

# COVID-19

## Middle East Updates

Webcast series



# Our focus for today

## Welcome

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**Stephen Anderson**

Strategy & Markets Leader,  
PwC Middle East

## Economic update

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**Richard Boxshall**

Chief Economist,  
PwC Middle East

## Public health considerations for reopening

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**Sara Barada**

Partner - Health Industries,  
PwC Middle East

## Digital Fitness for the World

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**Randa Bahsoun**

Partner - New world. New skills.  
PwC Middle East

## Q&A

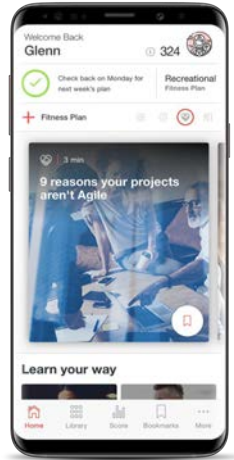
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# Lessons learned, so far, and implication for the “new normal”

## The ‘New Normal’

- **Engagement, Communications and Empathy**
  - Far more regular, personal, two-way communications leveraging technology
  - Involve teams in making decisions but then act clearly and show leadership
  - Greater focus on mental health and well being support to people
- **Rapid Innovation and Change Management**
  - We revisit everything that we thought we knew about change management. Change management at pace, no options, potentially more directional and compulsory - necessity trumps, “winning hearts and minds”
  - Common purpose and sense of urgency drives innovation
- **Realtime Data and Management**
  - No more monthly, quarterly reporting produced by armies of operational teams - daily, real time dashboards instantly available via cloud based applications run off high integrity data - immediate, self service
- **Productivity and Global Insight**
  - Remote working becomes the norm, no travel for “internal” meetings, client interactions predominantly remote - face to face must be experiential and memorable to justify the effort
  - Global subject matter experts available immediately
- **But, Trusted Relationships Vital**
  - First impressions, rapport building and relationships are difficult to form on-line, pre-existing close relationships and trust can be translated into a virtual working relationship - “we reconnect virtually, we don’t connect”

# COVID-19 checklist and digital resources available



**\*\*New\*\***

## Digital Fitness for the World

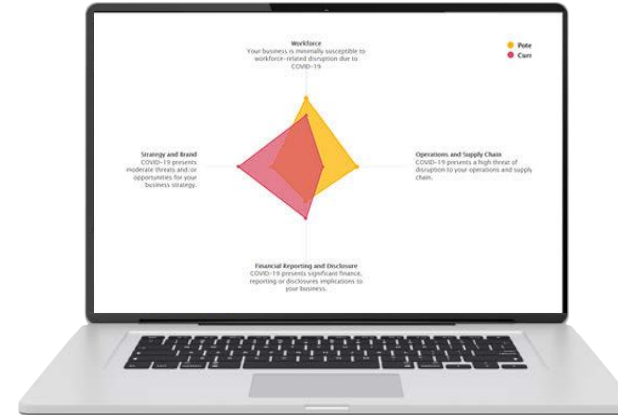
PwC's upskilling contribution to the world in response to COVID-19. Access our free Digital Fitness App available from the Apple App store and Google Play store.

**If registering with your personal email, use invite code (LRNALL) to access today**



## Considerations checklist, prior webcasts and resources

[www.pwc.com/me/covid-19](http://www.pwc.com/me/covid-19)



## COVID-19 - Navigator

Navigator is an online, interactive tool to help organisations better understand where they are on their path toward COVID-19 preparedness and response across six focus areas.

<http://pwc.com/us/covid-19-navigator>

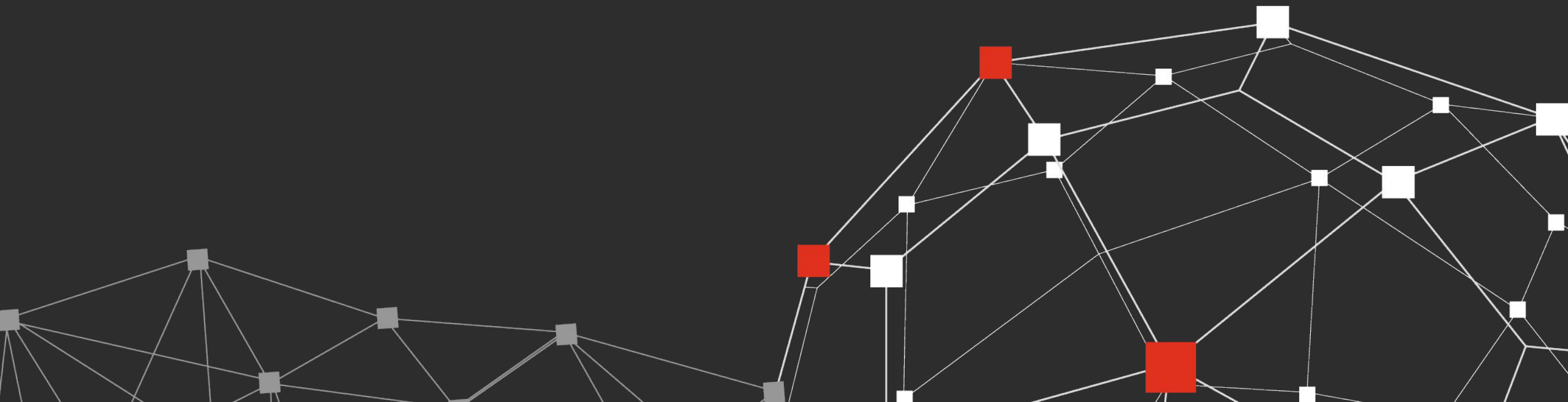


## Digital Trust Manager

Our COVID-19 response module identifies any gaps in your organisation's pandemic response approach. Available in both English and Arabic, the assessment focuses on business resilience, and provides detailed recommendations on the steps to take to improve your ability to respond and recover.

<https://digitaltrust-me.pwc.com/assess/COVID>

# Quick poll







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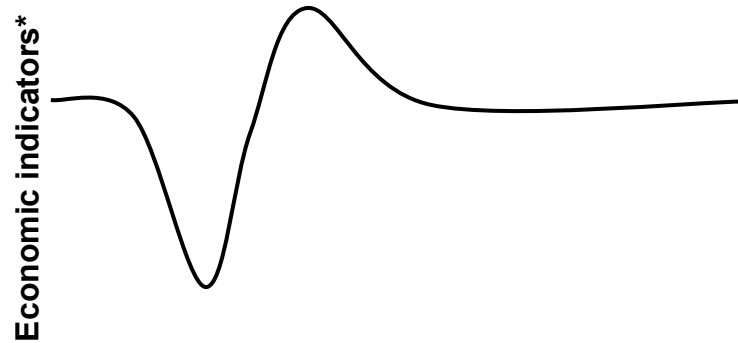
Economic update

**Richard Boxshall**

# The scenario set narrows as hard data becomes available

## V-shape

Deep contraction, quick recovery



### Drivers

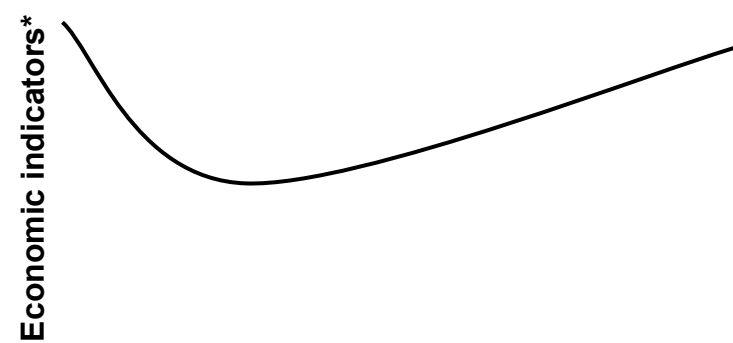
- COVID-19 cases spike quickly and recede quickly, allowing containment measures to be removed in H2

### Effects

- Short-term damage only to economy
- Recession expected in Q1 & Q2
- Rapid return to steady-state economic indicators

## U-shape ('Nike-swoosh')

Contraction flattened but extended, slow recovery

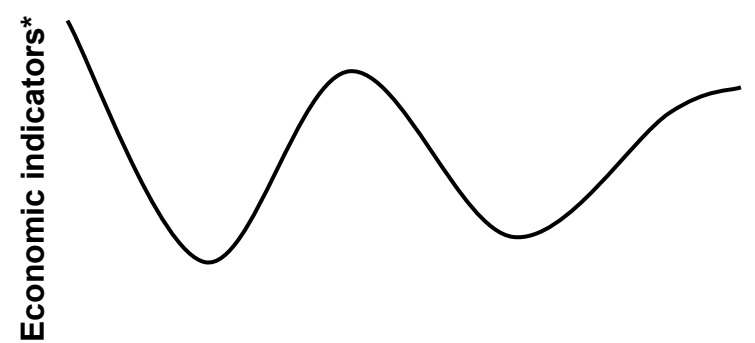


- Stringent containment measures, spreading out COVID-19 cases
- Outbreak curve is flattened due to effective managed release

- Some economic scarring
- Slow economy recovery as containment measures gradually eased over time

## W-shape

Contraction, recovery in oscillation until stabilisation



- Oscillation due to periodic spikes in COVID-19 cases which are subject to further containment measures

- Economy oscillates between anemic growth and recession
- Significant economic scarring

# Unprecedented deterioration in global data, but will April prove to be the low point?

## US

### Q1 GDP (Jan-Mar)

↓ **1.8% q/q**  
US Q1 2020 GDP  
(deannualised)

### April PMI (Contraction below 50)

↓ **36.1 Apr**  
US manufacturing PMI

## Europe

↓ **3.8% q/q**  
Eurozone Q1 2020 GDP

↓ **33.4 Apr**  
EU manufacturing PMI

## China

↓ **9.8% q/q**  
China Q1 2020 GDP

**49.4 Apr**  
China manufacturing PMI

## Commentary

- US Q1 GDP registered the sharpest drop since 2008
- April manufacturing PMI for US signals further contraction
- Largest quarterly decline in GDP on record in Eurozone
- April Eurozone PMI sharply down on March
- First contraction in China GDP since 1992
- China PMI data suggests economic decline stabilised in March/April





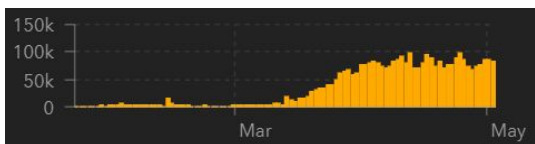
# 2

## Public health considerations for reopening

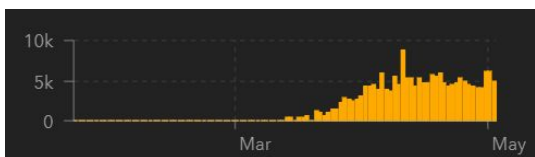
**Sara Barada**

## USA & UK

Reaching the peak of the outbreak



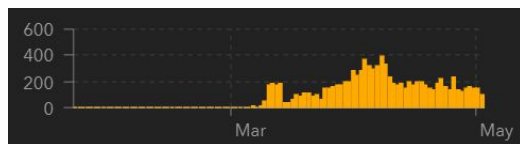
**USA:** 1,180,288 total cases



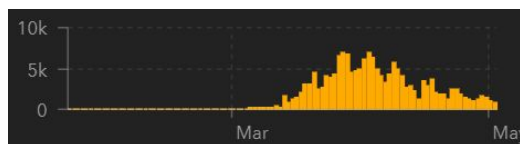
**UK:** 191,832 total cases

## Europe

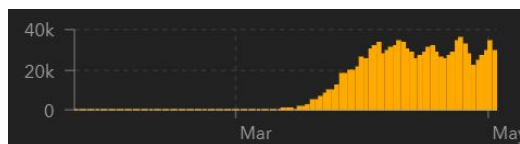
Many countries starting to see a reduction in cases per day and a flattening of the curve



**Denmark:** 9,868 total cases



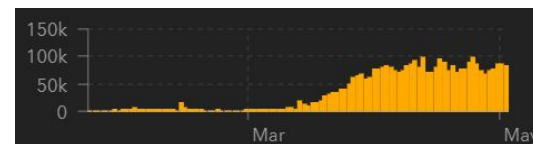
**Germany:** 166,152 total cases



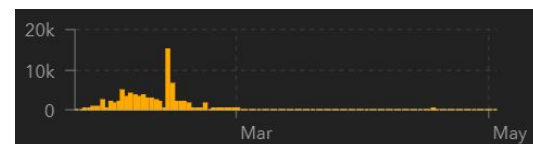
**Italy:** 211,938 total cases

## Asia

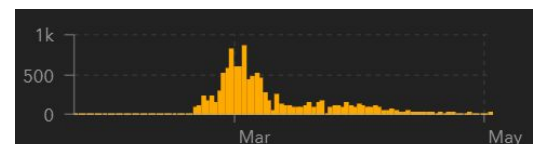
Cautiously re-opening however remaining vigilant for a potential resurgence or second wave



**Singapore:** 18,778 total cases



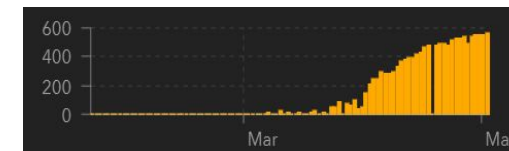
**China:** 83,965 total cases



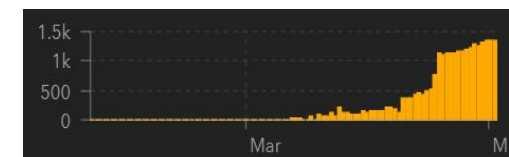
**South Korea:** 10,801 total cases

## GCC

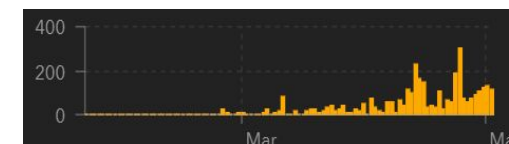
Most nations have reached the peak of the outbreak and are looking towards a gradual reopening



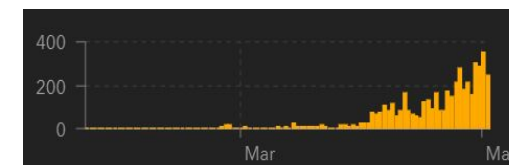
**UAE:** 14,730 total cases



**Saudi Arabia:** 28,656 total cases



**Bahrain:** 3,533 total cases



**Kuwait:** 5,278 total cases

Countries around the world are working to “flatten the curve” of the COVID-19 pandemic

Before making decisions to reopen and ease lockdown measures, a downward trend in the number of new cases needs to be visible.



**3,582,469**  
Confirmed Cases

# The WHO have issued guidelines for the lifting of COVID-19 restrictions

The WHO guidelines outline 6 areas public officials must consider before reopening:

**Transmission rates must be under control**



**Health Systems have the capacity to test, trace and isolate every case of COVID-19**



**Outbreak risks in high vulnerable contexts, such as nursing homes must be minimized**



**Schools and workplaces and other essential locations must have preventative measures in place**



**Importation risks of acquiring more cases from outside the country must be managed**



**Communities are fully educated, engaged and empowered to adjust to the “new norm”**



# The UAE began its 1<sup>st</sup> phase of opening up, with measures in place to enhance its preparedness and ongoing response

## Testing & Contact Tracing

- Upwards of **30,000 tests per day** and includes asymptomatic individuals
- **2 to 6 days** to receive test results; **rapid tests** (such as ones used by Emirates Airlines) needed to turn around results in **10 – 20 mins**
- **Tracing App** deployed however require higher adoption to be effective

### UAE

14,730 total cases  
789,095 tests conducted



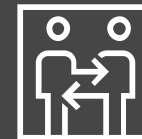
## Field Hospitals to prepare for potential surge

- Hospitals in Dubai have a capacity for **4,000 – 5,000 COVID-19** patients in the event of a surge
- **Dubai World Trade Centre** converted into a **field hospital** with a capacity to treat up to **3,000 additional patients**
- **SEHA** preparing **3 field hospitals** with a combined **capacity of 3,400**



## Public and Private Sector Collaboration

- **Dubai Health Authority (DHA)** circular instructing private hospitals to accept all emergency cases including positive and suspected cases of COVID-19
- **Abu Dhabi Department of Health (DoH)** joint database allowing the government to check the number of free beds and medical staff in public and private facilities across the Emirate



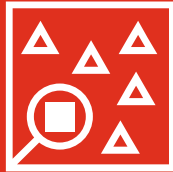
## Innovation & Adoption of Technology

- Smart helmets worn by **Dubai Police** capable of monitoring body temperature of individuals within 5 metres
- **Dubai Municipality and Dubai Police** utilizing drone technology for mass sterilization, monitoring, broadcasting and delivery
- Tech Lab in **Sharjah** 3D-printing 25,000 face shields every week to meet the demand for protective gear for health workers



# Testing efforts have been focused on high-risk population groups and expanded to businesses

**Screening and testing measures to prevent and control the spread of the virus in vulnerable populations**

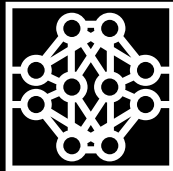


**Widespread screening in densely populated low income areas** led by public and private sector in Dubai

Abu Dhabi introduced **mandatory screening of low-income workers** with **10,000 screened per day**

**Mass screening programmes** rolled out in the **Northern Emirates** with target of **200,000 low-income workers**

**Mandatory screening and testing will be expanded to businesses opening up**



**Mandatory testing for retail workers in Abu Dhabi** with **20,000 tested to date**

**Scale up of contact tracing** with launch of **ALHOSN UAE App**

**Thermal screening and temperature checks** in public facilities and offices will become the norm



# Some European countries and the USA began lifting lockdown restrictions, with a strategy in place



## Denmark

### Decision to reopen driven by reduction in cases

Decrease in number of reported cases and related ICU numbers

### Reopen of the economy to follow three phases between April and August

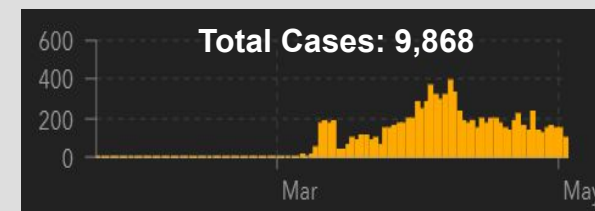
Dependent on continued stability of infection rates

### Scaling up of testing capacity key to decision to reopen

Scaled up to accommodate up to **32,000 per day** including asymptomatic individuals

**“The process will be a ‘delicate balancing act’”**

Mette Frederiksen



Tests per million: 40,366



## Germany

### Decision to reopen the economy following favourable recovery rates

Sharp decline in infection rates and number of cases

### Wide antibody testing studies being deployed

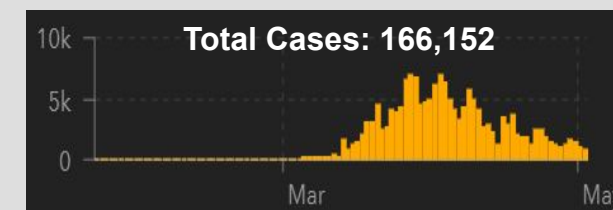
Nationwide antibody testing to determine immunity and monitor the spread of the virus

### Timing and phasing of eased measures is key

After rise in  $R_0$  number (0.9) concerns that early advantages from widespread testing may be lost if restrictions eased too quickly

**“We are on the thinnest ice”**

Angela Merkel



Tests per million: 30,400



## USA

### USA currently has the highest number of cases globally

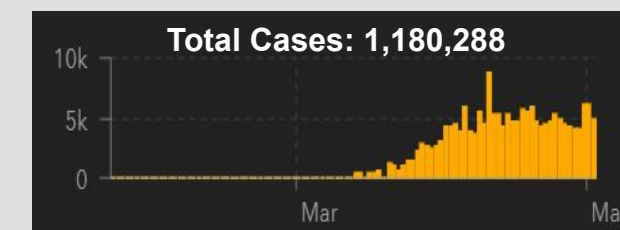
Majority of states have plans to open up in May

### President Trump has issued White House Guidelines for 'Opening Up America Again'

3 phases for states to gradually ease lockdowns beginning 1<sup>st</sup> May  
Milestones include a 14-day downward trend in coronavirus cases

### Report by Harvard, the Roadmap to Pandemic Resilience also details 4 phases to reopening

Testing Capacity to 5 million tests per day by June & 20 million a day by late July  
Current testing capacity varies between 150,000 – 400,000 per day



Tests per million: 20,593



# Lessons can be learnt from countries in Asia who have already opened up, however remain vigilant to a potential resurgence



## Singapore

### Respond quickly – Test, Trace, Isolate

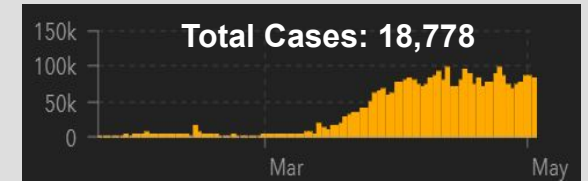
- Implemented a robust testing, tracing and isolation strategy without widespread lockdown
- Contact tracing strategy was cited as ‘a gold standard’ by Harvard Epidemiologists

### Tighten restrictions if surge is observed

- Surge of over **12,000 cases** since beginning of April (largely connected to migrant workforce)
- Led to introduction of movement restrictions

### Remain vigilant and focus on the vulnerable

- Governments can not become complacent while the virus is still in transmission
- Vulnerable communities must be identified and protected early in the outbreak



Tests per million: 20,816



## China

### Take targeted lockdown measures

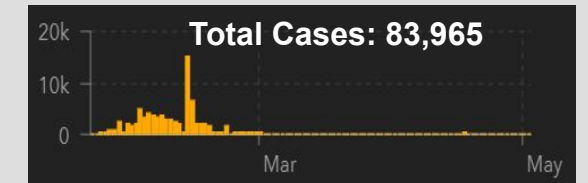
- Focused strictest quarantine measures on most affected areas to bring outbreak under control in just 100 days
- Since early April, China has seen a rise of rise of **imported cases** (over **1,600 confirmed** & 1,000 suspected cases)

### Monitor movement after lockdown is lifted

- Social media platforms like WeChat and Weibo have hotlines for people to report others
- Health survey app issues a colored health code dictating where citizens can go

### Prepare for economic tradeoffs

- China shows that the virus can be contained but economic costs need to be considered



Tests per million: 222



## South Korea

### Introduce widespread testing

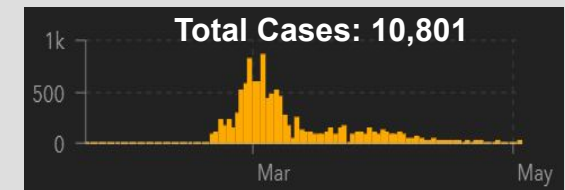
- Robust diagnostic testing capabilities at the core of the strategy, implementing mass drive through and walk through testing centers early

### Use technology transparently

- Contact tracing using credit card use records, CCTV footage and mobile phone GPS data, with privacy considered

### Engage your community and communicate

- Small spike in cases in April - **47 new cases** linked to **international travel**
- South Korea remains vigilant and shares situation updates and policy decisions with the community



Tests per million: 12,307

# Key global takeaways provide important and lasting implications for the future health systems and living with COVID-19



## Data Driven Simulation Models

- Measuring the effectiveness of control intervention measures
- **WHO & LGHTM Database** to analyze 170 interventions across 52 countries



## Surveillance & Monitoring of Population Health

- Systems in place to allow **mass surveillance** (through Antigen & Antibody testing and tracing)
- **Contact tracing** and use of **digital solutions** to monitor movement



## Capacity Planning

- **'Smart Capacity'** planning to support emergency preparedness in the future
- **New innovations** to meet surges through use of **modular and makeshift ICU & hospital units**



## Re-opening Vital Health Services

- **Non-urgent surgery and some treatments** have been delayed to redirect capacity to COVID-19
- Need to **mitigate backlog of patients** to avoid further overwhelm



## Ongoing Travel Restrictions

- Countries beginning to set tentative dates for the **reopening of borders**
- **Screening and testing at airports** and proof of good health required to fly



## Public-Private Coordination

- Improved **collaboration and coordination** between public & private health systems
- **Data sharing** and better use of capacity in times of crises



## Boom in Telehealth

- **Social distancing & isolation** have **catalysed the wider use of telehealth**
- Remote monitoring and virtual care will become **mainstream in the future of healthcare delivery**



## Focus on Mental Health

- Greater focus on mental health to **ease anxiety** during uncertain times
- Demand for services to deal with **PTSD in the aftermath of the pandemic**

Policy enforcement, people behaviour and compliance with regulations are also critical for the success of reopening measures



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# Digital Fitness for the World

**Randa Bahsoun**

# Digital Fitness for the World

We launched the Digital Fitness for the World Initiative, a **free** and enhanced version of our Digital Fitness Assessment app (DFA) to help our communities navigate the new reality.

## What does the Digital Fitness App (DFA) do?

### Assess

Understand your current digital fitness

### Learn

Choose a fitness plan and start learning

### Grow

Assess your progress week after week

## What new features does it have?

Recent content and resources related to the COVID-19 pandemic, including additional **modules** on:



Remote Work



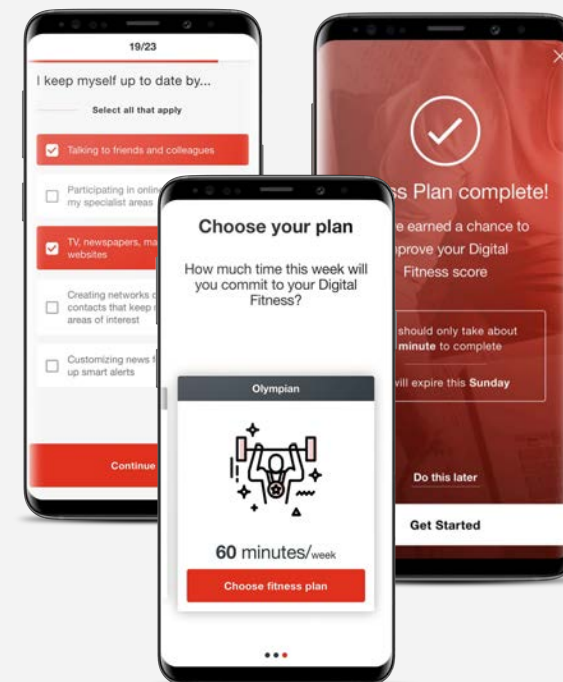
Self Care



Education



Planning L&D

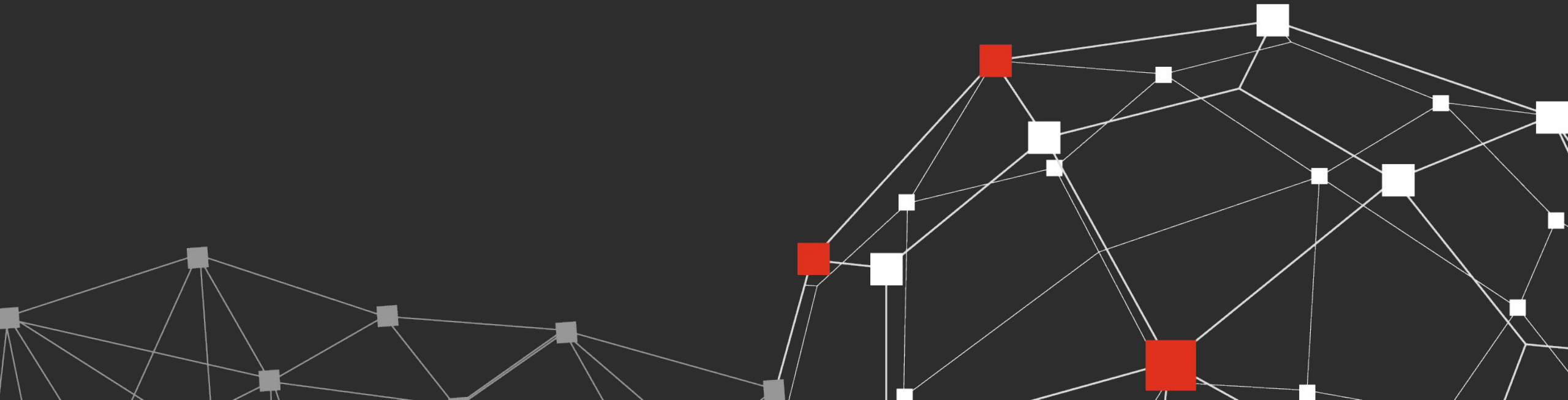


## How can I download it?

Through the **Apple App Store** and the **Google Play store**  
Use the code **LRNALL** to register your personal email address.

Free for users around the world until July 31, 2020.

# Q&A



# Contact us



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**Stephen Anderson**  
ME Strategy and Markets  
Leader

**PwC Middle East**  
[stephen.x.anderson@pwc.com](mailto:stephen.x.anderson@pwc.com)



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**Richard Boxshall**  
Chief Economist

**PwC Middle East**  
[boxshall.richard@pwc.com](mailto:boxshall.richard@pwc.com)



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**Sara Barada**  
Partner, Health Industries

**PwC Middle East**  
[sara.barada@pwc.com](mailto:sara.barada@pwc.com)



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**Randa Bahsoun**  
New world. New skills.  
Middle East Leader

**PwC Middle East**  
[r.bahsoun@pwc.com](mailto:r.bahsoun@pwc.com)



# Thank you

[pwc.com/me](https://www.pwc.com/me)

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