



JOINT SURVEY ON THE IMPACT ON BUSINESSES OPERATING IN MYANMAR

BY FOREIGN CHAMBERS OF COMMERCE IN MYANMAR

REPORT & SUMMARY OF FINDINGS

APRIL 2021



GERMAN MYANMAR
BUSINESS CHAMBER



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INTRODUCTION

On 31st March 2021, 10 foreign Chambers operating in Myanmar decided to join forces to launch a survey to assess the impact of the situation on companies operating in Myanmar.

The **10 foreign Chambers** participating in this project are the following:

- American Chamber Myanmar
- Australian Chamber Myanmar
- British Chamber Myanmar
- CCI France Myanmar
- EuroCham Myanmar
- German Myanmar Business Chamber
- Greek Myanmar Chamber of Commerce
- Italy Myanmar Business Association
- Japan Chamber of Commerce and Industry, Myanmar (JCCM)
- New Zealand Chamber Myanmar

This survey was **100% anonymous** in order to ensure the confidentiality of data and to ensure that companies participating in it would answer as truthfully as possible.

For the same reason, and to avoid any instrumentalization of this survey for political reasons, it was decided to limit the participation to Members of these 10 Chambers of Commerce in Myanmar.

Objectives of the survey

The survey aims at assessing the impact of one year of the Covid-19 pandemic in 2020, as well as of the political crisis which started in February 2021, on Myanmar and foreign companies operating in Myanmar.

It was also meant to provide some information on which direction the economic situation can be anticipated to follow in the coming months, until the end of 2021, thus providing valuable data to companies on the future of the Myanmar economic landscape during a times of great uncertainty.

For these reasons, the survey was organized in three separate parts:

- Part 1 – Study of the impact of one year of Covid-19 pandemic in 2020
- Part 2 – Study of the impact of the political crisis since February 2021
- Part 3 – Evaluation of the impact of the situation in the coming months until the end of 2021

Analysis of answers

Data were analysed in a way to both offer as much useful and precise information as possible, while maintaining and guaranteeing the confidentiality of data and the anonymity of the companies which participated in the survey.

In order to do that, this report only compiled data ensuring that no individual company can be singled out.

GENERAL PROFILE OF PARTICIPANTS

A total of **372 companies** have participated in the survey until its closure on 9th April 2021.

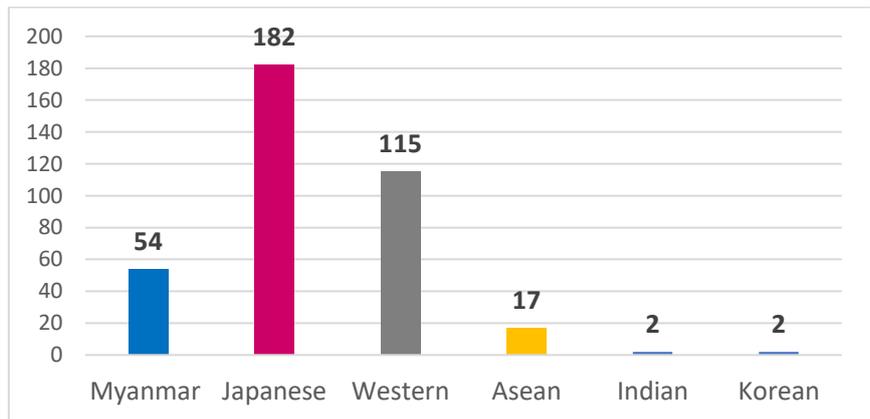
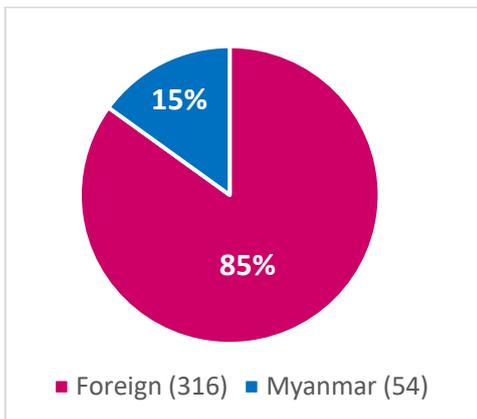
This panel may seem limited considering the thousands of foreign companies registered in Myanmar and the tens of thousands of Myanmar companies, which allows to question the extent of its representativeness.

It is especially true for Asean companies, since only 17 of them answered the survey. **Therefore, results cannot be considered as representative in the case of Asean companies.**

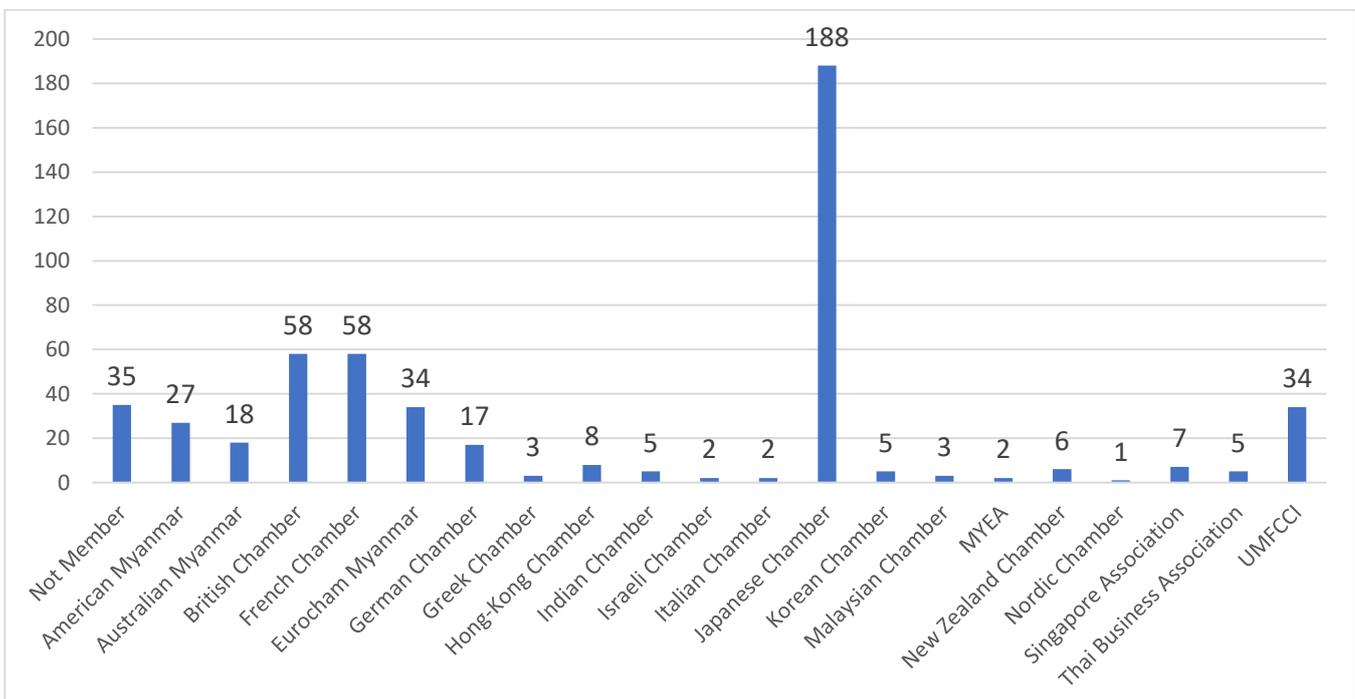
Yet, this survey nevertheless provides useful information on the economic situation in Myanmar for the following reasons:

- It offers a large diversity of participants in nationalities, sizes, sector and years of operations in the country.
- It complements macro-economic studies prepared by international organisations like the World Bank, by providing insight from the point of views of hundreds of companies.
- It is the only study existing in Myanmar on the topic of the current and future impact of the crisis on companies operating in the country.

Nationalities of participants



Number of Members by Chamber



[Companies by number of employees](#)

	All		Myanmar		Japanese		Western		Asean	
Less than 10 employees	29,57%	110	16,67%	9	31,32%	57	29,57%	34	29,41%	5
10 to 50 employees	31,99%	119	35,19%	19	34,07%	62	29,57%	34	23,53%	4
50 to 200 employees	21,77%	81	24,07%	13	21,43%	39	22,61%	26	23,53%	4
200 to 500 employees	5,65%	21	3,70%	2	4,95%	9	7,83%	9	5,88%	1
500 to 1,000 employees	2,96%	11	9,26%	5	1,10%	2	2,61%	3	5,88%	1
More than 1,000 employees	8,06%	30	11,11%	6	7,14%	13	7,83%	9	11,76%	2
Answered		372		54		182		115		17

[Companies by sector](#)

	All		Myanmar		Japanese		Western		Asean	
Agriculture/Agrifood/F&B	5,65%	21	7,41%	4	4,40%	8	4,35%	5	0%	0
Services/Legal/Banking/Insurance	30,65%	114	38,89%	21	29,12%	53	30,43%	35	58,82%	10
Infrastructure/Construction/Energy	27,96%	104	14,81%	8	34,62%	63	23,48%	27	11,76%	2
Healthcare/Pharma/Medical	3,49%	13	0,00%	0	2,75%	5	6,96%	8	5,88%	1
Import/Retail/Distribution/FMCG	12,37%	46	12,96%	7	13,74%	25	10,43%	12	11,76%	2
Hospitality/Tourism	5,38%	20	14,81%	8	1,65%	3	6,96%	8	0%	0
Media/Communication	5,11%	19	5,56%	3	3,85%	7	6,96%	8	5,88%	1
Logistics/Transport/Supply	9,41%	35	5,56%	3	9,89%	18	10,43%	12	5,88%	1
Answered		372		54		182		115		17

[Companies by years operating in Myanmar](#)

	ALL		Myanmar		Japanese		Western		Asean	
Less than 1 year	2,69%	10	3,70%	2	2,75%	5	0,87%	1	0%	0
1 to 3 years	14,25%	53	16,67%	9	14,29%	26	12,17%	14	17,65%	3
3 to 5 years	19,62%	73	22,22%	12	15,93%	29	21,74%	25	11,76%	2
5 to 10 years	45,16%	168	31,48%	17	50,55%	92	44,35%	51	47,06%	8
More than 10 years	18,28%	68	25,93%	14	16,48%	30	20,87%	24	23,53%	4
Answered		372		54		182		115		17

SUMMARY OF FINDINGS

As anticipated, the survey shows that almost all companies have suffered from one year of Covid-19, in 2020. Those operating in the hospitality/tourist sector were the ones to be the most impacted by the crisis which resulted from the pandemic.

Yet, despite an important decrease in their activities and income, a great majority of companies have maintained their operations. Despite having to implement measures to adapt their human resources to the situation and to the challenges that they faced, the answers show that most of them have done their maximum to limit the negative impact of the situation on their employees.

Indeed, a large majority of them have maintained employment contracts, salaries and have limited the reduction of salaries and of bonuses to a minimum, as long as they could.

Finally, the number of companies which completely terminated their activities was close to zero, except for the hospitality/tourist and for the healthcare/medical sectors.

Therefore, even after one year of pandemic, the social and economic impact remained limited to specific sectors and companies, and it could be anticipated that Myanmar economy could recover from the effects of the Covid-19 crisis in 2021, in the same way other countries in the region will do, as long as the pandemic remained under control.

Indeed, data also shows that, in January 2021, a majority of companies were planning to maintain or even to increase their operations and investments in Myanmar. These plans came to a halt after the political events of February 2021.

The answers provided by companies show that the impact of the events of 2021 had a stronger negative impact on companies after only two months, than a whole year of pandemic. Many of companies have recorded no income at all during the last two months and some of them already had to completely terminate their operations in a larger proportion than in 2020.

Furthermore, companies of all nationalities, of all sectors, of all sizes, have all seen their activities and income plunge since February 2021, and had no choice but to increase the measures implemented to overcome the challenges that they have been facing. This had a direct impact on their human resources.

This has already resulted in a jump in the number of terminations of employment contracts and in a drastic decrease of salaries. In addition to that they continued to increase the use of unpaid leave, of part-time work, and to stop all their recruitment.

The challenges and negative effects which directly result from the events which started in February 2021 are listed as the main reasons why a large number of companies are now planning to reduce or terminate all their operations in Myanmar.

This will give way to additional terminations of employment contracts and reductions of salaries in the coming months, which leads to anticipate a long-lasting social crisis, a general reduction of the purchasing power and standards of living of workers, and a dramatic increase of the unemployment rate in the months to come, especially since large companies are among those which are planning to let go an important portion of their staff.

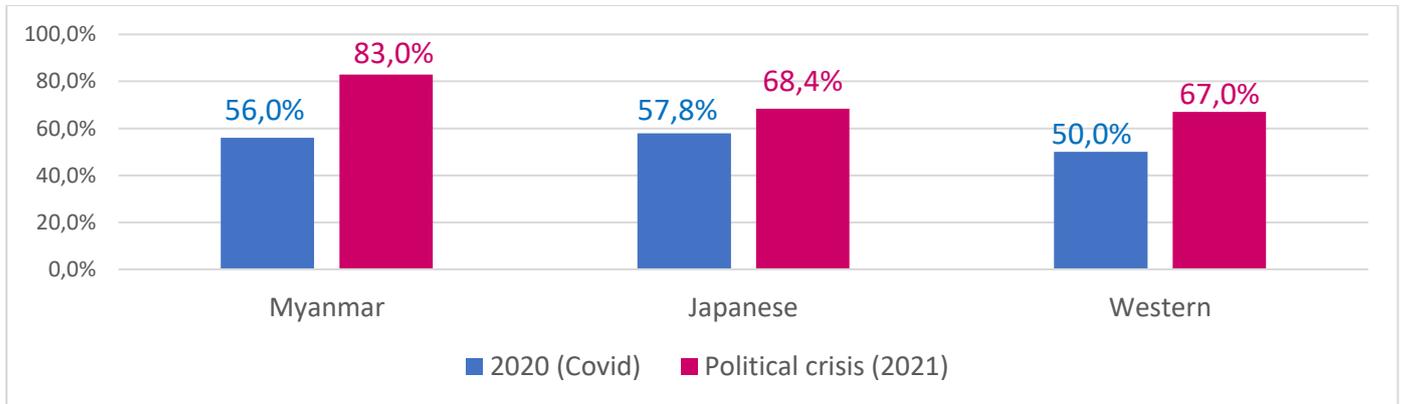
Now, on a more positive note, it also appears that, to this day, a great number of companies have not finalized their decisions and strategies yet. Which means that the current situation may not worsen if the economic and political environment in Myanmar improves by the end of 2021.

On the other hand, in the absence of any improvement by the end of September 2021, it is possible to foresee that the number of companies which will terminate all operations, terminate employment contracts, or reduce operations and salaries may actually double, in the worst-case scenario, by the end of the year.

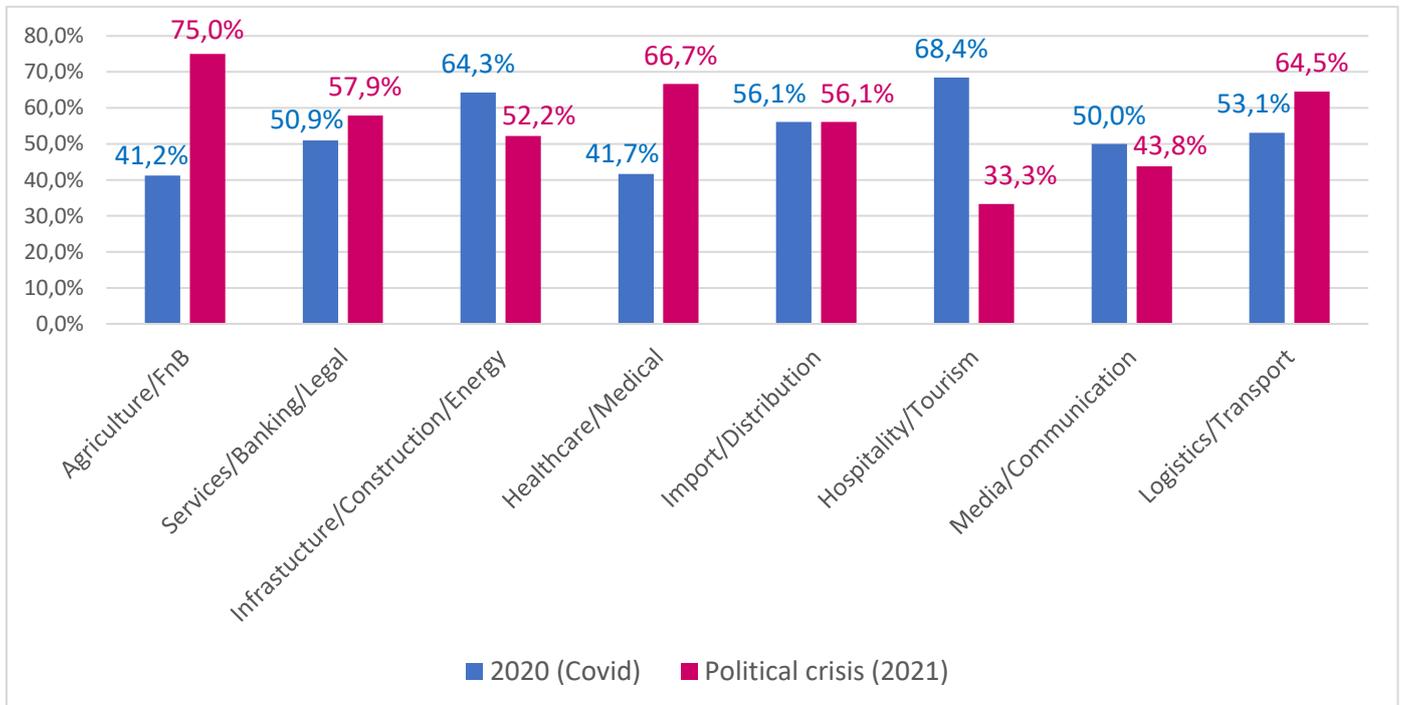
COMPARED DATA

Reduction of activity by 25% to 75%

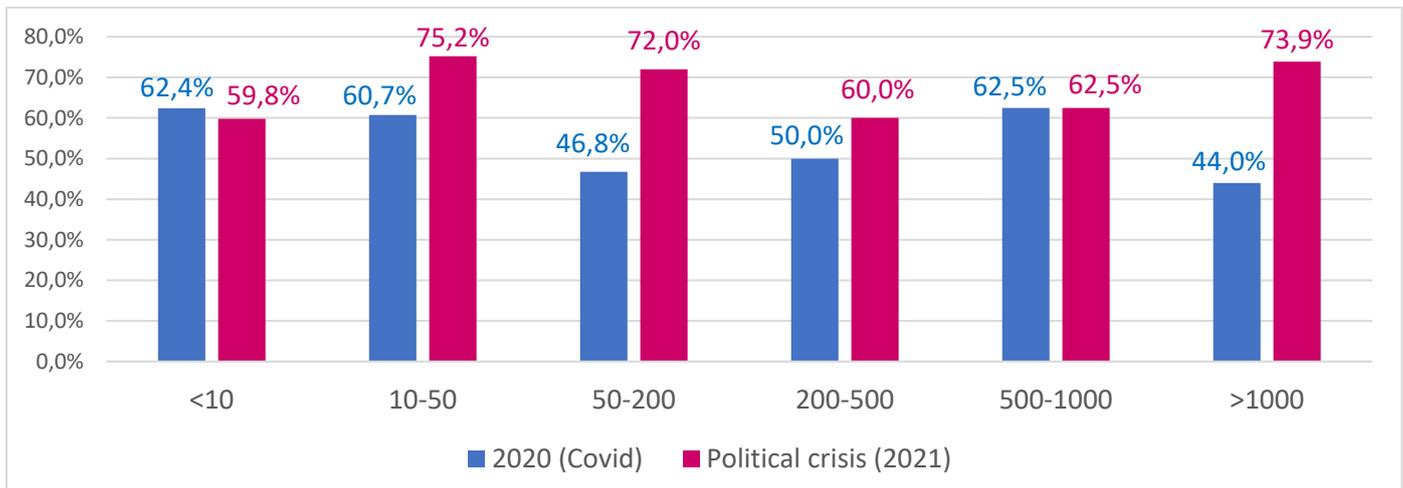
By nationality



By sector

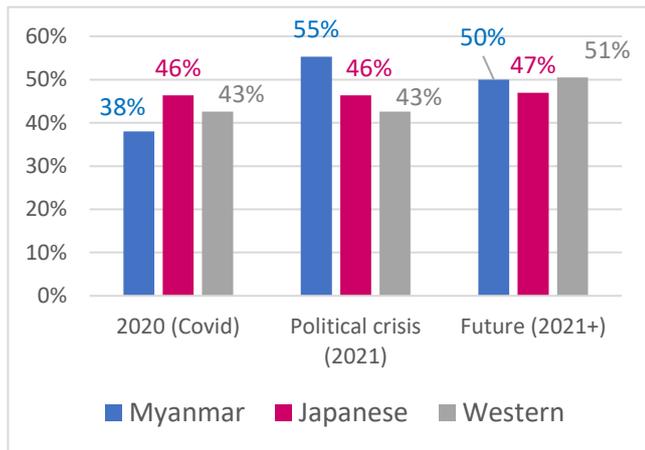


By size (number of employees)

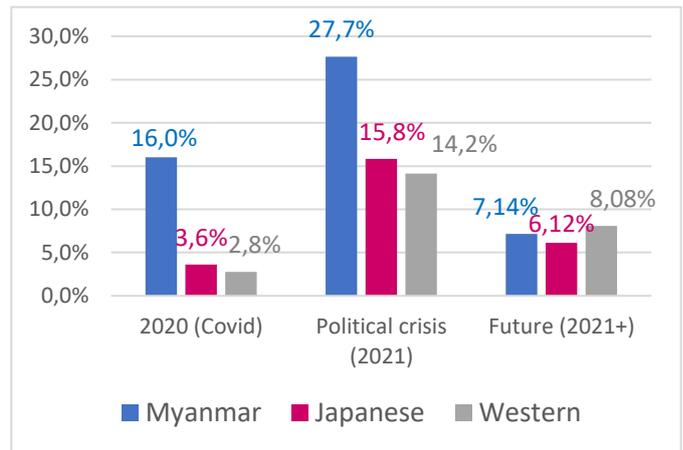


Reduction of income of 25% to 75%

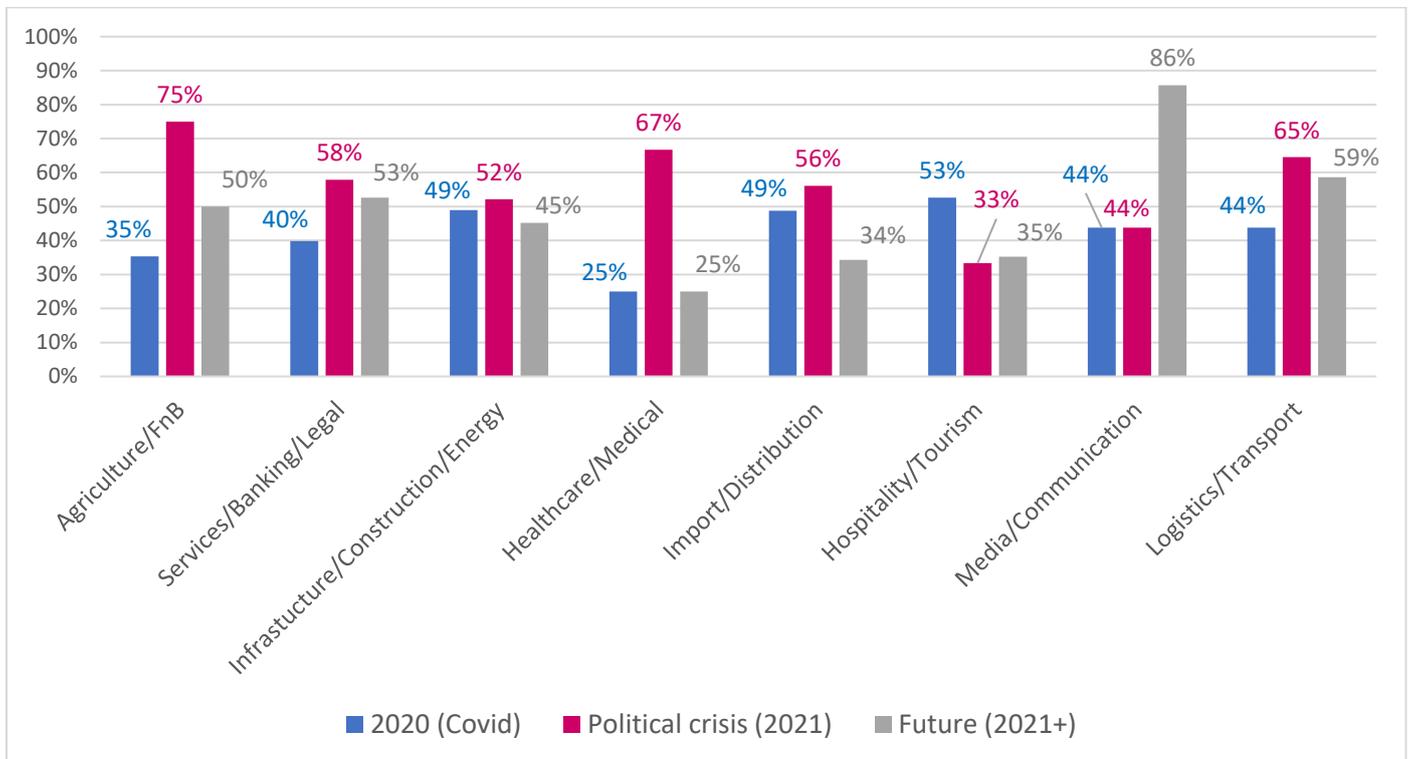
By nationality



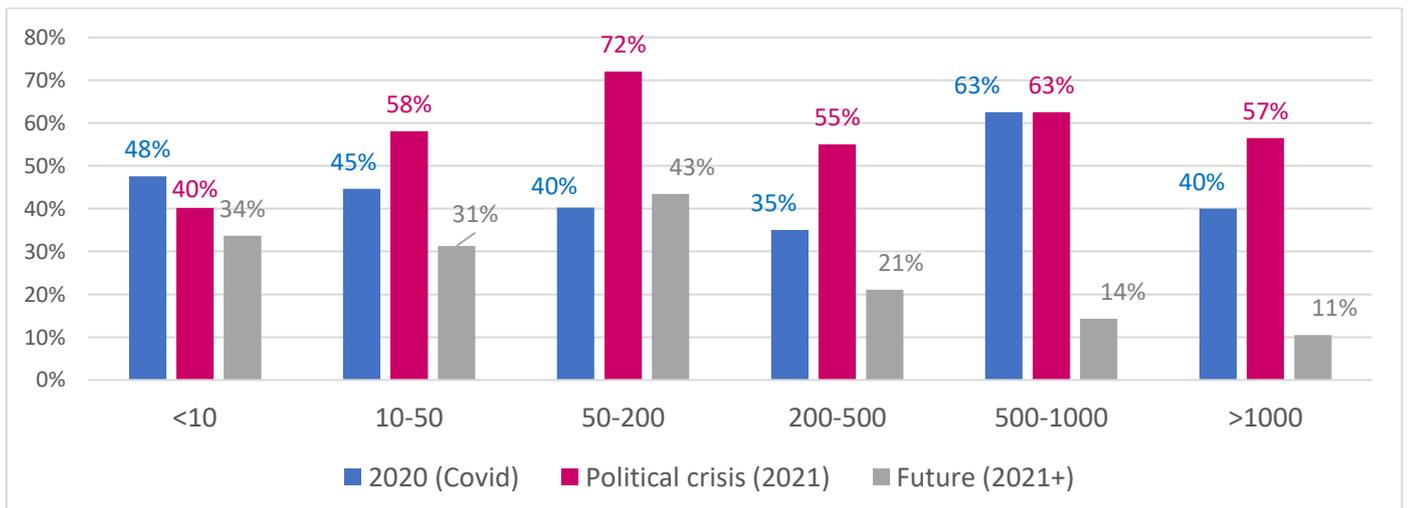
No income at all by nationality



By sector

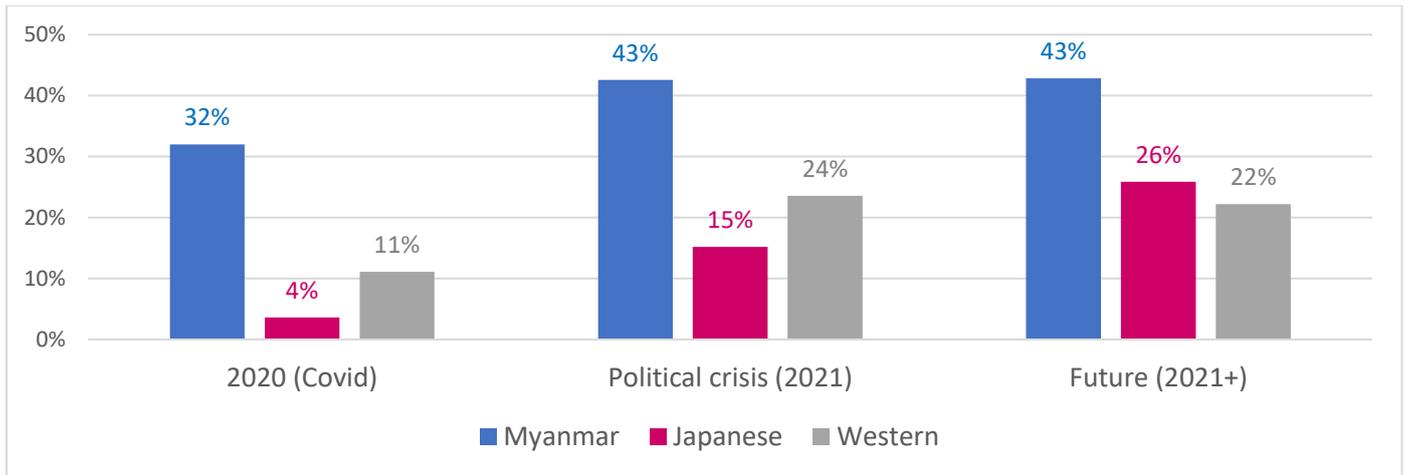


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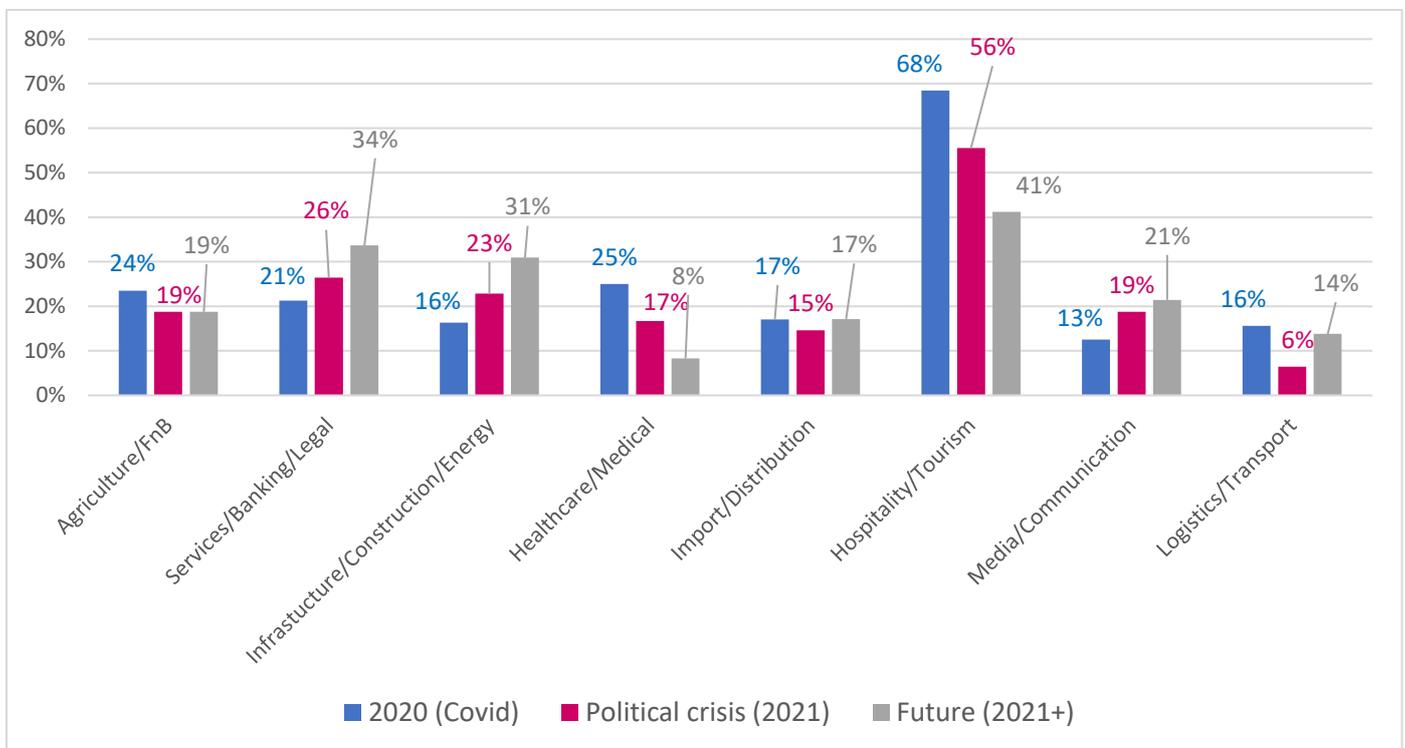


Reduction of salaries by 25% to 75% and over

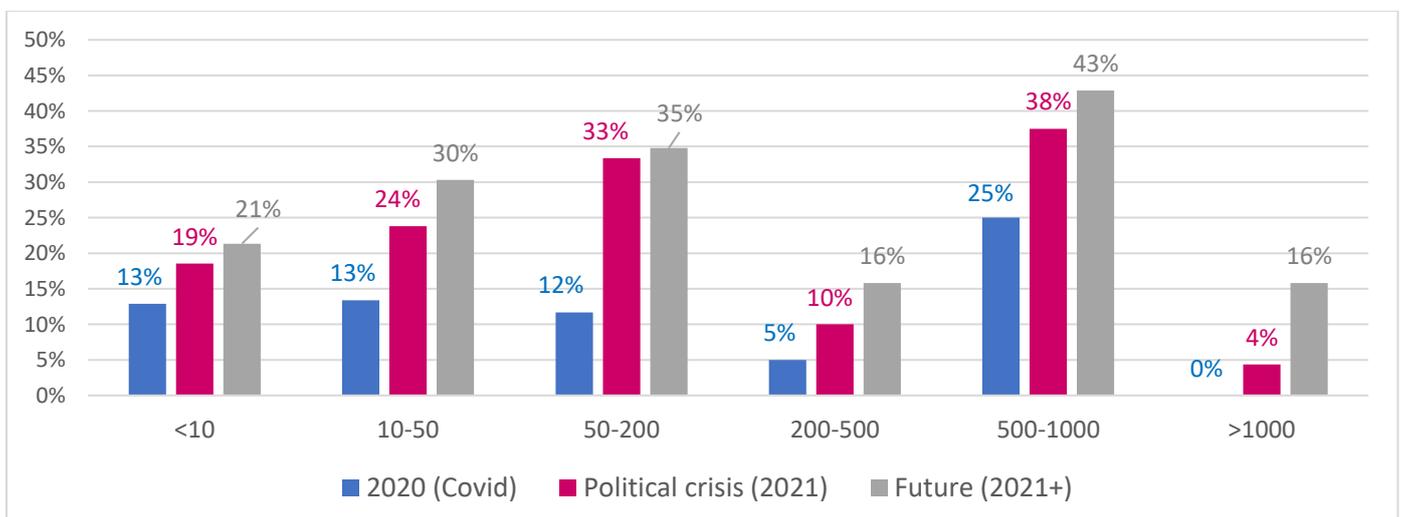
By nationality



By sector

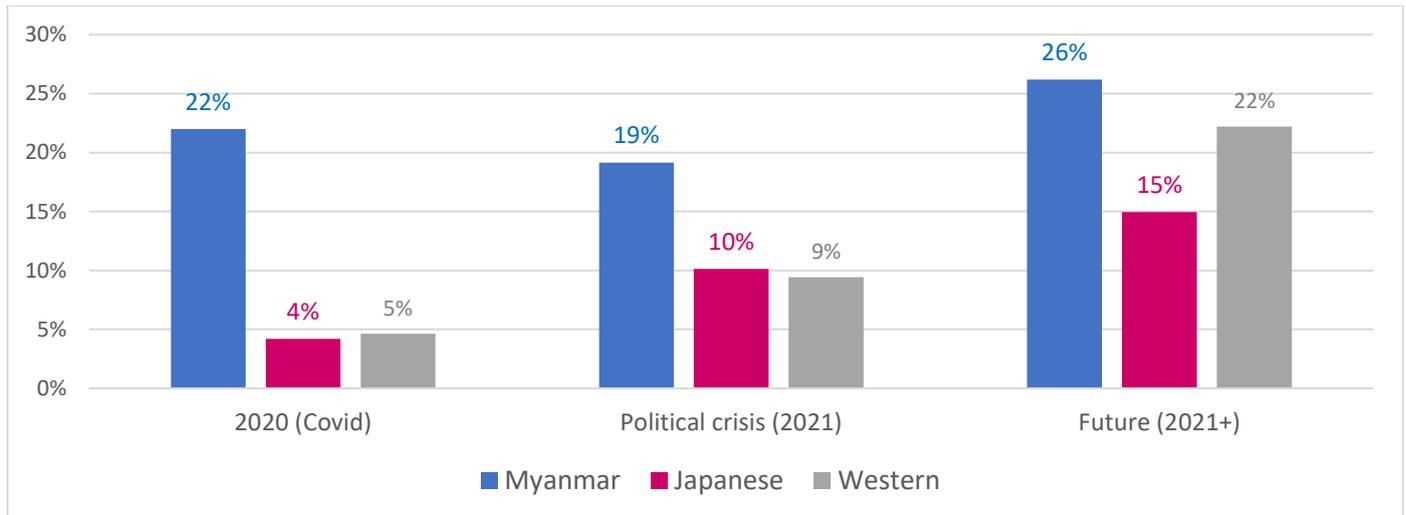


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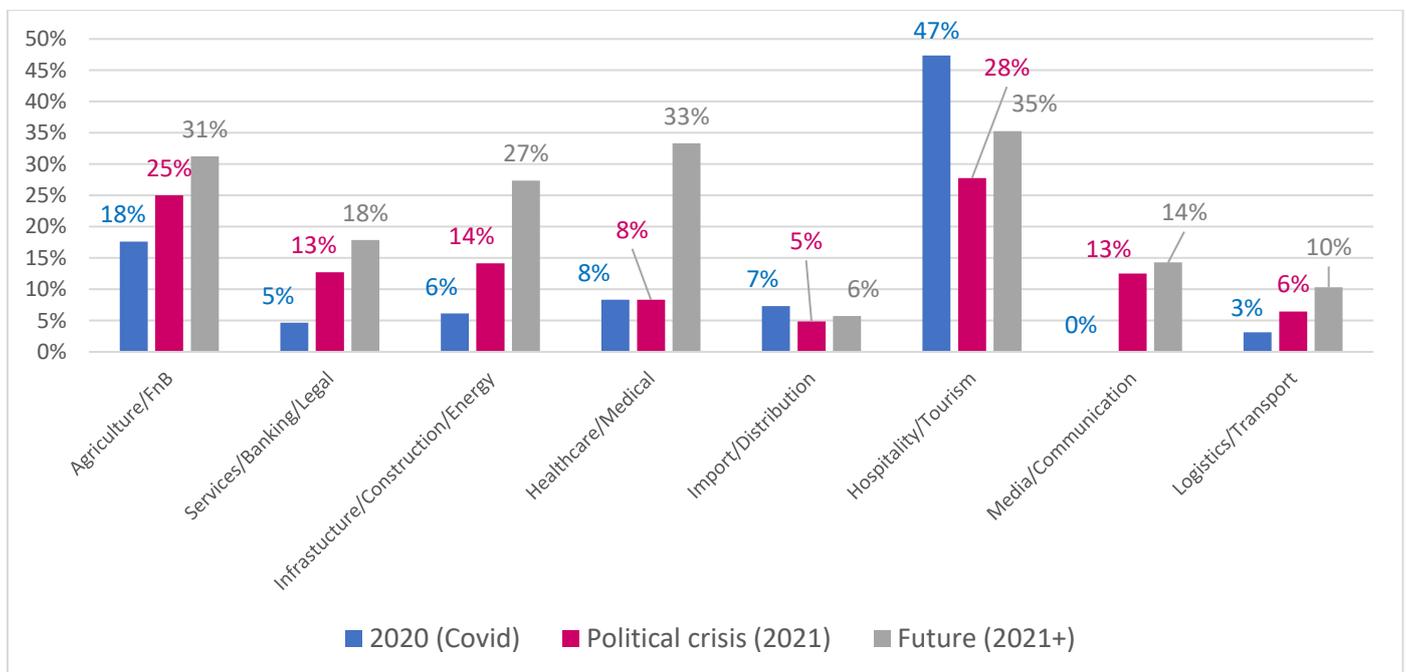


Terminations of 25% to 100% of employment contracts

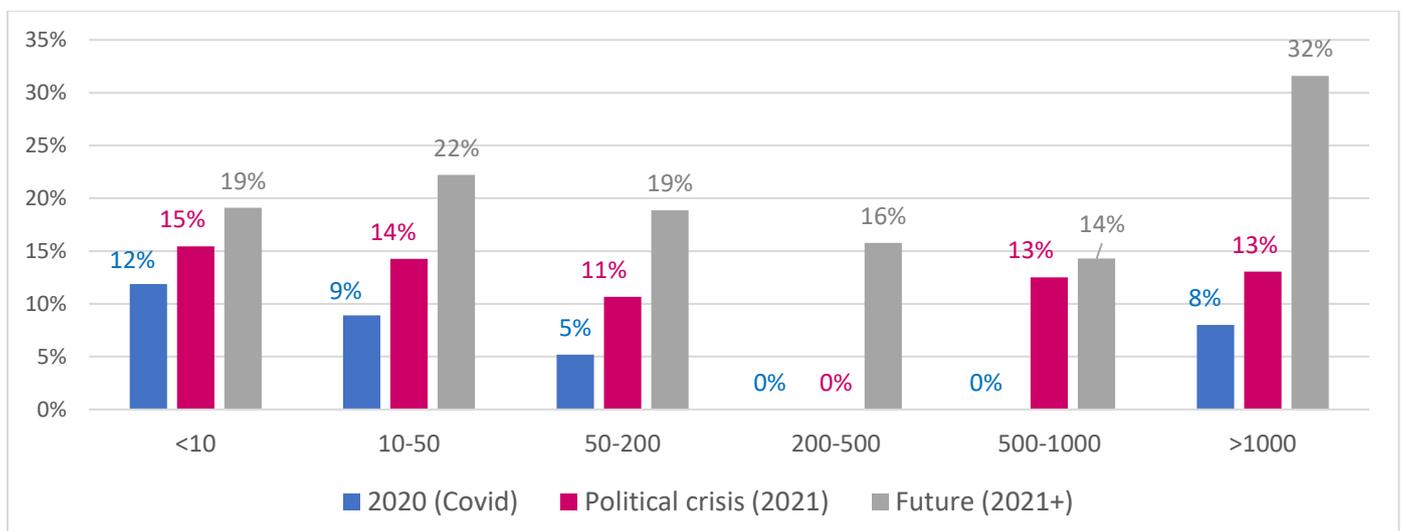
By nationality



By sector



By size



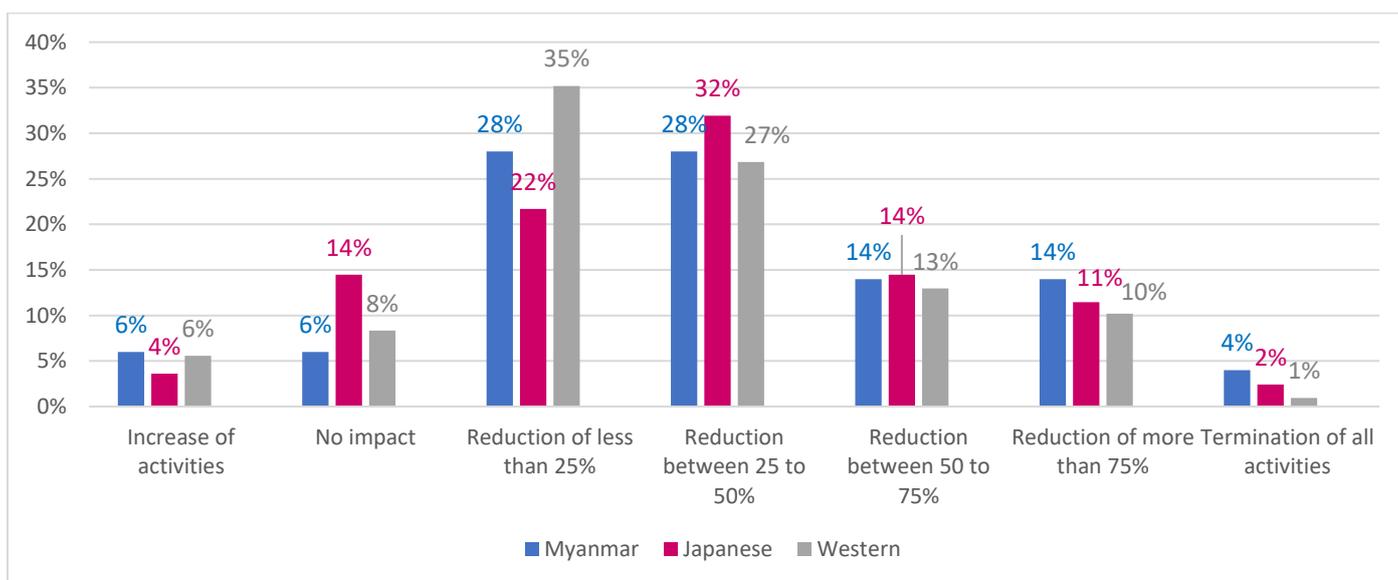
PART 1 – IMPACT OF ONE YEAR OF COVID-19 (2020)

SUMMARY

The answers from participants show that the Covid-19 crisis critically impacted the activity and the income of a large majority of companies operating in Myanmar, whatever their nationalities.

Indeed, between 73.34% to 85.19% declared that their activities had been impacted. And for 46.67% to 57.84% for them, their activities decreased by 25% to 75%, without any significant difference based on nationality.

How was your activity impacted by the Covid-19 crisis in 2020? (by nationality)

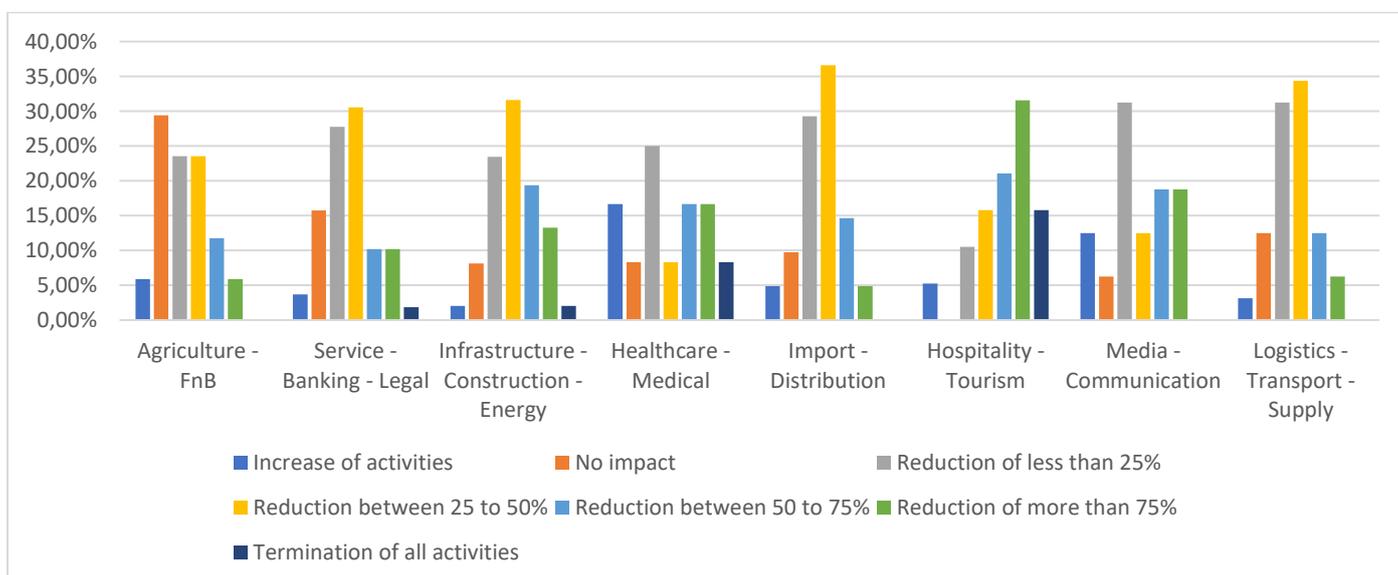


Yet almost no company was impacted so much by the pandemic in 2020 that it had to completely terminate its operations in Myanmar, except in the tourist/hospitality (15.79%) and in the healthcare/medical (8.33%) sectors.

Basically, all companies whatever their nationalities, sector, size, or years of operating in Myanmar, have been strongly impacted by the pandemic.

Data show without surprise that the most impacted sector was the tourist and hospitality sector. Indeed, 68.42% of the companies recorded a decrease in their activity between 25% to 75%, and 15.79% of them had to completely terminate all their activities in 2020.

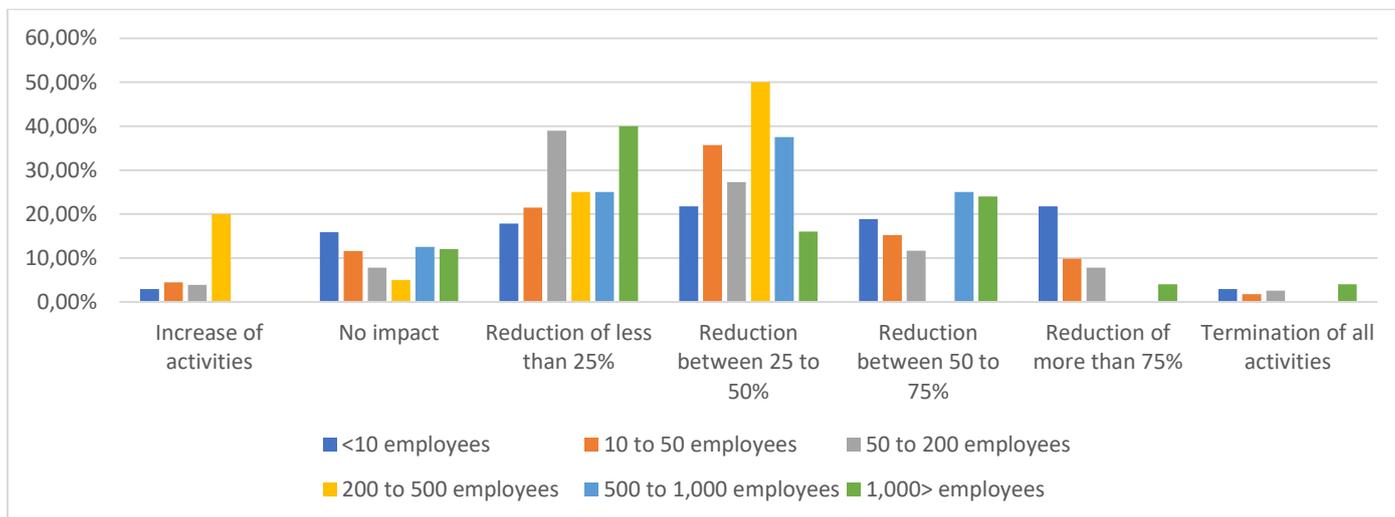
How was your activity impacted by the Covid-19 crisis in 2020? (by sector)



The survey shows that the second most impacted sector is that of infrastructure, construction and energy. 64.29% of the companies in that sector recorded a decrease in their activities between 25% to 75%. Yet, contrary to the tourist sector, almost no company in that sector had to completely terminate its operations in 2020.

In addition, other sectors were also strongly impacted, with a reduction of activities between 25% to 75%: service/banking/insurance (50.94%), import/distribution/retail (56.10%), media/communication (50%), and logistic/transport (53.13%). The least impacted sectors were the agriculture/agrifood/FnB (41.17%) and the healthcare/medical (41.67%) sectors.

How was your activity impacted by the Covid-19 crisis in 2020? (by size)



In addition, it also appears that the largest companies, those with the most employees, probably including hotels and construction companies working in the most impacted sectors, were the ones which suffered the most from the crisis in 2020, since their operations depended on the possibility for their staff to work on site.

Finally, the companies which were less impacted by the pandemic in 2020 were the ones which had been operating in Myanmar for more than 3 years, meaning that their operations were already strongly rooted in the market.

IMPACT ON INCOME

Apart from Asean companies (20%), only a very small minority of companies of other nationalities have recorded a growth of their income in 2020 (6% to 11.11%). And the only sector in which a certain number of companies (25%) registered a growth in their income in 2020 was logically the healthcare/medical sector, followed by the agriculture/agrifood/FnB sector (17.65%).

Only a minority of companies had no income at all in 2020 (5.54%). This critical situation concerned 16% of Myanmar companies, mostly in the hospitality/tourist sector (31.58% of the companies in that sector), whereas other nationalities and other sectors were far concerned by the total absence of income.

Yet, between these two extremes, all companies from all sectors, were impacted by the loss of income in 2020. Indeed, between 60% to 74.08% of companies of all nationalities have seen their income decrease during the past year, without including those which had no income at all.

In each sector, a large majority of companies registered a loss of 0 to 75% of their income in 2020, as follows:

- Agriculture/Agri-food/FnB: 52.95% of companies
- Service/banking/legal/insurance: 66.67% of companies
- Infrastructure/construction/energy: 73.46% of companies
- Healthcare/medical: 58.33% of companies
- Import/distribution/retail: 75.62% of companies
- Hospitality/tourism: 63.16% of companies
- Media/communication: 62.5% of companies
- Logistic/transport/supply: 75% of companies

On the other hand, the survey shows that the size of the company didn't play a large part on the loss of income, since a large majority of companies, whatever their sizes, recorded a loss of 0 to 75% of their income in 2020:

- Less than 10 employees: 66.33% of companies
- 10 to 50 employees: 72.32% of companies
- 50 to 200 employees: 68.84% of companies
- 200 to 500 employees: 60% of companies
- 500 to 1,000 employees: 87.5% of companies
- More than 1,000 employees: 68% of companies

The exception are companies employing between 500 to 1,000 persons, which have been much more impacted than the others. It is possible that many of these companies were factories, especially in the textile industry, which have been dramatically impacted by the decrease in demand globally, but it is hard to know for sure.

Finally, it appears that the seniority of the company in the country played a part, since the ones operating for less than one year in Myanmar were far more impacted than the ones who had been operating for many years.

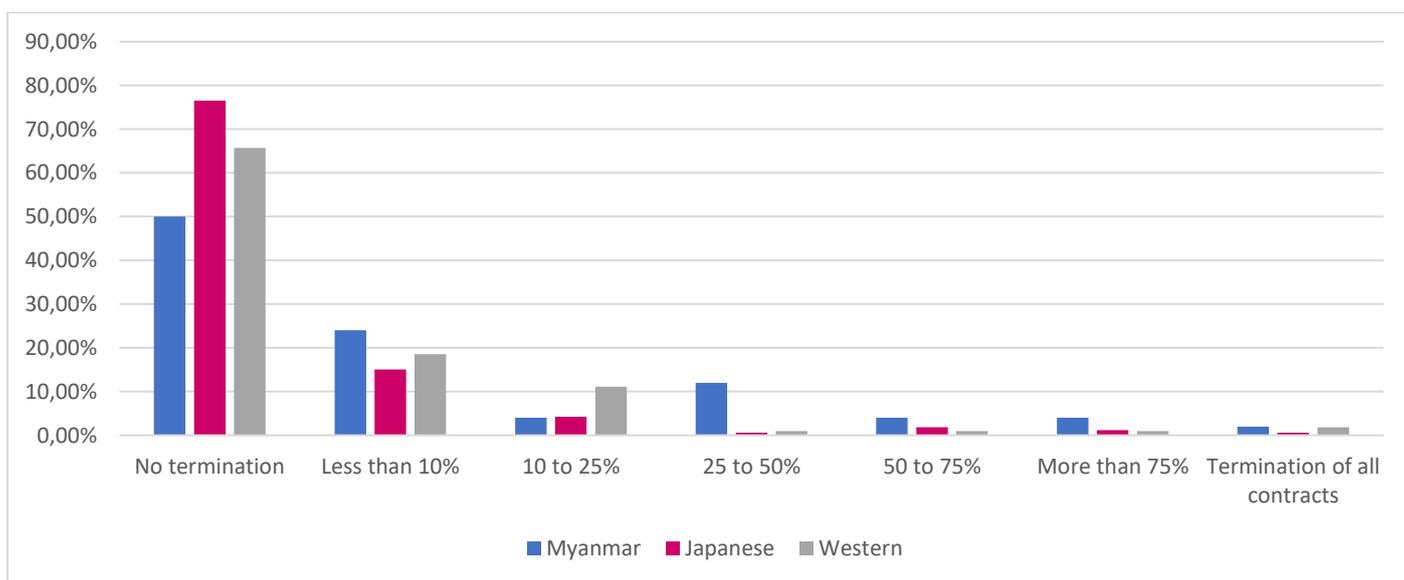
Indeed, 37.5% of the companies who had been operating for less than one year in Myanmar received no income at all in 2020, compared to less than 10% for the companies which had been operating for more than 3 years in the country.

IMPACT ON HUMAN RESOURCES

Answers show that only a very small minority of companies have recruited and/or increased salaries in 2020, mostly large companies (more than 200 employees), in the media/communication, service/banking/legal/insurance, healthcare/medical and the logistic/transport sectors.

On the other end of the spectrum a strong minority of companies from all nationalities (except Japanese companies) had to terminate employment contracts (between 14.81% to 20% of companies). These were mostly companies working in the hospitality/tourist sector, since 42.11% of the companies in this sector had to terminate contracts.

Around how many employment contracts did you have to terminate in 2020? (By nationality)

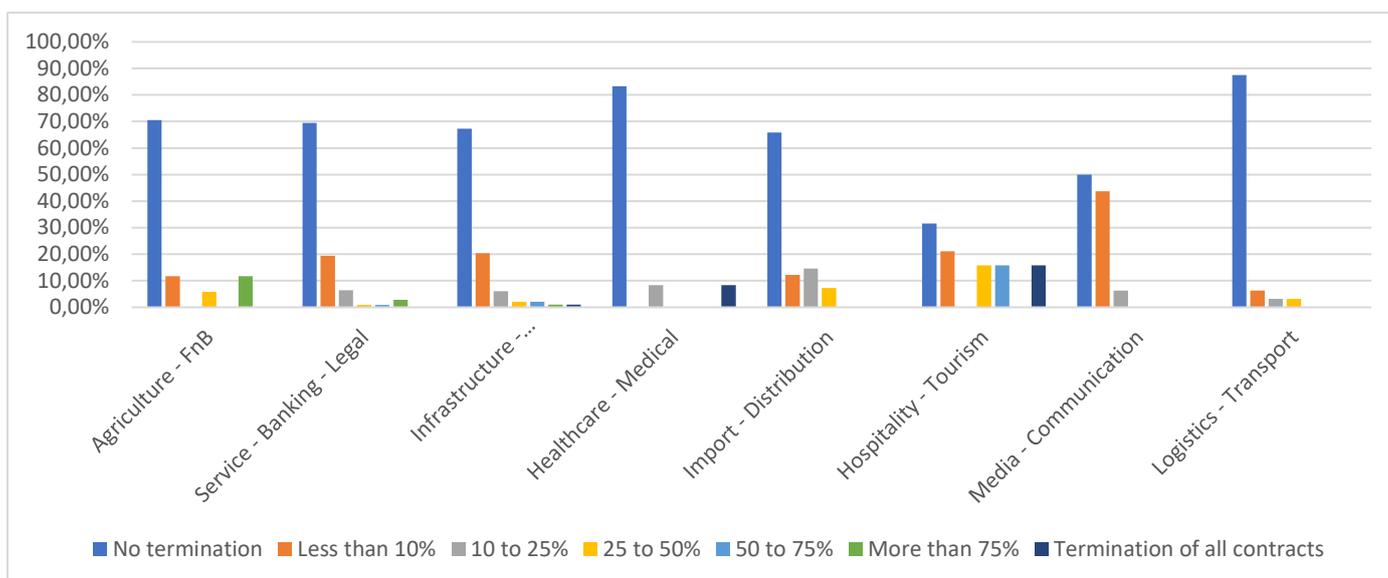


It is important to notice that more than 12% of companies employing more than 500 persons had to terminate employment contracts, resulting in the loss of thousands of jobs in 2020.

Fortunately, the large majority of companies who had to let go some of their employees only terminated less than 10% of the employment contracts of their staff.

In between these two extremes, a majority of companies had to implement a large range of measures to reduce their expenses and to adapt their operations to the impact of the Covid-19 on their activities and income.

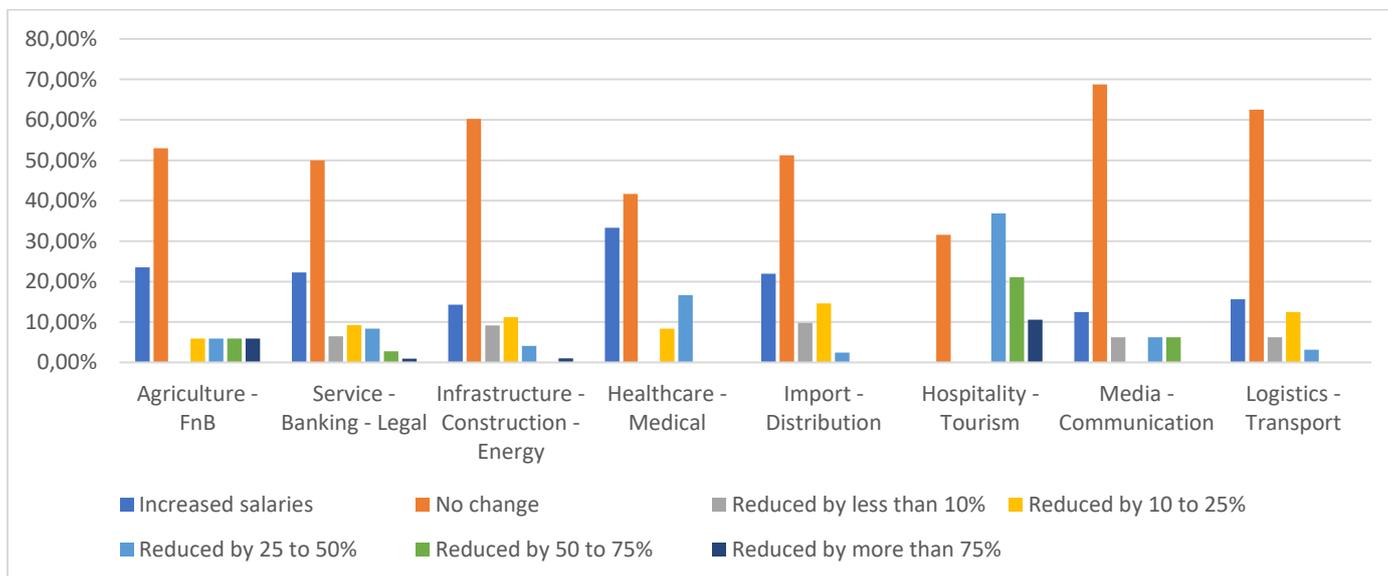
Around how many employment contracts did you have to terminate in 2020? (By sector)



These measures included mostly the freezing of all recruitment (26% to 43.52%), the decrease of salaries (10.24% to 42%), the cancellation of bonuses (13.33% to 30%), the freezing of salaries (7.23% to 21.30%), and the use of unpaid leaves (9.04% to 33.33%). Companies implemented these measures in different mixes depending on their activities and the impact of the safety measures and restrictions on them.

Furthermore, while a large number of companies didn't decrease the salaries of their staff, those which did had to reduce them by 10% to 50% in most cases. Once again, those who implement a reduction in salaries were mostly large companies (200 to 500 employees) in the hospitality and tourist sector.

In average, by how much did you have to change salaries in 2020? (By sector)



PART 2 – IMPACT OF THE POLITICAL CRISIS (SINCE FEBRUARY 2021)

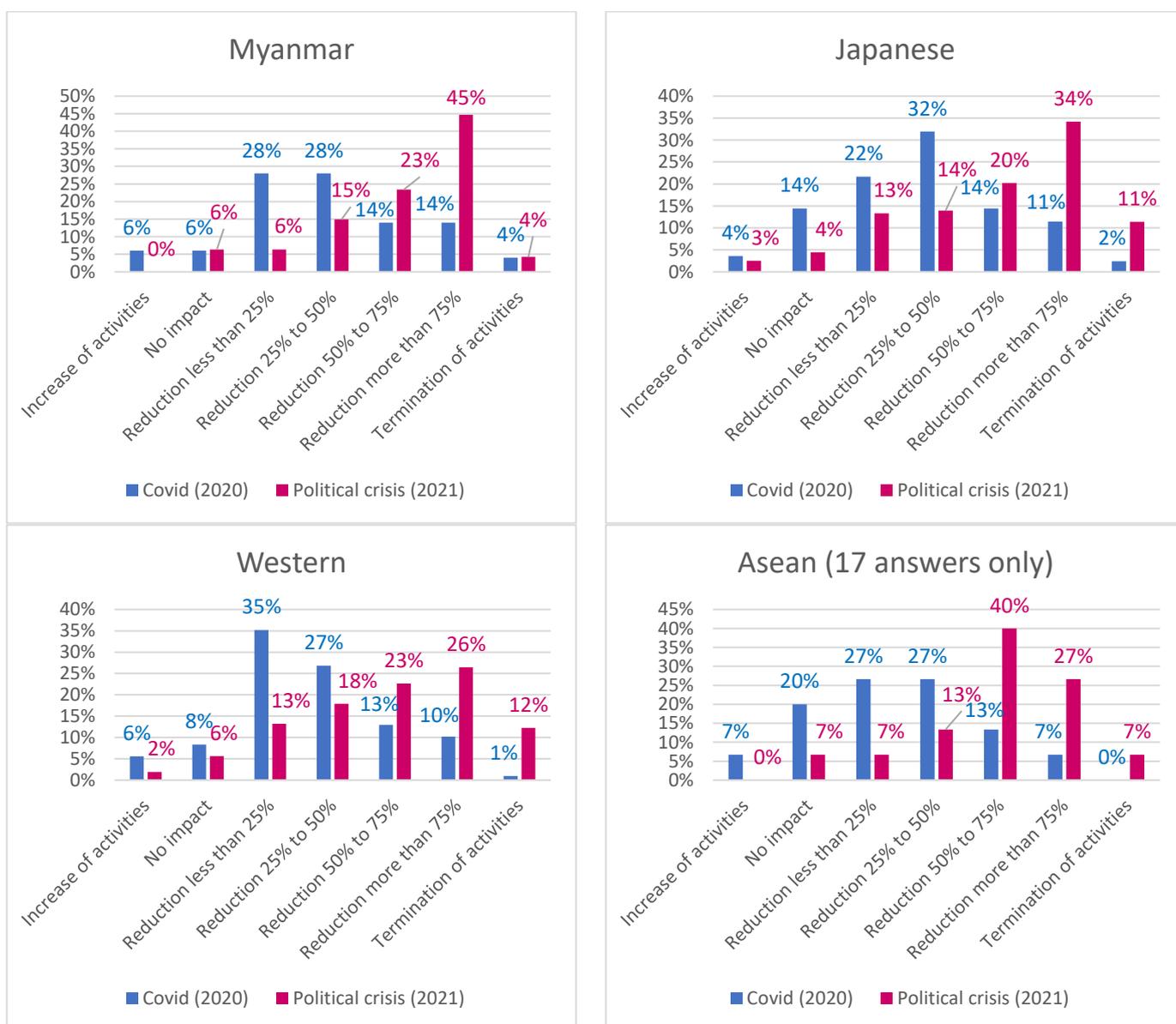
SUMMARY

The political crisis, which started in February 2021, came after one full year of economic crisis due to the Covid-19. Therefore, it came at a time when companies operating in Myanmar had already been dramatically fragilized by the pandemic, which resulted in a loss of activity and income, as shown in the answers of the part 1 of the survey.

By their very nature, the political events of 2021, which came on top of the continuing effects of the pandemic on the economy, had a sudden and direct impact on the companies because of a wide range of reasons.

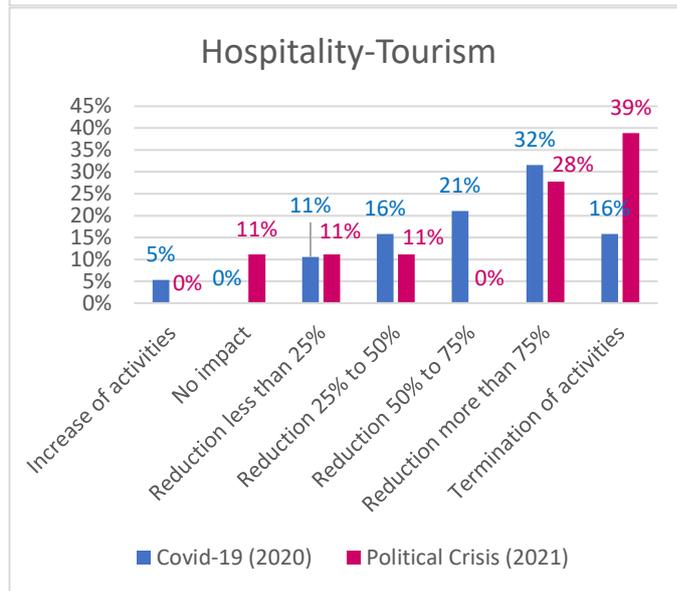
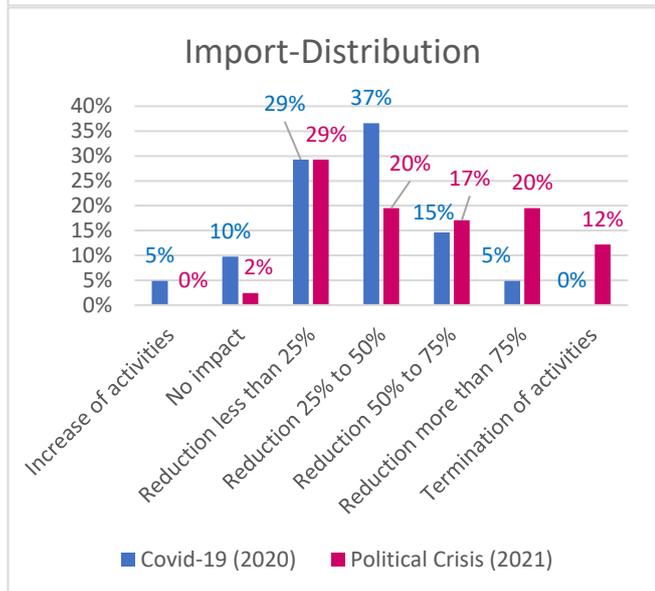
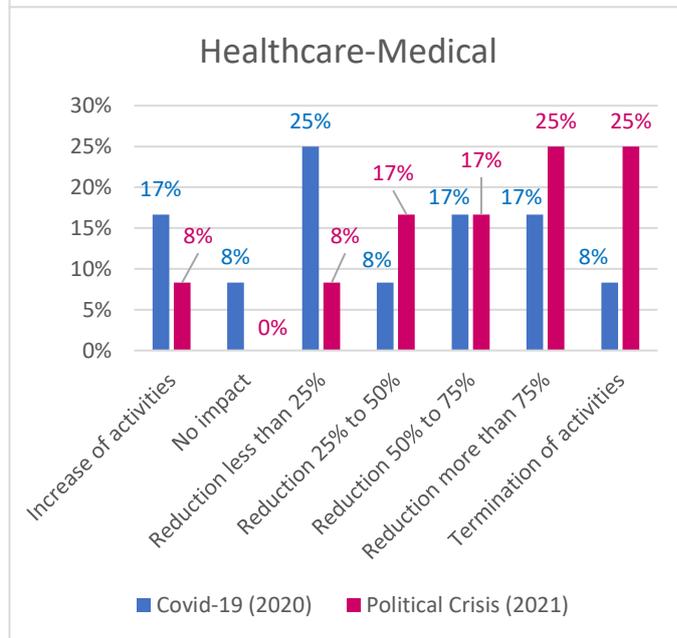
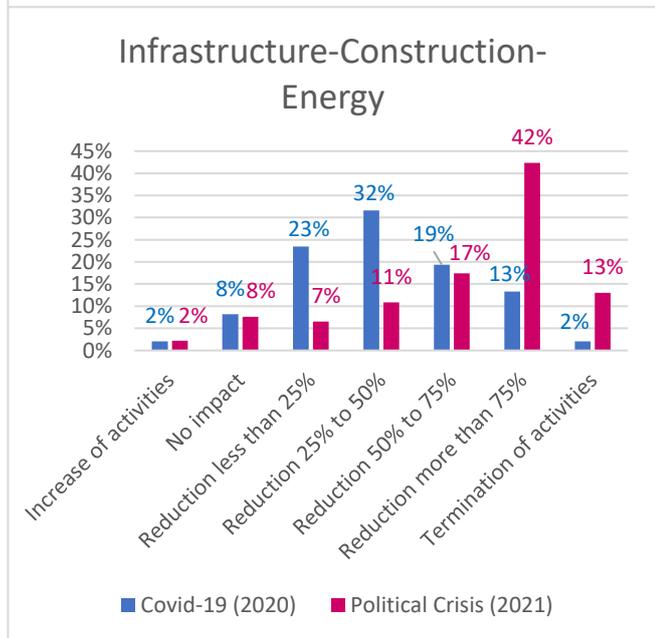
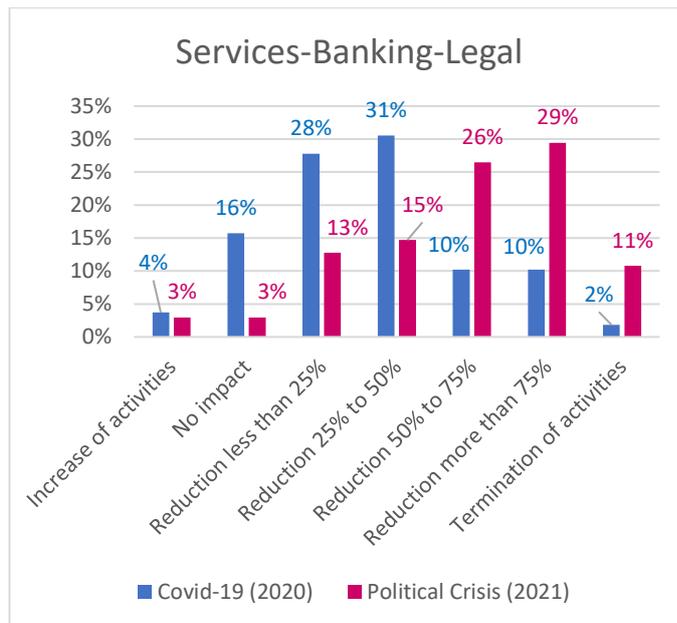
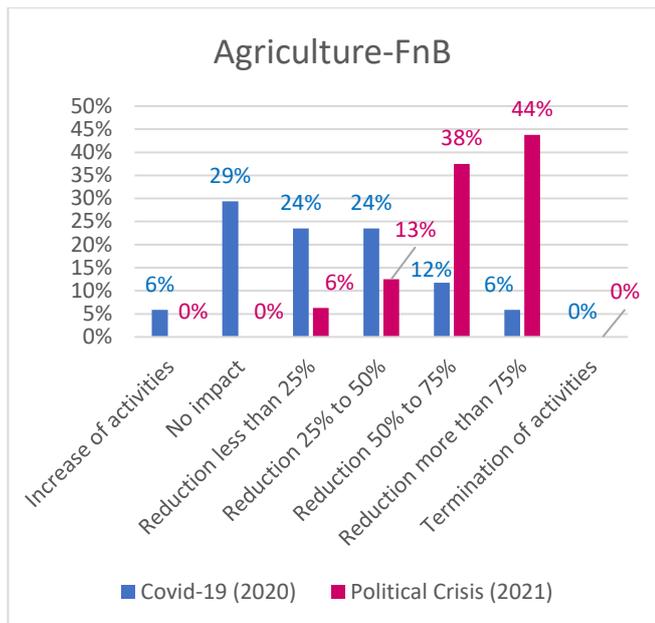
Indeed, the survey shows that after only two months, almost all companies operating in Myanmar were affected by the situation, independently of their nationalities, since only a very small minority of them indicated that their activities increased (0% to 2.53%) or where not impacted (4.43% to 6.67%).

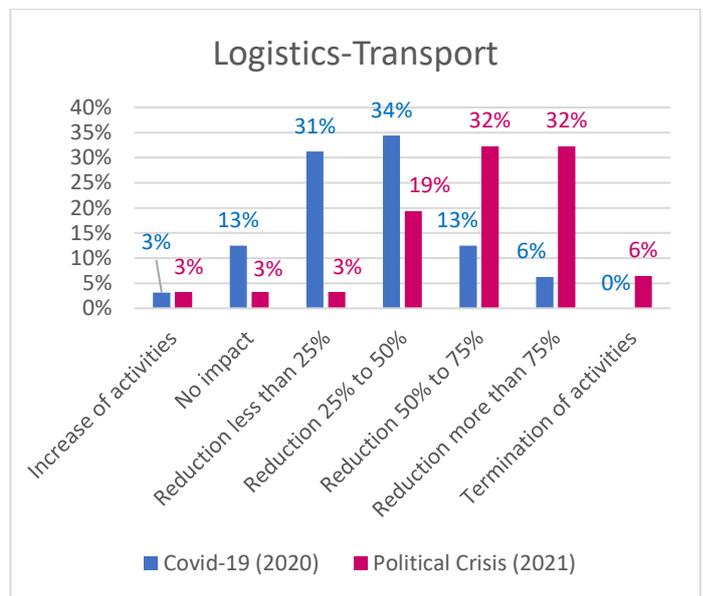
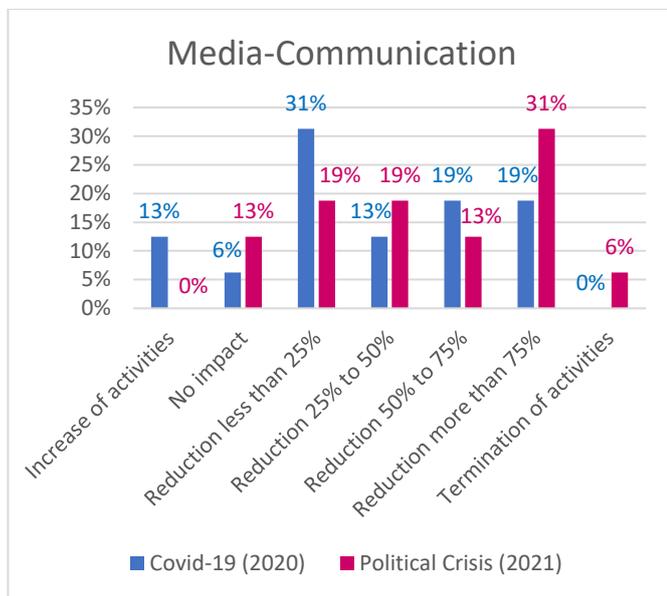
How was your activity impacted? (Comparison between 2020 and 2021, by nationality)



On the opposite, while the number of companies who terminated their operations after February 2021 is still a small minority, the number is reaching 12.26% for Western companies and 11.39% for Japanese companies, which is much higher than the number recorded after one year of Covid-19, especially for such a short period.

How was your activity impacted? (Comparison between 2020 and 2021, by sector)





In addition, the difference with the impact of the pandemic is that the companies who had to terminate operations operate in a larger number of different of sectors, instead of being mostly in the hospitality/tourist sector:

- Hospitality/tourist - 38.89% of companies (compared to 15.79% in 2020)
- Healthcare/medical - 25% of companies (compared to 8.33% in 2020)
- Infrastructure/construction/energy - 13.04% of companies (compared to 2.04%)
- Import/distribution/retail - 12.2% of companies (compared to 0% in 2020)
- Service/banking/legal/insurance – 10.78% of companies (compared to 1.85% in 2020)

In between these two extremes, all companies, independently of their nationalities, sectors and sizes have been strongly impacted indiscriminately by the political crisis, in only two months' time.

Indeed, the number of companies who have recorded a reduction of 25% to 75% of their activities are as follows:

By nationality

- Myanmar – 82.97% of companies (compared to 56% in 2020)
- Japanese – 68.35% of companies (compared to 57.84% in 2020)
- Western – 66.98% of companies (compared to 50% in 2020)
- Asean (17 answers only) – 80% of companies (compared to 46.67% in 2020)

By sector

- Agriculture/Agrifood/FnB: 93.75% of companies (compared to 41.17% in 2020)
- Service/banking/legal/insurance: 70.59% of companies (compared to 50.94% in 2020)
- Infrastructure/construction/energy: 70.65% of companies (compared to 64.29% in 2020)
- Healthcare/medical: 58.34% of companies (compared to 41.67% in 2020)
- Import/distribution/retail: 56.09% of companies (compared to 56.10% in 2020)
- Hospitality/tourism: 38.89% of companies (compared to 68.42%, their operations having already stopped)
- Media/communication: 62.5% of companies (compared to 50% in 2020)
- Logistic/transport/supply: 83.87% of companies (compared to 53.13% in 2020)

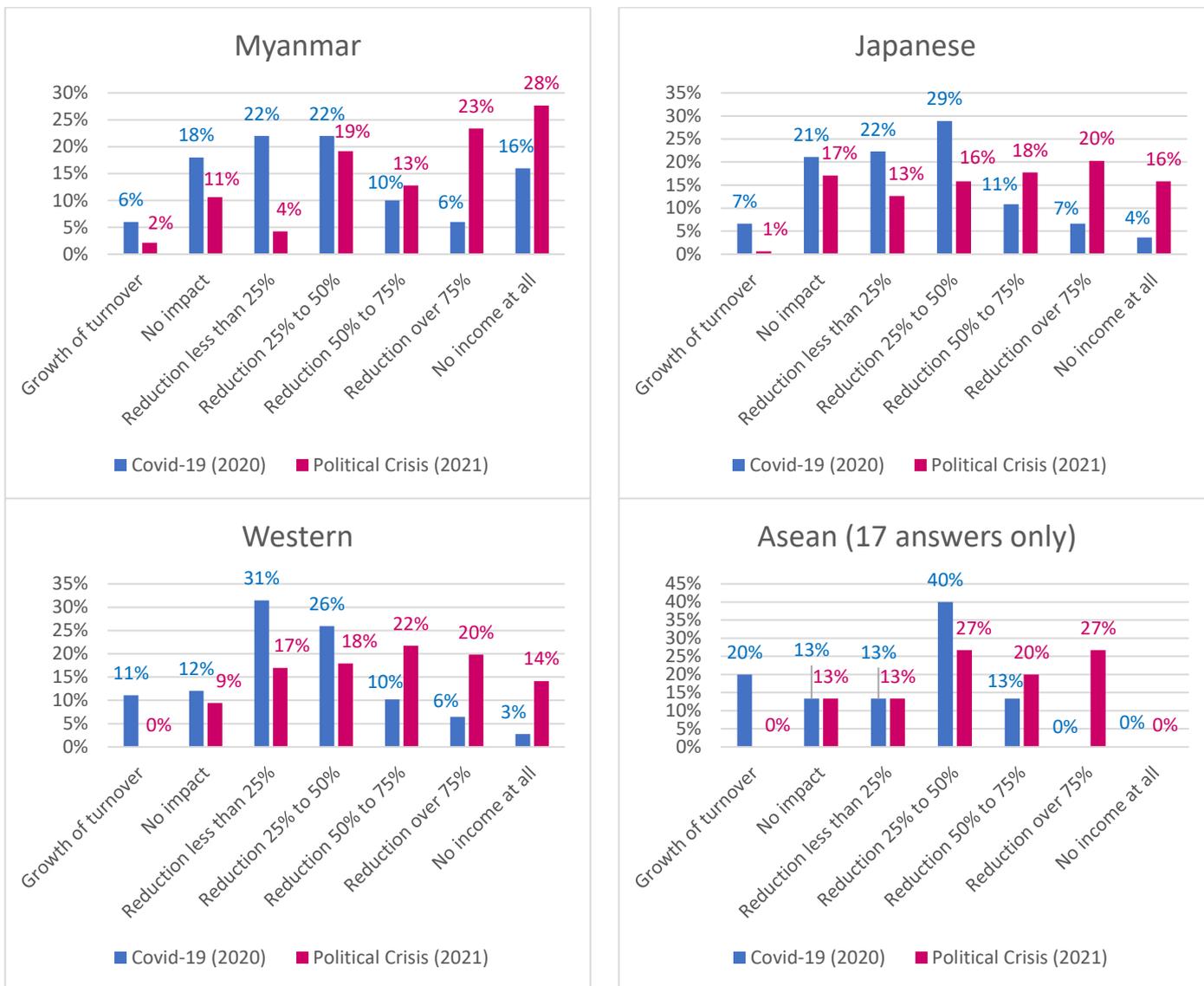
Data also shows that all companies have been impacted in the same way, whether they had been operating in Myanmar for many years or not.

IMPACT ON INCOME

Contrary to what happened in 2020, during the pandemic, no company operating in Myanmar has recorded an increase in their income since February 2021.

In the same way, only a very small minority (9.43% to 17.09%) among all nationalities answered that their income had not been impacted by the political crisis. These are companies working mostly in the infrastructure /construction/energy, import/distribution/retail, logistic/transport, and services/banking/legal/insurance sectors.

How was your income impacted? (Comparison between 2020 and 2021, by nationality)



The survey also shows that the number of companies which have not received any income since February is much higher than those which were in the same situation during the pandemic in 2020.

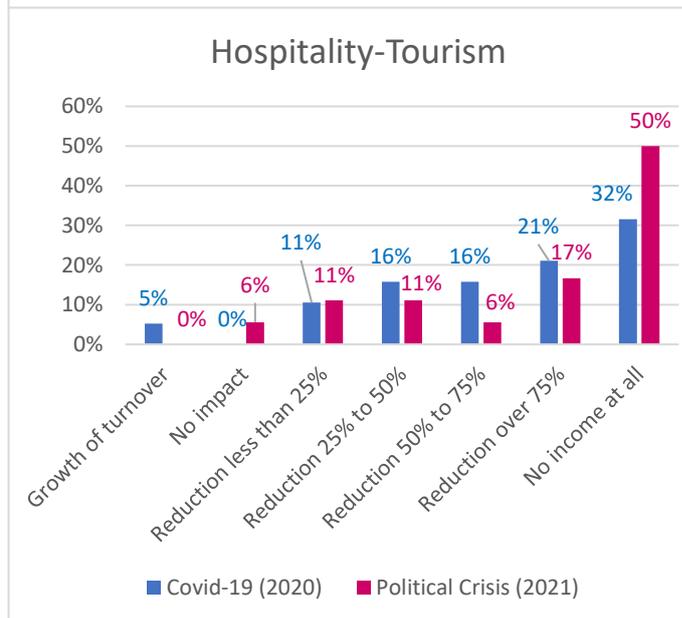
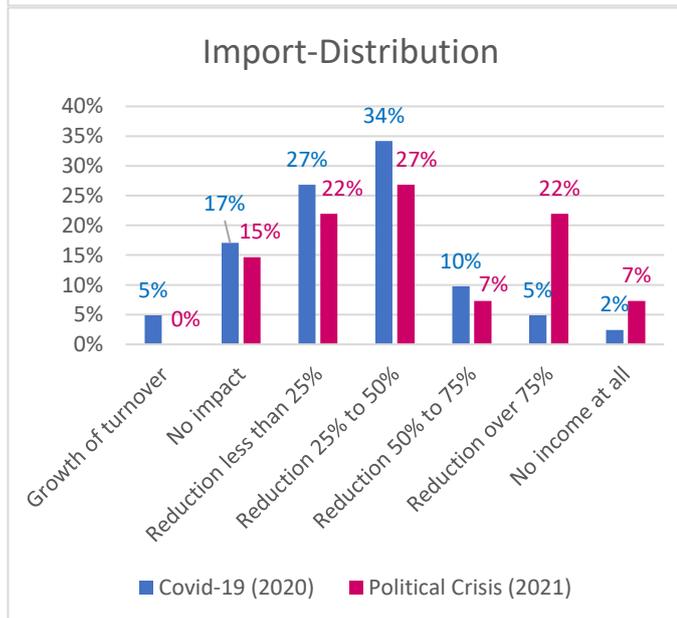
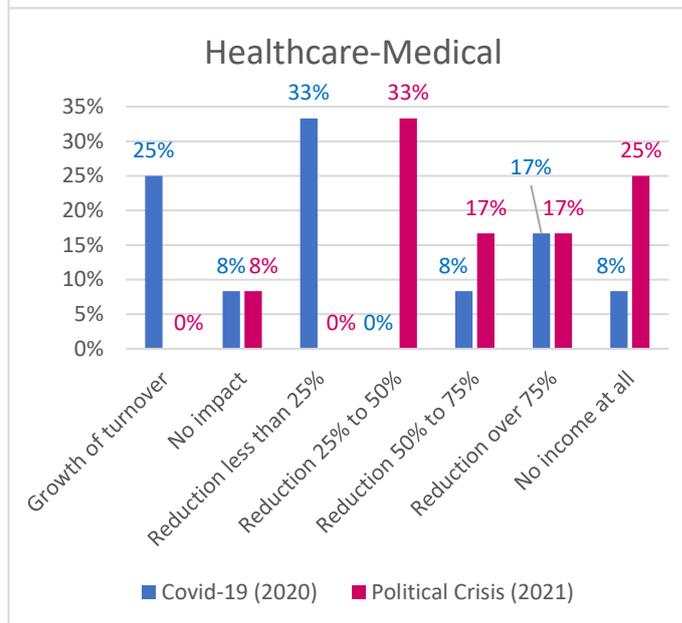
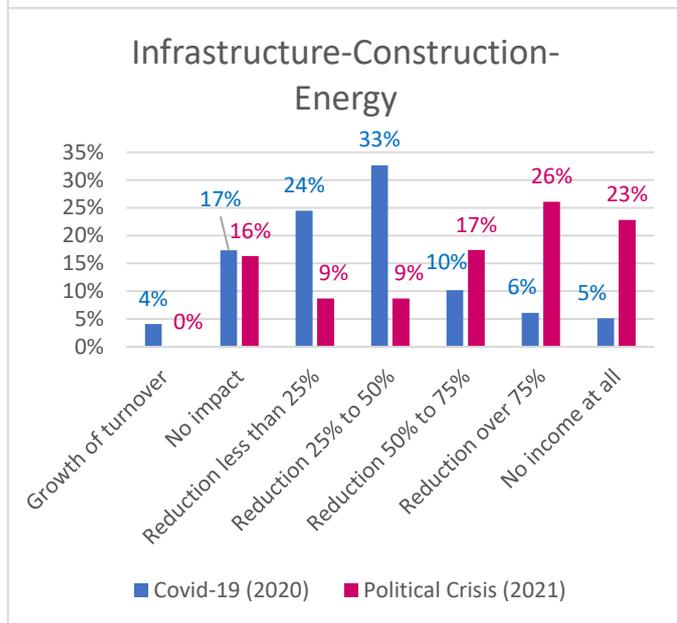
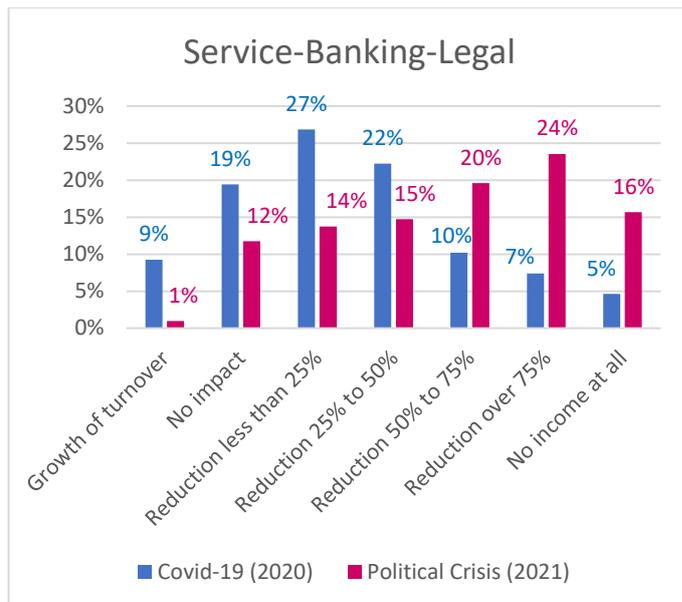
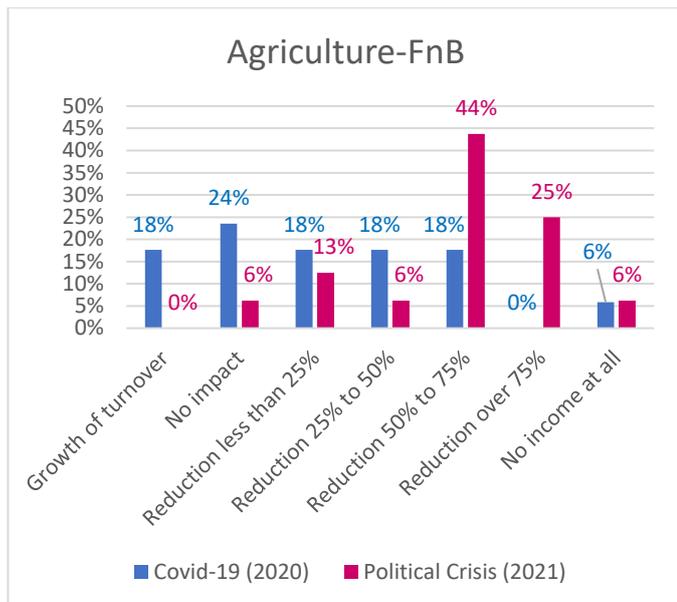
Indeed, apart from Asean companies, the number of companies which had no income during for two months were:

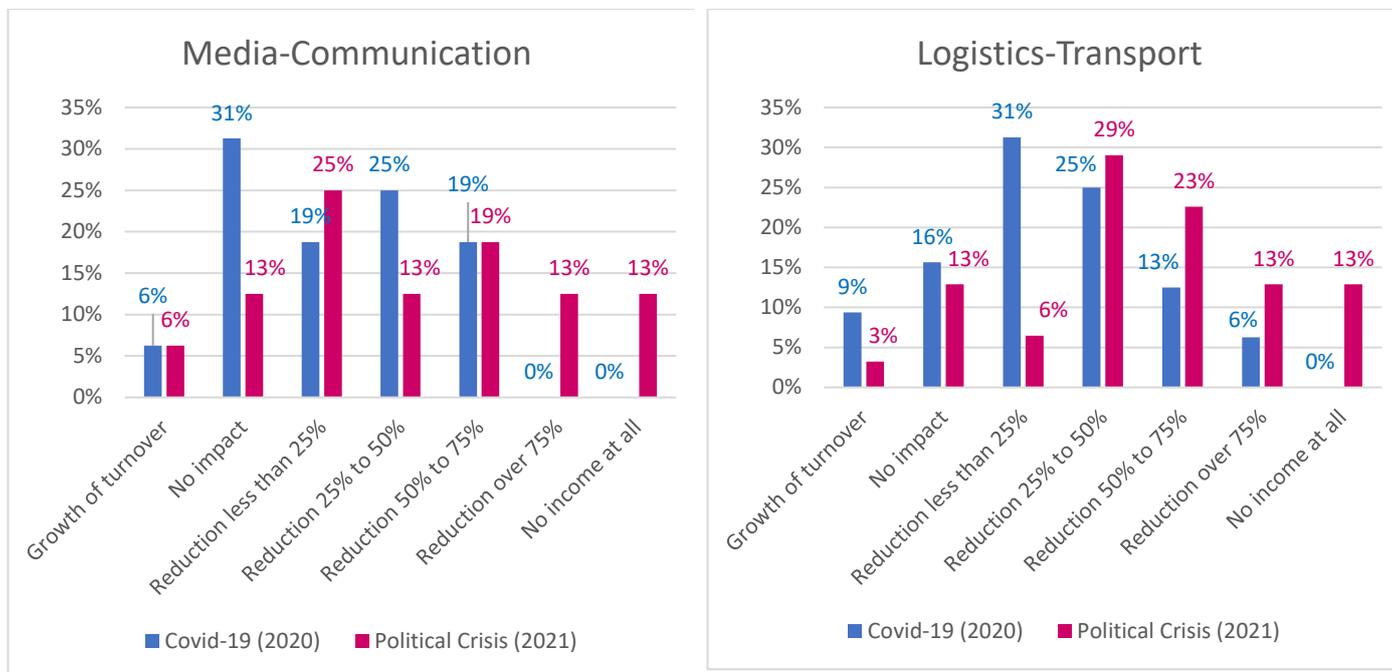
- Myanmar: 27.66% (compared to 16% in 2020)
- Japanese: 15.82% (compared to 3.61% in 2020)
- Western: 14.15% (compared to 2.78% in 2020)

The proportions of companies without income in the different sectors are the following:

- Agriculture/Agrifood/FnB: 6.25% of companies (compared to 5.88% in 2020)
- Service/banking/legal/insurance: 15.69% of companies (compared to 4.63% in 2020)
- Infrastructure/construction/energy: 22.83% of companies (compared to 5.10% in 2020)
- Healthcare/medical: 25% of companies (compared to 8.33% in 2020)
- Import/distribution/retail: 7.32% of companies (compared to 2.44% in 2020)
- Hospitality/tourism: 50% of companies (compared to 31.58% in 2020)
- Media/communication: 33.34% of companies (compared to 0% in 2020)
- Logistic/transport/supply: 43.75% of companies (compared to 0% in 2020)

How was your income impacted? (Comparison between 2020 and 2021, by sector)





In between these two extremes, all companies, independently of their nationalities, sectors and sizes have been strongly impacted indiscriminately by the political crisis, in only two months' time.

Indeed, the number of companies who have recorded a reduction of 25% to 75% of their income are as follows:

By nationality

- Myanmar – 55.79% of companies (compared to 38% in 2020)
- Japanese – 55.32% of companies (compared to 46.39% in 2020)
- Western – 53.79% of companies (compared to 42.60% in 2020)
- Asean (17 answers only) – 73.34% of companies (compared to 53.33% in 2020)

By sector

- Agriculture/Agrifood/FnB: 75% of companies (compared to 35.30% in 2020)
- Service/banking/legal/insurance: 57.85% of companies (compared to 39.82% in 2020)
- Infrastructure/construction/energy: 52.18% of companies (compared to 48.97% in 2020)
- Healthcare/medical: 66.67% of companies (compared to 25% in 2020)
- Import/distribution/retail: 56.10% of companies (compared to 48.79% in 2020)
- Hospitality/tourism: 33.34% of companies (compared to 52.63% in 2020, their operations already stopped)
- Media/communication: 43.75% of companies (compared to 43.75% in 2020)
- Logistic/transport/supply: 64.51% of companies (compared to 43.75% in 2020)

By size

- Less than 10 employees: 40.20% of companies (compared to 47.52% in 2020)
- 10 to 50 employees: 58.09% of companies (compared to 44.64% in 2020)
- 50 to 200 employees: 72% of companies (compared to 40.27% in 2020)
- 200 to 500 employees: 55% of companies (compared to 35% in 2020)
- 500 to 1,000 employees: 62.5% of companies (compared to 62.50% in 2020)
- More than 1,000 employees: 56.52% of companies (compared to 40% in 2020)

Now, it is necessary to underline that this dramatic drop in the income comes after one full year of pandemic during which companies had already faced substantial losses in their revenues. It also appears that large companies were more impacted by the crisis since February 2021 than by one year of pandemic.

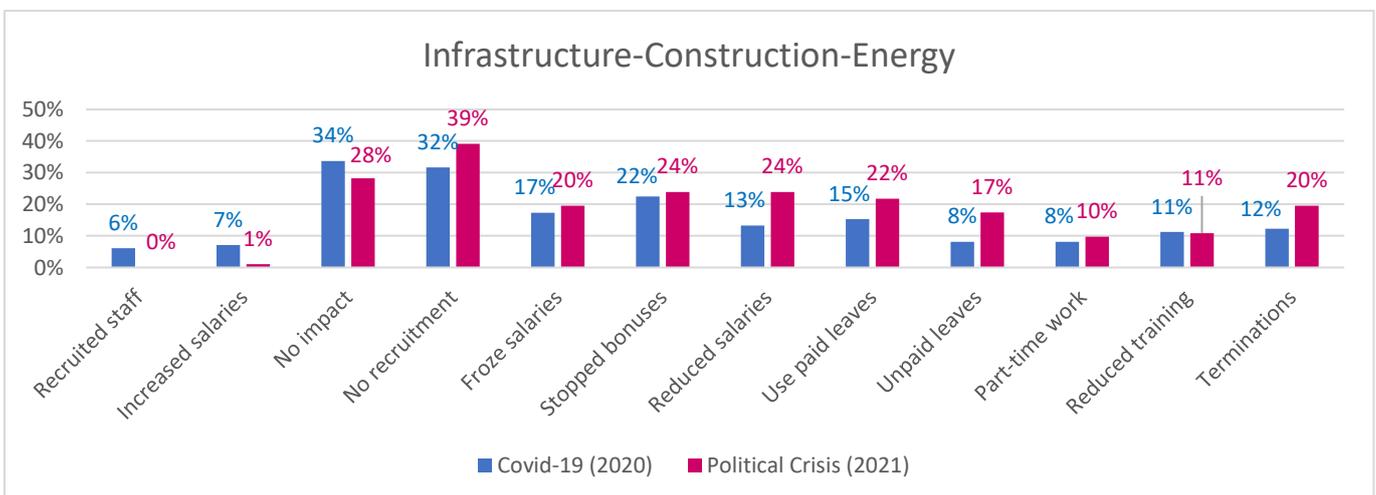
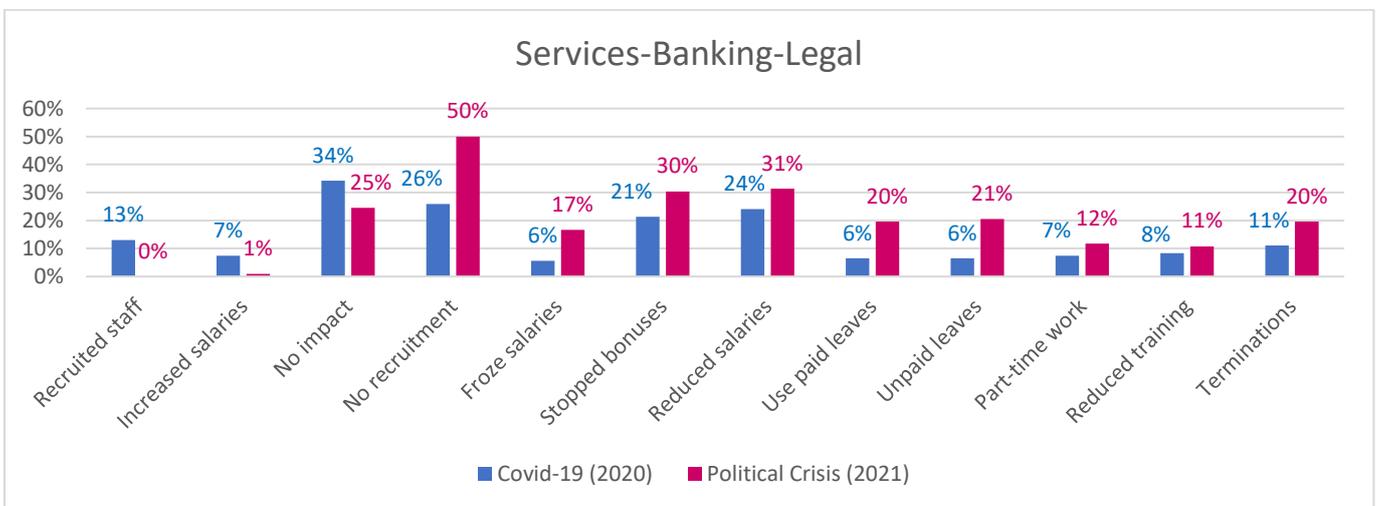
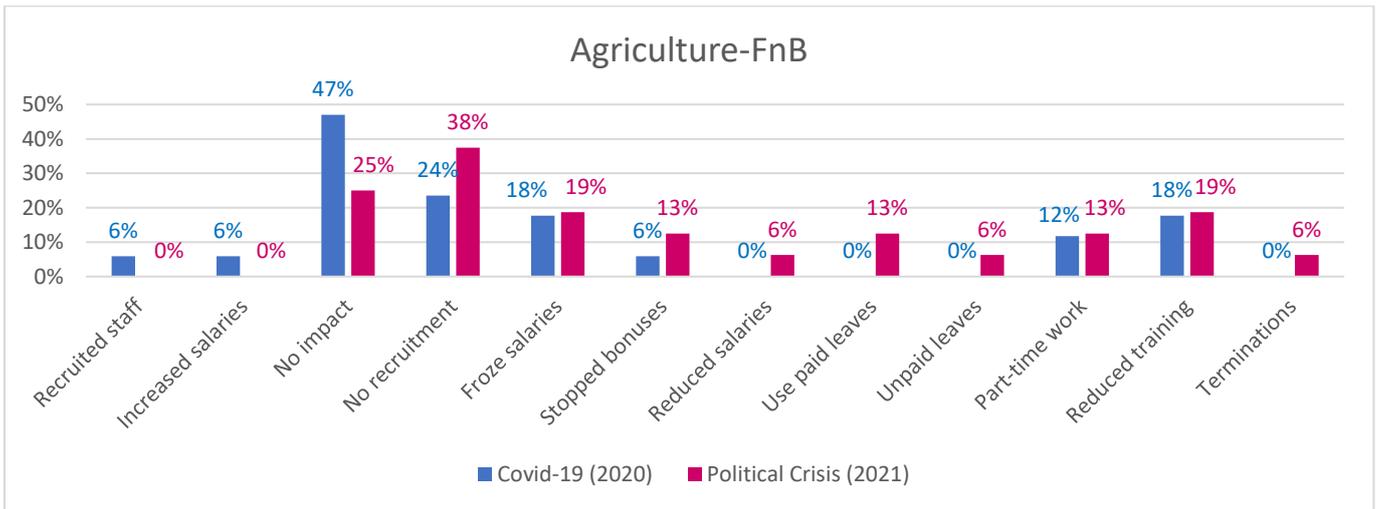
IMPACT ON HUMAN RESOURCES

Contrary to what happened in 2020, during the pandemic, no company operating in Myanmar has recruited new employees and/or increased salaries since February 2021.

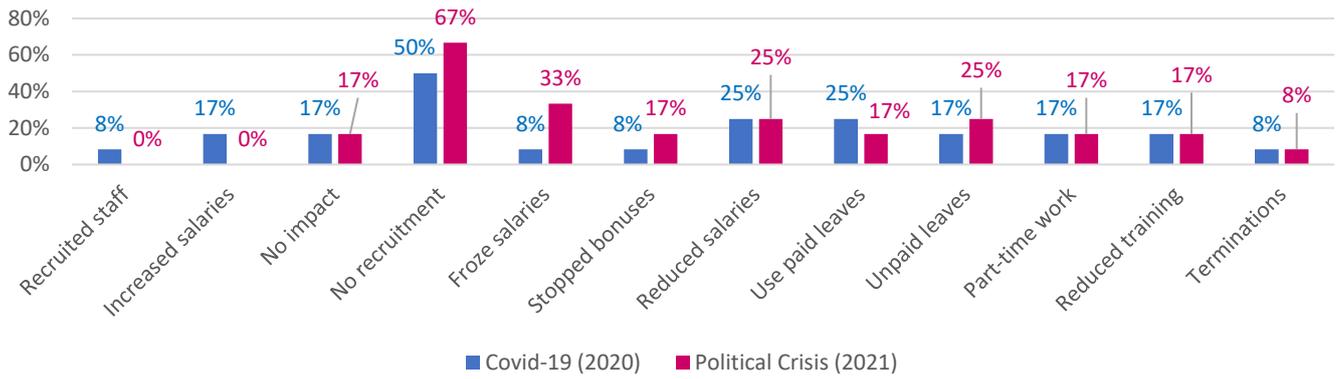
In addition, the number of companies which had to terminate contracts since February 2021 is a little higher than the one recorded in 2020, for all nationalities:

- Myanmar – 25.53% of companies (compared to 18% in 2020)
- Japanese – 11.39% of companies (compared to 5.42% in 2020)
- Western – 16.04% of companies (compared to 14.81% in 2020)

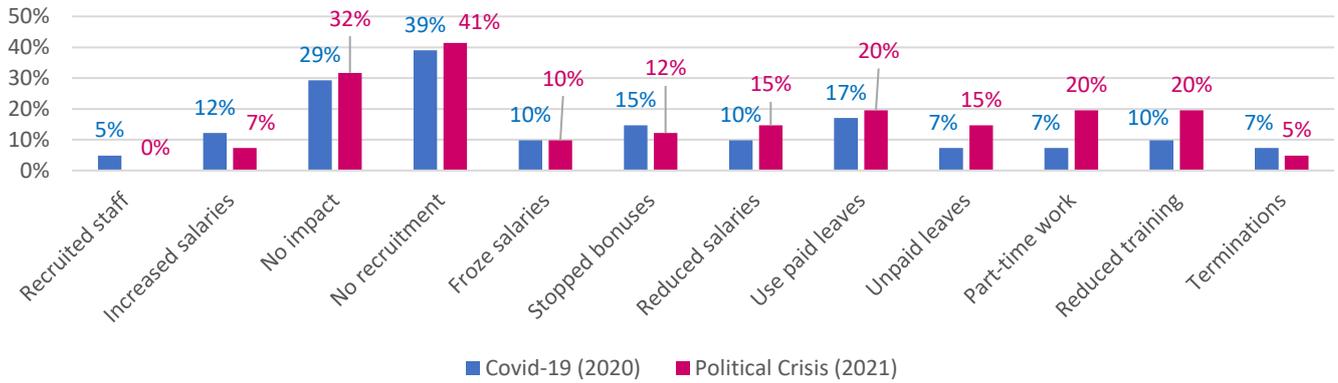
How were your human resources impacted? (Comparison between 2020 and 2021, by sector)



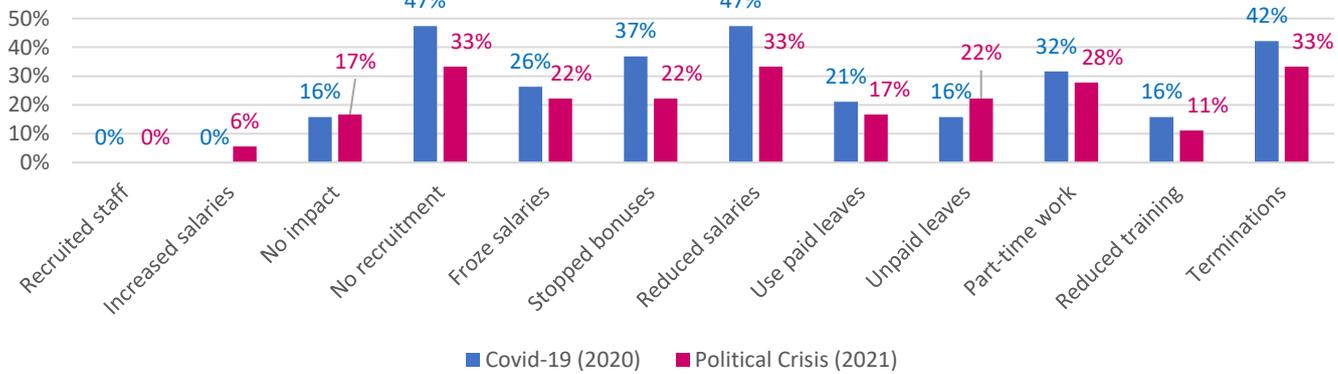
Healthcare-Medical



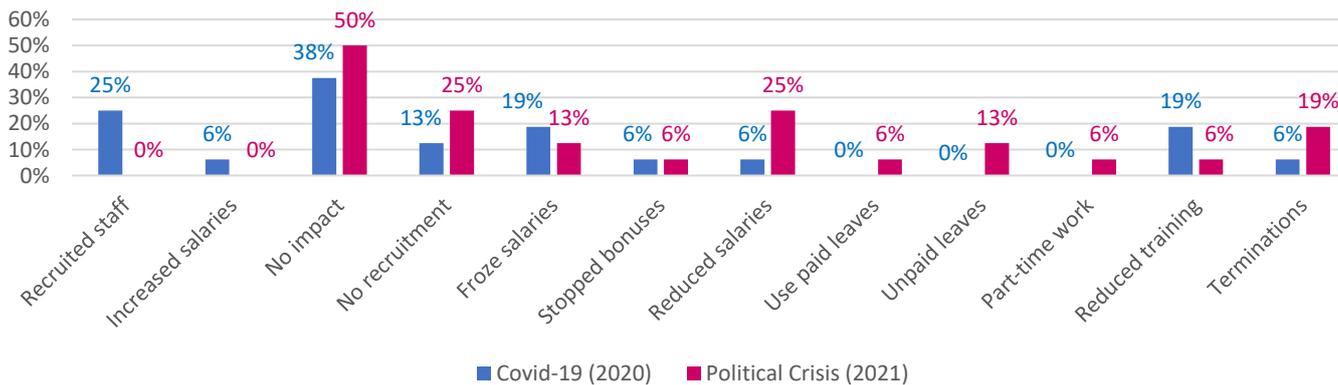
Import-Distribution

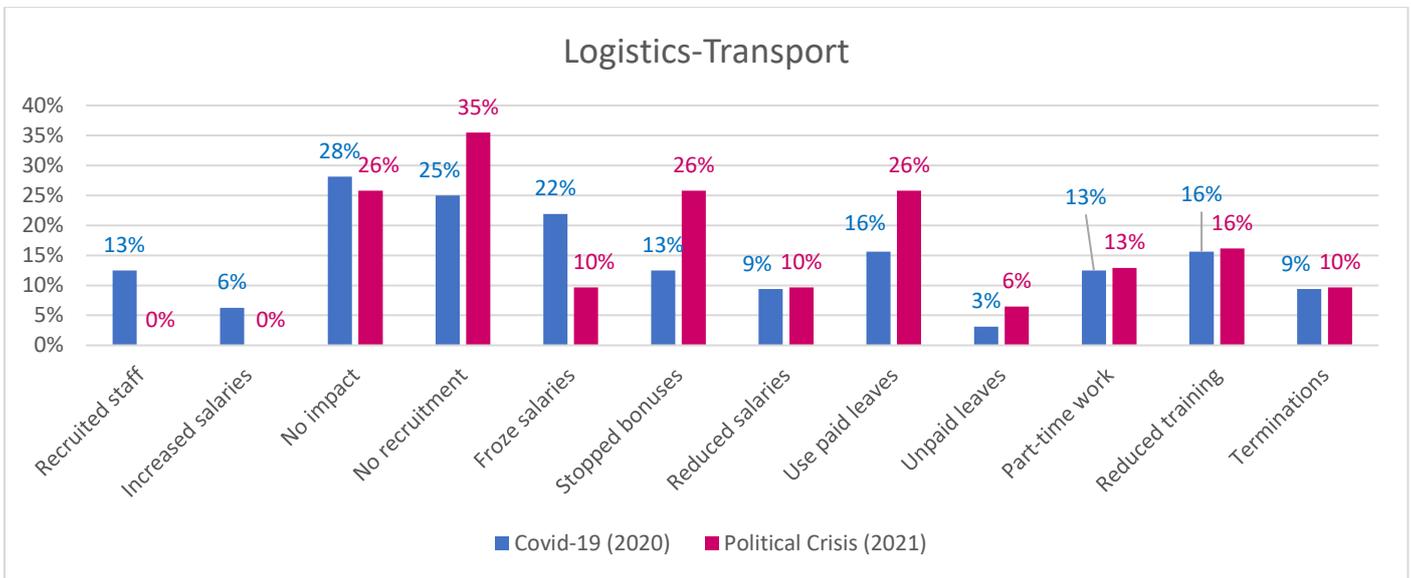


Hospitality-Tourism



Media-Communication





Companies which had to terminate contracts after February 2021 mostly operate in the following sectors:

- Service/banking/legal/insurance: 19.61% of companies (compared to 11.11% in 2020)
- Infrastructure/construction/energy: 19.57% of companies (compared to 12.24% in 2020)
- Hospitality/tourism: 33.33% of companies (compared to 42.11% in 2020)
- Media/communication: 18.75% of companies (compared to 6.25% in 2020)

What can be worrisome is that termination of employment contracts took place in 21.74% of companies employing more than 1,000 employees, which resulted in the loss of thousands of jobs in only two months, coming in addition to the jobs lost during the pandemic in 2020.

This comes in addition to the fact that 50% of large companies (500 to 1,000 employees) had to let go 10% to 50% of their staff.

On a more positive note, only 8.70% of these large companies had to terminate all or more than 75% of the employment contracts of their staff. Moreover, other companies which had to let go part of their staff are companies employing less than 200 persons. And they mostly terminated less than 10% to 25% of the employment contracts of their teams.

In addition to the termination of employment contracts, most companies from all nationalities, had to implement a wide range of measures to manage the impact of the crisis on their operations.

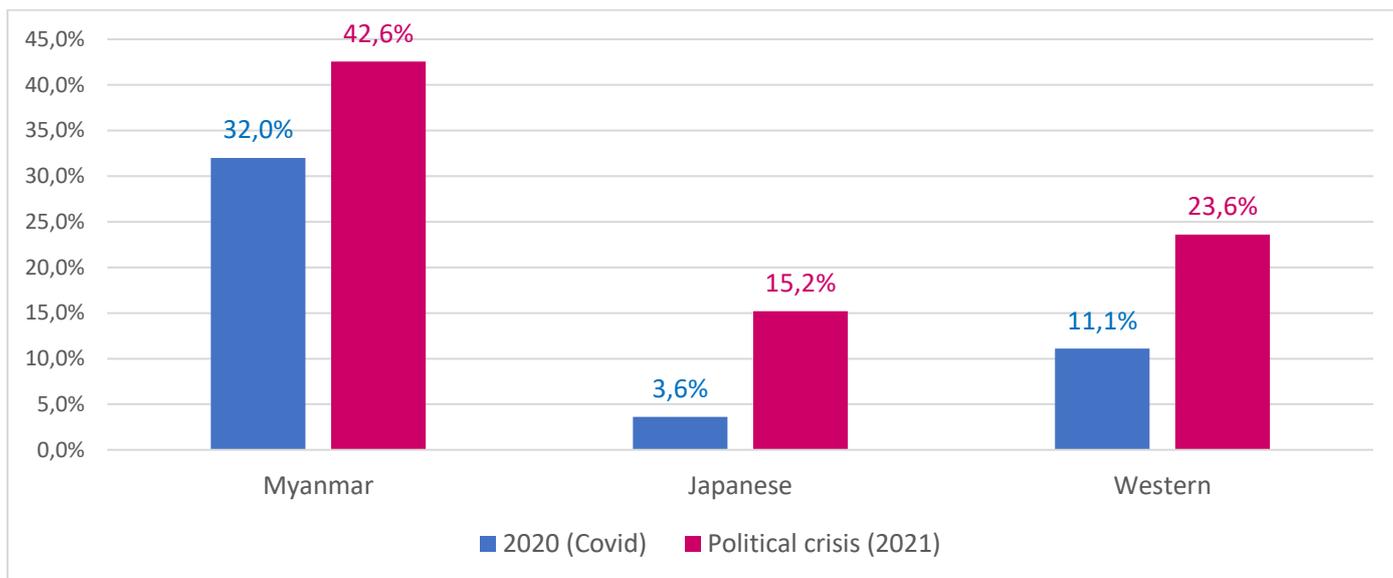
These measures included the freezing of all recruitments (36.08% to 53.19%), the cancellation of bonuses (13.33% to 31.91%), the reduction of all salaries (13.32% to 48.94%), the use of unpaid leaves (15.19% to 38.30%), the freezing of all salaries (8.86% to 40%), the use of unpaid leaves (9.49% to 34.04%), and the implementation of part-time work (3.80% to 31.91%).

Data also shows that Myanmar companies were in general more impacted by the current situation in the management of their human resources. The survey shows that this is especially the case regarding the reduction of salaries (13.32% to 48.94% of companies depending on their nationalities), since the percentage of reduction of salaries is higher among Myanmar companies than for other nationalities.

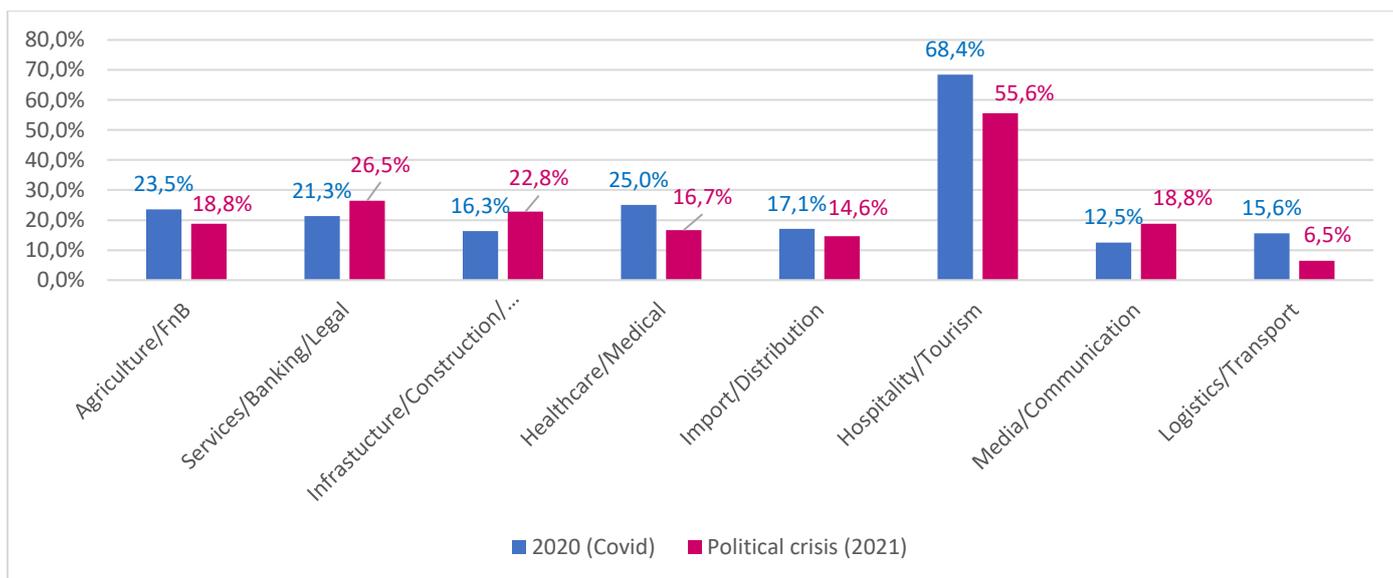
These answers show that the jobs which were lost in 2020 because of the Covid-19 will probably not be replaced in the near future, since most companies are still stopping their recruitment process. That, in addition to the reductions in salaries, the use of unpaid leave, the implementation of part-time work, and the freezing of all salaries since 2020, indicate that we can expect the standards of living and the purchasing power of the general population to continue to decrease in the near future, and thus to impact the recovery of the Myanmar economy in general.

Indeed, the proportions of companies which have implemented a decrease in salaries between 25% to 75% are the following:

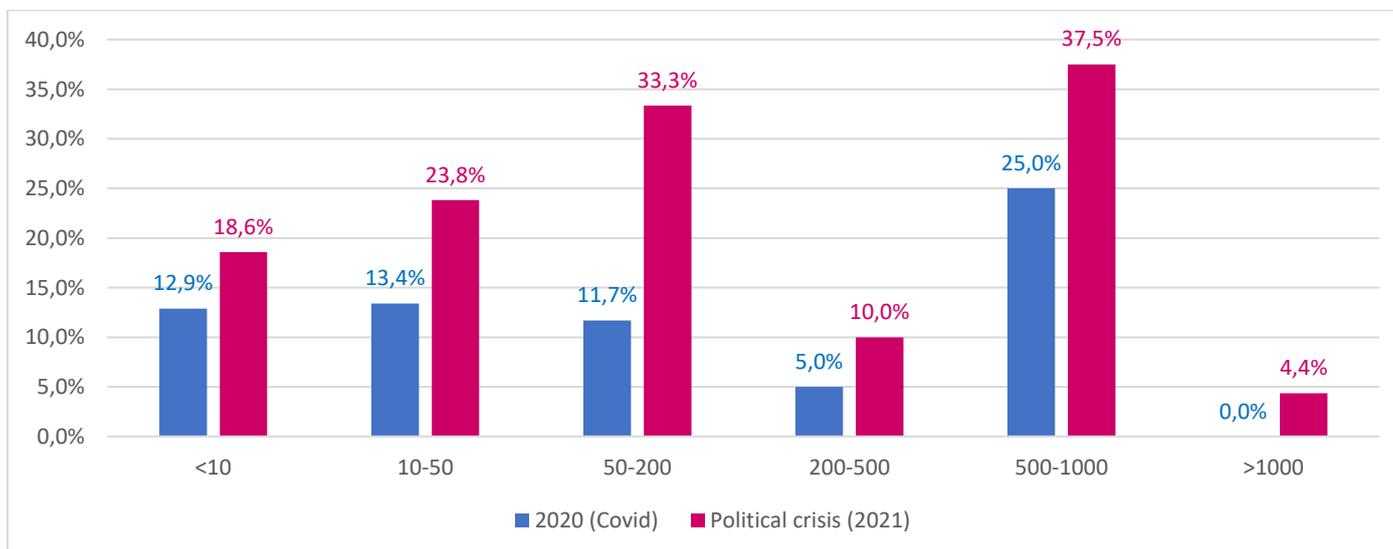
Reduction of salaries by 25% to 75% and over (comparison between 2020 and 2021, by nationality)



Reduction of salaries by 25% to 75% and over (comparison between 2020 and 2021, by sector)



Reduction of salaries by 25% to 75% and over (comparison between 2020 and 2021, by size)

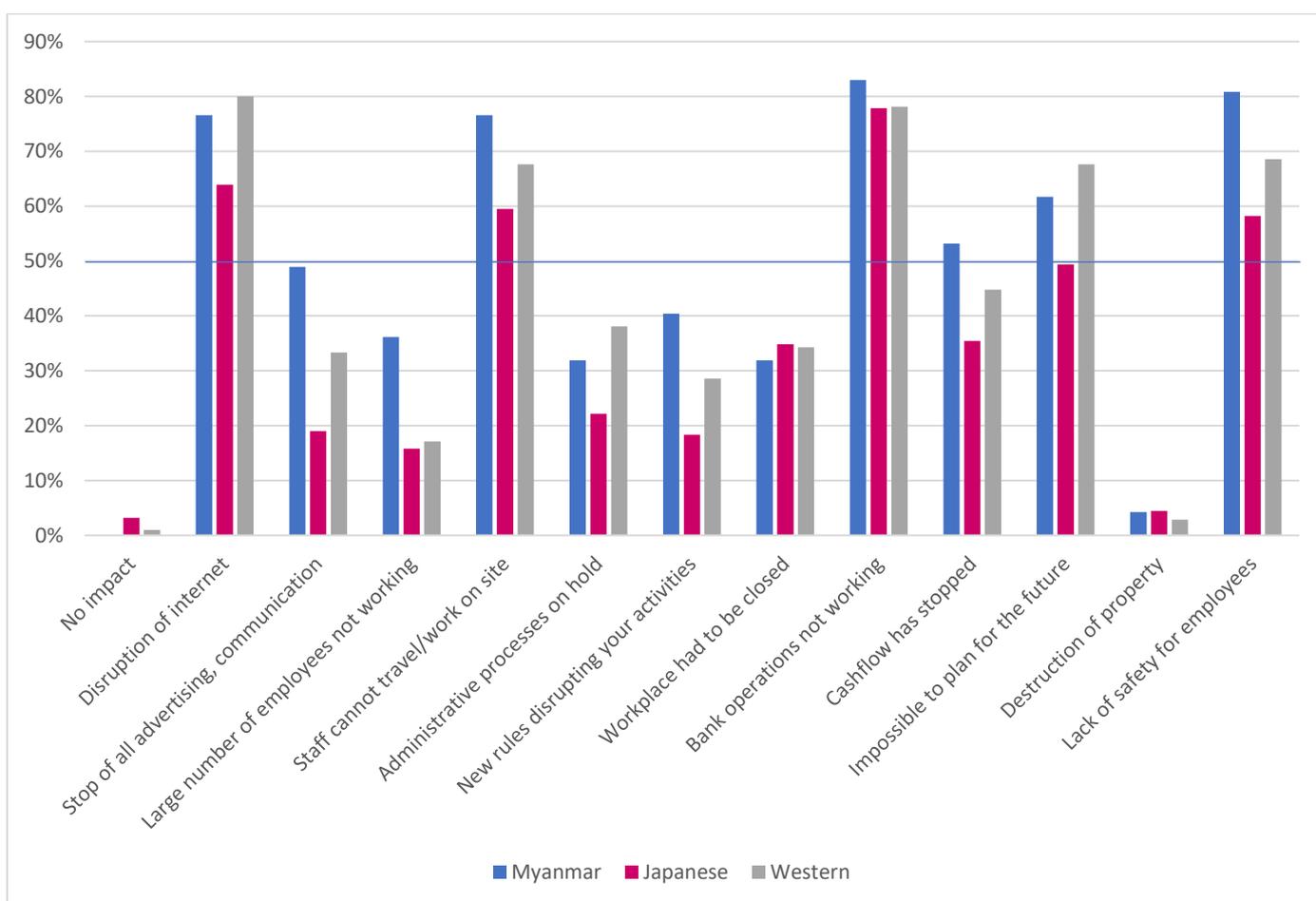


These answers show that the impact of the political events since February, after only two months, had been such on all companies, whatever their nationalities, sectors and sizes, that they all had to implement emergency measures in terms of human resources in order to counter-balance the effect of one year of 2020 followed by the events of 2021, even those which had managed to maintain the level of their employee’s salaries during the whole year of 2020.

These phenomena demonstrate the difference of nature of these two crises, especially since the political events of 2021 were combined with the continuous effects of the Covid-19 pandemic. This can be clearly seen in the main causes pointed out by all the companies of all nationalities and from all sectors, to explain the challenges that they have been facing since February 2021:

- The disruption for the Internet and communications: 63.92% to 86.67% of companies
- Impossibility for employees to work on site or to travel: 59.49% to 86.67% of companies
- Shutdown of bank transfers and operations, no access to cash: 73.33% to 82.98% of companies
- Lack of safety for employees: 58.23% to 80.85% of companies
- Impossibility to plan for the future: 49.37% to 67.62% of companies

If there was an impact, what were the main causes? (several answers possible)



Other challenges, which are more closely related to the safety measures implemented for the Covid-19 pandemic come second, such as:

- Cashflow stopped: 35.44% to 53.19% of companies
- Workplace closed/shutdown: 31.91% to 53.33% of companies
- Administrative processes on hold: 22.15% to 40%

PART 3 – EVALUATION OF THE EVOLUTION OF THE SITUATION (UNTIL END OF 2021)

SUMMARY

As shown in part 1, the Covid-19 crisis strongly impacted companies operating in Myanmar, in terms of activity, income and human resources.

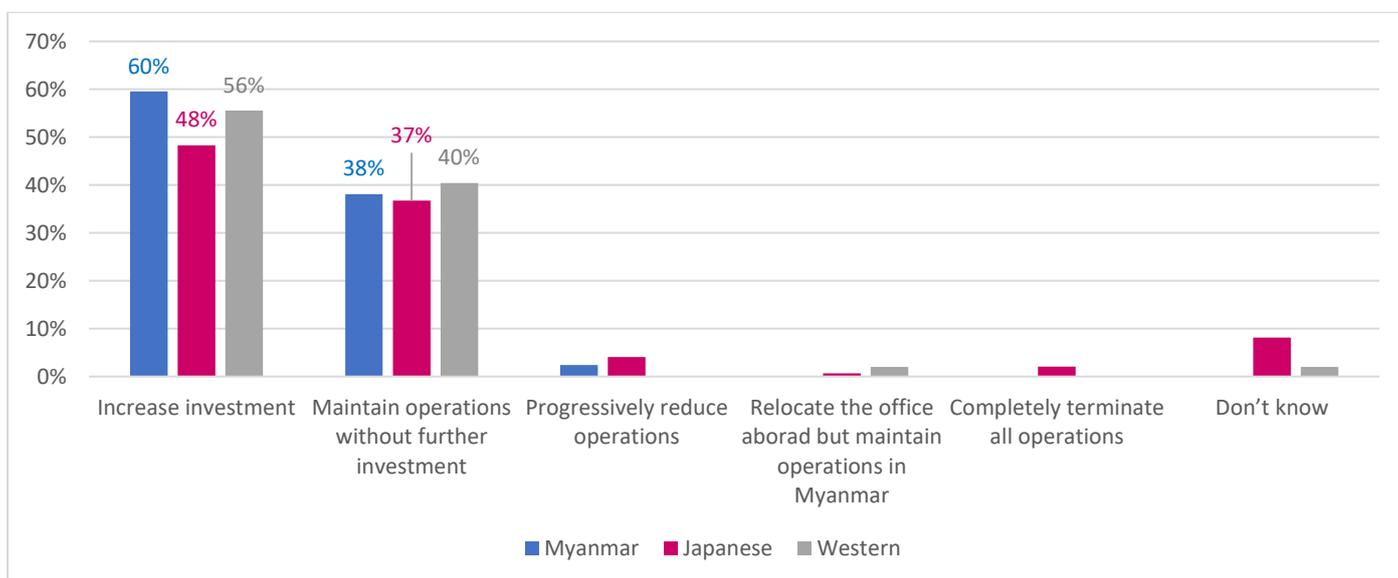
Yet, answers show that the impact of this crisis remained manageable and limited before February 2021, since a majority of companies were planning to increase their investments in Myanmar in 2021.

It was the case for companies from all nationalities operating in all sectors, except for the hospitality/tourist sector, which was not anticipating a recovery of their activities any time soon.

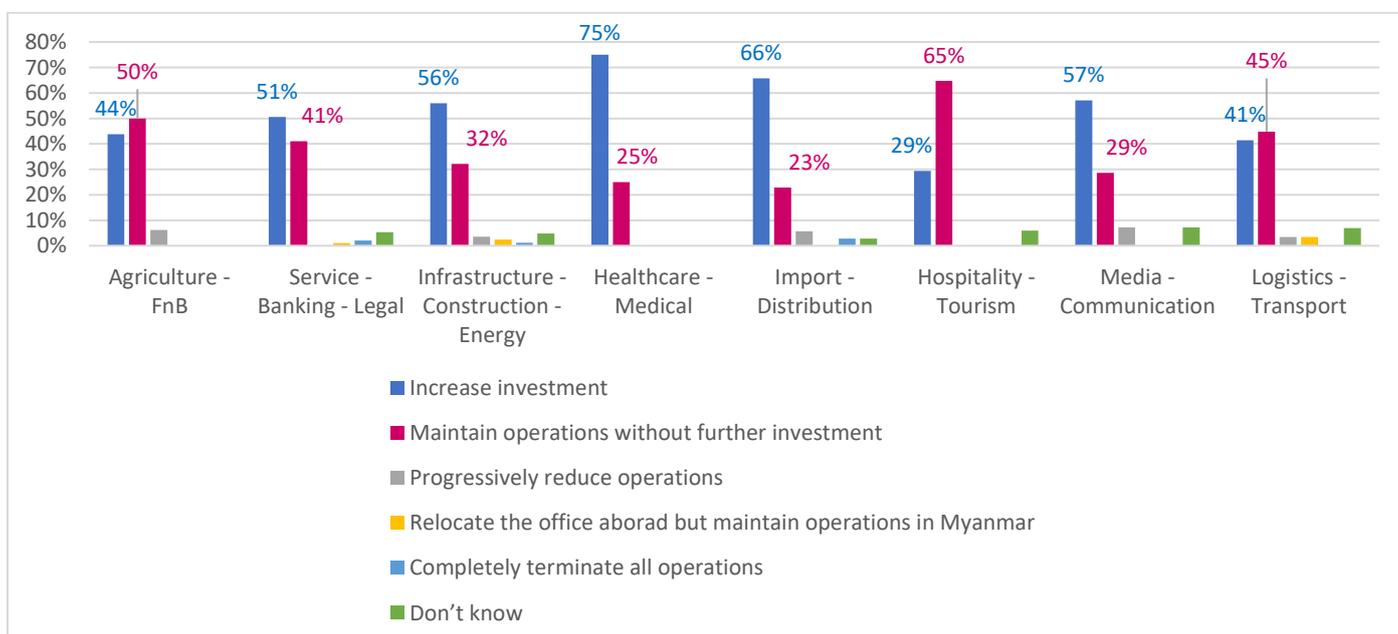
On a very positive note, the proportion of companies which were planning to increase their investment was higher among large companies employing more than 200 employees. This could have led to the creation of thousands of jobs in Myanmar in 2021, compensating for the loss of employments during the pandemic in 2020.

Indeed, the companies which were planning to increase their investment in Myanmar in 2021 were the following:

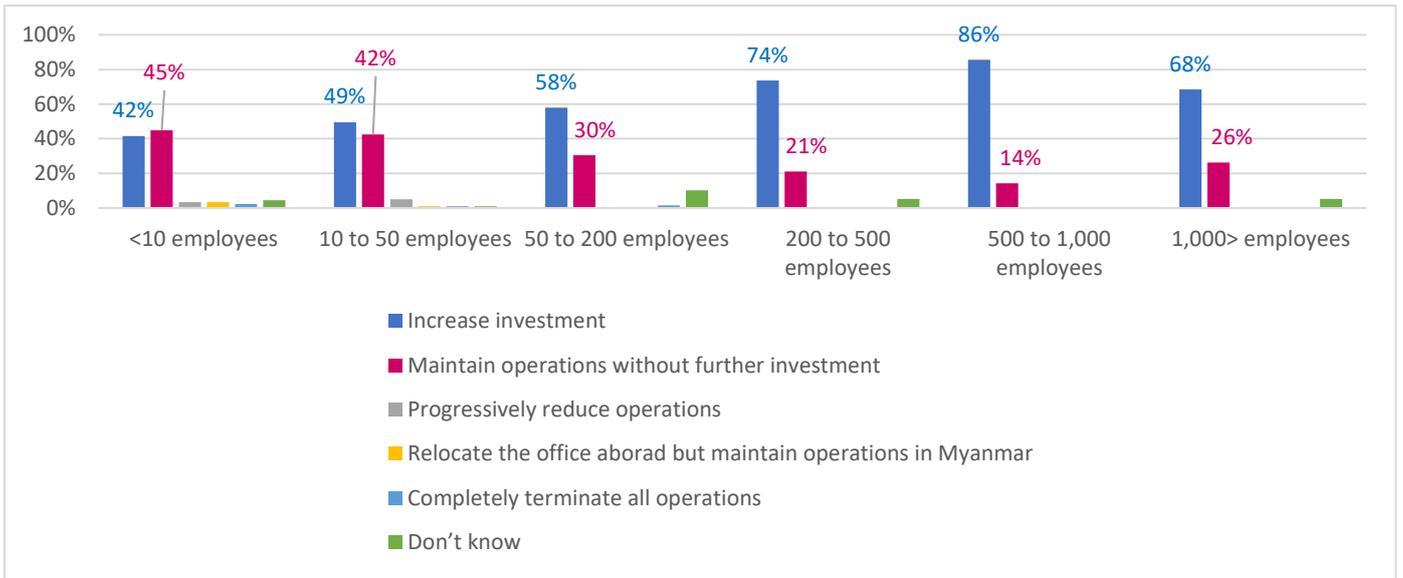
Before February 2021, your company had planned to (by nationality)



Before February 2021, your company had planned to (by sector)



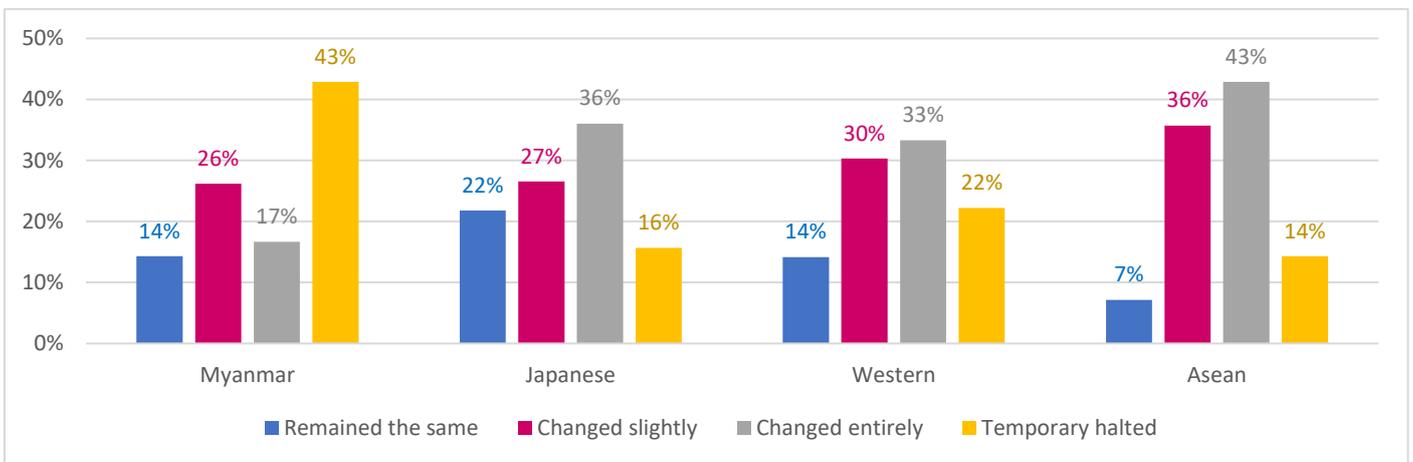
Before February 2021, your company had planned to (by size)



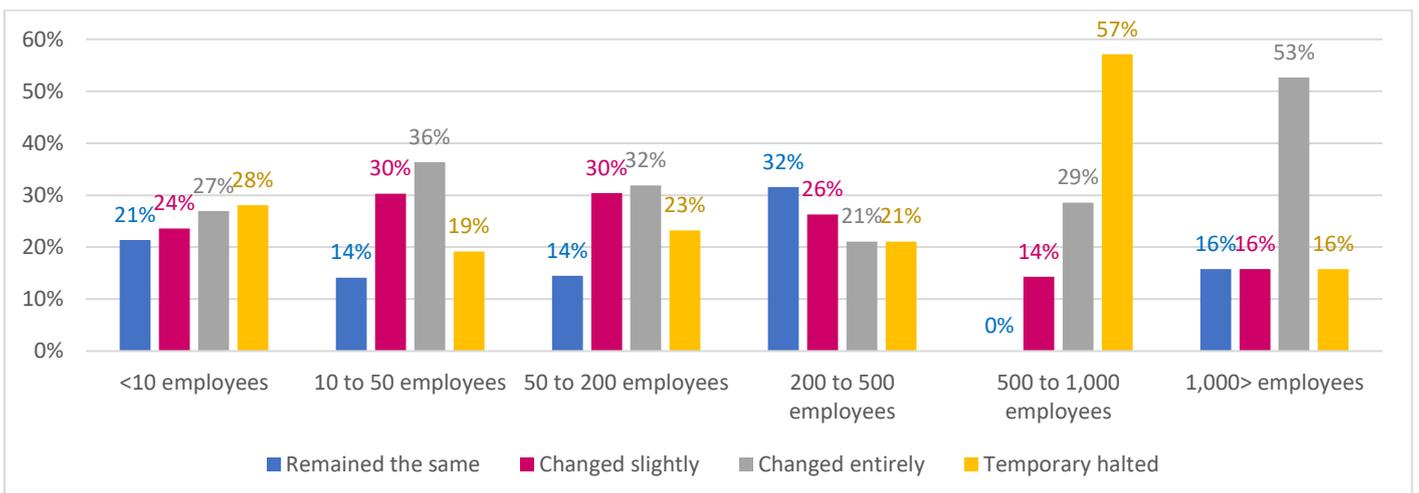
Once combined, the numbers of companies which were planning to increase or maintain their operations in Myanmar, before February, represent a very large majority. Actually, the proportion of companies which were planning to reduce, relocate or terminate their operations in 2021, was only between 5% to 10%.

Now, the survey shows that the events in 2021 had such an impact that a large majority of companies changed their intentions and plans after February 2021. The proportions of companies which entirely changed or halted their plans are as follows:

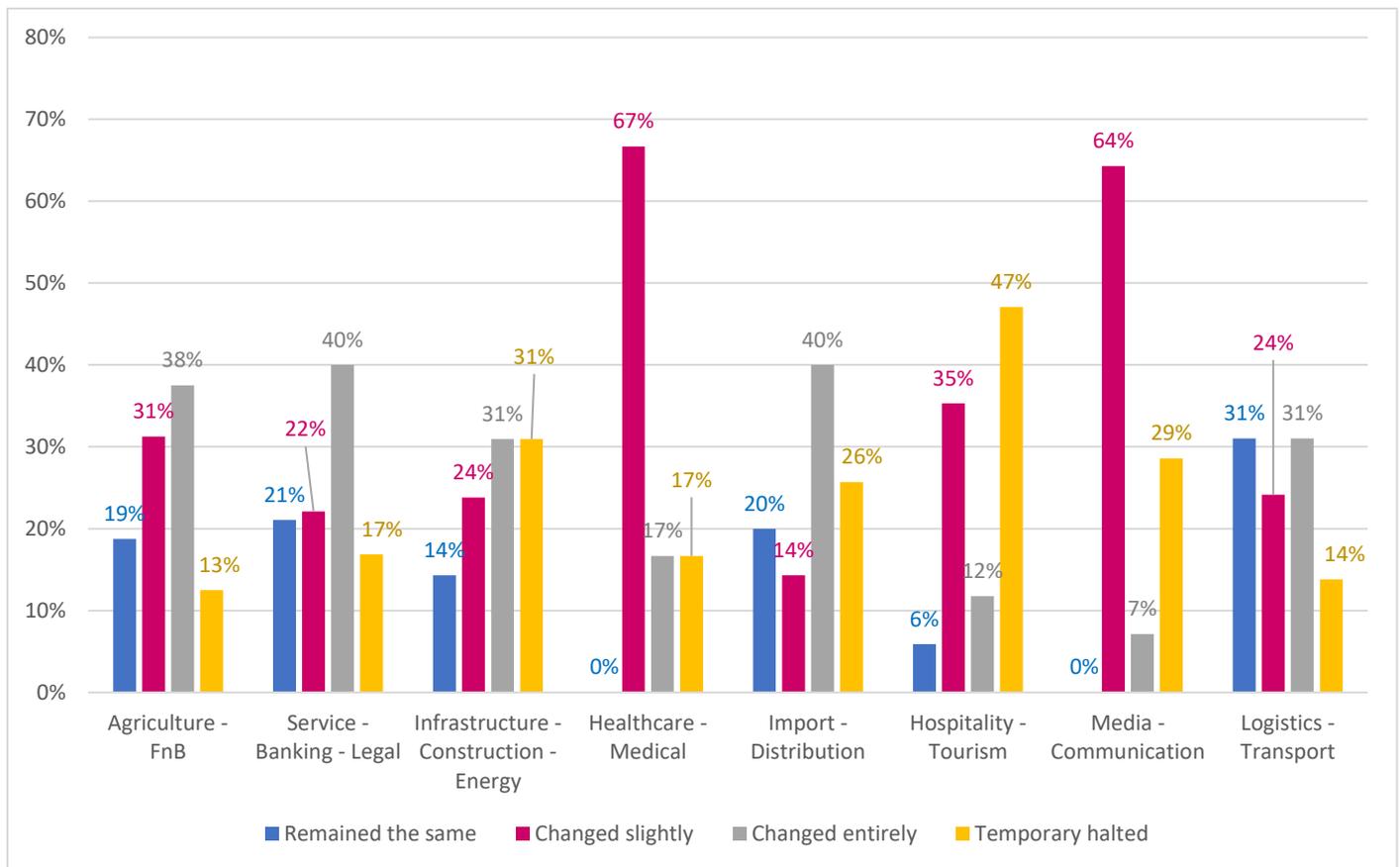
Since February, your company's plans have: (by nationality)



Since February, your company's plans have: (by size)

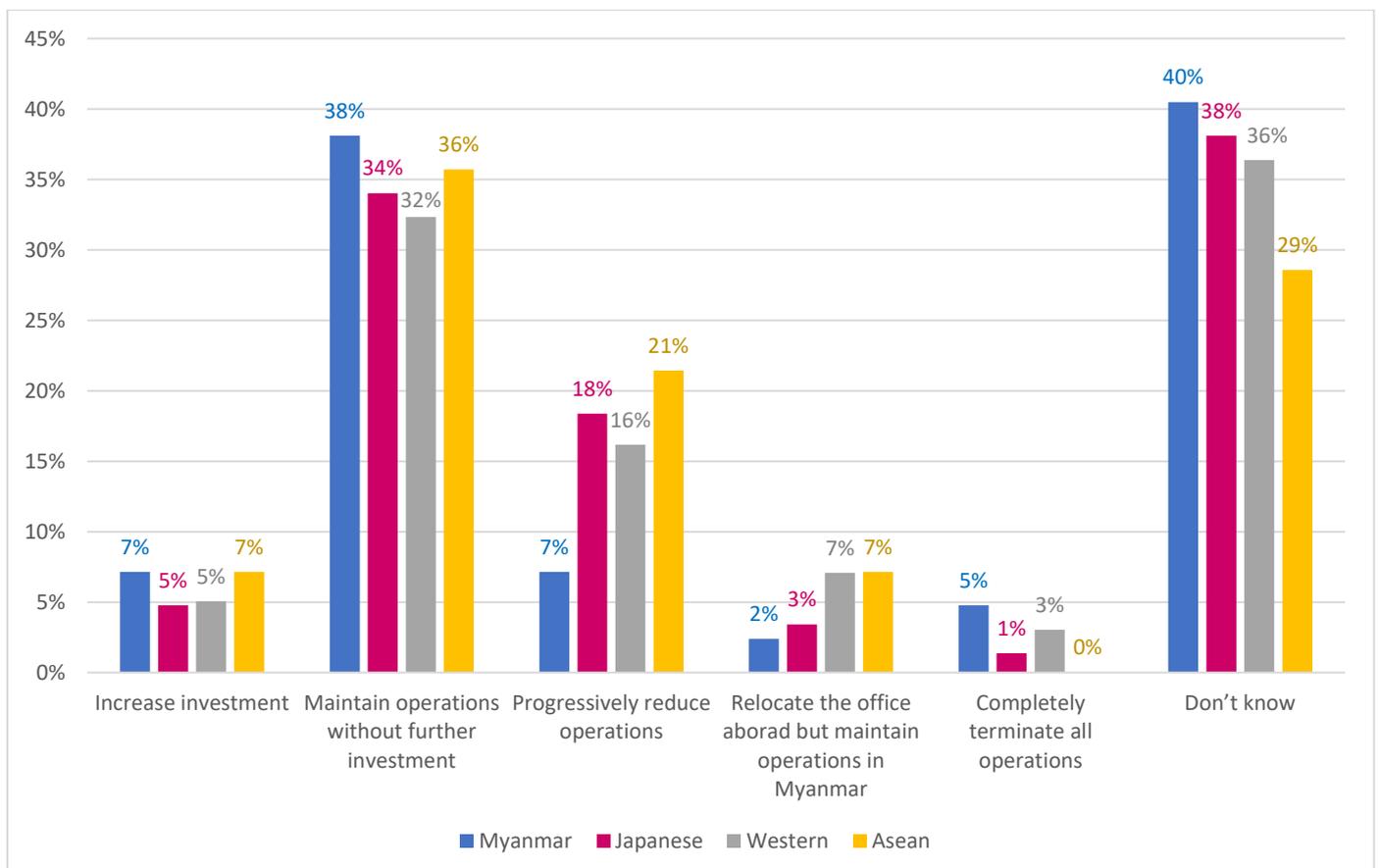


Since February, your company's plans have: (by sector)

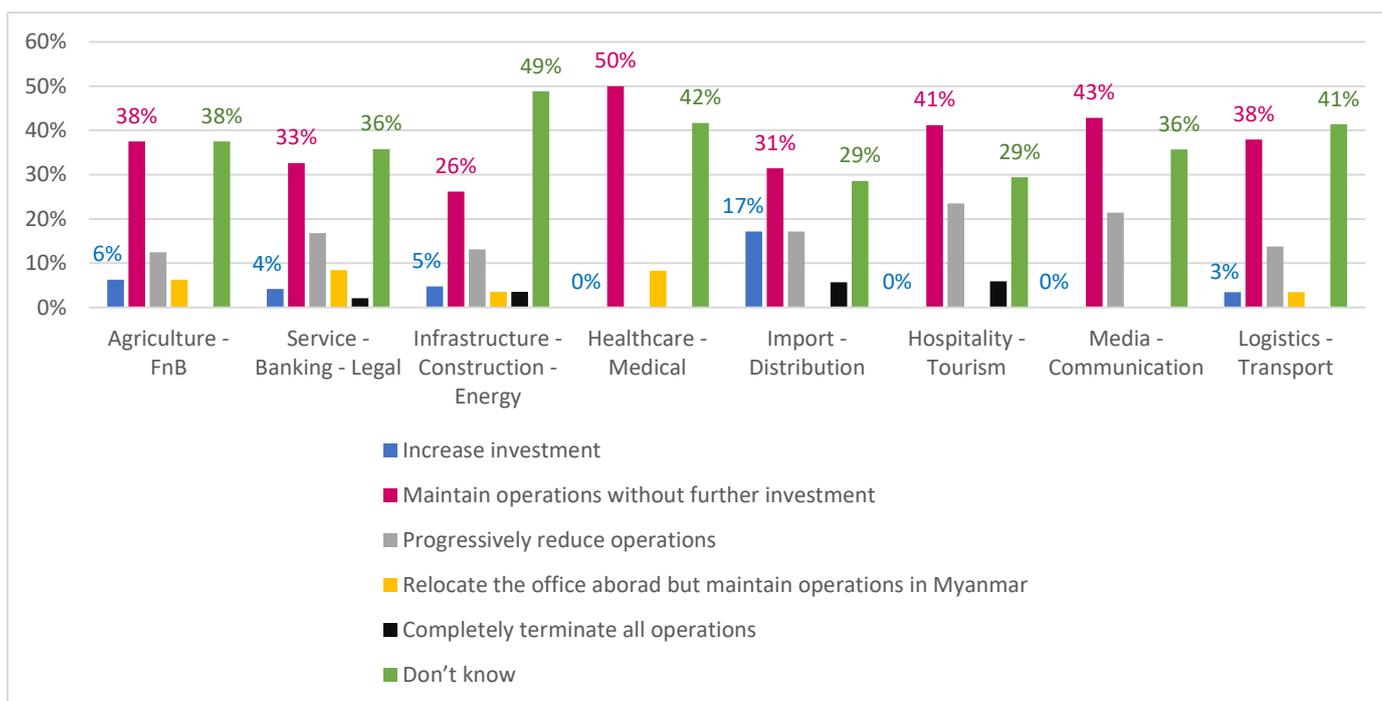


Following these changes of plans, the proportions of companies which are now planning to increase their investment in Myanmar in 2021 plunged to:

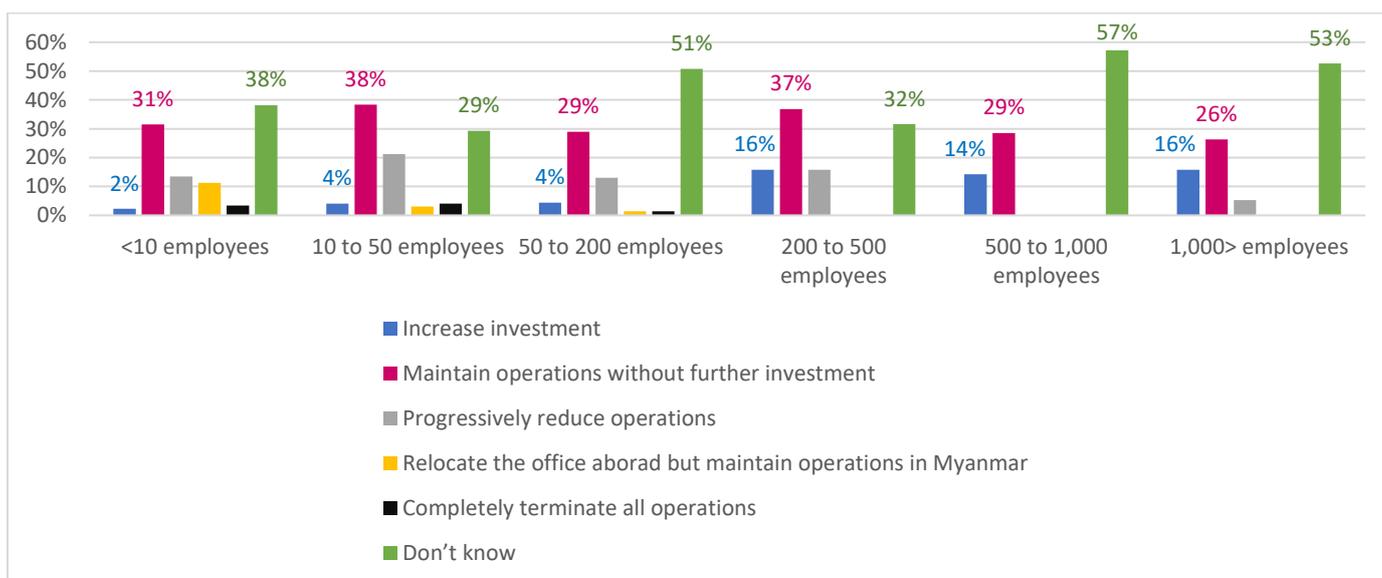
Based on that, by the end of 2021, your company is planning to: (by nationality)



Based on that, by the end of 2021, your company is planning to: (by sector)



Based on that, by the end of 2021, your company is planning to: (by size)



On the other hand, the number of companies planning to maintain their operations in Myanmar remains almost the same as in January 2021. Yet, these companies will do so without new investment in the country.

Moreover, the proportions of companies which are planning to reduce their operations in Myanmar has considerably increased compared to before February 2021:

By nationality

- Myanmar – 7.14% of companies (compared to 2.38% before February 2021)
- Japanese – 18.37% of companies (compared to 4.08% before February 2021)
- Western – 16.16% of companies (compared to 0% before February 2021)
- Asean (17 answers only) – 21.43% of companies (compared to 0% before February 2021)

By sector

- Agriculture/Agrifood/FnB: 12.50% of companies (compared to 6.25% before February 2021)
- Service/banking/legal/insurance: 16.84% of companies (compared to 0% before February 2021)

- Infrastructure/construction/energy: 13.10% of companies (compared to 3.57% before February 2021)
- Healthcare/medical: 0% of companies (compared to 0% before February 2021)
- Import/distribution/retail: 17.14% of companies (compared to 5.71% before February 2021)
- Hospitality/tourism: 23.53% of companies (compared to 0% before February 2021)
- Media/communication: 21.43% of companies (compared to 7.14% before February 2021)
- Logistic/transport/supply: 13.79% of companies (compared to 3.45% before February 2021)

Now, the number of companies which were already planning to relocate their offices or to completely terminate their operations in Myanmar remained small in April 2021. This can be explained by the large proportion of them which have not made any decision at this time and which are waiting to see how the situation evolves in the country.

The numbers of companies answering that their plans will depend on the evolution of the situation are:

By nationality

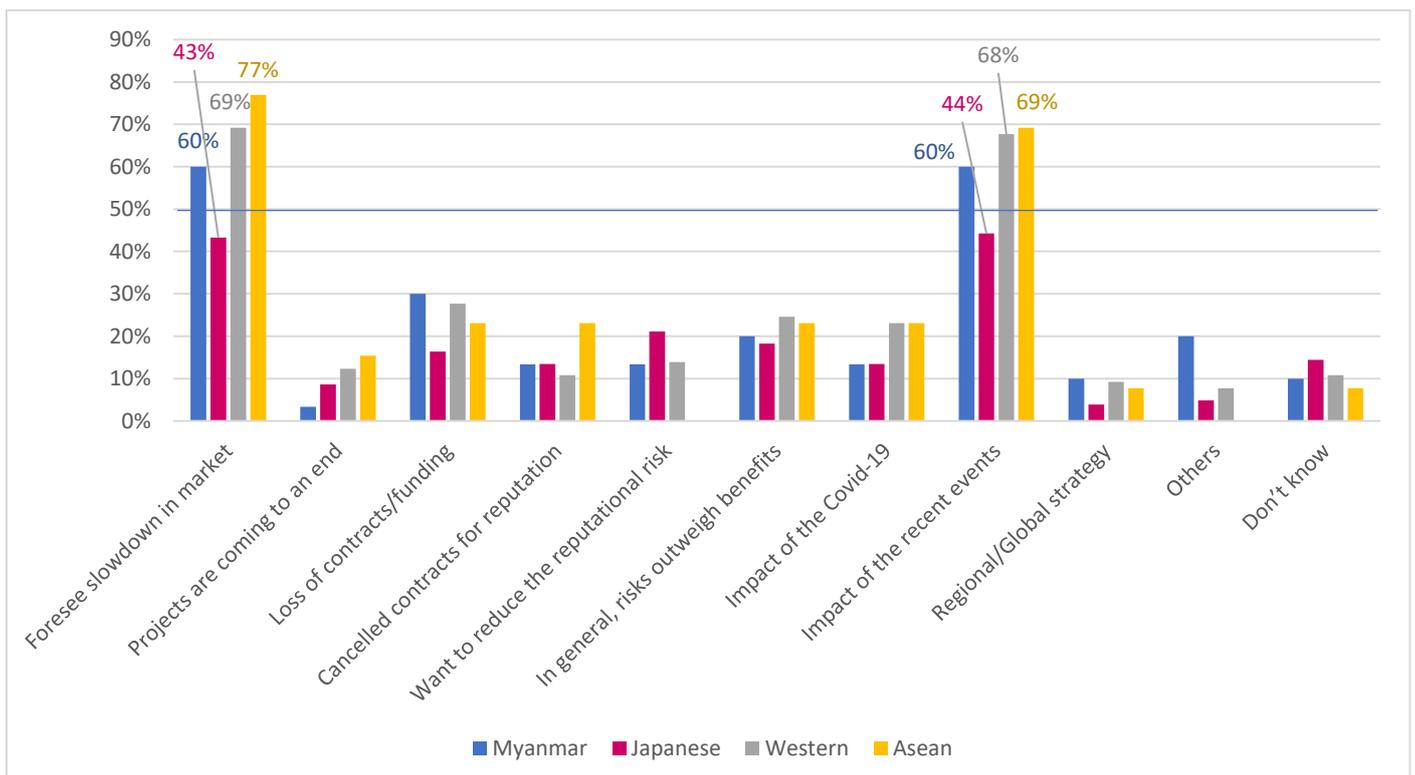
- Myanmar – 40.48% of companies
- Japanese – 38.10% of companies
- Western – 36.36% of companies
- Asean (17 answers only) – 28.57% of companies

By sector

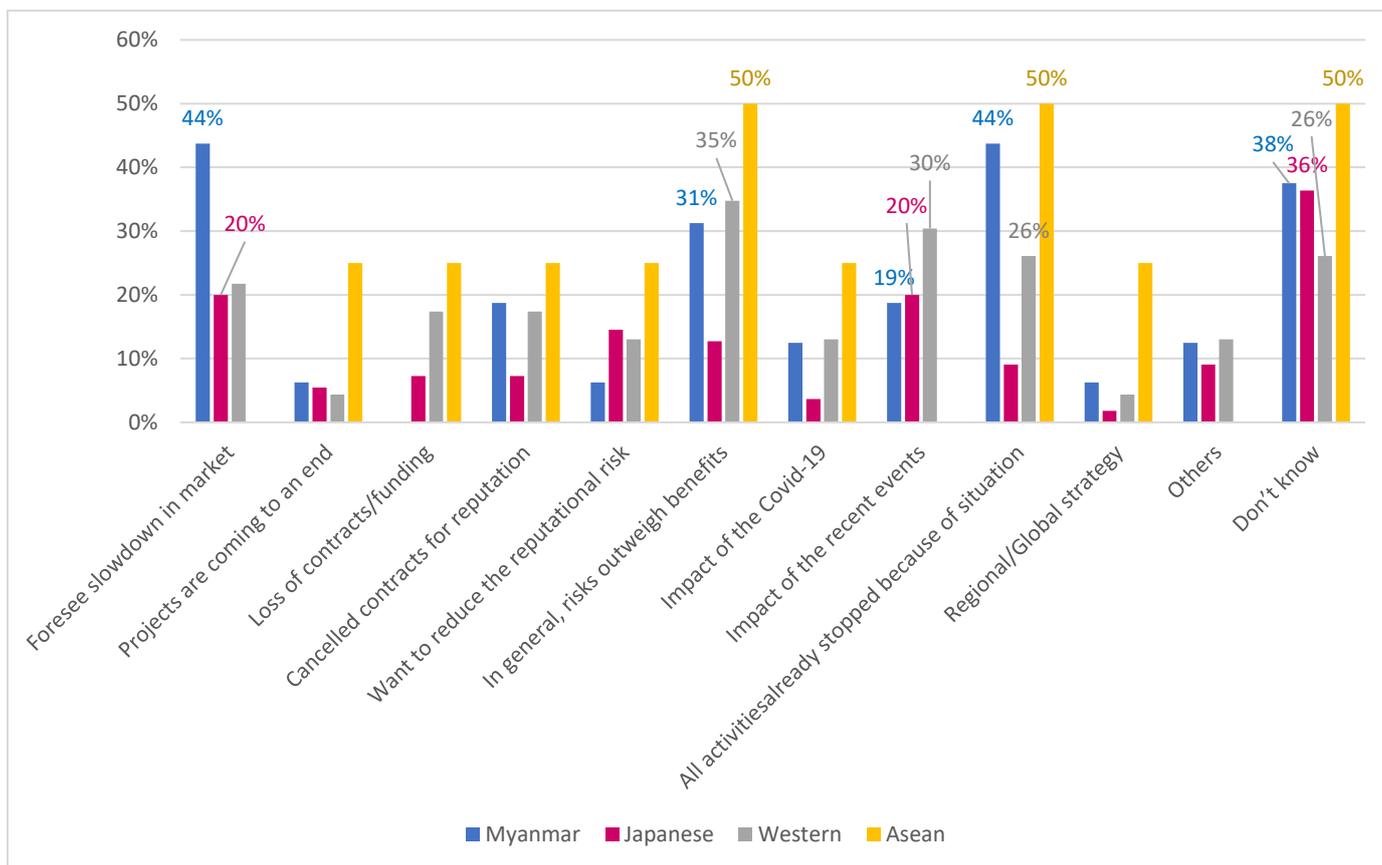
- Agriculture/Agri-food/FnB: 37.50% of companies
- Service/banking/legal/insurance: 35.79% of companies
- Infrastructure/construction/energy: 48.81% of companies
- Healthcare/medical: 41.67% of companies
- Import/distribution/retail: 28.57% of companies
- Hospitality/tourism: 29.41% of companies
- Media/communication: 35.71% of companies
- Logistic/transport/supply: 41.38% of companies

The companies which have already planned to reduce or terminate their operations in Myanmar have done so for the following reasons:

If your company plans to reduce operations in Myanmar, please explain why: (several answers possible)



If your company plans to terminate all operations in Myanmar, please explain why: (several answers possible)



Reduction of activities

- Impact of recent events on their activities: 44.23% to 69.23% of companies
- Slowdown foreseen in the market: 43.27% to 76.92% of companies
- Funding/contracts lost for projects: 16.35% to 30% of companies
- Impact of Covid-19 pandemic: 13.33% to 23.08% of companies

Termination of activities

- Don't know: 26.06% to 50% of companies
- Slowdown foreseen in the market: 20% to 43.75% of companies
- Activities have already stopped because of the situation: 9.09% to 43.75% of companies
- Impact of recent events on their activities: 18.75% to 30.43% of companies
- In general, the risks outweigh the benefits: 18.75% to 30.43% of companies
- Impact of Covid-19 pandemic: 3.64% to 25% of companies

Data shows that the impact of Covid-19 comes after the effects of the political crisis on the economy as a reason to explain why some companies have already decided to reduce or terminate completely their operations in Myanmar.

Once again, a large majority of companies (around 60%) are still waiting to see how the current situation will evolve before making any final decision. It can be anticipated that most companies will have finalized their plans before the closing of the Myanmar fiscal year, in September 2021.

Indeed, the proportion of companies which have indicated that they would reduce or terminate their operations in Myanmar, indicated that they would do so within the following timeframe:

- Within 3 months: 9.38% to 33.33% of companies
- Within 6 months: 22.92% to 42.86% of companies
- Within 9 months: 11.46% to 18.42% of companies
- In 2022: 14.29% to 26.04% of companies

This means by the situation should have stabilized by the end of 2021. By then, a third to half of companies in Myanmar, which are waiting to see how the situation will evolve, will decide if they will maintain, reduce or terminate their operations in Myanmar.

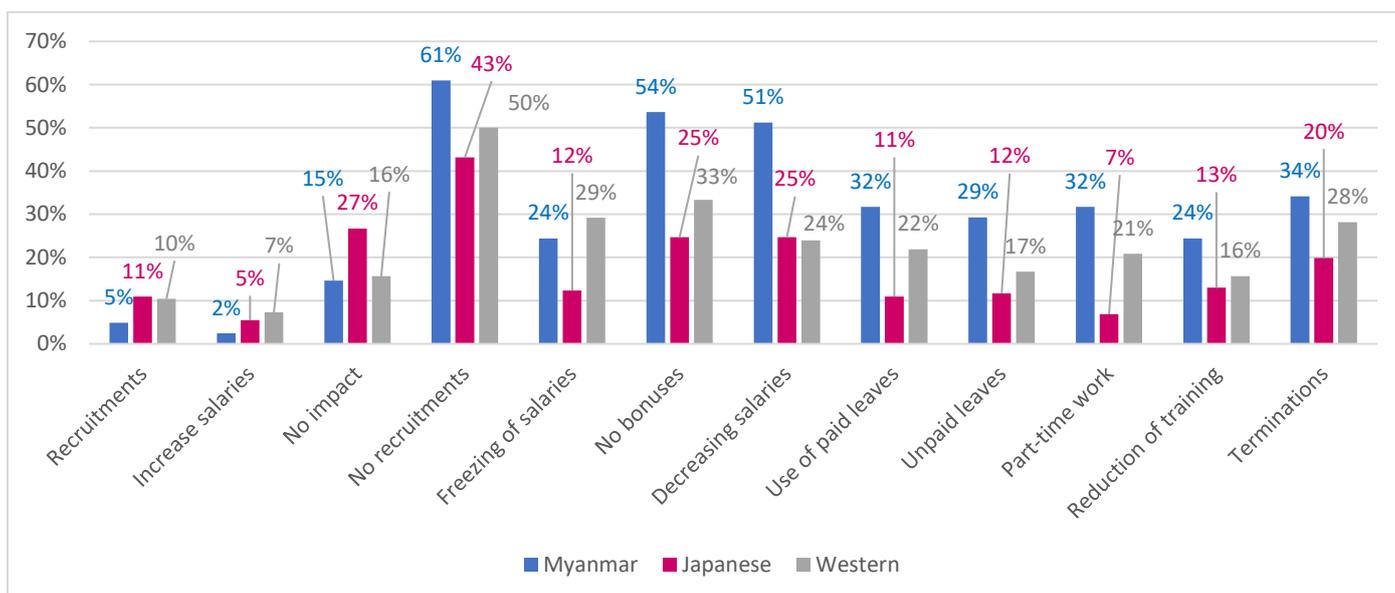
Their decisions will have a considerable impact on the future of the economic situation in Myanmar, since the number of companies which are planning to reduce or terminate their operations in Myanmar could possibly jump from the initial proportion of 15% to 20% of companies, to a maximum of 50% to 60% by the end of 2021.

Apart from the impact on the number of foreign investments in Myanmar after 2021, this would also have a dramatic impact on the level of employment and could considerably hinder the capacity of the Myanmar economy to quickly recover from the impacts of the pandemic and of the political crisis.

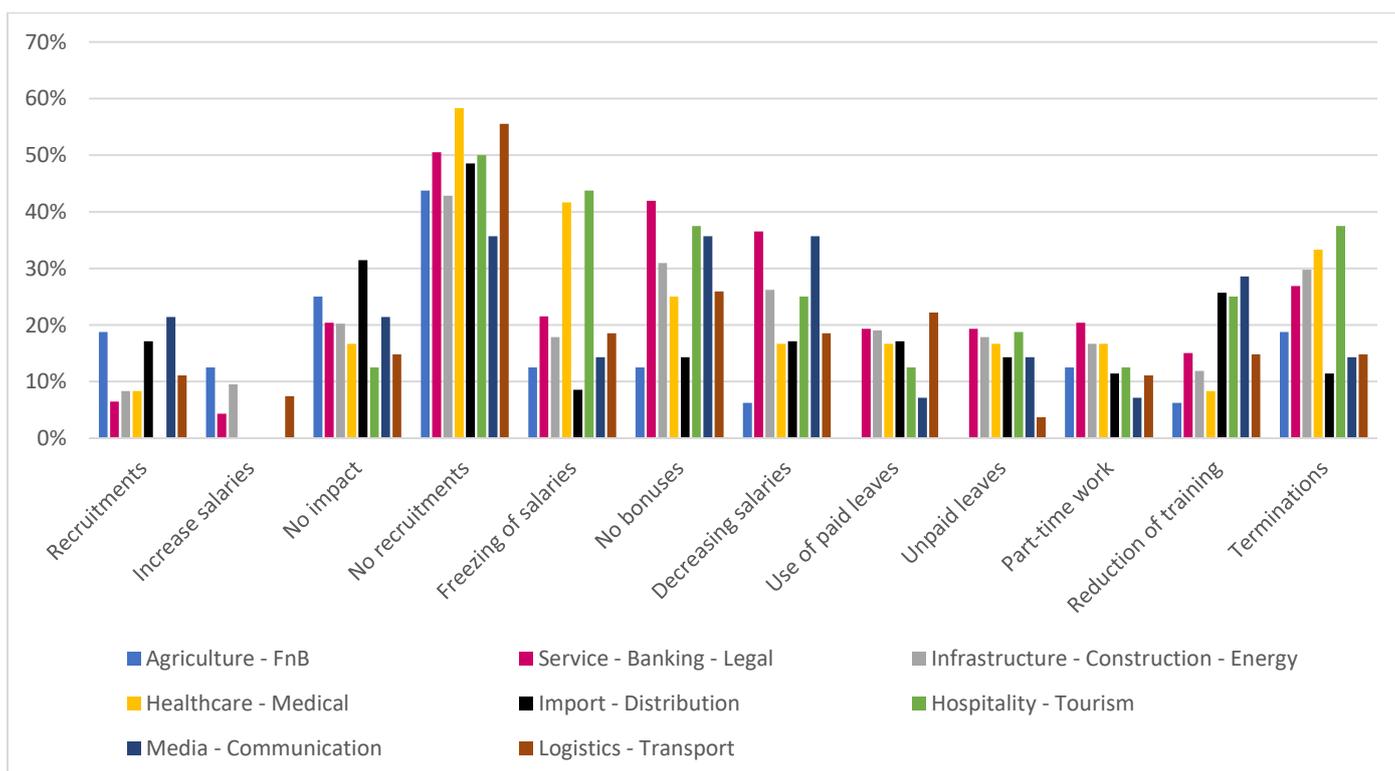
IMPACT ON HUMAN RESOURCES

Companies foresee that the current situation will strongly impact their human resources in the coming months.

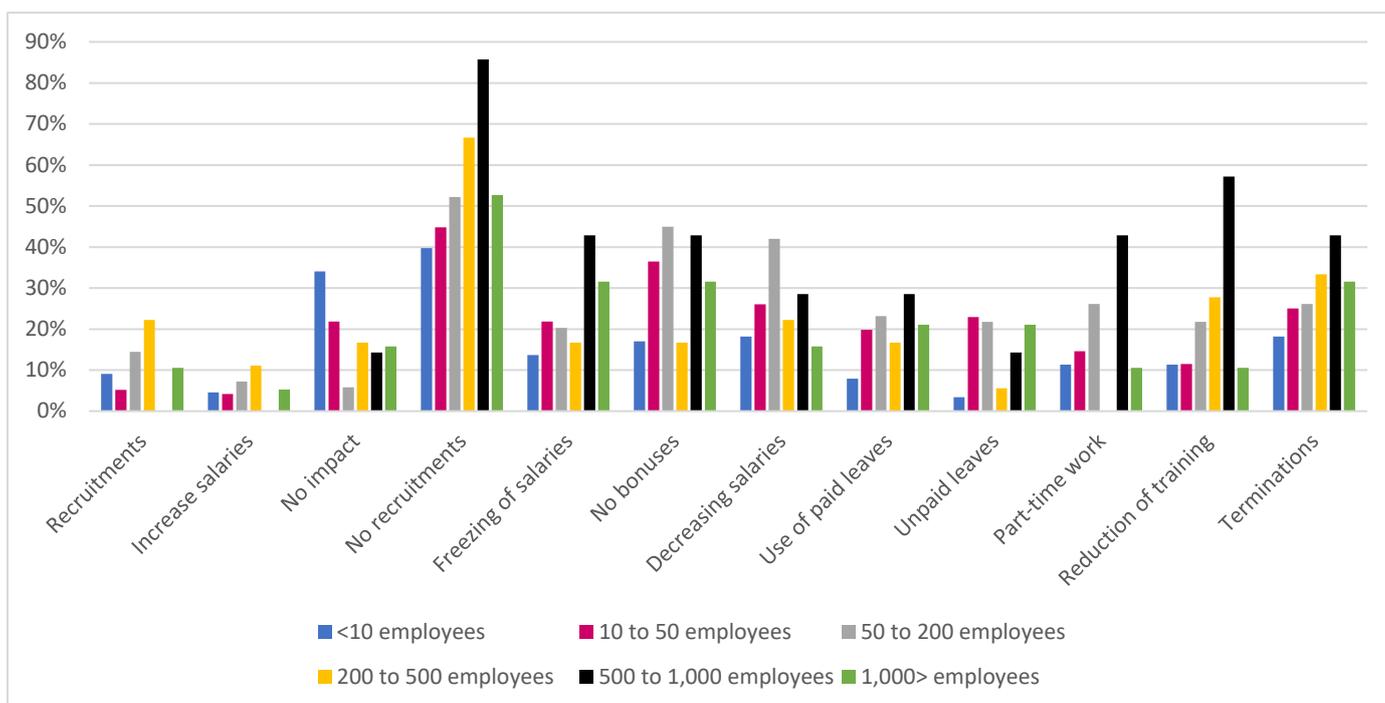
How will your HR be impacted by the situation in the coming 6 months (several answers possible)? (by nationality)



How will your HR be impacted by the situation in the coming 6 months (several answers possible)? (by sector)



How will your HR be impacted by the situation in the coming 6 months (several answers possible)? (by size)



First, it appears that most companies will continue to freeze their recruitment process in the near future. Indeed, the number of companies which are planning to recruit new employees will remain a very small minority:

Therefore, it is anticipated that most jobs which were lost in 2020 because of the pandemic, and then after February 2021, will not be renewed or refilled by 2022, especially in large companies employing more than 200 persons.

This comes in addition to the large number of companies which are planning on terminating employment contracts in the coming months:

By nationality

- Myanmar – 34.15% of companies
- Japanese – 19.86% of companies
- Western – 28.13% of companies
- Asean (17 answers only) – 35.71% of companies

By sector

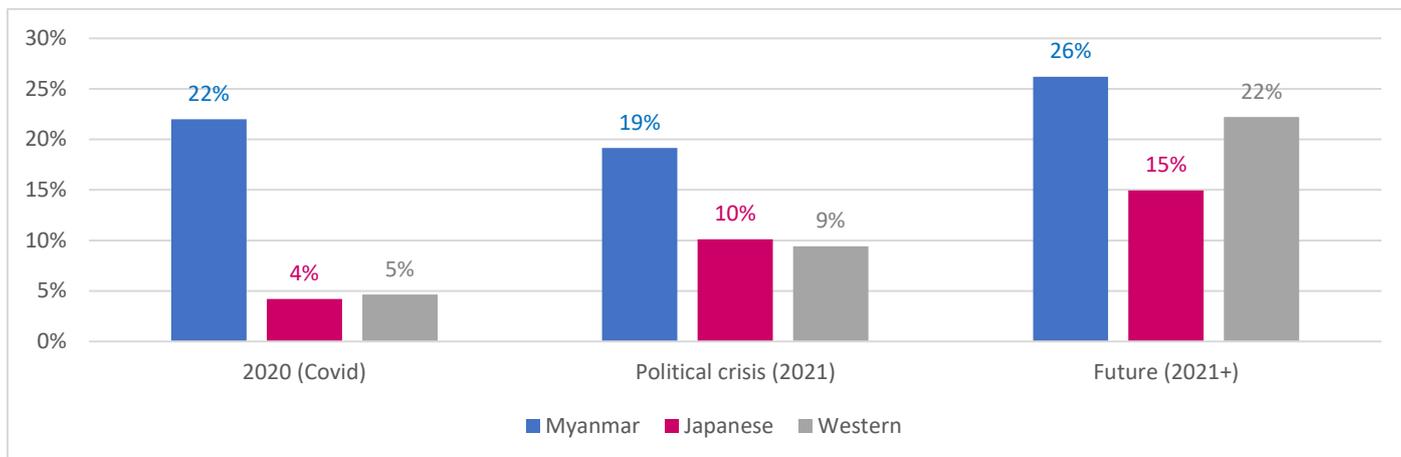
- Agriculture/Agrifood/FnB: 18.75% of companies
- Service/banking/legal/insurance: 26.88% of companies
- Infrastructure/construction/energy: 29.76% of companies
- Healthcare/medical: 33.33% of companies
- Import/distribution/retail: 11.43% of companies
- Hospitality/tourism: 37.50% of companies
- Media/communication: 14.29% of companies
- Logistic/transport/supply: 14.81% of companies

By size

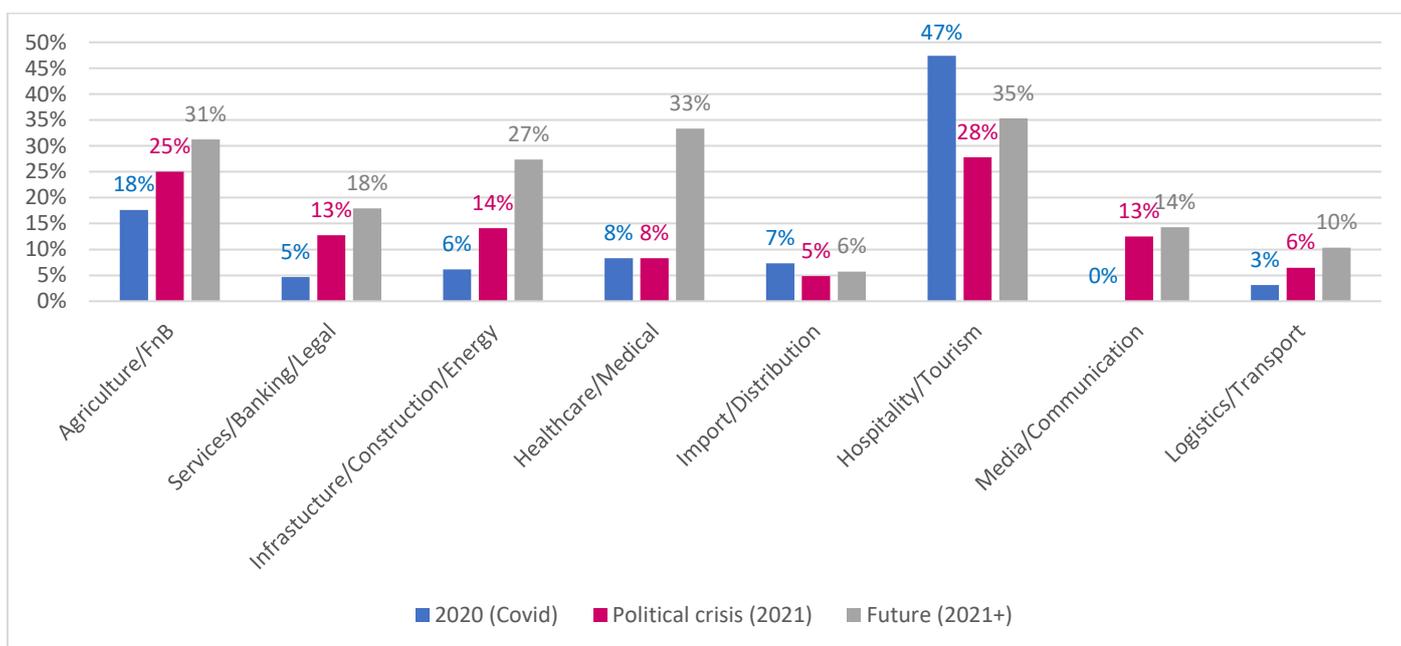
- Less than 10 employees: 18.18% of companies
- 10 to 50 employees: 25% of companies
- 50 to 200 employees: 26.09% of companies
- 200 to 500 employees: 33.33% of companies
- 500 to 1,000 employees: 42.86% of companies
- More than 1,000 employees: 31.58% of companies

Data shows that between a quarter and one third of companies are planning to terminate contracts. What is especially worrisome is that 33.33% to 42.86% of large companies employing more than 200 persons will let go up to 50% their staff in 2021. Indeed, companies which are planning to terminate between 25% to 100% of their employment contracts are the following:

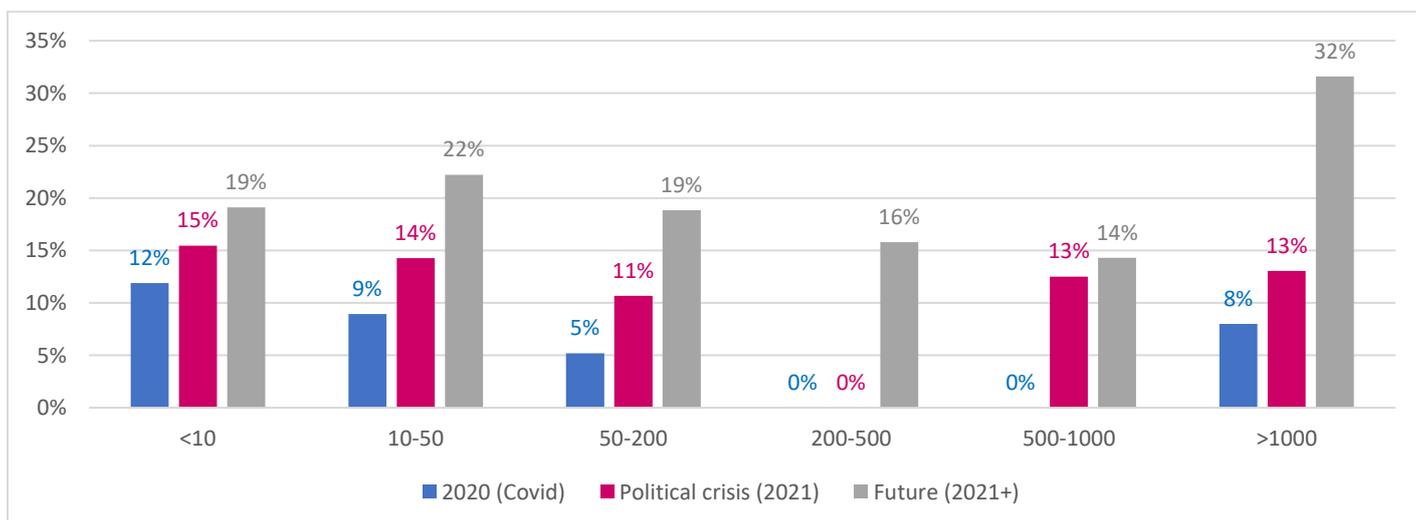
Termination of employment contracts by 25% to 100% (by nationality)



Termination of employment contracts by 25% to 100% (by sector)



Termination of employment contracts by 25% to 100% (by size)



It can be anticipated that employees working for large companies (more than 1,000 employees) in the agriculture/FnB, the infrastructure/construction/energy, the healthcare/medical and the hospitality/tourist sectors will be the most impacted by the termination of employment contracts in the coming months.

Future statistics should therefore show a dramatic jump in the unemployment rate in Myanmar in 2021, which will negatively impact the recovery of the economy in general, and which will result in an increased level of poverty.

In addition to the question of the unemployment and its social and economic impact, the survey also shows that a general loss of purchasing power and of the standards of living of employees can be anticipated in the coming months.

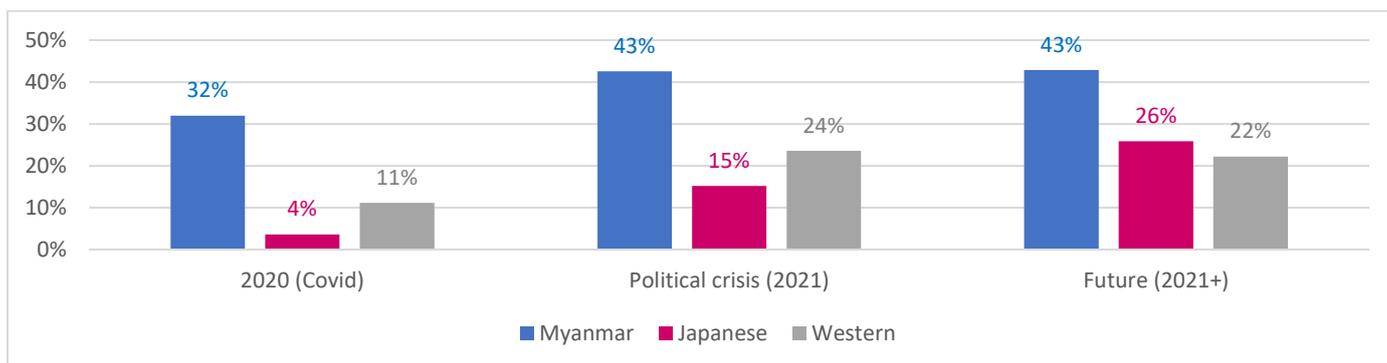
Indeed, in addition to freezing their recruitment process and to let go many of their staff, a very large majority of companies (more than 90% of them) have planned not to increase the salaries of their employees in the coming months.

Moreover, like they did during the pandemic and after February 2021, most of them will implement a mix of measures aiming at limiting their costs, which will come on top of those which have already been taken for one year:

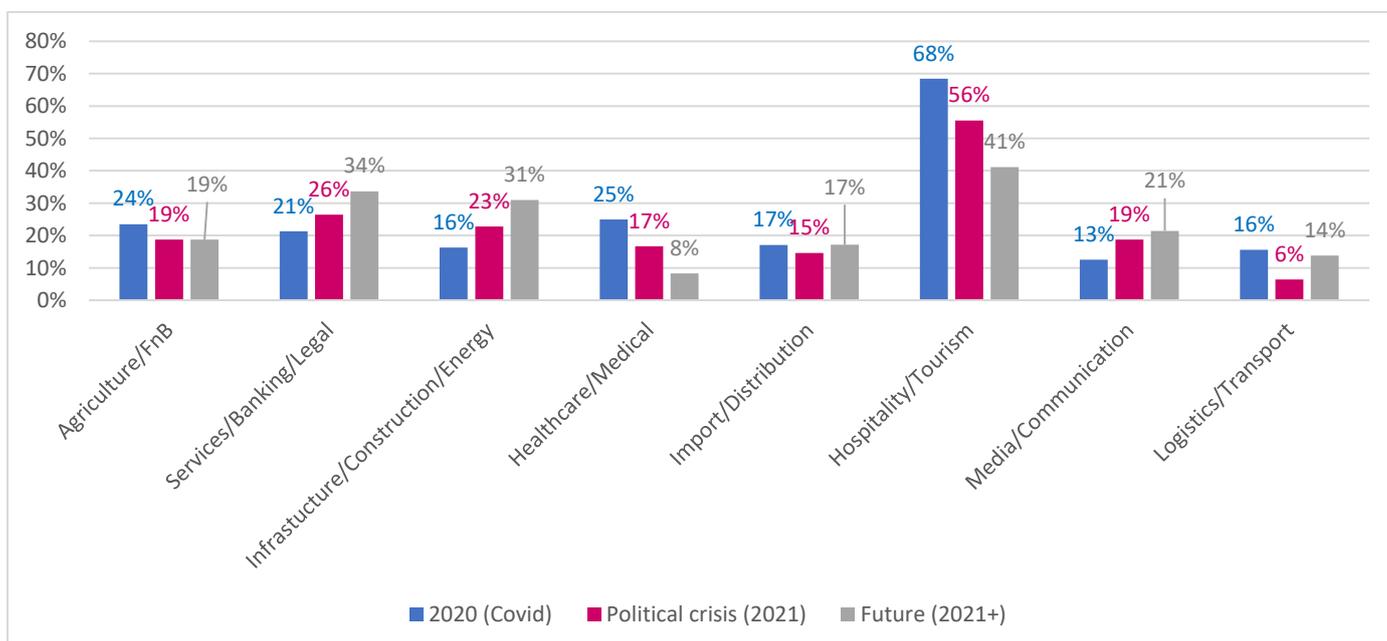
- Reduction of all salaries: 23.96% to 51.22% of companies
- Cancellation of bonuses: 24.66% to 53.66% of companies
- Freezing of all salaries: 12.33% to 29.17% of companies
- Use of unpaid leave: 11.64% to 35.71% of companies
- Implementation of part-time work: 6.85% to 31.71% of companies

Answers also show that companies which have planned to reduce salaries by 25% to 75% are the following:

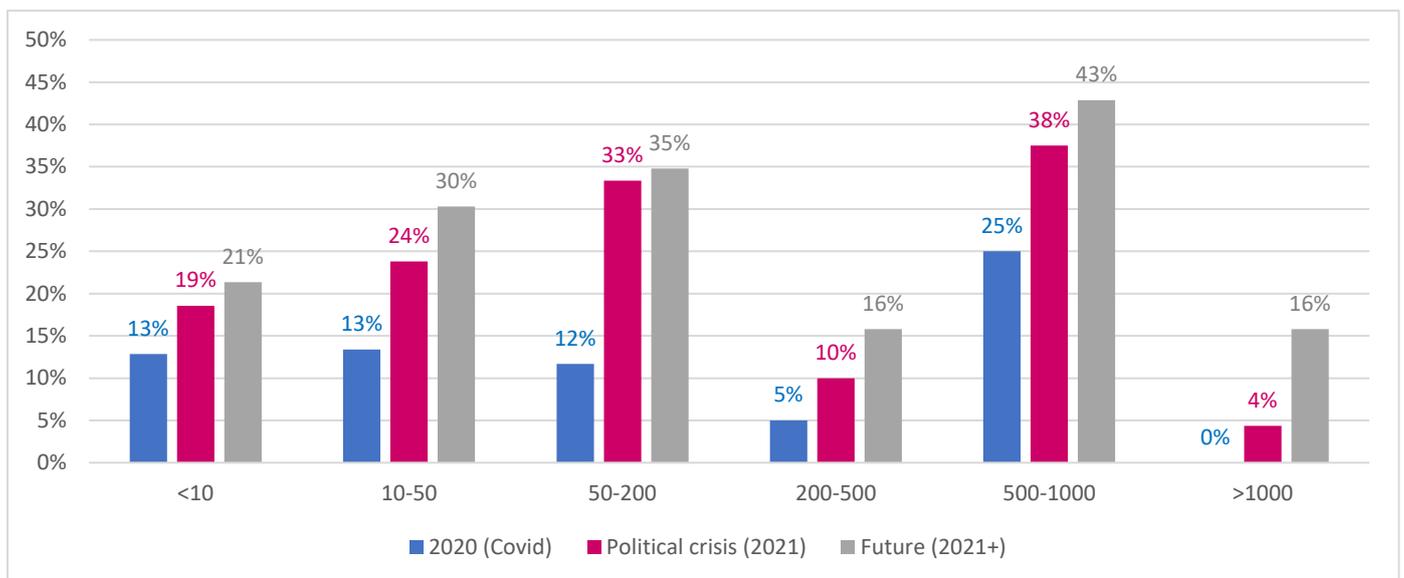
Reduction of salaries by 25% to 75% and over? (by nationality)



Reduction of salaries by 25% to 75% and over? (by sector)



Reduction of salaries by 25% to 75% and over? (by size)



Once again, it can be anticipated that the termination of employment contracts, the reduction of salaries and the other measures taken by companies to limit the cost of their human resources will be implemented mostly by the end of September 2021, before the closing of the Myanmar fiscal year.

PART 1 – ANSWERS BY NATIONALITY

1-How was your activity impacted by the Covid-19 crisis in 2020?

	All		Myanmar		Japanese		Western		Asean	
Increase of activities	4,37%	15	6,00%	3	3,61%	6	5,56%	6	6,67%	1
No impact	11,66%	40	6,00%	3	14,46%	24	8,33%	9	20,00%	3
Reduction of less than 25%	25,95%	89	28,00%	14	21,69%	36	35,19%	38	26,67%	4
Reduction between 25 to 50%	29,15%	100	28,00%	14	31,93%	53	26,85%	29	26,67%	4
Reduction between 50 to 75%	14,87%	51	14,00%	7	14,46%	24	12,96%	14	13,33%	2
Reduction of more than 75%	11,66%	40	14,00%	7	11,45%	19	10,19%	11	6,67%	1
Termination of all activities	2,33%	8	4,00%	2	2,41%	4	0,93%	1	0,00%	0
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

2- How was your income impacted by the Covid-19 crisis in 2020?

	All		Myanmar		Japanese		Western		Asean	
Growth of turnover	7,87%	27	6,00%	3	6,63%	11	11,11%	12	20,00%	3
No impact	17,49%	60	18,00%	9	21,08%	35	12,04%	13	13,33%	2
Reduction of less than 25%	25,07%	86	22,00%	11	22,29%	37	31,48%	34	13,33%	2
Reduction between 25 to 50%	25,66%	88	22,00%	11	28,92%	48	25,93%	28	40,00%	6
Reduction between 50 to 75%	11,37%	39	10,00%	5	10,84%	18	10,19%	11	13,33%	2
Reduction of more than 75%	7,00%	24	6,00%	3	6,63%	11	6,48%	7	0%	0
No income at all	5,54%	19	16,00%	8	3,61%	6	2,78%	3	0%	0
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

3- How was your human resources impacted by the Covid-19 crisis in 2020? (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
Increased number of staff	9,33%	32	12,00%	6	9,04%	15	9,26%	10	13,33%	2
Increased salaries	7,58%	26	6,00%	3	6,63%	11	12,04%	13	13,33%	2
No impact	32,07%	110	14,00%	7	40,96%	68	29,63%	32	20,00%	3
Froze all recruitments	30,32%	104	26,00%	13	23,49%	39	43,52%	47	40,00%	6
Froze all salaries	13,41%	46	16,00%	8	7,23%	12	21,30%	23	0%	0
Cancelled bonuses	18,95%	65	30,00%	15	13,25%	22	24,07%	26	13,33%	2
Decreased salaries	17,20%	59	42,00%	21	10,24%	17	15,74%	17	13,33%	2
Use of all paid leaves	11,95%	41	16,00%	8	9,04%	15	16,67%	18	33,33%	5
Unpaid leaves	7,00%	24	12,00%	6	3,01%	5	9,26%	10	0%	0
Part-time work	9,62%	33	18,00%	9	3,01%	5	14,81%	16	26,67%	4
Reduced training	11,66%	40	16,00%	8	10,24%	17	9,26%	10	13,33%	2
Cancelled all training	10,79%	37	12,00%	6	9,64%	16	13,89%	15	20,00%	3
Termination of contracts	11,66%	40	18,00%	9	5,42%	9	14,81%	16	20,00%	3
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

4- In average, by how much did you have to change salaries in 2020?

	All		Myanmar		Japanese		Western		Asean	
Increased salaries	18,08%	62	8,00%	4	20,48%	34	24,07%	26	53,33%	8
No change	53,94%	185	34,00%	17	60,84%	101	50,93%	55	33,33%	5
Reduced by less than 10%	6,71%	23	4,00%	2	9,04%	15	1,85%	2	0%	0
Reduced by 10 to 25%	9,62%	33	22,00%	11	6,02%	10	12,04%	13	6,67%	1
Reduced by 25 to 50%	7,58%	26	22,00%	11	2,41%	4	6,48%	7	6,67%	1
Reduced by 50 to 75%	2,62%	9	6,00%	3	1,20%	2	3,70%	4	0%	0
Reduced by more than 75%	1,46%	5	4,00%	2	0,00%	0	0,93%	1	0%	0
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

5- Around how many employment contracts did you have to terminate in 2020?

	All		Myanmar		Japanese		Western		Asean	
No termination	67,64%	232	50,00%	25	76,51%	127	65,74%	71	80,00%	12
Less than 10%	17,78%	61	24,00%	12	15,06%	25	18,52%	20	0%	0
10 to 25%	6,41%	22	4,00%	2	4,22%	7	11,11%	12	20,00%	3
25 to 50%	3,21%	11	12,00%	6	0,60%	1	0,93%	1	0%	0
50 to 75%	1,75%	6	4,00%	2	1,81%	3	0,93%	1	0%	0
More than 75%	1,75%	6	4,00%	2	1,20%	2	0,93%	1	0%	0
Termination of all contracts	1,46%	5	2,00%	1	0,60%	1	1,85%	2	0%	0
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

6- What was the situation of your workplace in 2020?

	All		Myanmar		Japanese		Western		Asean	
No change – Office open, staff at work	9,33%	32	6,00%	3	13,25%	22	4,63%	5	0,00%	0
Workplace mostly open with most staff on site	18,95%	65	22,00%	11	22,29%	37	12,04%	13	13,33%	2
Workplace mostly open with most staff working from home	26,53%	91	32,00%	16	21,69%	36	35,19%	38	33,33%	5
Workplace mostly open but all staff working from home	9,04%	31	6,00%	3	10,24%	17	9,26%	10	20,00%	3
Workplace mostly closed with most staff working from home	17,49%	60	10,00%	5	16,87%	28	21,30%	23	13,33%	2
Workplace mostly closed with all staff working from home	10,20%	35	8,00%	4	12,05%	20	7,41%	8	13,33%	2
Workplace completely closed with all staff working from home	4,96%	17	8,00%	4	2,41%	4	8,33%	9	6,67%	1
Workplace completely closed with no staff working (termination of operations)	3,50%	12	8,00%	4	1,20%	2	1,85%	2	0,00%	0
	Answered	343	Answered	50	Answered	166	Answered	108	Answered	15
	Skipped	29	Skipped	4	Skipped	16	Skipped	7	Skipped	2

PART 1 – ANSWERS BY SECTOR

1-How was your activity impacted by the Covid-19 crisis in 2020?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase of activities	5,88%	1	3,70%	4	2,04%	2	16,67%	2
No impact	29,41%	5	15,74%	17	8,16%	8	8,33%	1
Reduction of less than 25%	23,53%	4	27,78%	30	23,47%	23	25,00%	3
Reduction between 25 to 50%	23,53%	4	30,56%	33	31,63%	31	8,33%	1
Reduction between 50 to 75%	11,76%	2	10,19%	11	19,39%	19	16,67%	2
Reduction of more than 75%	5,88%	1	10,19%	11	13,27%	13	16,67%	2
Termination of all activities	0,00%	0	1,85%	2	2,04%	2	8,33%	1
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increase of activities	4,88%		5,26%	1	12,50%	2	3,13%	1
No impact	9,76%		0,00%	0	6,25%	1	12,50%	4
Reduction of less than 25%	29,27%		10,53%	2	31,25%	5	31,25%	10
Reduction between 25 to 50%	36,59%		15,79%	3	12,50%	2	34,38%	11
Reduction between 50 to 75%	14,63%		21,05%	4	18,75%	3	12,50%	4
Reduction of more than 75%	4,88%		31,58%	6	18,75%	3	6,25%	2
Termination of all activities	0,00%		15,79%	3	0,00%	0	0,00%	0
	Answered		Answered	19	Answered	16	Answered	32
	Skipped		Skipped	1	Skipped	3	Skipped	3

2- How was your income impacted by the Covid-19 crisis in 2020?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase of activities	17,65%	3	9,26%	10	4,08%	4	25,00%	3
No impact	23,53%	4	19,44%	21	17,35%	17	8,33%	1
Reduction of less than 25%	17,65%	3	26,85%	29	24,49%	24	33,33%	4
Reduction between 25 to 50%	17,65%	3	22,22%	24	32,65%	32	0,00%	0
Reduction between 50 to 75%	17,65%	3	10,19%	11	10,20%	10	8,33%	1
Reduction of more than 75%	0,00%	0	7,41%	8	6,12%	6	16,67%	2
Termination of all activities	5,88%	1	4,63%	5	5,10%	5	8,33%	1
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Growth of turnover	4,88%	2	5,26%	1	6,25%	1	9,38%	3
No impact	17,07%	7	0,00%	0	31,25%	5	15,63%	5
Reduction of less than 25%	26,83%	11	10,53%	2	18,75%	3	31,25%	10
Reduction between 25 to 50%	34,15%	14	15,79%	3	25,00%	4	25,00%	8
Reduction between 50 to 75%	9,76%	4	15,79%	3	18,75%	3	12,50%	4
Reduction of more than 75%	4,88%	2	21,05%	4	0,00%	0	6,25%	2
No income at all	2,44%	1	31,58%	6	0,00%	0	0,00%	0
	Answered	41	Answered	19	Answered	16	Answered	32
	Skipped	5	Skipped	1	Skipped	3	Skipped	3

3- How was your human resources impacted by the Covid-19 crisis in 2020? (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increased number of employees	5,88%	1	12,96%	14	6,12%	6	8,33%	1
Increased salaries	5,88%	1	7,41%	8	7,14%	7	16,67%	2
No impact	47,06%	8	34,26%	37	33,67%	33	16,67%	2
Froze all recruitments	23,53%	4	25,93%	28	31,63%	31	50,00%	6
Froze all salaries	17,65%	3	5,56%	6	17,35%	17	8,33%	1
Cancelled bonuses	5,88%	1	21,30%	23	22,45%	22	8,33%	1
Decreased salaries	0,00%	0	24,07%	26	13,27%	13	25,00%	3
Use of all paid leaves	0,00%	0	6,48%	7	15,31%	15	25,00%	3
Unpaid leaves	0,00%	0	6,48%	7	8,16%	8	16,67%	2
Implemented part-time work	11,76%	2	7,41%	8	8,16%	8	16,67%	2
Reduced training to essentials	17,65%	3	8,33%	9	11,22%	11	16,67%	2
Cancelled all training	5,88%	1	7,41%	8	13,27%	13	25,00%	3
Termination of employment contracts	0,00%	0	11,11%	12	12,24%	12	8,33%	1
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increased number of employees	4,88%	2	0,00%	0	25,00%	4	12,50%	4
Increased salaries	12,20%	5	0,00%	0	6,25%	1	6,25%	2
No impact	29,27%	12	15,79%	3	37,50%	6	28,13%	9
Froze all recruitments	39,02%	16	47,37%	9	12,50%	2	25,00%	8
Froze all salaries	9,76%	4	26,32%	5	18,75%	3	21,88%	7
Cancelled bonuses	14,63%	6	36,84%	7	6,25%	1	12,50%	4
Decreased salaries	9,76%	4	47,37%	9	6,25%	1	9,38%	3
Use of all paid leaves	17,07%	7	21,05%	4	0,00%	0	15,63%	5
Unpaid leaves	7,32%	3	15,79%	3	0,00%	0	3,13%	1
Implemented part-time work	7,32%	3	31,58%	6	0,00%	0	12,50%	4
Reduced training to essentials	9,76%	4	15,79%	3	18,75%	3	15,63%	5
Cancelled all training	17,07%	7	15,79%	3	0,00%	0	6,25%	2
Termination of employment contracts	7,32%	3	42,11%	8	6,25%	1	9,38%	3
	Answered	41	Answered	19	Answered	16	Answered	32
	Skipped	5	Skipped	1	Skipped	3	Skipped	3

4- In average, by how much did you have to change salaries in 2020?

4- In average, by how much did you have to change salaries in 2020?	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increased salaries	23,53%	4	22,22%	24	14,29%	14	33,33%	4
No change	52,94%	9	50,00%	54	60,20%	59	41,67%	5
Reduced by less than 10%	0,00%	0	6,48%	7	9,18%	9	0,00%	0
Reduced by 10 to 25%	5,88%	1	9,26%	10	11,22%	11	8,33%	1
Reduced by 25 to 50%	5,88%	1	8,33%	9	4,08%	4	16,67%	2
Reduced by 50 to 75%	5,88%	1	2,78%	3	0,00%	0	0,00%	0
Reduced by more than 75%	5,88%	1	0,93%	1	1,02%	1	0,00%	0
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increased salaries	21,95%	9	0,00%	0	12,50%	2	15,63%	5
No change	51,22%	21	31,58%	6	68,75%	11	62,50%	20
Reduced by less than 10%	9,76%	4	0,00%	0	6,25%	1	6,25%	2
Reduced by 10 to 25%	14,63%	6	0,00%	0	0,00%	0	12,50%	4
Reduced by 25 to 50%	2,44%	1	36,84%	7	6,25%	1	3,13%	1
Reduced by 50 to 75%	0,00%	0	21,05%	4	6,25%	1	0,00%	0
Reduced by more than 75%	0,00%	0	10,53%	2	0,00%	0	0,00%	0
	Answered	41	Answered	19	Answered	16	Answered	32
	Skipped	5	Skipped	1	Skipped	3	Skipped	3

5- Around how many employment contracts did you have to terminate in 2020?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No termination	70,59%	12	69,44%	75	67,35%	66	83,33%	10
Less than 10%	11,76%	2	19,44%	21	20,41%	20	0,00%	0
10 to 25%	0,00%	0	6,48%	7	6,12%	6	8,33%	1
25 to 50%	5,88%	1	0,93%	1	2,04%	2	0,00%	0
50 to 75%	0,00%	0	0,93%	1	2,04%	2	0,00%	0
More than 75%	11,76%	2	2,78%	3	1,02%	1	0,00%	0
Termination of all contracts	0,00%	0	0,00%	0	1,02%	1	8,33%	1
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No termination	65,85%	27	31,58%	6	50,00%	8	87,50%	28
Less than 10%	12,20%	5	21,05%	4	43,75%	7	6,25%	2
10 to 25%	14,63%	6	0,00%	0	6,25%	1	3,13%	1
25 to 50%	7,32%	3	15,79%	3	0,00%	0	3,13%	1
50 to 75%	0,00%	0	15,79%	3	0,00%	0	0,00%	0
More than 75%	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Termination of all contracts	0,00%	0	15,79%	3	0,00%	0	0,00%	0
	Answered	41	Answered	19	Answered	16	Answered	32
	Skipped	5	Skipped	1	Skipped	3	Skipped	3

6- What was the situation of your workplace in 2020?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No change – Office remained open and staff at work	0,00%	0	8,33%	9	11,22%	11	0,00%	0
Workplace mostly open with most staff working on site	35,29%	6	12,96%	14	23,47%	23	8,33%	1
Workplace mostly open with most staff working from home	41,18%	7	25,00%	27	21,43%	21	50,00%	6
Workplace mostly open but all staff working from home	11,76%	2	10,19%	11	8,16%	8	8,33%	1
Workplace mostly closed with most staff working from home	0,00%	0	21,30%	23	16,33%	16	8,33%	1
Workplace mostly closed with all staff working from home	0,00%	0	12,04%	13	13,27%	13	0,00%	0
Workplace completely closed with all staff working from home	5,88%	1	8,33%	9	3,06%	3	16,67%	2
Workplace completely closed with no staff working	5,88%	1	1,85%	2	3,06%	3	8,33%	1
	Answered	17	Answered	108	Answered	98	Answered	12
	Skipped	4	Skipped	6	Skipped	6	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No change – Office remained open and staff at work	7,32%	3	15,79%	3	12,50%	2	12,50%	4
Workplace mostly open with most staff working on site	21,95%	9	31,58%	6	6,25%	1	15,63%	5
Workplace mostly open with most staff working from home	26,83%	11	15,79%	3	31,25%	5	34,38%	11
Workplace mostly open but all staff working from home	9,76%	4	0,00%	0	12,50%	2	9,38%	3
Workplace mostly closed with most staff working from home	19,51%	8	10,53%	2	18,75%	3	21,88%	7
Workplace mostly closed with all staff working from home	12,20%	5	0,00%	0	18,75%	3	3,13%	1
Workplace completely closed with all staff working from home	2,44%	1	5,26%	1	0,00%	0	0,00%	0
Workplace completely closed with no staff working	0,00%	0	21,05%	4	0,00%	0	3,13%	1
	Answered	41	Answered	19	Answered	16	Answered	32
	Skipped	5	Skipped	1	Skipped	3	Skipped	3

PART 1 – ANSWERS BY SIZE

1-How was your activity impacted by the Covid-19 crisis in 2020?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increase of activities	2,97%	3	4,46%	5	3,90%	3	20,00%	4	0,00%	0	0,00%	0
No impact	15,84%	16	11,61%	13	7,79%	6	5,00%	1	12,50%	1	12,00%	3
Reduction less than 25%	17,82%	18	21,43%	24	38,96%	30	25,00%	5	25,00%	2	40,00%	10
Reduction 25 to 50%	21,78%	22	35,71%	40	27,27%	21	50,00%	10	37,50%	3	16,00%	4
Reduction 50 to 75%	18,83%	17	15,18%	17	11,69%	9	0,00%	0	25,00%	2	24,00%	6
Reduction more than 75%	21,78%	22	9,82%	11	7,79%	6	0,00%	0	0,00%	0	4,00%	1
Termination of all activities	2,97%	3	1,79%	2	2,60%	2	0,00%	0	0,00%	0	4,00%	1
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

2- How was your income impacted by the Covid-19 crisis in 2020?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Growth of turnover	3,96%	4	7,14%	8	10,39%	8	20,00%	4	0,00%	0	12,00%	3
No impact	21,78%	22	16,07%	18	14,29%	11	20,00%	4	12,50%	1	16,00%	4
Reduction of less than 25%	18,81%	19	27,68%	31	28,57%	22	25,00%	5	25,00%	2	28,00%	7
Reduction 25 to 50%	23,76%	24	27,68%	31	24,68%	19	30,00%	6	37,50%	3	20,00%	5
Reduction 50 to 75%	9,90%	10	9,82%	11	12,99%	10	5,00%	1	25,00%	2	20,00%	5
Reduction more than 75%	13,86%	14	7,14%	8	2,60%	2	0,00%	0	0,00%	0	0,00%	0
No income at all	7,92%	8	4,46%	5	6,49%	5	0,00%	0	0,00%	0	4,00%	1
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

3- How was your human resources impacted by the Covid-19 crisis in 2020? (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increased number of employees	5,94%	6	8,93%	10	11,69%	9	20,00%	4	12,50%	1	8,00%	2
Increased salaries	4,95%	5	9,82%	11	6,49%	5	25,00%	5	0,00%	0	0,00%	0
No impact	35,64%	36	32,14%	36	22,08%	17	45,00%	9	12,50%	1	44,00%	11
Froze all recruitments	33,66%	34	30,36%	34	29,87%	23	25,00%	5	25,00%	2	24,00%	6
Froze all salaries	8,91%	9	18,75%	21	12,99%	10	5,00%	1	12,50%	1	16,00%	4
Cancelled bonuses	10,89%	11	22,32%	25	27,27%	21	5,00%	1	37,50%	3	16,00%	4
Decreased salaries	13,86%	14	20,54%	23	22,08%	17	0,00%	0	37,50%	3	8,00%	2
Use of all paid leaves	8,91%	9	9,82%	11	12,99%	10	15,00%	3	12,50%	1	28,00%	7
Unpaid leaves	5,94%	6	6,25%	7	11,69%	9	0,00%	0	25,00%	2	0,00%	0
Implemented part-time work	9,90%	10	8,04%	9	12,99%	10	0,00%	0	12,50%	1	12,00%	3
Reduced training to essentials	4,95%	5	8,04%	9	18,18%	14	25,00%	5	25,00%	2	20,00%	5
Cancelled all training	8,91%	9	8,93%	10	14,29%	11	10,00%	2	37,50%	3	8,00%	2
Termination of employment contracts	16,83%	17	9,82%	11	10,39%	8	0,00%	0	12,50%	1	12,00%	3
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

4- In average, by how much did you have to change salaries in 2020?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increased salaries	11,88%	12	17,86%	20	19,48%	15	40,00%	8	25,00%	2	20,00%	5
No change	59,41%	60	53,57%	60	46,75%	36	50,00%	10	25,00%	2	68,00%	17
Reduced by less than 10%	6,93%	7	5,36%	6	10,39%	8	5,00%	1	0,00%	0	4,00%	1
Reduced by 10 to 25%	8,91%	9	9,82%	11	11,69%	9	0,00%	0	25,00%	2	8,00%	2
Reduced by 25 to 50%	8,91%	9	9,82%	11	5,19%	4	5,00%	1	12,50%	1	0,00%	0
Reduced by 50 to 75%	2,97%	3	1,79%	2	3,90%	3	0,00%	0	12,50%	1	0,00%	0
Reduced by more than 75%	0,99%	1	1,79%	2	2,60%	2	0,00%	0	0,00%	0	0,00%	0
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

5- Around how many employment contracts did you have to terminate in 2020?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No termination	69,31%	70	70,54%	79	58,44%	45	80,00%	16	37,50%	3	76,00%	19
Less than 10%	14,85%	15	16,07%	18	27,27%	21	15,00%	3	25,00%	2	8,00%	2
10 to 25%	3,96%	4	4,46%	5	9,09%	7	5,00%	1	37,50%	3	8,00%	2
25 to 50%	5,94%	6	3,57%	4	0,00%	0	0,00%	0	0,00%	0	4,00%	1
50 to 75%	0,99%	1	2,68%	3	1,30%	1	0,00%	0	0,00%	0	4,00%	1
More than 75%	1,98%	2	2,68%	3	1,30%	1	0,00%	0	0,00%	0	0,00%	0
Termination of all contracts	2,97%	3	0,00%	0	2,60%	2	0,00%	0	0,00%	0	0,00%	0
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

6- What was the situation of your workplace in 2020?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No change – Office remained open and staff continued to work	10,89%	11	12,50%	14	3,90%	3	5,00%	1	12,50%	1	8,00%	2
Workplace mostly open with most staff on site	13,86%	14	14,29%	16	23,38%	18	30,00%	6	37,50%	3	32,00%	8
Workplace mostly open with most staff working from home	18,81%	19	26,79%	30	36,36%	28	40,00%	8	25,00%	2	16,00%	4
Workplace mostly open but all staff working from home	8,91%	9	8,93%	10	9,09%	7	5,00%	1	12,50%	1	12,00%	3
Workplace mostly closed with most staff working from home	15,84%	16	19,64%	22	18,18%	14	5,00%	1	12,50%	1	24,00%	6
Workplace mostly closed with all staff working from home	16,83%	17	11,61%	13	1,30%	1	15,00%	3	0,00%	0	4,00%	1
Workplace completely closed with all staff working from home	9,90%	10	2,68%	3	5,19%	4	0,00%	0	0,00%	0	0,00%	0
Workplace completely closed with no staff working (termination of operations)	4,95%	5	3,57%	4	2,60%	2	0,00%	0	0,00%	0	4,00%	1
	Answered	101	Answered	112	Answered	77	Answered	20	Answered	8	Answered	25
	Skipped	9	Skipped	7	Skipped	4	Skipped	1	Skipped	3	Skipped	5

PART 1 – ANSWERS BY YEARS OF OPERATING IN MYANMAR

1-How was your activity impacted by the Covid-19 crisis in 2020?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increase of activities	0,00%	0	6,25%	3	8,45%	6	2,60%	4	3,23%	2
No impact	12,50%	1	4,17%	2	15,49%	11	9,74%	15	17,74%	11
Reduction of less than 25%	0,00%	0	8,33%	4	23,94%	17	33,77%	52	25,81%	16
Reduction between 25 to 50%	25,00%	2	39,58%	19	25,35%	18	27,27%	42	30,65%	19
Reduction between 50 to 75%	12,50%	1	12,50%	6	16,90%	12	15,58%	24	12,90%	8
Reduction of more than 75%	25,00%	2	25,00%	12	7,04%	5	9,74%	15	9,68%	6
Termination of all activities	25,00%	2	4,17%	2	2,82%	2	1,30%	2	0,00%	0
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

2- How was your income impacted by the Covid-19 crisis in 2020?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Growth of turnover	0,00%	0	6,25%	3	14,08%	10	6,49%	10	6,45%	4
No impact	12,50%	1	14,58%	7	16,90%	12	16,88%	26	22,58%	14
Reduction of less than 25%	0,00%	0	10,42%	5	22,54%	16	30,52%	47	29,03%	18
Reduction between 25 to 50%	25,00%	2	31,25%	15	25,35%	18	25,97%	40	20,97%	13
Reduction between 50 to 75%	12,50%	1	8,33%	4	12,68%	9	11,69%	18	11,29%	7
Reduction of more than 75%	12,50%	1	18,75%	9	2,82%	2	6,49%	10	3,23%	2
No income at all	37,50%	3	10,42%	5	5,63%	4	1,95%	3	6,45%	4
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

3- How was your human resources impacted by the Covid-19 crisis in 2020? (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increased number of employees	0,00%	0	8,33%	4	16,90%	12	8,44%	13	4,84%	3
Increased salaries	0,00%	0	4,17%	2	9,86%	7	8,44%	13	6,45%	4
No impact	37,50%	3	29,17%	14	28,17%	20	33,77%	52	33,87%	21
Froze all recruitments	37,50%	3	33,33%	16	22,54%	16	32,47%	50	30,65%	19
Froze all salaries	37,50%	3	6,25%	3	12,68%	9	12,99%	20	17,74%	11
Cancelled bonuses	12,50%	1	20,83%	10	18,31%	13	18,83%	29	19,35%	12
Decreased salaries	0,00%	0	25,00%	12	14,08%	10	17,53%	27	16,13%	10
Use of all paid leaves	0,00%	0	14,58%	7	11,27%	8	8,44%	13	20,97%	13
Unpaid leaves	0,00%	0	20,83%	10	8,45%	6	3,25%	5	4,84%	3
Implemented part-time work	0,00%	0	14,58%	7	16,90%	12	5,19%	8	9,68%	6
Reduced training to essentials	0,00%	0	4,17%	2	14,08%	10	11,69%	18	16,13%	10
Cancelled all training	0,00%	0	14,58%	7	11,27%	8	9,09%	14	12,90%	8
Termination of contracts	0,00%	0	20,83%	10	12,68%	9	9,09%	14	11,29%	7
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

4- In average, by how much did you have to change salaries in 2020?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increased salaries	0,00%	0	10,42%	5	23,94%	17	20,13%	31	14,52%	9
No change	75,00%	6	45,83%	22	53,52%	38	53,90%	83	58,06%	36
Reduced by less than 10%	12,50%	1	6,25%	3	4,23%	3	8,44%	13	4,84%	3
Reduced by 10 to 25%	0,00%	0	10,42%	5	8,45%	6	9,09%	14	12,90%	8
Reduced by 25 to 50%	12,50%	1	18,75%	9	8,45%	6	3,90%	6	6,45%	4
Reduced by 50 to 75%	0,00%	0	4,17%	2	1,41%	1	3,25%	5	1,61%	1
Reduced by more than 75%	0,00%	0	4,17%	2	0,00%	0	1,30%	2	1,61%	1
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

5- Around how many employment contracts did you have to terminate in 2020?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No termination	62,50%	5	58,33%	28	67,61%	48	71,43%	110	66,13%	41
Less than 10%	25,00%	2	8,33%	4	19,72%	14	18,18%	28	20,97%	13
10 to 25%	0,00%	0	12,50%	6	4,23%	3	5,84%	9	6,45%	4
25 to 50%	12,50%	1	8,33%	4	2,82%	2	0,65%	1	4,84%	3
50 to 75%	0,00%	0	2,08%	1	2,82%	2	1,30%	2	1,61%	1
More than 75%	0,00%	0	6,25%	3	1,41%	1	1,30%	2	0,00%	0
Termination of all contracts	0,00%	0	4,17%	2	1,41%	1	1,30%	2	0,00%	0
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

6- What was the situation of your workplace in 2020?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No change – Office remained open and staff continued to work	0,00%	0	12,50%	6	15,49%	11	5,84%	9	9,68%	6
Workplace mostly open with most staff working on site	12,50%	1	12,50%	6	16,90%	12	22,08%	34	19,35%	12
Workplace mostly open with most staff working from home	12,50%	1	22,92%	11	28,17%	20	26,62%	41	29,03%	18
Workplace mostly open but all staff working from home	12,50%	1	8,33%	4	4,23%	3	12,34%	19	6,45%	4
Workplace mostly closed with most staff working from home	12,50%	1	14,58%	7	12,68%	9	17,53%	27	25,81%	16
Workplace mostly closed with all staff working from home	25,00%	2	6,25%	3	12,68%	9	11,69%	18	4,84%	3
Workplace completely closed with all staff working from home	25,00%	2	10,42%	5	7,04%	5	1,30%	2	4,84%	3
Workplace completely closed with no staff working (termination of operations)	0,00%	0	12,50%	6	2,82%	2	2,60%	4	0,00%	0
	Answered	8	Answered	48	Answered	71	Answered	154	Answered	62
	Skipped	2	Skipped	5	Skipped	2	Skipped	14	Skipped	6

PART 2 – ANSWERS BY NATIONALITY

1-How has your activity been impacted by the political crisis since February 2021?

	All		Myanmar		Japanese		Western		Asean	
Increase of activities	2,13%	7	0,00%	0	2,53%	4	1,89%	2	0,00%	0
No impact	4,88%	16	6,38%	3	4,43%	7	5,66%	6	6,67%	1
Reduction of less than 25%	11,89%	39	6,38%	3	13,29%	21	13,21%	14	6,67%	1
Reduction between 25 to 50%	14,63%	48	14,89%	7	13,92%	22	17,92%	19	13,33%	2
Reduction between 50 to 75%	21,34%	70	23,40%	11	20,25%	32	22,64%	24	40,00%	6
Reduction of more than 75%	32,62%	107	44,68%	21	34,18%	54	26,42%	28	26,67%	4
Termination of all activities	12,50%	41	4,26%	2	11,39%	18	12,26%	13	6,67%	1
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

2- How has your income been impacted by the political crisis since February 2021?

	All		Myanmar		Japanese		Western		Asean	
Growth of turnover	0,91%	3	2,13%	1	0,63%	1	0,00%	0	0,00%	0
No impact	12,80%	42	10,64%	5	17,09%	27	9,43%	10	13,33%	2
Reduction of less than 25%	12,50%	41	4,26%	2	12,66%	20	16,98%	18	13,33%	2
Reduction between 25 to 50%	15,85%	52	19,15%	9	15,82%	25	17,92%	19	26,67%	4
Reduction between 50 to 75%	17,99%	59	12,77%	6	17,72%	28	21,70%	23	20,00%	3
Reduction of more than 75%	21,95%	72	23,40%	11	20,25%	32	19,81%	21	26,67%	4
No income at all	17,99%	59	27,66%	13	15,82%	25	14,15%	15	0,00%	0
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

3- How have your human resources been impacted by the political crisis since February 2021? (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
Increased number of employees	0,00%	0	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Increased salaries	1,83%	6	0,00%	0	1,90%	3	1,89%	2	0,00%	0
No impact	27,13%	89	10,64%	5	37,34%	59	21,70%	23	20,00%	3
Froze all recruitments	42,38%	139	53,19%	25	36,08%	57	51,89%	55	46,67%	7
Froze all salaries	16,77%	55	21,28%	10	8,86%	14	27,36%	29	40,00%	6
Cancelled bonuses	22,87%	75	31,91%	15	20,89%	33	20,75%	22	13,33%	2
Decreased salaries	23,48%	77	48,94%	23	17,72%	28	21,70%	23	13,33%	2
Use of all paid leaves	19,51%	64	38,30%	18	15,19%	24	17,92%	19	33,33%	5
Unpaid leaves	16,77%	55	34,04%	16	9,49%	15	18,87%	20	33,33%	5
Implemented part-time work	13,11%	43	31,91%	15	3,80%	6	15,09%	16	6,67%	1
Reduced training to essentials	12,80%	42	21,28%	10	10,13%	16	14,15%	15	26,67%	4
Termination of contracts	16,46%	54	25,53%	12	11,39%	18	16,04%	17	20,00%	3
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

4- In average, by how much have you changed salaries since February 2021?

	All		Myanmar		Japanese		Western		Asean	
No reduction	61,59%	202	34,04%	16	69,62%	110	66,04%	70	80,00%	12
Less than 10%	3,96%	13	4,26%	2	5,06%	8	1,89%	2	0,00%	0
10 to 25%	11,89%	39	19,15%	9	10,13%	16	8,49%	9	6,67%	1
25 to 50%	11,89%	39	21,28%	10	9,49%	15	11,32%	12	6,67%	1
50 to 75%	5,79%	19	12,77%	6	3,80%	6	6,60%	7	6,67%	1
More than 75%	4,88%	16	8,51%	4	1,90%	3	5,66%	6	0,00%	0
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

5- Around how many employment contracts have you terminated since February 2021?

	All		Myanmar		Japanese		Western		Asean	
No termination	69,51%	228	48,94%	23	77,85%	123	71,70%	76	73,33%	11
Less than 10%	11,89%	39	23,40%	11	8,23%	13	14,15%	15	6,67%	1
10 to 25%	5,79%	19	8,51%	4	3,80%	6	4,72%	5	6,67%	1
25 to 50%	3,35%	11	6,38%	3	2,53%	4	3,77%	4	13,33%	2
50 to 75%	3,96%	13	6,38%	3	3,16%	5	2,83%	3	0,00%	0
More than 75%	2,44%	8	4,26%	2	3,16%	5	0,00%	0	0,00%	0
Termination of all contracts	3,05%	10	2,13%	1	1,27%	2	2,83%	3	0,00%	0
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

6- What has the situation of your workplace been since February 2021?

	All		Myanmar		Japanese		Western		Asean	
No change – Office remained open and staff at work	5,18%	17	0,00%	0	7,59%	12	3,77%	4	0,00%	0
Workplace mostly open with most staff working on site	7,01%	23	12,77%	6	8,23%	13	2,83%	3	13,33%	2
Workplace mostly open with most staff working from home	13,41%	44	12,77%	6	10,13%	16	16,98%	18	6,67%	1
Workplace mostly open but all staff working from home	6,40%	21	8,51%	4	6,33%	10	6,60%	7	6,67%	1
Workplace mostly closed with most staff working from home	15,55%	51	14,89%	7	19,62%	31	11,32%	12	0,00%	0
Workplace mostly closed with all staff working from home	12,80%	42	2,13%	1	16,46%	26	12,26%	13	0,00%	0
Workplace completely closed with most staff working from home	8,54%	28	14,89%	7	9,49%	15	8,49%	9	13,33%	2
Workplace completely closed with all staff working from home	21,04%	69	19,15%	9	17,09%	27	29,25%	31	60,00%	9
Workplace completely closed with no staff working	10,06%	33	14,89%	7	5,06%	8	8,49%	9	0,00%	0
	Answered	328	Answered	47	Answered	158	Answered	106	Answered	15
	Skipped	44	Skipped	7	Skipped	24	Skipped	9	Skipped	2

7- If there was an impact, what were the main causes? (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
No impact	1,84%	6	0,00%	0	3,16%	5	0,95%	1	0,00%	0
Disruption of internet	69,63%	227	76,60%	36	63,92%	101	80,00%	84	86,67%	13
Stop of all advertising, PR, promotions, communication	28,22%	92	48,94%	23	18,99%	30	33,33%	35	33,33%	5
Large number of employees on leave or not working	20,25%	66	36,17%	17	15,82%	25	17,14%	18	6,67%	1
Staff cannot travel/work on site or in the field	65,03%	212	76,60%	36	59,49%	94	67,62%	71	86,67%	13
Admin. process on hold	30,06%	98	31,91%	15	22,15%	35	38,10%	40	40,00%	6
New rules and regulations disrupting your activities	25,77%	84	40,43%	19	18,35%	29	28,57%	30	13,33%	2
Workplace closed/shutdown	34,66%	113	31,91%	15	34,81%	55	34,29%	36	53,33%	8
Banks, transfers and payments not working	76,69%	250	82,98%	39	77,85%	123	78,10%	82	73,33%	11
Cashflow has stopped	41,10%	134	53,19%	25	35,44%	56	44,76%	47	46,67%	7
Impossible to plan the future	57,98%	189	61,70%	29	49,37%	78	67,62%	71	66,67%	10
Destruction of property	3,99%	13	4,26%	2	4,43%	7	2,86%	3	0,00%	0
Lack of safety for employees	65,95%	215	80,85%	38	58,23%	92	68,57%	72	73,33%	11
	Answered	326	Answered	47	Answered	158	Answered	105	Answered	15
	Skipped	46	Skipped	7	Skipped	24	Skipped	10	Skipped	2

PART 2 – ANSWERS BY SECTOR

1-How has your activity been impacted by the political crisis since February 2021?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase of activities	0,00%	0	2,94%	3	2,17%	2	8,33%	1
No impact	0,00%	0	2,94%	3	7,61%	7	0,00%	0
Reduction of less than 25%	6,25%	1	12,75%	13	6,52%	6	8,33%	1
Reduction 25 to 50%	12,50%	2	14,71%	15	10,87%	10	16,67%	2
Reduction 50 to 75%	37,50%	6	26,47%	27	17,39%	16	16,67%	2
Reduction of more than 75%	43,75%	7	29,41%	30	42,39%	39	25,00%	3
Termination of all activities	0,00%	0	10,78%	11	13,04%	12	25,00%	3
	Answered	16	Answered	102	Answered	92	Answered	12
	Skipped	5	Skipped	12	Skipped	12	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increase of activities	0,00%	0	0,00%	0	0,00%	0	3,23%	1
No impact	2,44%	1	11,11%	2	12,50%	2	3,23%	1
Reduction of less than 25%	29,27%	12	11,11%	2	18,75%	3	3,23%	1
Reduction 25 to 50%	19,51%	8	11,11%	2	18,75%	3	19,35%	6
Reduction 50 to 75%	17,07%	7	0,00%	0	12,50%	2	32,26%	10
Reduction of more than 75%	19,51%	8	27,78%	5	31,25%	5	32,26%	10
Termination of all activities	12,20%	5	38,89%	7	6,25%	1	6,45%	2
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

2- How has your income been impacted by the political crisis since February 2021?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Growth of turnover	0,00%	0	0,98%	1	0,00%	0	0,00%	0
No impact	6,25%	1	11,76%	12	16,30%	15	8,33%	1
Reduction of less than 25%	12,50%	2	13,73%	14	8,70%	8	0,00%	0
Reduction 25 to 50%	6,25%	1	14,71%	15	8,70%	8	33,33%	4
Reduction 50 to 75%	43,75%	7	19,61%	20	17,39%	16	16,67%	2
Reduction of more than 75%	25,00%	4	23,53%	24	26,09%	24	16,67%	2
No income at all	6,25%	1	15,69%	16	22,83%	21	25,00%	3
	Answered	16	Answered	102	Answered	92	Answered	12
	Skipped	5	Skipped	12	Skipped	12	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Growth of turnover	0,00%	0	0,00%	0	6,25%	1	3,23%	1
No impact	14,63%	6	5,56%	1	12,50%	2	12,90%	4
Reduction of less than 25%	21,95%	9	11,11%	2	25,00%	4	6,45%	2
Reduction between 25 to 50%	26,83%	11	11,11%	2	12,50%	2	29,03%	9
Reduction between 50 to 75%	7,32%	3	5,56%	1	18,75%	3	22,58%	7
Reduction of more than 75%	21,95%	9	16,67%	3	12,50%	2	12,90%	4
No income at all	7,32%	3	50,00%	9	12,50%	2	12,90%	4
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

3- How have your human resources been impacted by the political crisis since February 2021? (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increased number of employees	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Increased salaries	0,00%	0	0,98%	1	1,09%	1	0,00%	0
No impact	25,00%	4	24,51%	25	28,26%	26	16,67%	2
Froze all recruitments	37,50%	6	50,00%	51	39,13%	36	66,67%	8
Froze all salaries	18,75%	3	16,67%	17	19,57%	18	33,33%	4
Cancelled bonuses	12,50%	2	30,39%	31	23,91%	22	16,67%	2
Decreased salaries	6,25%	1	31,37%	32	23,91%	22	25,00%	3
Use of all paid leaves	12,50%	2	19,61%	20	21,74%	20	16,67%	2
Unpaid leaves	6,25%	1	20,59%	21	17,39%	16	25,00%	3
Implemented part-time work	12,50%	2	11,76%	12	9,78%	9	16,67%	2
Reduced training to essentials	18,75%	3	10,78%	11	10,87%	10	16,67%	2
Termination of contracts	6,25%	1	19,61%	20	19,57%	18	8,33%	1
	Answered	16	Answered	102	Answered	92	Answered	12
	Skipped	5	Skipped	12	Skipped	12	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increased number of employees	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Increased salaries	7,32%	3	5,56%	1	0,00%	0	0,00%	0
No impact	31,71%	13	16,67%	3	50,00%	8	25,81%	8
Froze all recruitments	41,46%	17	33,33%	6	25,00%	4	35,48%	11
Froze all salaries	9,76%	4	22,22%	4	12,50%	2	9,68%	3
Cancelled bonuses	12,20%	5	22,22%	4	6,25%	1	25,81%	8
Decreased salaries	14,63%	6	33,33%	6	25,00%	4	9,68%	3
Use of all paid leaves	19,51%	8	16,67%	3	6,25%	1	25,81%	8
Unpaid leaves	14,63%	6	22,22%	4	12,50%	2	6,45%	2
Implemented part-time work	19,51%	8	27,78%	5	6,25%	1	12,90%	4
Reduced training to essentials	19,51%	8	11,11%	2	6,25%	1	16,13%	5
Termination of contracts	4,88%	2	33,33%	6	18,75%	3	9,68%	3
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

4- In average, by how much have you changed salaries since February 2021?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No reduction	75,00%	12	55,88%	57	60,87%	56	75,00%	9
Less than 10%	0,00%	0	2,94%	3	4,35%	4	0,00%	0
10 to 25%	6,25%	1	14,71%	15	11,96%	11	8,33%	1
25 to 50%	6,25%	1	13,73%	14	15,22%	14	0,00%	0
50 to 75%	6,25%	1	7,84%	8	3,26%	3	8,33%	1
More than 75%	6,25%	1	4,90%	5	4,35%	4	8,33%	1
	Answered	16	Answered	102	Answered	92	Answered	12
	Skipped	5	Skipped	12	Skipped	12	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No reduction	70,73%	29	33,33%	6	62,50%	10	74,19%	23
Less than 10%	2,44%	1	0,00%	0	6,25%	1	12,90%	4
10 to 25%	12,20%	5	11,11%	2	12,50%	2	6,45%	2
25 to 50%	12,20%	5	5,56%	1	12,50%	2	6,45%	2
50 to 75%	2,44%	1	22,22%	4	6,25%	1	0,00%	0
More than 75%	0,00%	0	27,78%	5	0,00%	0	0,00%	0
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

5- Around how many employment contracts have you terminated since February 2021?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No termination	68,75%	11	66,67%	68	72,83%	67	91,67%	11
Less than 10%	6,25%	1	16,67%	17	7,61%	7	0,00%	0
10 to 25%	0,00%	0	3,92%	4	5,43%	5	0,00%	0
25 to 50%	0,00%	0	5,88%	6	3,26%	3	0,00%	0
50 to 75%	12,50%	2	1,96%	2	3,26%	3	0,00%	0
More than 75%	12,50%	2	1,96%	2	3,26%	3	0,00%	0
Termination of all contracts	0,00%	0	2,94%	3	4,35%	4	8,33%	1
Answered		16	Answered	102	Answered	92	Answered	12
Skipped		5	Skipped	12	Skipped	12	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No termination	73,17%	30	50,00%	9	50,00%	8	77,42%	24
Less than 10%	9,76%	4	16,67%	3	25,00%	4	9,68%	3
10 to 25%	12,20%	5	5,56%	1	12,50%	2	6,45%	2
25 to 50%	2,44%	1	0,00%	0	0,00%	0	3,23%	1
50 to 75%	2,44%	1	11,11%	2	12,50%	2	3,23%	1
More than 75%	0,00%	0	5,56%	1	0,00%	0	0,00%	0
Termination of all contracts	0,00%	0	11,11%	2	0,00%	0	0,00%	0
Answered		41	Answered	18	Answered	16	Answered	31
Skipped		5	Skipped	2	Skipped	3	Skipped	4

6- What has the situation of your workplace been since February 2021?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No change – Office remained open and staff at work	6,25%	1	2,94%	3	6,52%	6	0,00%	0
Workplace mostly open with most staff working on site	6,25%	1	4,90%	5	5,43%	5	0,00%	0
Workplace mostly open with most staff working from home	18,75%	3	13,73%	14	11,96%	11	8,33%	1
Workplace mostly open but all staff working from home	0,00%	0	6,86%	7	4,35%	4	16,67%	2
Workplace mostly closed with most staff working from home	18,75%	3	11,76%	12	18,48%	17	25,00%	3
Workplace mostly closed with all staff working from home	18,75%	3	11,76%	12	10,87%	10	8,33%	1
Workplace completely closed with most staff working from home	6,25%	1	7,84%	8	9,78%	9	0,00%	0
Workplace completely closed with all staff working from home	6,25%	1	32,35%	33	19,57%	18	25,00%	3
Workplace completely closed with no staff working	18,75%	3	7,84%	8	13,04%	12	16,67%	2
Answered		16	Answered	102	Answered	92	Answered	12
Skipped		5	Skipped	12	Skipped	12	Skipped	1

	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No change – Office remained open and staff at work	7,32%	3	11,11%	2	6,25%	1	3,23%	1
Workplace mostly open with most staff working on site	9,76%	4	22,22%	4	0,00%	0	12,90%	4
Workplace mostly open with most staff working from home	17,07%	7	16,67%	3	6,25%	1	12,90%	4
Workplace mostly open but all staff working from home	2,44%	1	0,00%	0	25,00%	4	9,68%	3
Workplace mostly closed with most staff working from home	19,51%	8	5,56%	1	6,25%	1	19,35%	6
Workplace mostly closed with all staff working from home	17,07%	7	11,11%	2	18,75%	3	12,90%	4
Workplace completely closed with most staff working from home	14,63%	6	0,00%	0	12,50%	2	6,45%	2
Workplace completely closed with all staff working from home	7,32%	3	5,56%	1	25,00%	4	19,35%	6
Workplace completely closed with no staff working	4,88%	2	27,78%	5	0,00%	0	3,23%	1
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

7- If there was an impact, what were the main causes? (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
No impact	6,25%	1	0,99%	1	2,20%	2	0,00%	0
Disruption of internet and communications	62,50%	10	82,18%	83	60,44%	55	66,67%	8
Stop of all advertising, PR, promotions, communication	43,75%	7	37,62%	38	8,79%	8	50,00%	6
Large number of employees on leave or not working	6,25%	1	22,77%	23	24,18%	22	16,67%	2
Staff cannot travel/work on site or in the field	62,50%	10	65,35%	66	70,33%	64	75,00%	9
Admin. processes on hold	37,50%	6	33,66%	34	34,07%	31	16,67%	2
New rules, laws and regulations disrupting your activities	12,50%	2	33,66%	34	23,08%	21	33,33%	4
Workplace had to be closed/shutdown	25,00%	4	37,62%	38	36,26%	33	25,00%	3
Banks, transfers and payments not working	62,50%	10	81,19%	82	78,02%	71	91,67%	11
Cashflow has stopped	31,25%	5	46,53%	47	37,36%	34	41,67%	5
Impossible to plan for the future	68,75%	11	61,39%	62	62,64%	57	75,00%	9
Destruction of property	6,25%	1	3,96%	4	4,40%	4	0,00%	0
Lack of safety for employees	56,25%	9	70,30%	71	69,23%	63	66,67%	8
	Answered	16	Answered	101	Answered	91	Answered	12
	Skipped	5	Skipped	13	Skipped	13	Skipped	1

	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
No impact	2,44%	1	0,00%	0	6,25%	1	0,00%	0
Disruption of internet and communications	68,29%	28	66,67%	12	62,50%	10	67,74%	21
Stop of all advertising, PR, promotions, communication	36,59%	15	27,78%	5	62,50%	10	9,68%	3
Large number of employees on leave or not working	12,20%	5	22,22%	4	12,50%	2	22,58%	7
Staff cannot travel/work on site or in the field	68,29%	28	50,00%	9	56,25%	9	54,84%	17
Administrative processes on hold	26,83%	11	22,22%	4	12,50%	2	25,81%	8
New rules, laws and regulations disrupting your activities	19,51%	8	16,67%	3	31,25%	5	22,58%	7
Workplace had to be closed/shutdown	43,90%	18	11,11%	2	37,50%	6	29,03%	9
Banks, transfers and payments not working	70,73%	29	83,33%	15	43,75%	7	80,65%	25
Cashflow has stopped	41,46%	17	44,44%	8	25,00%	4	45,16%	14
Impossible to plan for the future	43,90%	18	77,78%	14	25,00%	4	45,16%	14
Destruction of property	0,00%	0	11,11%	2	6,25%	1	3,23%	1
Lack of safety for employees	58,54%	24	61,11%	11	56,25%	9	64,52%	20
	Answered	41	Answered	18	Answered	16	Answered	31
	Skipped	5	Skipped	2	Skipped	3	Skipped	4

PART 2 – ANSWERS BY SIZE OF COMPANIES

1-How has your activity been impacted by the political crisis since February 2021?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increase of activities	3,09%	3	1,90%	2	2,67%	2	0,00%	0	0,00%	0	0,00%	0
No impact	5,15%	5	6,67%	7	1,33%	1	5,00%	1	12,50%	1	4,35%	1
Reduction of less than 25%	9,28%	9	7,62%	8	16,00%	12	35,00%	7	25,00%	2	4,35%	1
Reduction 25 to 50%	15,46%	15	13,33%	14	12,00%	9	30,00%	6	12,50%	1	13,04%	3
Reduction 50 to 75%	15,46%	15	21,90%	23	25,33%	19	20,00%	4	12,50%	1	34,78%	8
Reduction more than 75%	28,87%	28	40,00%	42	34,67%	26	10,00%	2	37,50%	3	26,09%	6
Termination of all activities	22,68%	22	8,57%	9	8,00%	6	0,00%	0	0,00%	0	17,39%	4
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

2- How has your income been impacted by the political crisis since February 2021?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Growth of turnover	2,06%	2	0,00%	0	0,00%	0	0,00%	0	12,50%	1	0,00%	0
No impact	20,62%	20	14,29%	15	4,00%	3	5,00%	1	0,00%	0	13,04%	3
Reduction of less than 25%	10,31%	10	10,48%	11	10,67%	8	40,00%	8	25,00%	2	8,70%	2
Reduction 25 to 50%	10,31%	10	12,38%	13	20,00%	15	25,00%	5	25,00%	2	30,43%	7
Reduction 50 to 75%	16,49%	16	16,19%	17	25,33%	19	10,00%	2	12,50%	1	17,39%	4
Reduction more than 75%	13,40%	13	29,52%	31	26,67%	20	20,00%	4	25,00%	2	8,70%	2
No income at all	26,80%	26	17,14%	18	13,33%	10	0,00%	0	0,00%	0	21,74%	5
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

3- How have your human resources been impacted by the political crisis since February 2021? (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increased number of employees	0,00%	0	0,00%	0	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Increased salaries	2,06%	2	0,95%	1	0,00%	0	10,00%	2	12,50%	1	0,00%	0
No impact	37,11%	36	25,71%	27	20,00%	15	35,00%	7	25,00%	2	8,70%	2
Froze all recruitments	28,87%	28	40,00%	42	50,67%	38	50,00%	10	50,00%	4	73,91%	17
Froze all salaries	15,46%	15	16,19%	17	18,67%	14	15,00%	3	12,50%	1	21,74%	5
Cancelled bonuses	12,37%	12	25,71%	27	32,00%	24	10,00%	2	50,00%	4	26,09%	6
Decreased salaries	13,40%	13	28,57%	30	36,00%	27	10,00%	2	37,50%	3	8,70%	2
Use of all paid leaves	5,15%	5	25,71%	27	20,00%	15	25,00%	5	37,50%	3	39,13%	9
Unpaid leaves	5,15%	5	22,86%	24	21,33%	16	15,00%	3	25,00%	2	21,74%	5
Implemented part-time work	7,22%	7	12,38%	13	18,67%	14	10,00%	2	37,50%	3	17,39%	4
Reduced training to essentials	2,06%	2	9,52%	10	21,33%	16	35,00%	7	37,50%	3	17,39%	4
Termination of contracts	14,43%	14	17,14%	18	18,67%	14	10,00%	2	12,50%	1	21,74%	5
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

4- In average, by how much have you changed salaries since February 2021?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No reduction	69,07%	67	58,10%	61	50,67%	38	80,00%	16	25,00%	2	78,26%	18
Less than 10%	3,09%	3	2,86%	3	4,00%	3	5,00%	1	25,00%	2	4,35%	1
10 to 25%	9,28%	9	15,24%	16	12,00%	9	5,00%	1	12,50%	1	13,04%	3
25 to 50%	8,25%	8	15,24%	16	14,67%	11	10,00%	2	25,00%	2	0,00%	0
50 to 75%	3,09%	3	2,86%	3	14,67%	11	0,00%	0	12,50%	1	4,35%	1
More than 75%	7,22%	7	5,71%	6	4,00%	3	0,00%	0	0,00%	0	0,00%	0
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

5- Around how many employment contracts have you terminated since February 2021?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No termination	70,10%	68	74,29%	78	64,00%	48	75,00%	15	37,50%	3	69,57%	16
Less than 10%	11,34%	11	7,62%	8	16,00%	12	15,00%	3	37,50%	3	8,70%	2
10 to 25%	3,09%	3	3,81%	4	9,33%	7	10,00%	2	12,50%	1	8,70%	2
25 to 50%	3,09%	3	4,76%	5	1,33%	1	0,00%	0	12,50%	1	4,35%	1
50 to 75%	3,09%	3	5,71%	6	5,33%	4	0,00%	0	0,00%	0	0,00%	0
More than 75%	3,09%	3	2,86%	3	1,33%	1	0,00%	0	0,00%	0	4,35%	1
Termination of all contracts	6,19%	6	0,95%	1	2,67%	2	0,00%	0	0,00%	0	4,35%	1
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

6- What has the situation of your workplace been since February 2021?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No change – Office remained open and staff continued to work	6,19%	6	6,67%	7	1,33%	1	5,00%	1	12,50%	1	4,35%	1
Workplace mostly open with most staff working on site	6,19%	6	4,76%	5	8,00%	6	10,00%	2	25,00%	2	8,70%	2
Workplace mostly open with most staff working from home	10,31%	10	11,43%	12	16,00%	12	25,00%	5	0,00%	0	21,74%	5
Workplace mostly open but all staff working from home	10,31%	10	7,62%	8	4,00%	3	0,00%	0	0,00%	0	0,00%	0
Workplace mostly closed with most staff working from home	5,15%	5	20,00%	21	18,67%	14	20,00%	4	37,50%	3	17,39%	4
Workplace mostly closed with all staff working from home	15,46%	15	9,52%	10	12,00%	9	20,00%	4	25,00%	2	8,70%	2
Workplace completely closed with most staff working from home	6,19%	6	8,57%	9	12,00%	9	15,00%	3	0,00%	0	4,35%	1
Workplace completely closed with all staff working from home	28,87%	28	21,90%	23	14,67%	11	5,00%	1	0,00%	0	26,09%	6
Workplace completely closed with no staff working	11,34%	11	9,52%	10	13,33%	10	0,00%	0	0,00%	0	8,70%	2
	Answered	97	Answered	105	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	13	Skipped	14	Skipped	6	Skipped	1	Skipped	3	Skipped	7

7- If there was an impact, what were the main causes? (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No impact	3,13%	3	1,92%	2	0,00%	0	0,00%	0	12,50%	1	0,00%	0
Disruption of internet and communications	62,50%	60	74,04%	77	72,00%	54	75,00%	15	62,50%	5	69,57%	16
Stop of all advertising, PR, promotions, communication	26,04%	25	22,12%	23	30,67%	23	45,00%	9	37,50%	3	39,13%	9
Large number of employees on leave or not working	9,38%	9	24,04%	25	25,33%	19	15,00%	3	12,50%	1	39,13%	9
Staff cannot travel/work on site or in the field	59,38%	57	67,31%	70	69,33%	52	75,00%	15	50,00%	4	60,87%	14
Administrative processes on hold	34,38%	33	28,85%	30	28,00%	21	15,00%	3	25,00%	2	39,13%	9
New rules, laws and regulations disrupting your activities	16,67%	16	28,85%	30	26,67%	20	25,00%	5	50,00%	4	39,13%	9
Workplace had to be closed/shutdown	34,38%	33	27,88%	29	44,00%	33	35,00%	7	25,00%	2	39,13%	9
Banks, transfers and payments not working	71,88%	69	81,73%	85	78,67%	59	85,00%	17	50,00%	4	69,57%	16
Cashflow has stopped	39,58%	38	43,27%	45	44,00%	33	40,00%	8	25,00%	2	34,78%	8
Impossible to plan for the future	59,38%	57	57,69%	60	58,67%	44	50,00%	10	37,50%	3	65,22%	15
Destruction of property	5,21%	5	2,88%	3	5,33%	4	5,00%	1	0,00%	0	0,00%	0
Lack of safety for employees	60,42%	58	68,27%	71	70,67%	53	60,00%	12	50,00%	4	73,91%	17
	Answered	96	Answered	104	Answered	75	Answered	20	Answered	8	Answered	23
	Skipped	14	Skipped	15	Skipped	6	Skipped	1	Skipped	3	Skipped	7

PART 2 – ANSWERS BY YEARS OF OPERATING IN MYANMAR

1-How has your activity been impacted by the political crisis since February 2021?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increase of activities	12,50%	1	0,00%	0	1,47%	1	2,68%	4	1,67%	1
No impact	0,00%	0	6,98%	3	5,88%	4	4,03%	6	5,00%	3
Reduction of less than 25%	0,00%	0	18,60%	8	10,29%	7	8,05%	12	20,00%	12
Reduction 25 to 50%	25,00%	2	2,33%	1	11,76%	8	19,46%	29	13,33%	8
Reduction 50 to 75%	25,00%	2	13,95%	6	19,12%	13	23,49%	35	23,33%	14
Reduction more than 75%	12,50%	1	34,88%	15	35,29%	24	32,21%	48	31,67%	19
Termination of all activities	25,00%	2	23,26%	10	16,18%	11	10,07%	15	5,00%	3
	Answered	8	Answered	43	Answered	68	Answered	149	Answered	60
	Skipped	2	Skipped	10	Skipped	5	Skipped	19	Skipped	8

2- How has your income been impacted by the political crisis since February 2021?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Growth of turnover	0,00%	0	0,00%	0	0,00%	0	2,01%	3	0,00%	0
No impact	12,50%	1	13,95%	6	11,76%	8	10,74%	16	18,33%	11
Reduction of less than 25%	0,00%	0	13,95%	6	7,35%	5	14,09%	21	15,00%	9
Reduction 25 to 50%	37,50%	3	2,33%	1	13,24%	9	16,11%	24	25,00%	15
Reduction 50 to 75%	12,50%	1	13,95%	6	16,18%	11	22,82%	34	11,67%	7
Reduction more than 75%	0,00%	0	18,60%	8	26,47%	18	23,49%	35	18,33%	11
No income at all	37,50%	3	37,21%	16	25,00%	17	10,74%	16	11,67%	7
	Answered	8	Answered	43	Answered	68	Answered	149	Answered	60
	Skipped	2	Skipped	10	Skipped	5	Skipped	19	Skipped	8

3- How have your human resources been impacted by the political crisis since February 2021? (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increased number of employees	0,00%	0	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Increased salaries	0,00%	0	0,00%	0	2,94%	2	2,68%	4	0,00%	0
No impact	37,50%	3	32,56%	14	22,06%	15	26,85%	40	28,33%	17
Froze all recruitments	12,50%	1	37,21%	16	42,65%	29	39,60%	59	56,67%	34
Froze all salaries	37,50%	3	13,95%	6	14,71%	10	16,11%	24	20,00%	12
Cancelled bonuses	12,50%	1	11,63%	5	25,00%	17	26,85%	40	20,00%	12
Decreased salaries	0,00%	0	25,58%	11	26,47%	18	24,83%	37	18,33%	11
Use of all paid leaves	0,00%	0	20,93%	9	27,94%	19	16,78%	25	18,33%	11
Unpaid leaves	0,00%	0	18,60%	8	23,53%	16	14,09%	21	16,67%	10
Implemented part-time work	0,00%	0	11,63%	5	20,59%	14	8,05%	12	20,00%	12
Reduced training to essentials	0,00%	0	6,98%	3	17,65%	12	12,75%	19	13,33%	8
Termination contracts	0,00%	0	18,60%	8	22,06%	15	18,79%	28	5,00%	3
	Answered	8	Answered	43	Answered	68	Answered	149	Answered	60
	Skipped	2	Skipped	10	Skipped	5	Skipped	19	Skipped	8

4- In average, by how much have you changed salaries since February 2021?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No reduction	75,00%	6	46,51%	20	58,82%	40	64,43%	96	66,67%	40
Less than 10%	0,00%	0	4,65%	2	4,41%	3	2,68%	4	6,67%	4
10 to 25%	12,50%	1	13,95%	6	13,24%	9	11,41%	17	10,00%	6
25 to 50%	0,00%	0	13,95%	6	14,71%	10	12,75%	19	6,67%	4
50 to 75%	12,50%	1	4,65%	2	4,41%	3	7,38%	11	3,33%	2
More than 75%	0,00%	0	16,28%	7	4,41%	3	1,34%	2	6,67%	4
Answered	8		Answered	43	Answered	68	Answered	149	Answered	60
Skipped	2		Skipped	10	Skipped	5	Skipped	19	Skipped	8

5- Around how many employment contracts have you terminated since February 2021?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No termination	75,00%	6	55,81%	24	69,12%	47	68,46%	102	81,67%	49
Less than 10%	0,00%	0	13,95%	6	10,29%	7	12,75%	19	11,67%	7
10 to 25%	12,50%	1	2,33%	1	10,29%	7	4,70%	7	5,00%	3
25 to 50%	0,00%	0	6,98%	3	1,47%	1	4,70%	7	0,00%	0
50 to 75%	12,50%	1	4,65%	2	1,47%	1	5,37%	8	1,67%	1
More than 75%	0,00%	0	9,30%	4	1,47%	1	2,01%	3	0,00%	0
Termination of all contracts	0,00%	0	6,98%	3	5,88%	4	2,01%	3	0,00%	0
Answered	8		Answered	43	Answered	68	Answered	149	Answered	60
Skipped	2		Skipped	10	Skipped	5	Skipped	19	Skipped	8

6- What has the situation of your workplace been since February 2021?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No change – Office remained open and staff continued to work	12,50%	1	6,98%	3	7,35%	5	3,36%	5	5,00%	3
Workplace mostly open with most staff working on site	12,50%	1	6,98%	3	5,88%	4	9,40%	14	1,67%	1
Workplace mostly open with most staff working from home	12,50%	1	11,63%	5	11,76%	8	13,42%	20	16,67%	10
Workplace mostly open but all staff working from home	0,00%	0	4,65%	2	5,88%	4	8,05%	12	5,00%	3
Workplace mostly closed with most staff working from home	12,50%	1	6,98%	3	16,18%	11	13,42%	20	26,67%	16
Workplace mostly closed with all staff working from home	12,50%	1	9,30%	4	2,94%	2	18,12%	27	13,33%	8
Workplace completely closed with most staff working from home	0,00%	0	9,30%	4	10,29%	7	8,05%	12	8,33%	5
Workplace completely closed with all staff working from home	37,50%	3	23,26%	10	22,06%	15	20,81%	31	16,67%	10
Workplace completely closed with no staff working	0,00%	0	20,93%	9	17,65%	12	5,37%	8	6,67%	4
Answered	8		Answered	43	Answered	68	Answered	149	Answered	60
Skipped	2		Skipped	10	Skipped	5	Skipped	19	Skipped	8

7- If there was an impact, what were the main causes? (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No impact	0,00%	0	2,33%	1	4,41%	3	0,68%	1	1,67%	1
Disruption of internet and communications	75,00%	6	67,44%	29	60,29%	41	76,19%	112	65,00%	39
Stop of all advertising, PR, promotions, communication	25,00%	2	37,21%	16	27,94%	19	27,21%	40	25,00%	15
Large number of employees on leave or not working	0,00%	0	11,63%	5	25,00%	17	20,41%	30	23,33%	14
Staff cannot travel/work on site or in the field	25,00%	2	67,44%	29	67,65%	46	65,99%	97	63,33%	38
Administrative processes on hold	25,00%	2	27,91%	12	32,35%	22	31,29%	46	26,67%	16
New rules, laws and regulations disrupting your activities	0,00%	0	25,58%	11	27,94%	19	23,81%	35	31,67%	19
Workplace had to be closed/shutdown	25,00%	2	27,91%	12	42,65%	29	34,01%	50	33,33%	20
Banks, transfers and payments not working	37,50%	3	72,09%	31	73,53%	50	78,23%	115	85,00%	51
Cashflow has stopped	25,00%	2	48,84%	21	45,59%	31	42,18%	62	30,00%	18
Impossible to plan for the future	37,50%	3	67,44%	29	60,29%	41	56,46%	83	55,00%	33
Destruction of property	0,00%	0	4,65%	2	4,41%	3	4,08%	6	3,33%	2
Lack of safety for employees	12,50%	1	67,44%	29	60,29%	41	70,07%	103	68,33%	41
	Answered	8	Answered	43	Answered	68	Answered	147	Answered	60
	Skipped	2	Skipped	10	Skipped	5	Skipped	21	Skipped	8

PART 3 – ANSWERS BY NATIONALITY

1-By the end of 2021, you have planned your income in Myanmar to:

	All		Myanmar		Japanese		Western		Asean	
Increase	7,62%	23	14,29%	6	4,76%	7	9,09%	9	14,29%	2
Remain the same	13,25%	40	7,14%	3	18,37%	27	11,11%	11	14,29%	2
Reduce by less than 25%	8,94%	27	7,14%	3	7,48%	11	11,11%	11	7,14%	1
Reduce by 25 to 50%	15,89%	48	14,29%	6	17,01%	25	18,18%	18	7,14%	1
Reduce by 50 to 75%	18,21%	55	16,67%	7	16,33%	24	18,18%	18	28,57%	4
Reduce by more than 75%	14,24%	43	19,05%	8	13,61%	20	14,14%	14	21,43%	3
No income at all	7,62%	23	7,14%	3	6,12%	9	8,08%	8	7,14%	1
Don't know	14,24%	43	14,29%	6	16,33%	24	10,10%	10	0,00%	0
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

2-Before February 2021, your company had planned to:

	All		Myanmar		Japanese		Western		Asean	
Increase its investment in Myanmar	52,65%	159	59,52%	25	48,30%	71	55,56%	55	57,14%	8
Maintain operations in Myanmar but without further investment	37,42%	113	38,10%	16	36,73%	54	40,40%	40	42,86%	6
Progressively reduce operations in Myanmar	2,65%	8	2,38%	1	4,08%	6	0,00%	0	0,00%	0
Relocate the office outside of Myanmar but maintain operations in the country	1,32%	4	0,00%	0	0,68%	1	2,02%	2	0,00%	0
Completely terminate all operations in Myanmar	1,32%	4	0,00%	0	2,04%	3	0,00%	0	0,00%	0
Don't know	4,64%	14	0,00%	0	8,16%	12	2,02%	2	0,00%	0
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

3- Since February, your company's plans have:

	All		Myanmar		Japanese		Western		Asean	
Remained the same	17,22%	52	14,29%	6	21,77%	32	14,14%	14	7,14%	1
Changed slightly	26,82%	81	26,19%	11	26,53%	39	30,30%	30	35,71%	5
Changed entirely	32,45%	98	16,67%	7	36,05%	53	33,33%	33	42,86%	6
Temporary halted	23,51%	71	42,86%	18	15,65%	23	22,22%	22	14,29%	2
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

4- Based on that, by the end of 2021, your company is planning to:

	All		Myanmar		Japanese		Western		Asean	
Increase its investment	5,30%	16	7,14%	3	4,76%	7	5,05%	5	7,14%	1
Maintain operations without further investment	33,11%	100	38,10%	16	34,01%	50	32,32%	32	35,71%	5
Progressively reduce operations in Myanmar	15,23%	46	7,14%	3	18,37%	27	16,16%	16	21,43%	3
Relocate the office outside of Myanmar but maintain operations in the country	4,64%	14	2,38%	1	3,40%	5	7,07%	7	7,14%	1
Completely terminate all operations in Myanmar	2,65%	8	4,76%	2	1,36%	2	3,03%	3	0,00%	0
Don't know – It depends on the evolution of situation	39,07%	118	40,48%	17	38,10%	56	36,36%	36	28,57%	4
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

5- If your company plans to increase operations in Myanmar, please explain why: (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
You foresee a growth in your market	44,90%	44	47,06%	8	47,06%	24	46,15%	12	40,00%	2
You have signed new contracts	11,22%	11	29,41%	5	3,92%	2	11,54%	3	0,00%	0
You will get funding from development agencies	7,14%	7	17,65%	3	5,88%	3	3,85%	1	20,00%	1
Part of a regional/global development strategy of the company	24,49%	24	23,53%	4	21,57%	11	26,92%	7	20,00%	1
Others	41,84%	41	41,18%	7	43,14%	22	46,15%	12	60,00%	3
	Answered	98	Answered	17	Answered	51	Answered	26	Answered	5
	Skipped	274	Skipped	37	Skipped	131	Skipped	89	Skipped	12

6- If your company plans to reduce operations in Myanmar, please explain why: (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
You foresee a slowdown in your market	54,03%	114	60,00%	18	43,27%	45	69,23%	45	76,92%	10
Projects coming to an end	9,00%	19	3,33%	1	8,65%	9	12,31%	8	15,38%	2
You lost contracts/funding	22,27%	47	30,00%	9	16,35%	17	27,69%	18	23,08%	3
You had to cancel contracts reputational reasons	11,85%	25	13,33%	4	13,46%	14	10,77%	7	23,08%	3
You want to reduce the reputational risk	17,54%	37	13,33%	4	21,15%	22	13,85%	9	0,00%	0
In general, the risks outweigh the benefits	21,33%	45	20,00%	6	18,27%	19	24,62%	16	23,08%	3
Impact of the Covid-19	17,06%	36	13,33%	4	13,46%	14	23,08%	15	23,08%	3
Impact of the recent events	54,03%	114	60,00%	18	44,23%	46	67,69%	44	69,23%	9
Regional strategy	7,58%	16	10,00%	3	3,85%	4	9,23%	6	7,69%	1
Global strategy	0,00%	0	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Others	8,06%	17	20,00%	6	4,81%	5	7,69%	5	0,00%	0
Don't know	11,85%	25	10,00%	3	14,42%	15	10,77%	7	7,69%	1
	Answered	211	Answered	30	Answered	104	Answered	65	Answered	13
	Skipped	161	Skipped	24	Skipped	78	Skipped	50	Skipped	4

7- If your company plans to terminate all operations in Myanmar, please explain why: (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
You foresee a slowdown in your market	25,24%	26	43,75%	7	20,00%	11	21,74%	5	0,00%	0
Projects coming to an end	4,85%	5	6,25%	1	5,45%	3	4,35%	1	25,00%	1
You lost contracts/funding	8,74%	9	0,00%	0	7,27%	4	17,39%	4	25,00%	1
You had to cancel contracts reputational reasons	11,65%	12	18,75%	3	7,27%	4	17,39%	4	25,00%	1
You want to reduce the reputational risk	12,62%	13	6,25%	1	14,55%	8	13,04%	3	25,00%	1
In general, the risks outweigh the benefits	21,36%	22	31,25%	5	12,73%	7	34,78%	8	50,00%	2
Impact of the Covid-19	6,80%	7	12,50%	2	3,64%	2	13,04%	3	25,00%	1
Impact of the recent events	23,30%	24	18,75%	3	20,00%	11	30,43%	7	0,00%	0
Regional strategy	18,45%	19	43,75%	7	9,09%	5	26,09%	6	50,00%	2
Global strategy	2,91%	3	6,25%	1	1,82%	1	4,35%	1	25,00%	1
Others	9,71%	10	12,50%	2	9,09%	5	13,04%	3	0,00%	0
Don't know	32,04%	33	37,50%	6	36,36%	20	26,09%	6	50,00%	2
	Answered	103	Answered	16	Answered	55	Answered	23	Answered	4
	Skipped	269	Skipped	38	Skipped	127	Skipped	92	Skipped	13

8- How much will your human resources be impacted by the situation in the coming 6 months? (several answers possible)

	All		Myanmar		Japanese		Western		Asean	
Recruitment of new employees	9,76%	29	4,88%	2	10,96%	16	10,42%	10	7,14%	1
Increased salaries	5,39%	16	2,44%	1	5,48%	8	7,29%	7	7,14%	1
No impact	20,88%	62	14,63%	6	26,71%	39	15,63%	15	21,43%	3
Freezing of all recruitments	47,81%	142	60,98%	25	43,15%	63	50,00%	48	42,86%	6
Freezing of all salaries	19,87%	59	24,39%	10	12,33%	18	29,17%	28	21,43%	3
Cancellation of bonuses	31,31%	93	53,66%	22	24,66%	36	33,33%	32	42,86%	6
Decreasing of all salaries	26,60%	79	51,22%	21	24,66%	36	23,96%	23	28,57%	4
Use of all paid leaves	17,17%	51	31,71%	13	10,96%	16	21,88%	21	35,71%	5
Unpaid leaves	15,49%	46	29,27%	12	11,64%	17	16,67%	16	35,71%	5
Implementation of part-time	15,82%	47	31,71%	13	6,85%	10	20,83%	20	14,29%	2
Reduction of training	15,82%	47	24,39%	10	13,01%	19	15,63%	15	14,29%	2
Termination of employment contracts	24,58%	73	34,15%	14	19,86%	29	28,13%	27	35,71%	5
	Answered	297	Answered	41	Answered	146	Answered	96	Answered	14
	Skipped	75	Skipped	13	Skipped	36	Skipped	19	Skipped	3

9- In average, by how much do you plan to reduce salaries in the coming 6 months?

	All		Myanmar		Japanese		Western		Asean	
No reduction	53,97%	163	28,57%	12	53,74%	79	63,64%	63	64,29%	9
Less than 10%	5,63%	17	11,90%	5	3,40%	5	5,05%	5	0,00%	0
10 to 25%	13,25%	40	16,67%	7	17,01%	25	9,09%	9	7,14%	1
25 to 50%	15,23%	46	19,05%	8	15,65%	23	14,14%	14	21,43%	3
50 to 75%	6,29%	19	19,05%	8	4,76%	7	4,04%	4	0,00%	0
More than 75%	5,63%	17	4,76%	2	5,44%	8	4,04%	4	7,14%	1
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

10- Around how many employment contracts will you have to terminate in the coming 6 months?

	All		Myanmar		Japanese		Western		Asean	
No termination	55,96%	169	26,19%	11	65,31%	96	56,57%	56	50,00%	7
Less than 10%	11,59%	35	26,19%	11	8,16%	12	12,12%	12	7,14%	1
10 to 25%	11,92%	36	21,43%	9	11,56%	17	9,09%	9	7,14%	1
25 to 50%	8,28%	25	11,90%	5	6,12%	9	8,08%	8	14,29%	2
50 to 75%	5,30%	16	14,29%	6	2,72%	4	6,06%	6	7,14%	1
More than 75%	3,64%	11	0,00%	0	4,08%	6	4,04%	4	14,29%	2
Termination of all contracts	3,31%	10	0,00%	0	2,04%	3	4,04%	4	0,00%	0
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

11- At what stage is the decision-making process regarding the evolution of your operations in Myanmar?

	All		Myanmar		Japanese		Western		Asean	
Don't know	16,89%	51	4,76%	2	27,89%	41	8,08%	8	7,14%	1
Will be discussed soon depending on the situation	21,19%	64	23,81%	10	25,85%	38	14,14%	14	14,29%	2
Already under discussion but will depend on the situation	41,06%	124	40,48%	17	35,37%	52	51,52%	51	78,57%	11
Already under discussion no matter the situation	2,98%	9	7,14%	3	0,68%	1	2,02%	2	0,00%	0
Already decided but may change with the situation	12,25%	37	19,05%	8	4,76%	7	19,19%	19	0,00%	0
Already decided no matter the evolution of the situation	2,98%	9	0,00%	0	2,72%	4	4,04%	4	0,00%	0
Already under implementation	2,65%	8	4,76%	2	2,72%	4	1,01%	1	0,00%	0
	Answered	302	Answered	42	Answered	147	Answered	99	Answered	14
	Skipped	70	Skipped	12	Skipped	35	Skipped	16	Skipped	3

12- If your company plans to reduce or terminate all operations in Myanmar, please indicate the timeframe:

	All		Myanmar		Japanese		Western		Asean	
Already terminated	7,93%	13	0,00%	0	7,29%	7	7,89%	3	0,00%	0
Within 3 months	13,41%	22	33,33%	7	9,38%	9	13,16%	5	14,29%	1
Within 6 months	26,22%	43	33,33%	7	22,92%	22	39,47%	15	42,86%	3
Within 9 months	15,24%	25	14,29%	3	11,46%	11	18,42%	7	14,29%	1
In 2022	21,34%	35	14,29%	3	26,04%	25	15,79%	6	0,00%	0
After 2022	15,85%	26	4,76%	1	22,92%	22	5,26%	2	28,57%	2
	Answered	164	Answered	21	Answered	96	Answered	38	Answered	7
	Skipped	208	Skipped	33	Skipped	86	Skipped	77	Skipped	10

PART 3 – ANSWERS BY SECTOR

1-By the end of 2021, you have planned your income in Myanmar to:

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase	6,25%	1	8,42%	8	5,95%	5	16,67%	2
Remain the same	18,75%	3	9,47%	9	10,71%	9	25,00%	3
Reduce by less than 25%	12,50%	2	13,68%	13	3,57%	3	0,00%	0
Reduce by 25 to 50%	12,50%	2	18,95%	18	7,14%	6	8,33%	1
Reduce by 50 to 75%	31,25%	5	15,79%	15	17,86%	15	8,33%	1
Reduce by more than 75%	6,25%	1	17,89%	17	20,24%	17	8,33%	1
No income at all	6,25%	1	4,21%	4	15,48%	13	16,67%	2
Don't know	6,25%	1	11,58%	11	19,05%	16	16,67%	2
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increase	8,57%	3	5,88%	1	7,14%	1	6,90%	2
Remain the same	25,71%	9	11,76%	2	7,14%	1	13,79%	4
Reduce by less than 25%	20,00%	7	5,88%	1	0,00%	0	3,45%	1
Reduce by 25 to 50%	8,57%	3	11,76%	2	42,86%	6	34,48%	10
Reduce by 50 to 75%	22,86%	8	11,76%	2	28,57%	4	17,24%	5
Reduce by more than 75%	2,86%	1	11,76%	2	14,29%	2	6,90%	2
No income at all	0,00%	0	17,65%	3	0,00%	0	0,00%	0
Don't know	11,43%	4	23,53%	4	0,00%	0	17,24%	5
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

2-Before February 2021, your company had planned to:

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase its investment in Myanmar	43,75%	7	50,53%	48	55,95%	47	75,00%	9
Maintain operations in Myanmar but without further investment	50,00%	8	41,05%	39	32,14%	27	25,00%	3
Progressively reduce operation	6,25%	1	0,00%	0	3,57%	3	0,00%	0
Relocate the office outside of Myanmar but maintain small operations	0,00%	0	1,05%	1	2,38%	2	0,00%	0
Completely terminate all operations	0,00%	0	2,11%	2	1,19%	1	0,00%	0
Don't know	0,00%	0	5,26%	5	4,76%	4	0,00%	0
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increase its investment in Myanmar	65,71%	23	29,41%	5	57,14%	8	41,38%	12
Maintain operations in Myanmar but without further investment	22,86%	8	64,71%	11	28,57%	4	44,83%	13
Progressively reduce operation	5,71%	2	0,00%	0	7,14%	1	3,45%	1
Relocate the office outside of Myanmar but maintain small operations	0,00%	0	0,00%	0	0,00%	0	3,45%	1
Completely terminate all operations	2,86%	1	0,00%	0	0,00%	0	0,00%	0
Don't know	2,86%	1	5,88%	1	7,14%	1	6,90%	2
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

3- Since February, your company's plans have:

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Remained the same	18,75%	3	21,05%	20	14,29%	12	0,00%	0
Changed slightly	31,25%	5	22,11%	21	23,81%	20	66,67%	8
Changed entirely	37,50%	6	40,00%	38	30,95%	26	16,67%	2
Temporary halted	12,50%	2	16,84%	16	30,95%	26	16,67%	2
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Remained the same	20,00%	7	5,88%	1	0,00%	0	31,03%	9
Changed slightly	14,29%	5	35,29%	6	64,29%	9	24,14%	7
Changed entirely	40,00%	14	11,76%	2	7,14%	1	31,03%	9
Temporary halted	25,71%	9	47,06%	8	28,57%	4	13,79%	4
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

4- Based on that, by the end of 2021, your company is planning to:

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Increase its investment in Myanmar	6,25%	1	4,21%	4	4,76%	4	0,00%	0
Maintain operations without further investment	37,50%	6	32,63%	31	26,19%	22	50,00%	6
Progressively reduce operations in Myanmar	12,50%	2	16,84%	16	13,10%	11	0,00%	0
Relocate the office outside of Myanmar but maintain small operations in the country	6,25%	1	8,42%	8	3,57%	3	8,33%	1
Completely terminate all operations in Myanmar	0,00%	0	2,11%	2	3,57%	3	0,00%	0
Don't know – It will depend on the situation	37,50%	6	35,79%	34	48,81%	41	41,67%	5
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Increase its investment in Myanmar	17,14%	6	0,00%	0	0,00%	0	3,45%	1
Maintain operations without further investment	31,43%	11	41,18%	7	42,86%	6	37,93%	11
Progressively reduce operations in Myanmar	17,14%	6	23,53%	4	21,43%	3	13,79%	4
Relocate the office outside of Myanmar but maintain small operations in the country	0,00%	0	0,00%	0	0,00%	0	3,45%	1
Completely terminate all operations in Myanmar	5,71%	2	5,88%	1	0,00%	0	0,00%	0
Don't know – It will depend on the situation	28,57%	10	29,41%	5	35,71%	5	41,38%	12
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

5- If your company plans to increase operations in Myanmar, please explain why: (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
You foresee a growth in your market	75,00%	6	41,67%	10	40,91%	9	50,00%	2
You have signed new contracts	0,00%	0	0,00%	0	22,73%	5	0,00%	0
You will get funding from development agencies	25,00%	2	8,33%	2	4,55%	1	0,00%	0
Part of a regional/global strategy of the company	12,50%	1	33,33%	8	22,73%	5	75,00%	3
Others	0,00%	0	45,83%	11	40,91%	9	50,00%	2
	Answered	8	Answered	24	Answered	22	Answered	4
	Skipped	13	Skipped	90	Skipped	82	Skipped	9

	Import - Distribution		Hospitality - Tourism		Media - Communication		Logistics - Transport	
You foresee a growth in your market	47,37%	9	33,33%	2	50,00%	2	36,36%	4
You have signed new contracts	15,79%	3	0,00%	0	50,00%	2	9,09%	1
You will get funding from development agencies	5,26%	1	0,00%	0	0,00%	0	9,09%	1
Part of a regional/global strategy of the company	26,32%	5	16,67%	1	0,00%	0	9,09%	1
Others	47,37%	9	83,33%	5	25,00%	1	36,36%	4
	Answered	19	Answered	6	Answered	4	Answered	11
	Skipped	27	Skipped	14	Skipped	15	Skipped	24

6- If your company plans to reduce operations in Myanmar, please explain why: (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
You foresee a slowdown in your market	36,36%	4	58,82%	40	45,16%	28	88,89%	8
Your projects are coming to an end	0,00%	0	7,35%	5	17,74%	11	11,11%	1
You lost contracts and funding for your operations	18,18%	2	19,12%	13	29,03%	18	33,33%	3
You had to cancel contracts for reputational reasons	18,18%	2	13,24%	9	9,68%	6	22,22%	2
You want to reduce the reputational risk	9,09%	1	13,24%	9	20,97%	13	33,33%	3
In general, the risks outweigh the benefits	0,00%	0	26,47%	18	20,97%	13	44,44%	4
Impact of the Covid-19 on activities	18,18%	2	14,71%	10	16,13%	10	22,22%	2
Impact of the recent events on activities	63,64%	7	57,35%	39	54,84%	34	66,67%	6
Regional/Global strategy	0,00%	0	5,88%	4	9,68%	6	22,22%	2
Others	18,18%	2	10,29%	7	3,23%	2	11,11%	1
Don't know	0,00%	0	14,71%	10	11,29%	7	0,00%	0
	Answered	11	Answered	68	Answered	62	Answered	9
	Skipped	10	Skipped	46	Skipped	42	Skipped	4

	Import - Distribution		Hospitality - Tourism		Media - Communication		Logistics - Transport	
You foresee a slowdown in your market	36,36%	8	83,33%	10	80,00%	8	47,06%	8
Your projects are coming to an end	0,00%	0	0,00%	0	10,00%	1	5,88%	1
You lost contracts and funding for your operations	18,18%	4	0,00%	0	40,00%	4	17,65%	3
You had to cancel contracts for reputational reasons	4,55%	1	8,33%	1	20,00%	2	11,76%	2
You want to reduce the reputational risk	22,73%	5	8,33%	1	30,00%	3	11,76%	2
In general, the risks outweigh the benefits	18,18%	4	25,00%	3	20,00%	2	5,88%	1
Impact of the Covid-19 on activities	27,27%	6	33,33%	4	0,00%	0	11,76%	2
Impact of the recent events on activities	36,36%	8	50,00%	6	50,00%	5	52,94%	9
Regional/Global strategy	4,55%	1	8,33%	1	0,00%	0	11,76%	2
Others	13,64%	3	16,67%	2	0,00%	0	0,00%	0
Don't know	13,64%	3	8,33%	1	0,00%	0	23,53%	4
	Answered	22	Answered	12	Answered	10	Answered	17
	Skipped	24	Skipped	8	Skipped	9	Skipped	18

7- If your company plans to terminate all operations in Myanmar, please explain why: (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
You foresee a slowdown in your market	25,00%	2	25,00%	7	25,81%	8	0,00%	0
Your projects are coming to an end	0,00%	0	0,00%	0	3,23%	1	33,33%	1
You lost contracts and funding for your operations	12,50%	1	7,14%	2	16,13%	5	0,00%	0
You had to cancel contracts for reputational reasons	12,50%	1	7,14%	2	9,68%	3	33,33%	1
You want to reduce the reputational risk	0,00%	0	10,71%	3	12,90%	4	66,67%	2
In general, the risks outweigh the benefits	0,00%	0	25,00%	7	19,35%	6	66,67%	2
Impact of the Covid-19 on activities	0,00%	0	7,14%	2	3,23%	1	33,33%	1
Impact of the recent events on activities	37,50%	3	21,43%	6	25,81%	8	33,33%	1
Activities have already stopped because of situation	12,50%	1	21,43%	6	9,68%	3	33,33%	1
Global strategy	0,00%	0	0,00%	0	0,00%	0	33,33%	1
Others	12,50%	1	10,71%	3	3,23%	1	0,00%	0
Don't know	12,50%	1	32,14%	9	41,94%	13	0,00%	0
	Answered	8	Answered	28	Answered	31	Answered	3
	Skipped	13	Skipped	86	Skipped	73	Skipped	10

	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
You foresee a slowdown in your market	30,77%	4	33,33%	3	50,00%	1	11,11%	1
Your projects are coming to an end	15,38%	2	0,00%	0	0,00%	0	11,11%	1
You lost contracts and funding for your operations	0,00%	0	0,00%	0	0,00%	0	11,11%	1
You had to cancel contracts for reputational reasons	23,08%	3	11,11%	1	0,00%	0	11,11%	1
You want to reduce the reputational risk	23,08%	3	0,00%	0	0,00%	0	11,11%	1
In general, the risks outweigh the benefits	23,08%	3	22,22%	2	100,00%	2	0,00%	0
Impact of the Covid-19 on activities	15,38%	2	11,11%	1	0,00%	0	0,00%	0
Impact of the recent events on activities	15,38%	2	11,11%	1	0,00%	0	33,33%	3
Activities have already stopped because of situation	15,38%	2	33,33%	3	100,00%	2	11,11%	1
Global strategy	15,38%	2	0,00%	0	0,00%	0	0,00%	0
Others	7,69%	1	33,33%	3	0,00%	0	11,11%	1
Don't know	23,08%	3	22,22%	2	0,00%	0	55,56%	5
	Answered	13	Answered	9	Answered	2	Answered	9
	Skipped	33	Skipped	11	Skipped	17	Skipped	26

8- How much will your human resources be impacted by the situation in the coming 6 months? (several answers possible)

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Recruitment of new employees	18,75%	3	6,45%	6	8,33%	7	8,33%	1
Increased salaries	12,50%	2	4,30%	4	9,52%	8	0,00%	0
No impact	25,00%	4	20,43%	19	20,24%	17	16,67%	2
Freezing of all recruitments	43,75%	7	50,54%	47	42,86%	36	58,33%	7
Freezing of all salaries	12,50%	2	21,51%	20	17,86%	15	41,67%	5
Cancellation of bonuses	12,50%	2	41,94%	39	30,95%	26	25,00%	3
Decreasing of all salaries	6,25%	1	36,56%	34	26,19%	22	16,67%	2
Use of all paid leaves	0,00%	0	19,35%	18	19,05%	16	16,67%	2
Unpaid leaves	0,00%	0	19,35%	18	17,86%	15	16,67%	2
Implementation of part-time work	12,50%	2	20,43%	19	16,67%	14	16,67%	2
Reduction of training to essentials	6,25%	1	15,05%	14	11,90%	10	8,33%	1
Termination of employment contracts	18,75%	3	26,88%	25	29,76%	25	33,33%	4
	Answered	16	Answered	93	Answered	84	Answered	12
	Skipped	5	Skipped	21	Skipped	20	Skipped	1
	Import - Distribution - Retail		Hospitality - Tourism		Media - Communication		Logistics - Transport	
Recruitment of new employees	17,14%	6	0,00%	0	21,43%	3	11,11%	3
Increased salaries	0,00%	0	0,00%	0	0,00%	0	7,41%	2
No impact	31,43%	11	12,50%	2	21,43%	3	14,81%	4
Freezing of all recruitments	48,57%	17	50,00%	8	35,71%	5	55,56%	15
Freezing of all salaries	8,57%	3	43,75%	7	14,29%	2	18,52%	5
Cancellation of bonuses	14,29%	5	37,50%	6	35,71%	5	25,93%	7
Decreasing of all salaries	17,14%	6	25,00%	4	35,71%	5	18,52%	5
Use of all paid leaves	17,14%	6	12,50%	2	7,14%	1	22,22%	6
Unpaid leaves	14,29%	5	18,75%	3	14,29%	2	3,70%	1
Implementation of part-time work	11,43%	4	12,50%	2	7,14%	1	11,11%	3
Reduction of training to essentials	25,71%	9	25,00%	4	28,57%	4	14,81%	4
Termination of employment contracts	11,43%	4	37,50%	6	14,29%	2	14,81%	4
	Answered	35	Answered	16	Answered	14	Answered	27
	Skipped	11	Skipped	4	Skipped	5	Skipped	8

9- In average, by how much do you plan to reduce salaries in the coming 6 months?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Energy		Healthcare - Medical	
No reduction	81,25%	13	45,26%	43	54,76%	46	66,67%	8
Less than 10%	0,00%	0	4,21%	4	3,57%	3	8,33%	1
10 to 25%	0,00%	0	16,84%	16	10,71%	9	16,67%	2
25 to 50%	6,25%	1	17,89%	17	20,24%	17	0,00%	0
50 to 75%	6,25%	1	5,26%	5	4,76%	4	8,33%	1
More than 75%	6,25%	1	10,53%	10	5,95%	5	0,00%	0
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail		Hospitality - Tourism		Media - Communication		Logistics - Transport	
No reduction	60,00%	21	35,29%	6	42,86%	6	68,97%	20
Less than 10%	5,71%	2	17,65%	3	14,29%	2	6,90%	2
10 to 25%	17,14%	6	5,88%	1	21,43%	3	10,34%	3
25 to 50%	14,29%	5	5,88%	1	21,43%	3	6,90%	2
50 to 75%	2,86%	1	29,41%	5	0,00%	0	6,90%	2
More than 75%	0,00%	0	5,88%	1	0,00%	0	0,00%	0
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

10- Around how many employment contracts will you have to terminate in the coming 6 months?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Energy		Healthcare - Medical	
No termination	68,75%	11	51,58%	49	52,38%	44	58,33%	7
Less than 10%	0,00%	0	13,68%	13	9,52%	8	8,33%	1
10 to 25%	0,00%	0	16,84%	16	10,71%	9	0,00%	0
25 to 50%	12,50%	2	5,26%	5	13,10%	11	25,00%	3
50 to 75%	0,00%	0	6,32%	6	5,95%	5	0,00%	0
More than 75%	18,75%	3	4,21%	4	3,57%	3	0,00%	0
Termination of all contracts	0,00%	0	2,11%	2	4,76%	4	8,33%	1
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1
	Import - Distribution - Retail		Hospitality - Tourism		Media - Communication		Logistics - Transport	
No termination	74,29%	26	41,18%	7	64,29%	9	55,17%	16
Less than 10%	11,43%	4	11,76%	2	21,43%	3	13,79%	4
10 to 25%	8,57%	3	11,76%	2	0,00%	0	20,69%	6
25 to 50%	2,86%	1	0,00%	0	14,29%	2	3,45%	1
50 to 75%	0,00%	0	23,53%	4	0,00%	0	3,45%	1
More than 75%	2,86%	1	0,00%	0	0,00%	0	0,00%	0
Termination of all contracts	0,00%	0	11,76%	2	0,00%	0	3,45%	1
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

11- At what stage is the decision-making process regarding the evolution of your operations in Myanmar?

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Energy		Healthcare - Medical	
Don't know	18,75%	3	14,74%	14	17,86%	15	0,00%	0
Will be discussed soon depending on the situation	18,75%	3	20,00%	19	25,00%	21	16,67%	2
Already under discussion but will depend on of the situation	43,75%	7	41,05%	39	34,52%	29	66,67%	8
Already under discussion no matter the situation	12,50%	2	2,11%	2	3,57%	3	0,00%	0
Already decided but may change depending of the situation	0,00%	0	16,84%	16	10,71%	9	16,67%	2
Already decided for sure no matter the situation	6,25%	1	1,05%	1	5,95%	5	0,00%	0
Already under implementation	0,00%	0	4,21%	4	2,38%	2	0,00%	0
	Answered	16	Answered	95	Answered	84	Answered	12
	Skipped	5	Skipped	19	Skipped	20	Skipped	1

	Import - Distribution		Hospitality - Tourism		Media - Communication		Logistics - Transport	
Don't know	17,14%	6	23,53%	4	14,29%	2	24,14%	7
Will be discussed soon depending on the situation	17,14%	6	11,76%	2	14,29%	2	31,03%	9
Already under discussion but will depend on of the situation	45,71%	16	29,41%	5	71,43%	10	34,48%	10
Already under discussion no matter the situation	5,71%	2	0,00%	0	0,00%	0	0,00%	0
Already decided but may change depending of the situation	11,43%	4	17,65%	3	0,00%	0	10,34%	3
Already decided for sure no matter the situation	2,86%	1	5,88%	1	0,00%	0	0,00%	0
Already under implementation	0,00%	0	11,76%	2	0,00%	0	0,00%	0
	Answered	35	Answered	17	Answered	14	Answered	29
	Skipped	11	Skipped	3	Skipped	5	Skipped	6

12- If your company plans to reduce or terminate all operations in Myanmar, please indicate the timeframe:

	Agriculture - Agrifood - FnB		Service - Banking - Legal - Insurance		Infrastructure - Construction - Energy		Healthcare - Medical	
Already terminated	0,00%	0	11,54%	6	6,12%	3	25,00%	2
Within 3 months	12,50%	1	11,54%	6	18,37%	9	0,00%	0
Within 6 months	37,50%	3	23,08%	12	30,61%	15	12,50%	1
Within 9 months	0,00%	0	11,54%	6	14,29%	7	25,00%	2
In 2022	25,00%	2	21,15%	11	16,33%	8	25,00%	2
After 2022	25,00%	2	21,15%	11	14,29%	7	12,50%	1
	Answered	8	Answered	52	Answered	49	Answered	8
	Skipped	13	Skipped	62	Skipped	55	Skipped	5
	Import - Distribution - Retail - FMCG		Hospitality - Tourism		Media - Communication		Logistics - Transport - Supply	
Already terminated	0,00%	0	11,11%	1	0,00%	0	6,25%	1
Within 3 months	14,29%	2	11,11%	1	25,00%	2	6,25%	1
Within 6 months	42,86%	6	33,33%	3	12,50%	1	12,50%	2
Within 9 months	21,43%	3	11,11%	1	25,00%	2	25,00%	4
In 2022	14,29%	2	22,22%	2	25,00%	2	37,50%	6
After 2022	7,14%	1	11,11%	1	12,50%	1	12,50%	2
	Answered	14	Answered	9	Answered	8	Answered	16
	Skipped	32	Skipped	11	Skipped	11	Skipped	19

PART 3 – ANSWERS BY SIZE OF COMPANY

1-By the end of 2021, you have planned your income in Myanmar to:

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increase	3,37%	3	8,08%	8	11,59%	8	5,26%	1	14,29%	1	10,53%	2
Remain the same	16,85%	15	11,11%	11	11,59%	8	21,05%	4	0,00%	0	10,53%	2
Reduce by less than 25%	7,87%	7	9,09%	9	2,90%	2	26,32%	5	28,57%	2	10,53%	2
Reduce by 25 to 50%	12,36%	11	15,15%	15	17,39%	12	10,53%	2	28,57%	2	31,58%	6
Reduce by 50 to 75%	23,60%	21	13,13%	13	23,19%	16	21,05%	4	0,00%	0	5,26%	1
Reduce by more than 75%	10,11%	9	18,18%	18	20,29%	14	0,00%	0	14,29%	1	5,26%	1
No income at all	13,48%	12	7,07%	7	2,90%	2	0,00%	0	0,00%	0	10,53%	2
Don't know	12,36%	11	18,18%	18	10,14%	7	15,79%	3	14,29%	1	15,79%	3
	Answered	89	Answered	99	Answered	69	Answered	19	Answered	7	Answered	19
	Skipped	21	Skipped	20	Skipped	12	Skipped	2	Skipped	4	Skipped	11

2-Before February 2021, your company had planned to:

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increase its investment in Myanmar	41,57%	37	49,49%	49	57,97%	40	73,68%	14	85,71%	6	68,42%	13
Maintain operations in without further investment	44,94%	40	42,42%	42	30,43%	21	21,05%	4	14,29%	1	26,32%	5
Progressively reduce operations in Myanmar	3,37%	3	5,05%	5	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Relocate the office outside but maintain operations in Myanmar	3,37%	3	1,01%	1	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Completely terminate all operations in Myanmar	2,25%	2	1,01%	1	1,45%	1	0,00%	0	0,00%	0	0,00%	0
Don't know	4,49%	4	1,01%	1	10,14%	7	5,26%	1	0,00%	0	5,26%	1
	Answered	89	Answered	99	Answered	69	Answered	19	Answered	7	Answered	19
	Skipped	21	Skipped	20	Skipped	12	Skipped	2	Skipped	4	Skipped	11

3- Since February, your company's plans have:

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Remained the same	21,35%	19	14,14%	14	14,49%	10	31,58%	6	0,00%	0	15,79%	3
Changed slightly	23,60%	21	30,30%	30	30,43%	21	26,32%	5	14,29%	1	15,79%	3
Changed entirely	26,97%	24	36,36%	36	31,88%	22	21,05%	4	28,57%	2	52,63%	10
Temporary halted	28,09%	25	19,19%	19	23,19%	16	21,05%	4	57,14%	4	15,79%	3
	Answered	89	Answered	99	Answered	69	Answered	19	Answered	7	Answered	19
	Skipped	21	Skipped	20	Skipped	12	Skipped	2	Skipped	4	Skipped	11

4- Based on that, by the end of 2021, your company is planning to:

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Increase its investment in Myanmar	2,25%	2	4,04%	4	4,35%	3	15,79%	3	14,29%	1	15,79%	3
Maintain operations without further investment	31,46%	28	38,38%	38	28,99%	20	36,84%	7	28,57%	2	26,32%	5
Progressively reduce operations in Myanmar	13,48%	12	21,21%	21	13,04%	9	15,79%	3	0,00%	0	5,26%	1
Relocate the office outside of Myanmar but maintain operations in Myanmar	11,24%	10	3,03%	3	1,45%	1	0,00%	0	0,00%	0	0,00%	0
Completely terminate all operations in Myanmar	3,37%	3	4,04%	4	1,45%	1	0,00%	0	0,00%	0	0,00%	0
Don't know – It will depend on the situation	38,20%	34	29,29%	29	50,72%	35	31,58%	6	57,14%	4	52,63%	10
	Answered	89	Answered	99	Answered	69	Answered	19	Answered	7	Answered	19
	Skipped	21	Skipped	20	Skipped	12	Skipped	2	Skipped	4	Skipped	11

5- If your company plans to increase operations in Myanmar, please explain why: (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
You foresee a growth in your market	45,45%	15	21,74%	5	56,52%	13	62,50%	5	50,00%	2	57,14%	4
You have signed new contracts	3,03%	1	26,09%	6	13,04%	3	0,00%	0	0,00%	0	14,29%	1
You will get funding from development agencies	6,06%	2	13,04%	3	0,00%	0	0,00%	0	25,00%	1	14,29%	1
Part of a regional/global development strategy of the company	21,21%	7	17,39%	4	30,43%	7	25,00%	2	0,00%	0	57,14%	4
Others	42,42%	14	52,17%	12	47,83%	11	37,50%	3	25,00%	1	0,00%	0
	Answered	33	Answered	23	Answered	23	Answered	8	Answered	4	Answered	7
	Skipped	77	Skipped	96	Skipped	58	Skipped	13	Skipped	7	Skipped	23

6- If your company plans to reduce operations in Myanmar, please explain why: (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
You foresee a slowdown in your market	53,62%	37	53,13%	34	52,00%	26	66,67%	6	60,00%	3	57,14%	8
Projects coming to an end	10,14%	7	12,50%	8	6,00%	3	0,00%	0	0,00%	0	7,14%	1
You lost contracts/funding	14,49%	10	26,56%	17	28,00%	14	11,11%	1	40,00%	2	21,43%	3
You had to cancel contracts for reputational reasons	8,70%	6	10,94%	7	20,00%	10	0,00%	0	0,00%	0	14,29%	2
You want to reduce the reputational risk	26,09%	18	14,06%	9	14,00%	7	22,22%	2	0,00%	0	7,14%	1
In general, the risks outweigh the benefits	23,19%	16	15,63%	10	26,00%	13	22,22%	2	0,00%	0	28,57%	4
Impact of the Covid-19 on activities	26,09%	18	14,06%	9	12,00%	6	11,11%	1	20,00%	1	7,14%	1
Impact of the recent events on activities	42,03%	29	59,38%	38	66,00%	33	77,78%	7	60,00%	3	28,57%	4
Regional/Global strategy	8,70%	6	9,38%	6	4,00%	2	0,00%	0	0,00%	0	14,29%	2
Others	10,14%	7	4,69%	3	8,00%	4	22,22%	2	20,00%	1	0,00%	0
Don't know	13,04%	9	10,94%	7	12,00%	6	0,00%	0	0,00%	0	21,43%	3
	Answered	69	Answered	64	Answered	50	Answered	9	Answered	5	Answered	14
	Skipped	41	Skipped	55	Skipped	31	Skipped	12	Skipped	6	Skipped	16

7- If your company plans to terminate all operations in Myanmar, please explain why: (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
You foresee a slowdown in your market	47,37%	18	4,35%	1	21,43%	6	20,00%	1	0,00%	0	0,00%	0
Projects coming to an end	2,63%	1	4,35%	1	10,71%	3	0,00%	0	0,00%	0	0,00%	0
You lost contracts/funding	5,26%	2	0,00%	0	17,86%	5	0,00%	0	0,00%	0	33,33%	2
You cancelled contracts for reputational reasons	7,89%	3	21,74%	5	10,71%	3	0,00%	0	0,00%	0	16,67%	1
You want to reduce the reputational risk	18,42%	7	8,70%	2	7,14%	2	20,00%	1	0,00%	0	16,67%	1
In general, the risks outweigh the benefits	18,42%	7	13,04%	3	28,57%	8	40,00%	2	0,00%	0	33,33%	2
Impact of the Covid-19	7,89%	3	4,35%	1	10,71%	3	0,00%	0	0,00%	0	0,00%	0
Impact of the recent events on activities	18,42%	7	30,43%	7	21,43%	6	40,00%	2	0,00%	0	33,33%	2
Activities already stopped because of the situation	18,42%	7	13,04%	3	25,00%	7	0,00%	0	0,00%	0	33,33%	2
Regional/Global strategy	0,00%	0	8,70%	2	3,57%	1	0,00%	0	0,00%	0	0,00%	0
Others	7,89%	3	8,70%	2	10,71%	3	20,00%	1	33,33%	1	0,00%	0
Don't know	36,84%	14	30,43%	7	25,00%	7	20,00%	1	66,67%	2	33,33%	2
	Answered	38	Answered	23	Answered	28	Answered	5	Answered	3	Answered	6
	Skipped	72	Skipped	96	Skipped	53	Skipped	16	Skipped	8	Skipped	24

8- How much will your human resources be impacted by the situation in the coming 6 months? (several answers possible)

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Recruitment of new employees	9,09%	8	5,21%	5	14,49%	10	22,22%	4	0,00%	0	10,53%	2
Increased salaries	4,55%	4	4,17%	4	7,25%	5	11,11%	2	0,00%	0	5,26%	1
No impact	34,09%	30	21,88%	21	5,80%	4	16,67%	3	14,29%	1	15,79%	3
Freezing of all recruitments	39,77%	35	44,79%	43	52,17%	36	66,67%	12	85,71%	6	52,63%	10
Freezing of all salaries	13,64%	12	21,88%	21	20,29%	14	16,67%	3	42,86%	3	31,58%	6
Cancellation of bonuses	17,05%	15	36,46%	35	44,93%	31	16,67%	3	42,86%	3	31,58%	6
Decreasing of all salaries	18,18%	16	26,04%	25	42,03%	29	22,22%	4	28,57%	2	15,79%	3
Use of all paid leaves	7,95%	7	19,79%	19	23,19%	16	16,67%	3	28,57%	2	21,05%	4
Unpaid leaves	3,41%	3	22,92%	22	21,74%	15	5,56%	1	14,29%	1	21,05%	4
Part-time work	11,36%	10	14,58%	14	26,09%	18	0,00%	0	42,86%	3	10,53%	2
Reduction of training	11,36%	10	11,46%	11	21,74%	15	27,78%	5	57,14%	4	10,53%	2
Termination of contracts	18,18%	16	25,00%	24	26,09%	18	33,33%	6	42,86%	3	31,58%	6
	Answered	88	Answered	96	Answered	69	Answered	18	Answered	7	Answered	19
	Skipped	22	Skipped	23	Skipped	12	Skipped	3	Skipped	4	Skipped	11

9- In average, by how much do you plan to reduce salaries in the coming 6 months?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No reduction	65,17%	58	49,49%	49	44,93%	31	63,16%	12	28,57%	2	57,89%	11
Less than 10%	3,37%	3	8,08%	8	4,35%	3	5,26%	1	14,29%	1	5,26%	1
10 to 25%	10,11%	9	12,12%	12	15,94%	11	15,79%	3	14,29%	1	21,05%	4
25 to 50%	8,99%	8	19,19%	19	18,84%	13	10,53%	2	14,29%	1	15,79%	3
50 to 75%	3,37%	3	6,06%	6	10,14%	7	5,26%	1	28,57%	2	0,00%	0
More than 75%	8,99%	8	5,05%	5	5,80%	4	0,00%	0	0,00%	0	0,00%	0
	Answered	89	Answered	99	Answered	69	Answered	19	Answered	7	Answered	19
	Skipped	21	Skipped	20	Skipped	12	Skipped	2	Skipped	4	Skipped	11

10- Around how many employment contracts will you have to terminate in the coming 6 months?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
No termination	70,79%	63	54,55%	54	47,83%	33	57,89%	11	28,57%	2	31,58%	6
Less than 10%	6,74%	6	12,12%	12	15,94%	11	10,53%	2	28,57%	2	10,53%	2
10 to 25%	3,37%	3	11,11%	11	17,39%	12	15,79%	3	28,57%	2	26,32%	5
25 to 50%	5,62%	5	11,11%	11	2,90%	2	10,53%	2	0,00%	0	26,32%	5
50 to 75%	3,37%	3	5,05%	5	8,70%	6	0,00%	0	14,29%	1	5,26%	1
More than 75%	4,49%	4	3,03%	3	4,35%	3	5,26%	1	0,00%	0	0,00%	0
Termination of all contracts	5,62%	5	3,03%	3	2,90%	2	0,00%	0	0,00%	0	0,00%	0
Answered	89	89	99	99	69	69	19	19	7	7	19	19
Skipped	21	21	20	20	12	12	2	2	4	4	11	11

11- At what stage is the decision-making process regarding the evolution of your operations in Myanmar?

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Don't know	20,22%	18	16,16%	16	15,94%	11	26,32%	5	0,00%	0	5,26%	1
Will be discussed soon depending on the evolution of the situation	28,09%	25	19,19%	19	15,94%	11	15,79%	3	28,57%	2	21,05%	4
Already under discussion but will depend on the evolution of the situation	29,21%	26	39,39%	39	47,83%	33	52,63%	10	71,43%	5	57,89%	11
Already under discussion no matter the evolution of the situation	3,37%	3	4,04%	4	1,45%	1	0,00%	0	0,00%	0	5,26%	1
Already decided but may change depending of the evolution of the situation	12,36%	11	12,12%	12	15,94%	11	5,26%	1	0,00%	0	10,53%	2
Already decided for sure no matter the evolution of the situation	4,49%	4	3,03%	3	2,90%	2	0,00%	0	0,00%	0	0,00%	0
Already under implementation	2,25%	2	6,06%	6	0,00%	0	0,00%	0	0,00%	0	0,00%	0
Answered	89	89	99	99	69	69	19	19	7	7	19	19
Skipped	21	21	20	20	12	12	2	2	4	4	11	11

12- If your company plans to reduce or terminate all operations in Myanmar, please indicate the timeframe:

	<10 employees		10 to 50 employees		50 to 200 employees		200 to 500 employees		500 to 1,000 employees		1,000> employees	
Already terminated	8,62%	5	7,84%	4	8,11%	3	0,00%	0	0,00%	0	12,50%	1
Within 3 months	10,34%	6	19,61%	10	8,11%	3	0,00%	0	25,00%	1	25,00%	2
Within 6 months	31,03%	18	33,33%	17	13,51%	5	0,00%	0	25,00%	1	25,00%	2
Within 9 months	17,24%	10	7,84%	4	24,32%	9	33,33%	2	0,00%	0	0,00%	0
IN 2022	22,41%	13	17,65%	9	21,62%	8	0,00%	0	50,00%	2	37,50%	3
After 2022	10,34%	6	13,73%	7	24,32%	9	66,67%	4	0,00%	0	0,00%	0
Answered	58	58	51	51	37	37	6	6	4	4	8	8
Skipped	52	52	68	68	44	44	15	15	7	7	22	22

PART 3 – ANSWERS BY YEARS OF OPERATING IN MYANMAR

1-By the end of 2021, you have planned your income in Myanmar to:

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increase	14,29%	1	7,69%	3	7,81%	5	8,63%	12	3,77%	2
Remain the same	14,29%	1	15,38%	6	10,94%	7	10,79%	15	20,75%	11
Reduce by less than 25%	0,00%	0	10,26%	4	9,38%	6	7,91%	11	11,32%	6
Reduce by 25 to 50%	0,00%	0	15,38%	6	3,13%	2	20,86%	29	20,75%	11
Reduce by 50 to 75%	28,57%	2	2,56%	1	26,56%	17	20,86%	29	11,32%	6
Reduce by more than 75%	0,00%	0	15,38%	6	15,63%	10	13,67%	19	15,09%	8
No income at all	42,86%	3	17,95%	7	9,38%	6	3,60%	5	3,77%	2
Don't know	0,00%	0	15,38%	6	17,19%	11	13,67%	19	13,21%	7
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

2-Before February 2021, your company had planned to:

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increase its investment	57,14%	4	58,97%	23	54,69%	35	47,48%	66	58,49%	31
Maintain operations in Myanmar but without further investment	28,57%	2	41,03%	16	29,69%	19	41,73%	58	33,96%	18
Progressively reduce operations	14,29%	1	0,00%	0	0,00%	0	3,60%	5	3,77%	2
Relocate the office outside of Myanmar but maintain operations in the country	0,00%	0	0,00%	0	3,13%	2	1,44%	2	0,00%	0
Completely terminate all operations in Myanmar	0,00%	0	0,00%	0	3,13%	2	1,44%	2	0,00%	0
Don't know	0,00%	0	0,00%	0	9,38%	6	4,32%	6	3,77%	2
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

3- Since February, your company's plans have:

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Remained the same	42,86%	3	15,38%	6	7,81%	5	23,02%	32	11,32%	6
Changed slightly	0,00%	0	28,21%	11	35,94%	23	23,74%	33	26,42%	14
Changed entirely	28,57%	2	20,51%	8	29,69%	19	35,97%	50	35,85%	19
Temporary halted	28,57%	2	35,90%	14	26,56%	17	17,27%	24	26,42%	14
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

4- Based on that, by the end of 2021, your company is planning to:

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Increase its investment	14,29%	1	5,13%	2	6,25%	4	3,60%	5	7,55%	4
Maintain operations in Myanmar but without further investment	28,57%	2	33,33%	13	21,88%	14	36,69%	51	37,74%	20
Progressively reduce operations	28,57%	2	7,69%	3	15,63%	10	15,11%	21	18,87%	10
Relocate the office outside of Myanmar but maintain small operations in the country	0,00%	0	10,26%	4	4,69%	3	5,04%	7	0,00%	0
Completely terminate all operations in Myanmar	0,00%	0	0,00%	0	7,81%	5	1,44%	2	1,89%	1
Don't know – It will depend on the evolution of the situation	28,57%	2	43,59%	17	43,75%	28	38,13%	53	33,96%	18
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

5- If your company plans to increase operations in Myanmar, please explain why: (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
You foresee a growth in your market	50,00%	2	56,25%	9	43,48%	10	38,89%	14	47,37%	9
You have signed new contracts	0,00%	0	12,50%	2	13,04%	3	2,78%	1	26,32%	5
You will get funding from development agencies	25,00%	1	6,25%	1	8,70%	2	5,56%	2	5,26%	1
Part of a regional/global development strategy of the company	0,00%	0	37,50%	6	13,04%	3	30,56%	11	21,05%	4
Others	25,00%	1	50,00%	8	43,48%	10	41,67%	15	36,84%	7
	Answered	4	Answered	16	Answered	23	Answered	36	Answered	19
	Skipped	6	Skipped	37	Skipped	50	Skipped	132	Skipped	49

6- If your company plans to reduce operations in Myanmar, please explain why: (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
You foresee a slowdown in your market	50,00%	3	48,39%	15	56,82%	25	50,53%	48	65,71%	23
Projects coming to an end	0,00%	0	3,23%	1	11,36%	5	11,58%	11	5,71%	2
You lost contracts/funding	0,00%	0	9,68%	3	27,27%	12	24,21%	23	25,71%	9
You had to cancel contracts for reputational reasons	0,00%	0	9,68%	3	6,82%	3	16,84%	16	8,57%	3
You want to reduce reputational risk	16,67%	1	29,03%	9	13,64%	6	13,68%	13	22,86%	8
In general, the risks outweigh the benefits	0,00%	0	16,13%	5	25,00%	11	22,11%	21	22,86%	8
Impact of the Covid-19 on activities	16,67%	1	25,81%	8	20,45%	9	15,79%	15	8,57%	3
Impact of the recent events on activities	16,67%	1	51,61%	16	59,09%	26	53,68%	51	57,14%	20
Global/Regional strategy	0,00%	0	9,68%	3	6,82%	3	9,47%	9	2,86%	1
Others	33,33%	2	16,13%	5	6,82%	3	4,21%	4	8,57%	3
Don't know	0,00%	0	9,68%	3	13,64%	6	15,79%	15	2,86%	1
	Answered	6	Answered	31	Answered	44	Answered	95	Answered	35
	Skipped	4	Skipped	22	Skipped	29	Skipped	73	Skipped	33

7- If your company plans to terminate all operations in Myanmar, please explain why: (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
You foresee a slowdown in your market	60,00%	3	26,67%	4	21,74%	5	21,74%	10	28,57%	4
Your projects are coming to an end	0,00%	0	0,00%	0	8,70%	2	4,35%	2	7,14%	1
You lost contracts/funding	0,00%	0	6,67%	1	8,70%	2	13,04%	6	0,00%	0
You had to cancel contracts for reputational reasons	20,00%	1	6,67%	1	8,70%	2	13,04%	6	14,29%	2
You want to reduce reputational risk	20,00%	1	20,00%	3	8,70%	2	10,87%	5	14,29%	2
In general, the risks outweigh the benefits	20,00%	1	20,00%	3	30,43%	7	17,39%	8	21,43%	3
Impact of the Covid-19 on activities	0,00%	0	20,00%	3	8,70%	2	2,17%	1	7,14%	1
Impact of the recent events on activities	0,00%	0	40,00%	6	30,43%	7	17,39%	8	21,43%	3
Activities have already stopped	0,00%	0	20,00%	3	34,78%	8	10,87%	5	21,43%	3
Global strategy	0,00%	0	0,00%	0	4,35%	1	2,17%	1	7,14%	1
Others	20,00%	1	6,67%	1	4,35%	1	13,04%	6	7,14%	1
Don't know	0,00%	0	46,67%	7	21,74%	5	34,78%	16	35,71%	5
	Answered	5	Answered	15	Answered	23	Answered	46	Answered	14
	Skipped	5	Skipped	38	Skipped	50	Skipped	122	Skipped	54

8- How much will your human resources be impacted by the situation in the coming 6 months? (several answers possible)

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Recruitment of new employees	16,67%	1	23,08%	9	11,29%	7	4,35%	6	11,54%	6
Increased salaries	0,00%	0	5,13%	2	6,45%	4	5,80%	8	3,85%	2
No impact	50,00%	3	15,38%	6	19,35%	12	18,84%	26	28,85%	15
Freezing of all recruitments	16,67%	1	43,59%	17	46,77%	29	52,17%	72	44,23%	23
Freezing of all salaries	0,00%	0	17,95%	7	16,13%	10	19,57%	27	28,85%	15
Cancellation of bonuses	0,00%	0	17,95%	7	33,87%	21	37,68%	52	25,00%	13
Decreasing of all salaries	33,33%	2	30,77%	12	24,19%	15	28,99%	40	19,23%	10
Use of all paid leaves	16,67%	1	20,51%	8	25,81%	16	13,04%	18	15,38%	8
Unpaid leaves	0,00%	0	17,95%	7	17,74%	11	13,04%	18	19,23%	10
Implementation of part-time work	0,00%	0	17,95%	7	22,58%	14	13,04%	18	15,38%	8
Reduction of training to essentials	0,00%	0	12,82%	5	19,35%	12	18,12%	25	9,62%	5
Termination of employment contracts	0,00%	0	33,33%	13	22,58%	14	27,54%	38	15,38%	8
	Answered	6	Answered	39	Answered	62	Answered	138	Answered	52
	Skipped	4	Skipped	14	Skipped	11	Skipped	30	Skipped	16

9- In average, by how much do you plan to reduce salaries in the coming 6 months?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No reduction	42,86%	3	46,15%	18	56,25%	36	55,40%	77	54,72%	29
Less than 10%	0,00%	0	5,13%	2	7,81%	5	5,76%	8	3,77%	2
10 to 25%	0,00%	0	23,08%	9	7,81%	5	10,07%	14	22,64%	12
25 to 50%	14,29%	1	10,26%	4	17,19%	11	17,99%	25	9,43%	5
50 to 75%	14,29%	1	2,56%	1	4,69%	3	7,91%	11	5,66%	3
More than 75%	28,57%	2	12,82%	5	6,25%	4	2,88%	4	3,77%	2
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

10- Around how many employment contracts will you have to terminate in the coming 6 months?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
No termination	71,43%	5	61,54%	24	54,69%	35	54,68%	76	54,72%	29
Less than 10%	14,29%	1	5,13%	2	10,94%	7	12,23%	17	15,09%	8
10 to 25%	0,00%	0	2,56%	1	17,19%	11	11,51%	16	15,09%	8
25 to 50%	14,29%	1	5,13%	2	7,81%	5	10,07%	14	5,66%	3
50 to 75%	0,00%	0	5,13%	2	4,69%	3	4,32%	6	9,43%	5
More than 75%	0,00%	0	10,26%	4	0,00%	0	5,04%	7	0,00%	0
Termination of all contracts	0,00%	0	10,26%	4	4,69%	3	2,16%	3	0,00%	0
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

11- At what stage is the decision-making process regarding the evolution of your operations in Myanmar?

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Don't know	28,57%	2	12,82%	5	17,19%	11	16,55%	23	18,87%	10
Will be discussed soon depending on the evolution of the situation	28,57%	2	20,51%	8	17,19%	11	23,02%	32	20,75%	11
Already under discussion but will depend on the situation	14,29%	1	43,59%	17	40,63%	26	43,17%	60	37,74%	20
Already under discussion no matter the evolution of the situation	28,57%	2	2,56%	1	4,69%	3	0,72%	1	3,77%	2
Already decided but may change depending on the situation	0,00%	0	12,82%	5	12,50%	8	10,79%	15	16,98%	9
Already decided for sure no matter the evolution of the situation	0,00%	0	2,56%	1	6,25%	4	2,16%	3	1,89%	1
Already under implementation	0,00%	0	5,13%	2	1,56%	1	3,60%	5	0,00%	0
	Answered	7	Answered	39	Answered	64	Answered	139	Answered	53
	Skipped	3	Skipped	14	Skipped	9	Skipped	29	Skipped	15

12- If your company plans to reduce or terminate all operations in Myanmar, please indicate the timeframe:

	<1 year		1 to 3 years		3 to 5 years		5 to 10 years		10> years	
Already terminated	0,00%	0	13,04%	3	5,88%	2	9,33%	7	3,70%	1
Within 3 months	0,00%	0	17,39%	4	11,76%	4	13,33%	10	14,81%	4
Within 6 months	60,00%	3	26,09%	6	26,47%	9	25,33%	19	22,22%	6
Within 9 months	0,00%	0	8,70%	2	26,47%	9	14,67%	11	11,11%	3
IN 2022	40,00%	2	13,04%	3	23,53%	8	20,00%	15	25,93%	7
After 2022	0,00%	0	21,74%	5	5,88%	2	17,33%	13	22,22%	6
	Answered	5	Answered	23	Answered	34	Answered	75	Answered	27
	Skipped	5	Skipped	30	Skipped	39	Skipped	93	Skipped	41