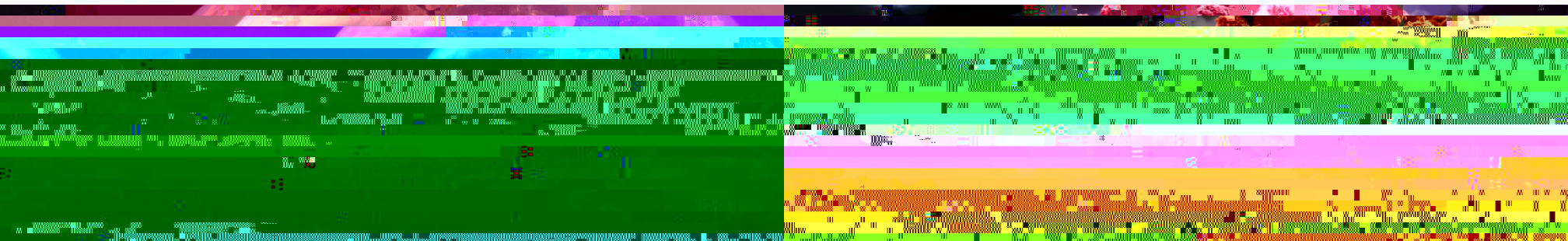


RESPONDING TO COVID-19

Almanac Highlights

June 4, 2020 update

INTRODUCTION: OLIVER WYMAN COVID-19 ALMANAC



Context and purpose

The novel coronavirus has infected hundreds of thousands of people globally and is taking a severe toll on individuals, families, and economies as productivity drops and stock markets reflect increased global uncertainty

This document provides a sample of available baseline facts and guidance for business leaders as to critical questions to address in the immediate and near-term to ensure the continuity of their business and the safety, health, and wellbeing of their workforce and customers

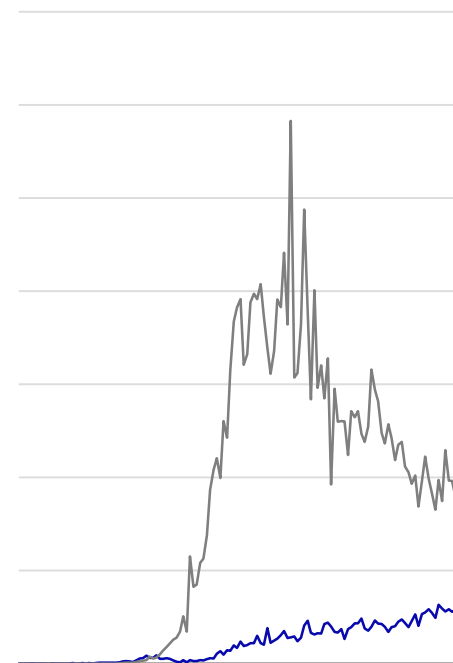
What is it?

COVID-19 is the name for the illness caused by the novel coronavirus that originated in Wuhan, China in December 2019

It is from the

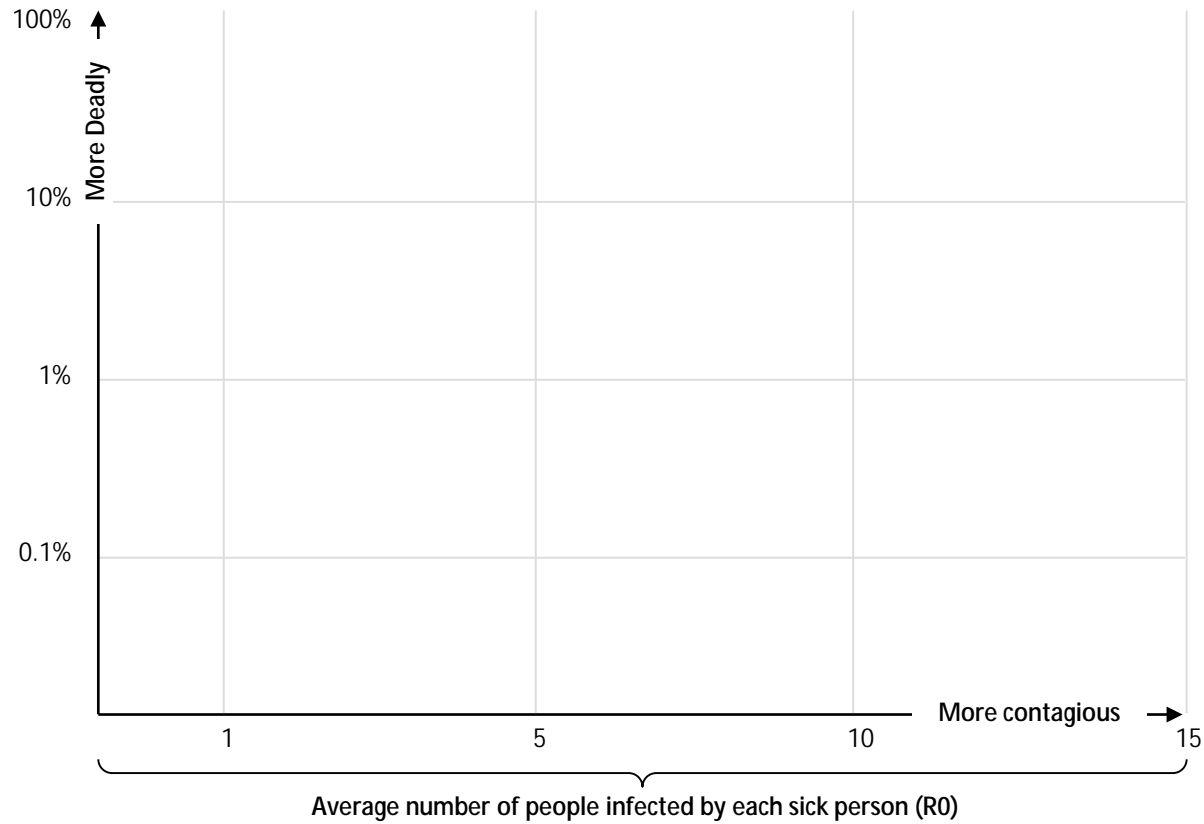
OUR DETAILED ALMANAC CONTAINS THE LATEST PERSPECTIVES ON KEY AREAS RELATED TO THE COVID-19 PANDEMIC

	Key Topics	Summary
Epidemiologic perspectives (Sample pages 4-6)	Epidemiological background Up-to-date statistics by geography	Coronavirus, declared a pandemic in March 2020, has infected millions globally The virus displays unique and deadlier characteristics than other known diseases The pace and maturity of infection is highly variable by region, largely hinging on speed and strength of government response
First peak suppression and road to re-opening (Sample pages 7-8)		



HOW DOES COVID-19 COMPARE TO OTHER DISEASE OUTBREAKS? (1 OF 2)

COVID-



OUR FACTBASE

WE CANNOT AFFORD TO REMAIN SHUT DOWN, BUT IT'S NOT WITHOUT RISK TO RE-OPEN FULLY. WE EXPECT >12 MORE MONTHS OF SOCIAL DISTANCING "CYCLES"

Initial Outbreak

Long Haul of Suppression

Mitigation/Economy

REOPENING PLANS SHOULD BALANCE MOBILITY AND ECONOMIC OPPORTUNITY FOR YOUNGER RESIDENTS WITH PROTECTION FOR VULNERABLE POPULATIONS

While infection is prevalent in those under the age of 60, the risk for hospitalization and death is severely diminished in younger age groups

Asymptomatic patients tend to be younger: there is

ILLUSTRATIVE PLAYBOOK COMPONENTS ON WORKFORCE RESILIENCE AND READINESS

Functional redesigns

Workflow redesign to reduce hand-offs, complexity, and intensity of rare skills
Automation of critical processes and processes with higher personnel risks
Infrastructure and IT configured for enablement of full program portfolio
No sharing of equipment when possible

Alternative staffing models

Formal separation of a-teams and b-teams to ensure backup availability
“Flex pool” or “pool of pools” to plug live gaps
Reallocation of workforce across sites to mitigate undue risk in one location
All who can work-from-home do so
Cross-training of all critical roles

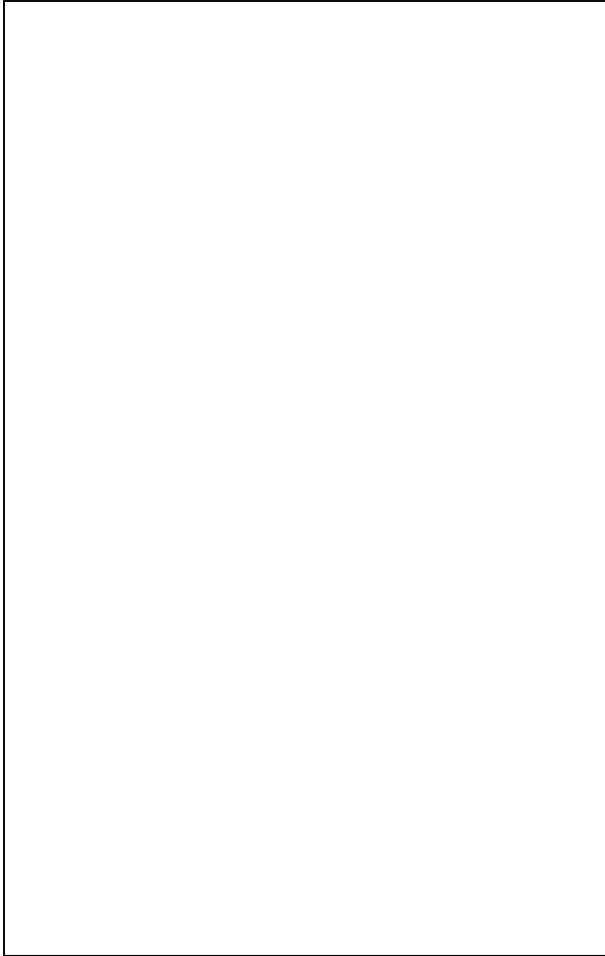
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AS US STATES RE-OPEN, WE ARE MONITORING A BROAD ARRAY OF DATA POINTS TO PREDICT REGIONS AT HIGHEST RISK OF ADDITIONAL DISRUPTION

How hard has the region been hit?

Where is the region on its first outbreak curve (emerging, stabilizing, recovering)?

WE HAVE A HIGHLY DEVELOPED TOOLKIT TO SUPPORT MANAGEMENT TEAMS A



WE CAN ALSO ASSESS THE IMPACT OF HOW CHANGES IN MOBILITY AND TESTING IMPACT VIRUS SPREAD

Example outputs for United States

Similar outputs are available for all U.S. States

How long could that take?

In short, 18+ months is likely for development, trials, approval and mass production

The best comparison we have is the development of H1N1 vaccines under similar circumstances:

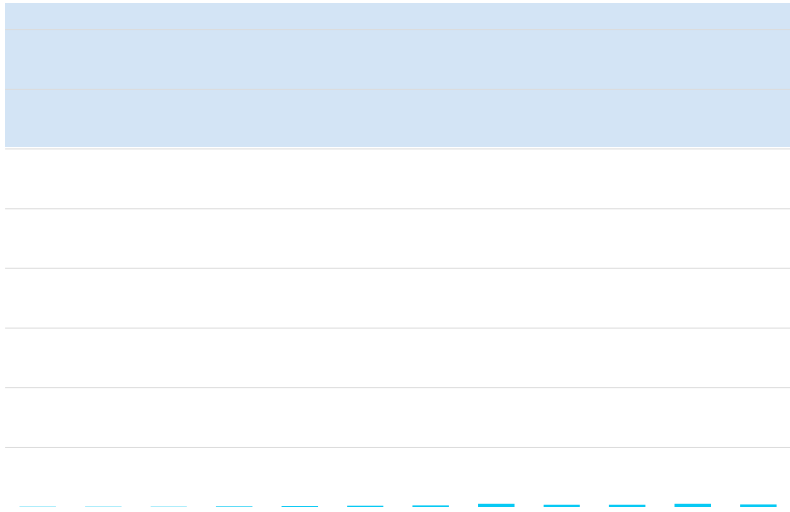
What is the current status?

As of 5/26, there are 113 vaccine programs, with 15 in a clinical stage

Two broad categories of vaccine are under development:

Traditional (inactivated or live attenuated) and mRNA

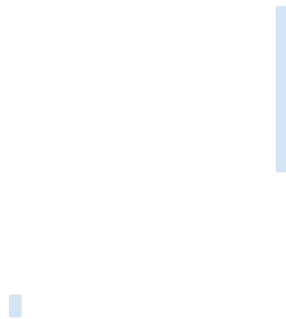
Infected proportion of population, by country



Infected proportion of US population, by MSA

U.S. Unemployment Forecasts – Q1, Q2, Q3, and Q4

Quarterly unemployment rate, by select economic analysts (5)¹



Key insights

Most annual unemployment forecasts assume a steady economic recovery starting in June, and do not account for the possibility of subsequent significant waves of infection

41.1 million unemployment claims filed since start of the COVID-19 lockdown, wiping out the last eleven years of job gains^{2, 3}

Congressional Budget Office forecasts a slower employment recovery than

READ OUR LATEST INSIGHTS ABOUT COVID-19 AND ITS GLOBAL IMPACT ONLINE

Oliver Wyman and our parent company Marsh and McLennan (MMC) have been monitoring the latest events and are putting forth our perspectives to support our clients and the industries they serve around the world. Our dedicated COVID-19 digital destination will be updated daily as the situation evolves.

[Visit our dedicated COVID-19 website](#)

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