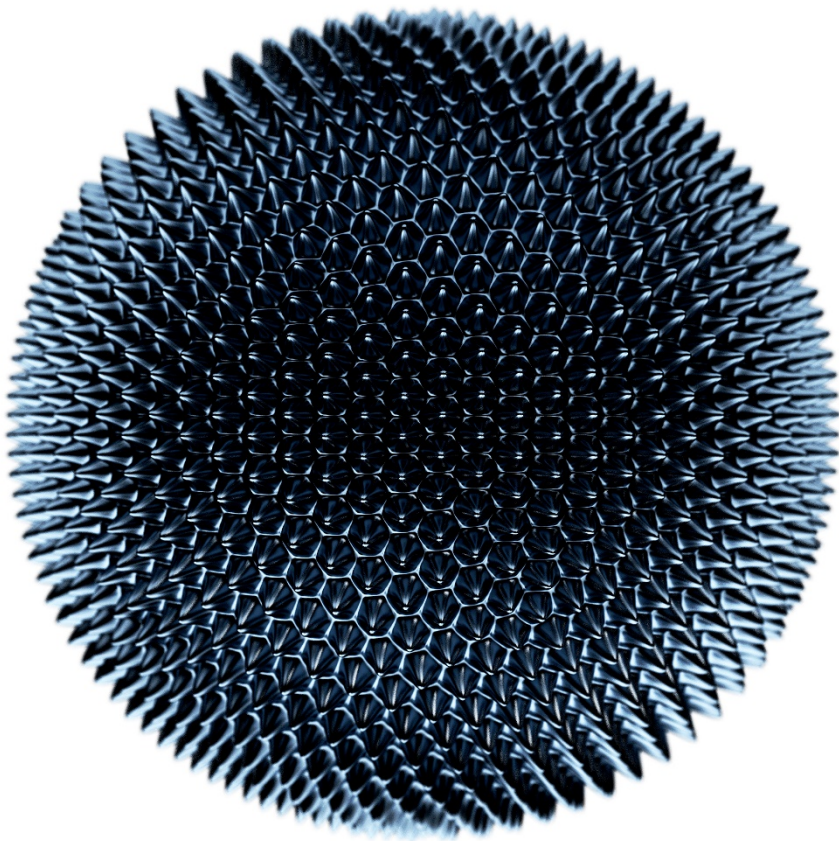
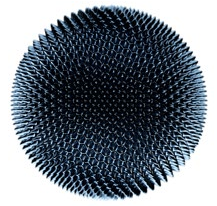


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Deloitte Human Capital Insights & Rewards
COVID-19 Flash Survey
March 2020

COVID-19 Flash Survey



Introduction

There has been, and will likely continue to be, considerable uncertainty in the wake of the COVID-19 outbreak. Many companies are facing difficult choices with limited information amid rapidly changing scenarios. In these difficult and turbulent times, we are all doing our utmost to support and protect our families and way of life.

In an effort to alleviate the impact of the disease, the South African government has put stringent precautionary measures in place, first starting with a ban on international travel to high-risk countries and the closure of the majority of the country's ports of entry, and then escalating to a national shutdown for 21 days.

Similarly, the South African Reserve bank (SARB) is also trying to do its part to help, primarily by reducing the repurchase (repo) rate by 100 basis points to 5.25% in an effort to alleviate the strain on the economy. The SARB's decision to ease its monetary policy stance is in line with several of its international counterparts, including but not limited to the central banks of the United Kingdom, United States, and China. While the European Central Bank (ECB) did not lower interest rates, the central bank did announce a stimulus package.

However, despite the SARB's interest rate cut, the central bank still expects a sharp impact on the South African economy's growth path. Indeed, the SARB has lowered its already-lacklustre forecast of 1.2% growth this year to a contraction of 0.2% in 2020. Furthermore, these forecasts were revised before the national shutdown was announced. The true economic consequences, both locally and on a global scale, of the COVID-19 outbreak will take some time to be fully felt and understood.


In an effort to help understand the impact of the COVID-19 outbreak, Deloitte Human Capital has undertaken a Snapshot Survey in order to provide an authoritative account of how companies are dealing with leave allocation, travel restrictions and additional precautionary measures. Over 100 companies provided input into this survey in the space of 48 hours, for which we extend our sincere gratitude.

This report outlines the results of the survey. Please note that the survey was undertaken prior to the announcement of a national shutdown.

Nevertheless, we trust that you will still find this information informative and insightful and may help your firms challenge and inform their processes in the future. Please reach out to our team as detailed in the contacts page should you have any queries or concerns.

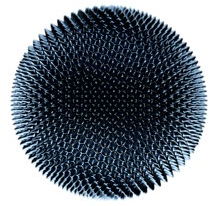
Kind regards

Tyrone Jansen
Associate Director
Deloitte Consulting

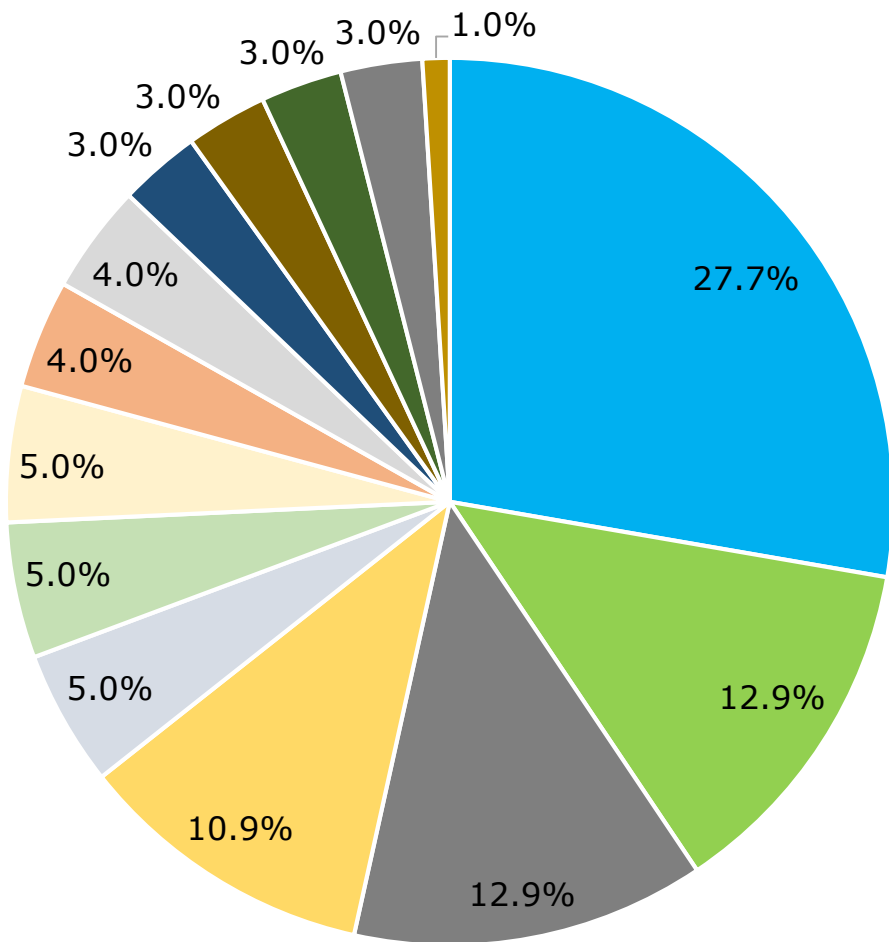


COVID-19 Snapshot Survey
Trends & Insights

COVID-19 Flash Survey

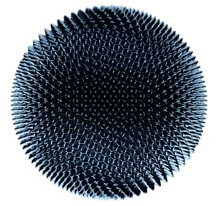


Distribution of participants



- Manufacturing
- Pharmaceutical
- Fast Moving Consumer Goods (FMCG)
- Professional Services
- Education
- Mining & Resources
- Agriculture & Forestry
- Public Sector
- Financial Services
- Technology, Media and Telecommunications (TMT)
- Other
- Retail

COVID-19 Flash Survey



Does your organisation have an HR policy in place that handles extreme events like the COVID-19 outbreak?



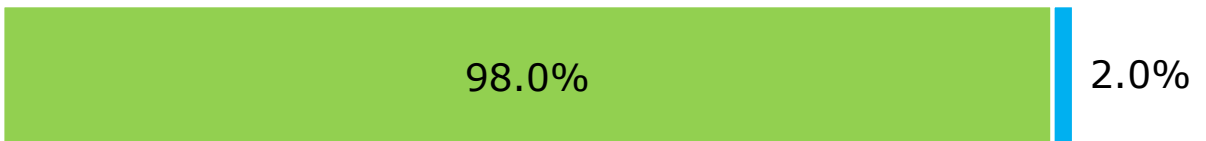
■ Yes ■ No

If no, is your organisation currently reviewing its HR policies?



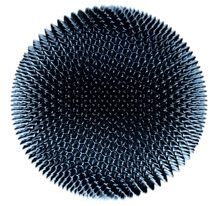
■ Yes ■ No

Has your organisation communicated with staff regarding the COVID-19 outbreak?

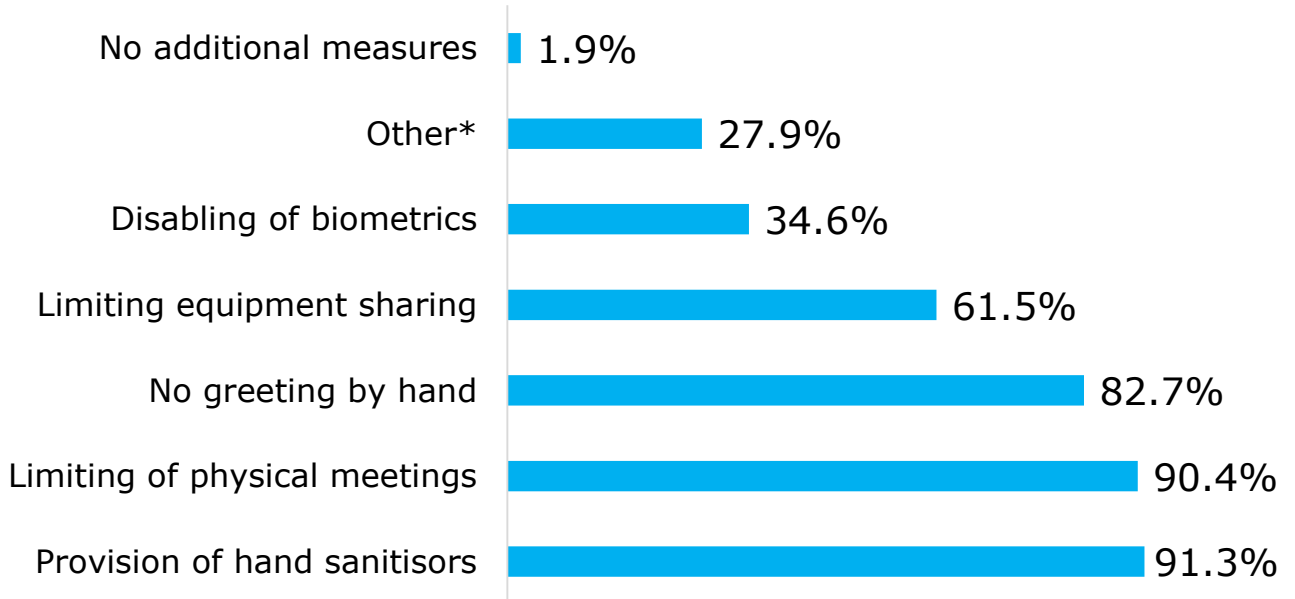


■ Yes ■ No

COVID-19 Flash Survey



Are additional precautionary hygiene measures being implemented in the wake of the COVID-19 outbreak?



*Respondents indicated that "other" precautionary measures being implemented included:

- Temperature scanners
- External visitors ban
- Staggered eating times
- Terminate alcohol breath-testing

Are extraordinary work-from-home policies being put in place in the wake of the COVID-19 outbreak?



■ Yes ■ No

Are travel restrictions beyond government mandates being put in place in the wake of the COVID-19 outbreak?

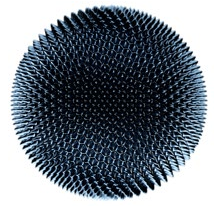


■ Yes ■ No

Additional travel restriction that are being put in place include:

- Zero/limited domestic or international travel
- Zero/limited public transport

COVID-19 Flash Survey

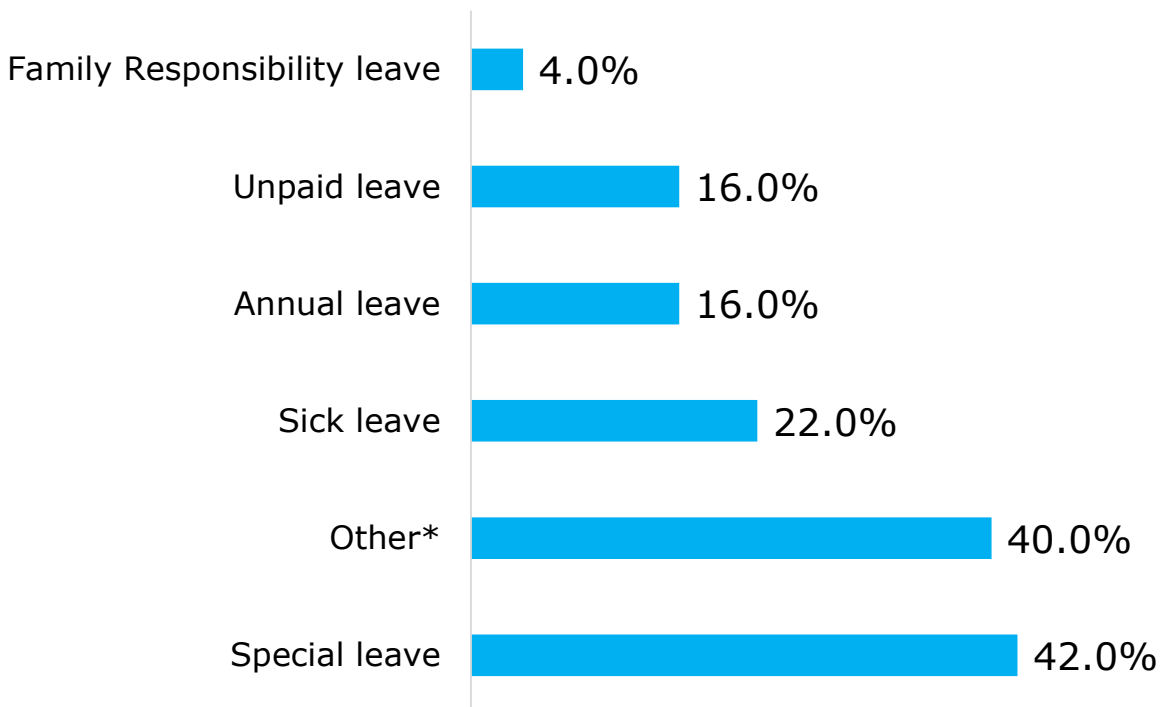


Are any employees being told to stay home, even if they cannot perform their job responsibilities from home?



■ Yes ■ No

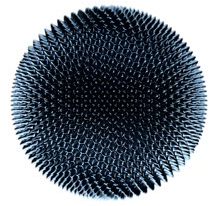
If yes, is additional leave being allocated?



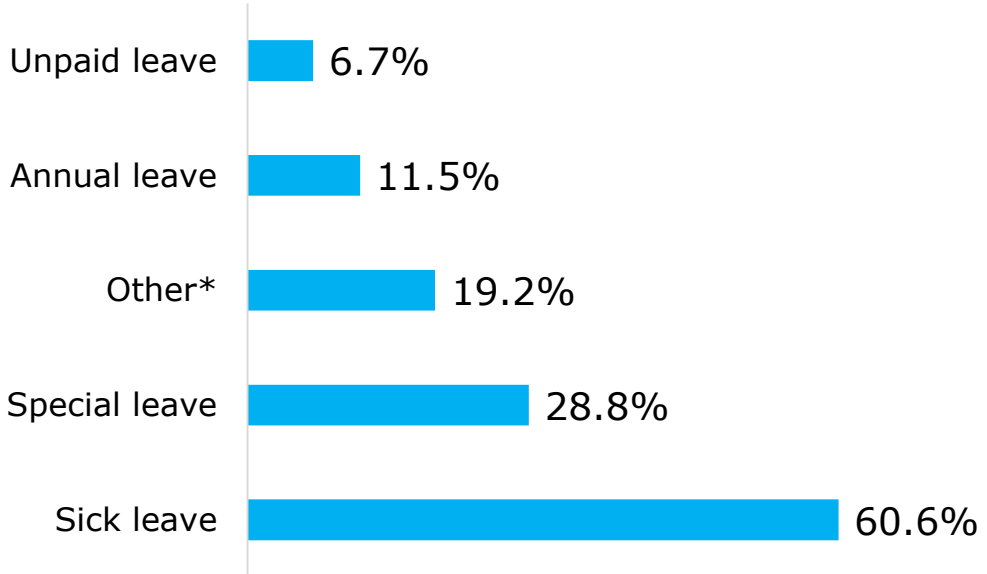
* Respondents that indicated "other" elaborated as follows:

- No standard policy in place yet, therefore handled on a case-by-case basis
- Sick leave, but if exhausted, sick leave is being increased on a case-by-case basis

COVID-19 Flash Survey



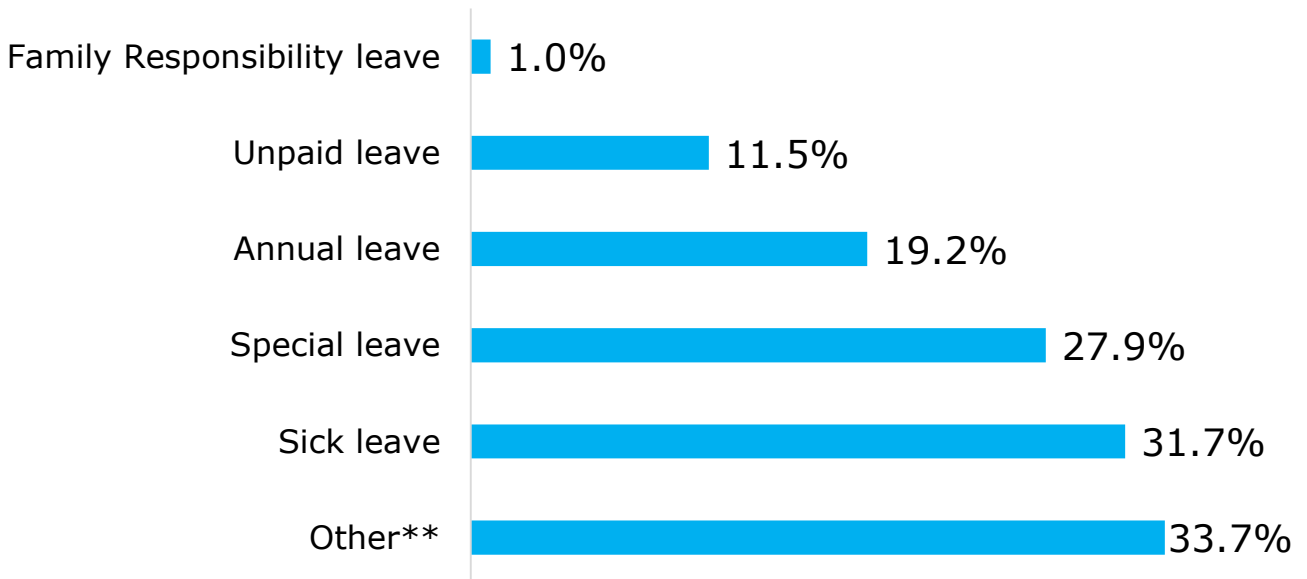
If an employee that has contracted COVID-19 has been instructed to stay home, how is the leave being allocated?



* Respondents that indicated "other" elaborated as follows:

- No standard policy in place yet, therefore handled on a case-by-case basis
- Sick leave, but if exhausted, sick leave is being increased on a case-by-case basis

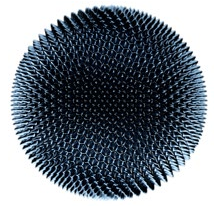
If an employee that has NOT contracted COVID-19 but is in mandatory self-quarantine, how is the leave being allocated?



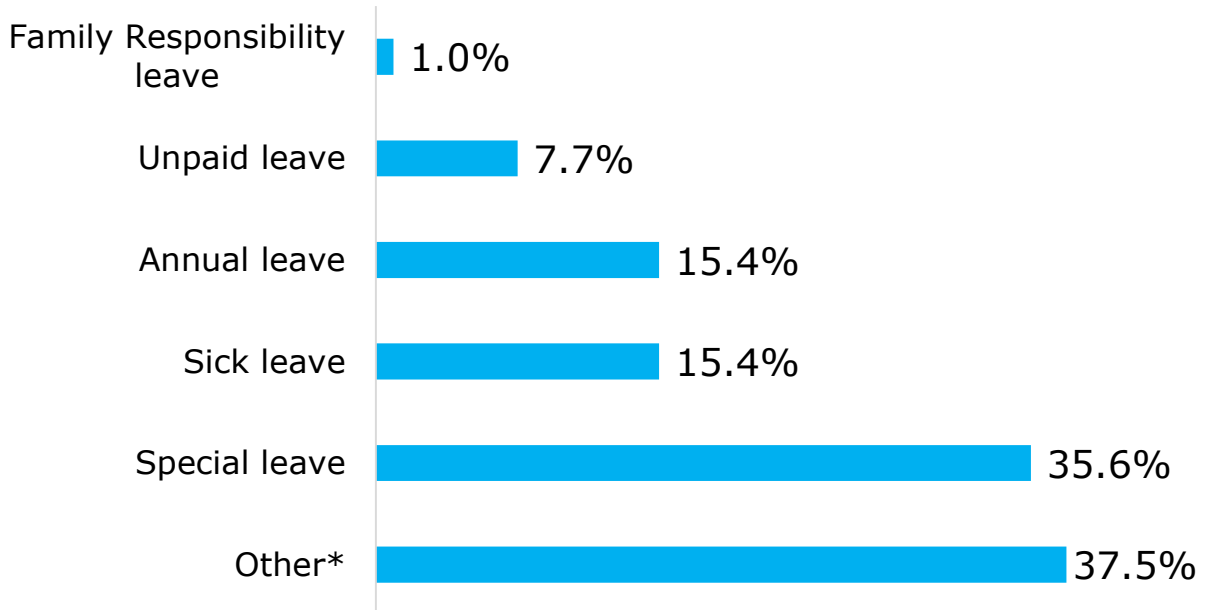
** Respondents that indicated "other" elaborated as follows:

- No standard policy in place yet, therefore handled on a case-by-case basis
- Fully paid, even if work from home cannot be done
- Special leave, but if exhausted special leave is being increased on a case-by-case basis

COVID-19 Flash Survey



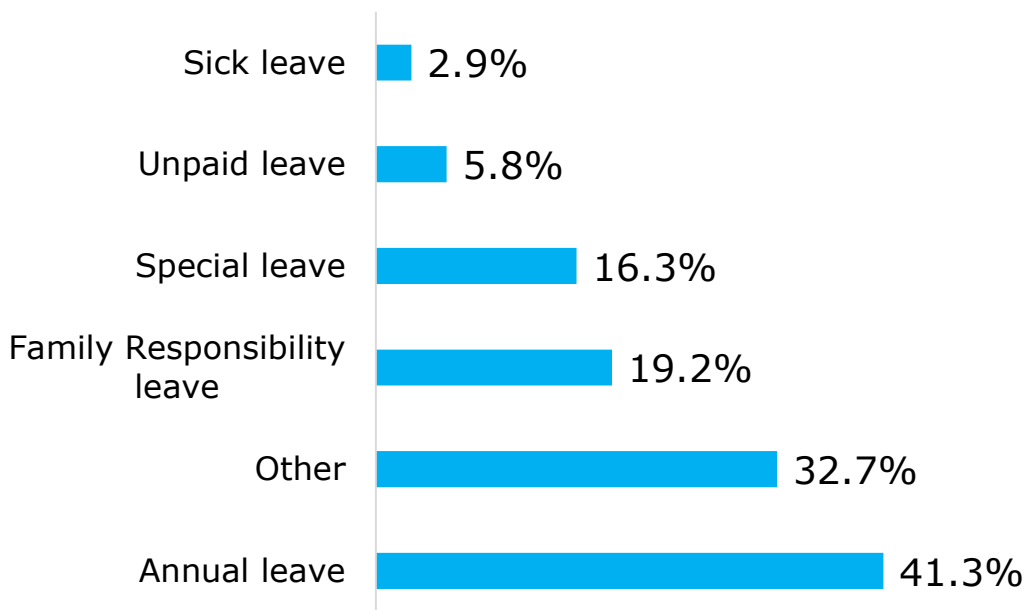
If a healthy employee has been instructed to stay home and is therefore not able to do his/her job, how is the leave being allocated?



*Respondents that indicated "other" elaborated as follows:

- No standard policy in place yet, therefore handled on a case-by-case basis
- Fully paid, even if work from home cannot be done
- Annual leave, but if exhausted annual leave is being increased on a case-by-case basis

For employees with children staying at home, how is leave being allocated?



*Respondents that indicated "other" elaborated as follows:

- No standard policy in place yet, therefore handled on a case-by-case basis
- Work-from-home policies apply
- Family responsibility leave, but if exhausted family responsibility leave is being increased on a case-by-case basis

Working in the COVID-19 era
Key tips & Thought Leadership

Working in the COVID-19 era

Key tips

The realities of COVID-19 are making working from home or working remotely a way for employees to continue to perform their job responsibilities and contribute to their organisation and economy.

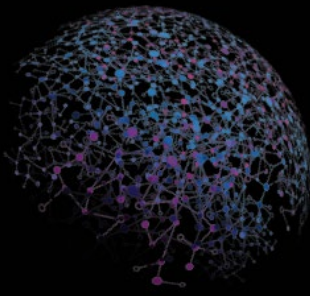
While working remotely, here are some tips to stay focused and collaborate with colleagues while working outside of the office:



Working in the COVID-19 era


Thought Leadership

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COVID-19
Managing cash flow during a period of crisis

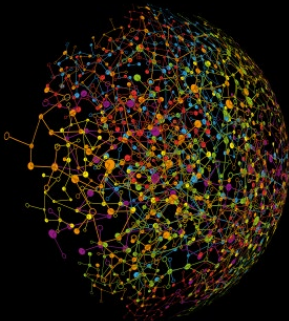
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MAKING AN IMPACT THAT MATTERS
Since 1989



The Heart of Resilient Leadership
Responding to COVID-19

March 12, 2020

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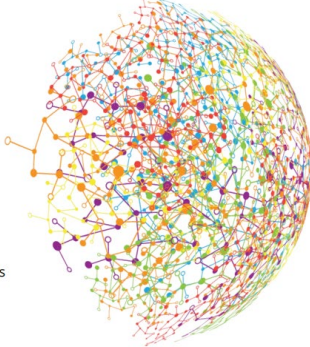
COVID-19
Managing supply chain risk and disruption

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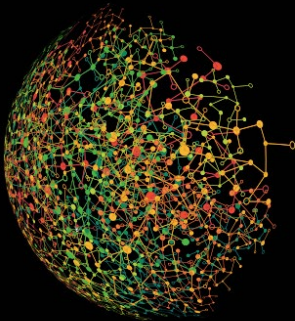
INCREASING ORGANIZATIONAL RESILIENCE IN THE FACE OF COVID-19

FUTURE OF WORK
Ways of working to sustain and thrive in uncertain times

MARCH 2020



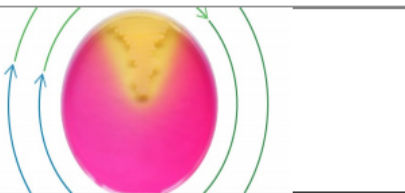
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COVID-19
Practical workforce strategies that put your people first

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Addressing the financial impact of Covid-19
Navigating Volatility & Distress



Addressing the financial impact of Covid-19
Navigating Volatility & Distress

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