



PLANNING & DEVELOPMENT DEPARTMENT  
GOVERNMENT OF SINDH

# COVID -19 IN SINDH: MACRO-ECONOMIC AND SOCIO-ECONOMIC IMPACT ASSESSMENT AND DEVELOPMENT RESPONSE FRAMEWORK



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# Executive Summary

With the constantly evolving situation of COVID-19, it is imperative for Government of Sindh to assess the estimated macro-economic and socio-economic impact of the outbreak to adopt evidence-based strategic planning and policy formulation. The overarching objective of this report is to assess the estimated impact of COVID-19 on key provincial macro-economic and socio-economic indicators in order to identify prioritized areas of intervention for the Government to guide economic recovery and social protection of the vulnerable segments of population.

Based on the preliminary macro-economic and socio-economic impact assessment of Pakistan by Sub-Committee of the National Coordination Committee for COVID-19 on Economic Analysis, provincial estimations have been done for Sindh. Overall national estimates are broadly defined into Scenario-I and Scenario-II based on the intensity of lockdown and implementation periods. National GDP growth is estimated to decline by 0.7% (Scenario-I) to 1.3% (Scenario-II). Similarly, unemployment is expected to increase by 12.6 million (Scenario-I) to 19.1 million (Scenario-II). Poverty Head-Count is estimate to increase by 4.7% (Scenario-I) to 9.2% (Scenario-II).

Provincial assessment of GDP losses for Sindh estimate that, in Scenario-I, GDP growth in services sector is expected to decrease by 0.54% while agriculture sector, growth pattern will reduce by 0.26%. The overall GDP will reduce from expected \$101.19 billion to \$100.12 billion. For Scenario-II, in Sindh, the greatest hit will be on industries sector with GDP growth reduction of 3.66%, followed by services sector growth reduction of 1.39% and agriculture sector growth reduction of 1.22%. Overall provincial GDP is expected to decrease from \$101.19 to \$98.94 billion in Scenario-II.

In terms of expected job losses in Scenario-I, it is estimated that 2.8 million people in the province will become unemployed. The sectoral shares would be 1.2 million for industries, 1 million for agriculture and 0.6 million unemployed people in services sector respectively. For Scenario-II, it is estimated that 4.3 million people will become unemployed. The sectoral shares would be 1.99 million for industries, 1.64 million for agriculture and 0.77 million unemployed people in services sector respectively.

In terms of provincial poverty impact, it is estimated that between 2.98 million (Scenario-I) and 5.69 million (Scenario-II) additional people could fall below the poverty line due to the COVID-19 impact. This essentially means that the total number of people below poverty line in Sindh could range from 18.03 million to 20.74 million people due to COVID-19 Impact.

The broad thematic areas to focus on in terms of economic recovery include supporting business (especially SMEs), developing sector-specific protocols, mitigating the effect of sectoral losses and wage support schemes. Social protection efforts need to be centered on social assistance, social insurance, labor market programs, social care services and targeted subsidies.





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# Introduction

Coronavirus (COVID-19) pandemic has impacted the entire world, including the lives of the people in Pakistan. With two confirmed cases on 26<sup>th</sup> February 2020, the country's total confirmed cases are 12, 227 as of 25<sup>th</sup> April 2020 out of which Sindh has 4,232 confirmed COVID-19 cases.<sup>1</sup> The immediate risk of the virus is a public health concern; however, the severity of outbreak warrants scenario-wise assessment of the socio-economic impact to guide social protection, development response and other economic recovery efforts.

The prevailing situation demands the Government to prepare a dynamic framework of short-term, medium-term and long-term development plans. Given the evolving outbreak situation, the overarching development response must cater to address both the direct and indirect effects of the outbreak on people, especially the most vulnerable segments of the population of Sindh. A provincial socio-economic assessment would help estimate the quantifiable impact of COVID-19. Estimated impact can help the Government in evidence-based planning and resource allocations to cater to the affectees of the virus. Strategic development planning to effectively mitigate the adverse effects can be devised in terms of social protection and economic recovery. Formulation of plans to prioritize development priorities, guide economic recovery and social protection entails mobilizing resources through government own-sources, donors' assistance and engagement with development partners.

The total development budget outlay for Sindh for FY 2019-20 is **Rs.284** billion. This includes **Rs.208** billion for Provincial ADP and **Rs.20** billion for District ADP schemes. **Rs.51.15** billion are earmarked for the Foreign Projects Assistance (FPA) component. **Rs.4.89** billion have been included in Federal PSDP for GOS

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<sup>1</sup> Government of Pakistan. <http://covid.gov.pk/stats/pakistan>



executed schemes. According to release and expenditure position of dated 7<sup>th</sup> April, 2020, Rs.68.273 billion is spent on Provincial ADP schemes and Rs.4.524 billion is spent on District ADP schemes. There were 912 schemes which were provided 100% allocations and therefore likely to be completed (LTBC) in current financial year (CFY) however, there are **125 such schemes** which have spent full funds and will be completed. In case the released funds Rs. 6.5 Billion are unfreezed, additional **441 LTBC** schemes would be completed during CFY. In addition, **26 major schemes**, where re-appropriation proposals have been conveyed to FD, would be completed during CFY in case Rs. 2700 million are allowed for these schemes.

Planning & Development Department has been interacting constantly with development partners for addressing critical shortage of resources. On 3<sup>rd</sup> April, 2020 the Project of "Pandemic Response Effectiveness in Pakistan" (PREP) was approved by World Bank board. The project's was approved in CDWP on 16<sup>th</sup> March, 2020 and on 21<sup>st</sup> March, loan was negotiated between World Bank and Federal and Provincial Governments. Provincial governments have been asked to do the urgent withdrawal of US\$ 5 million for COVID-19 related expenditures and Government of Sindh has filed the withdrawal application very recently.

Government of Sindh has been discussing with World Bank to tap unused resources from World Bank funded projects which do not need restructuring or repurposing for the resources to be used for combating COVID. As a result, US\$ 36.2 Million have been diverted from various current projects for COVID related expenditures. US\$ 10 Million from Sindh Resilience Project, US\$ 1 Million from Sindh Revenue Board, US\$ 11.2 Million from Sindh Enhancing Response to Reduce Stunting (AAP), and US\$ 15 million from Water Sector Improvement Project.

In addition to the aforementioned, rounds of deliberations have been done with World Bank to look into possible restructuring/repurposing of existing projects or creating of new project for COVID financing. As a sequel, Planning Commission conducted a detailed meeting with all Provincial Governments on 15<sup>th</sup> April, 2020. Provincial Governments apprised Planning Commission of their plans to combat COVID and resource constraints they are facing.

On 2<sup>nd</sup> April, 2020, a web meeting was held between Chairman P&DD and United Nations Resident Coordinator (UN-RC) Mr. Julien Harneis. The meeting was intended to apprise UNRC of GoS plans for COVID so that UN-RC office may coordinate between UN agencies to work with Sindh government smoothly.

# Assessment of Economic Impact

The economy of Pakistan was already passing through a slow growth trajectory and was expected to grow at a mere 3.3% in the current Fiscal Year (Planning Commission Jan 2020). After the COVID-19 shock, IMF lowered its forecast for Pakistan to a negative growth of 1.5% in real GDP<sup>2</sup>. The sheer uncertainty regarding the length and severity of the COVID-19 crisis is fueling perception of risk and volatility in financial markets.

While it is significantly difficult to come up with the exact net impact of COVID-19 on Pakistan's economy, it is still possible to compute with some high-level assumptions. Some attempts have been made by Sub-committee of the National Coordination Committee for COVID-19 in estimating potential economic losses through two different scenarios. <sup>3</sup>The same model has been adapted here to estimate the numbers for Sindh.

Following table shows two scenarios predicted by the model:

	<b>Scenario I</b>	<b>Scenario II</b>
<b>GDP</b>	2.6%	2.0%
<b>GDP Reduction from Expected Growth</b>	0.7%	1.3%
<b>Unemployment</b>	12.6 million	19.1 million
<b>Increase in Poverty</b>	4.7%	9.2%

<sup>2</sup> <https://www.imf.org/en/Countries/PAK#ataglance>

Sub-committee of the National Coordination Committee for COVID-19 on Economic Analysis

To compute the estimates of each of the above-mentioned scenarios for Sindh, the following assumptions have been made:

## Assumptions for GDP Estimations

- Sindh's share in Pakistan's GDP is taken as 30%. [Pasha, Hafiz A. "Growth of the provincial economies." *Institute for Policy Reforms (IPR)*. <http://ipr.org.pk/wp-content/uploads/2016/04/GROWTH-OF-PROVINCIAL-ECONOMICS-.pdf> (2015)];
- Shares of each sector for Sindh are computed through 2014-15 data given in percentage (%). [Pasha, Hafiz A. "Growth of the provincial economies." *Institute for Policy Reforms (IPR)*. <http://ipr.org.pk/wp-content/uploads/2016/04/GROWTH-OF-PROVINCIAL-ECONOMICS-.pdf> (2015)]; and
- Overall GDP and sector-wise losses in Pakistan are computed through scenario-based analysis and simulation model implied by sub-committee of the National Coordination Committee for COVID-19 on economic analysis

## Methodology to compute GDP Loss

- Sector-wise percentage share in GDP for both Pakistan and Sindh has been compared (period used: 2014-15)<sup>[1]</sup>;
- Scenario-based parameters have been utilized, as economic analysis conducted by sub-committee established for economic analysis on COVID-19.
- For forecasting the overall GDP loss percentage in Sindh, the national level GDP loss has been used as the basis;
- Thereafter, the total GDP loss percentage has been divided by cumulative sectoral loss percentage (Socio-economic assessment by national sub-committee on COVID 19 economic analysis; and

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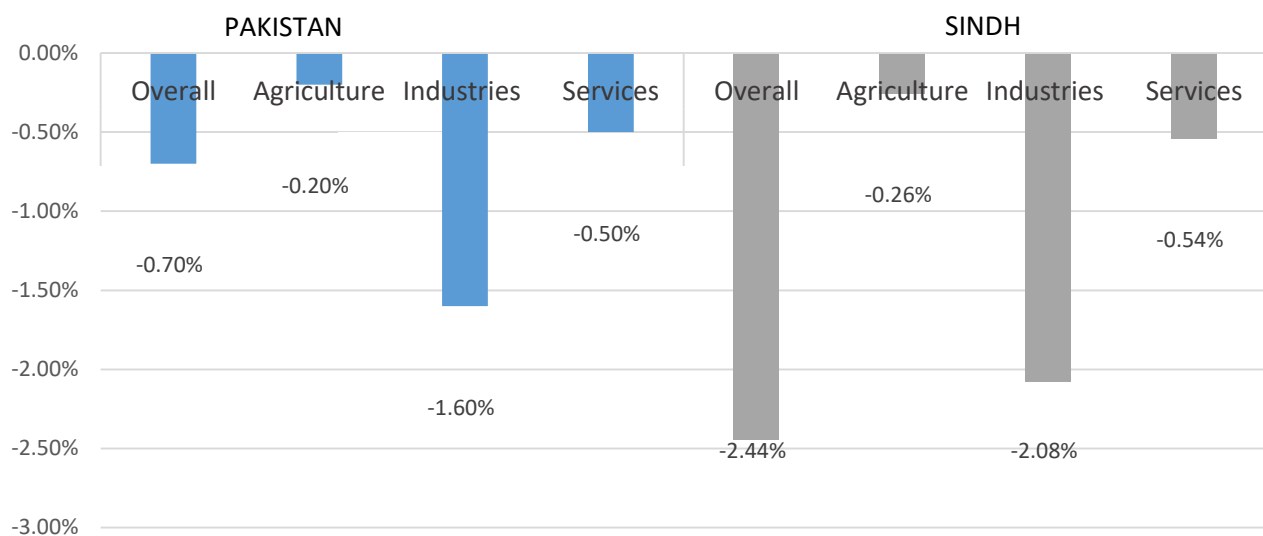
<sup>[1]</sup> Pasha, Hafiz A. "Growth of the provincial economies." *Institute for Policy Reforms (IPR)*. <http://ipr.org.pk/wp-content/uploads/2016/04/GROWTH-OF-PROVINCIAL-ECONOMICS-.pdf> (2015)]

- The derived ratio was then multiplied by cumulative sectoral loss in Sindh to determine Sindh level loss percentage.

## Analysis of GDP Losses in Pakistan and Sindh due to slower GDP Growth: Scenario 1

In scenario 1, it is anticipated that GDP in Pakistan will decrease from 3.3% to 2.6%. In absolute numbers, the GDP is expected to fall from \$335 billion to \$332 billion. The highest predicted decrease will be in the industries sector (-1.60%) followed by services sector (0.50%). The Agriculture sector is expected to witness a reduction of 0.20% hence a lower growth. The aggregation of sector wise GDP losses will manifest into overall GDP loss of 0.70%.

### GDP (%) change after COVID 19 (Scenario 1: 0.7% reduction in GDP)



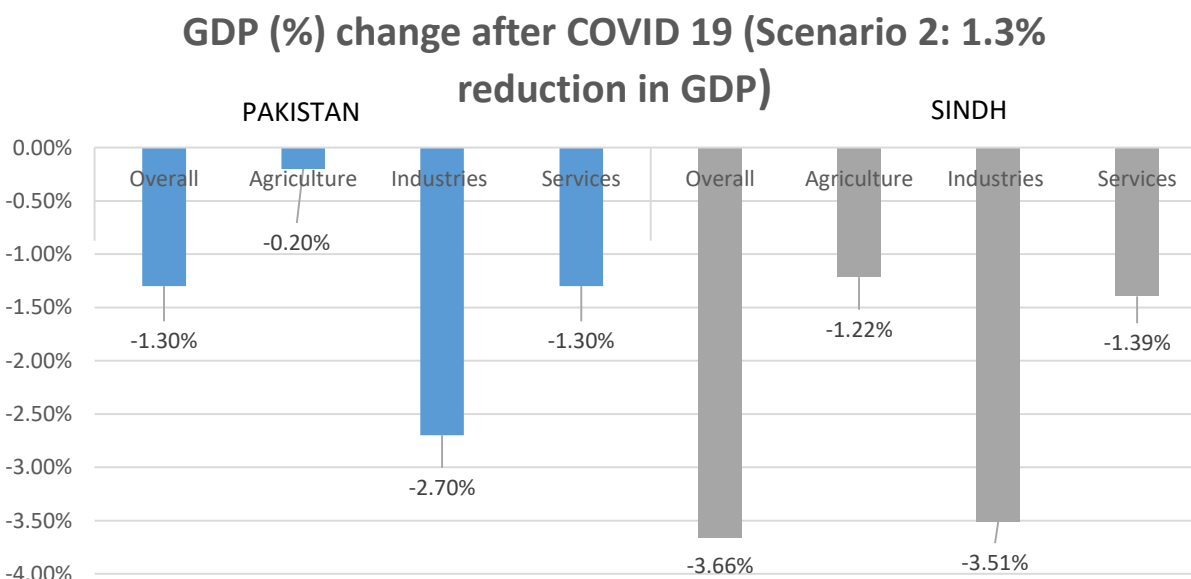
Due to the higher comparative share of industries sector in Sindh's economy, the net industrial losses are expected to be significantly higher (-2.08%) in the province, when compared with national losses. The negative growth in the industrial sector can be attributed to many factors such as fall in labor supply due to quarantine measures, fall in economic activity, supply chain disruptions, fall in demand (consumption + investment), etc.

GDP growth in services sector is expected to decrease by 0.54% while agriculture sector, growth pattern will reduce by 0.26%. The cumulative sector wise GDP losses will translate into net GDP loss of 2.44% in Sindh. The overall GDP will reduce from expected \$101.19 billion to \$100.12 billion.

Year	Region	Expected GDP at constant prices (World Bank & IMF estimates)- (3.3% Growth)	GDP Loss Percentage scenario 1 (0.7% reduction in GDP Growth)		
			GDP Percentage Decline after COVID 19	change in GDP (loss/increase)	Total Net GDP
2020	<b>Pakistan</b>	335	-0.70%	-3	332
	Agriculture	62	-0.20%	-0.12	61.96
	Industries	68	-1.60%	-2.76	65.15
	Services	205	-0.50%	0.60	205.67
2020	<b>Sindh</b>	101	-2.44%	-1.07	100.12
	Agriculture	16.25	-0.26%	-0.04	16.22
	Industries	30	-2.08%	-1.46	28.20
	Services	55.27	-0.54%	-0.07	55.20

## Analysis of GDP Losses in Pakistan and Sindh due to slower GDP Growth: Scenario 2

In scenario 2, GDP in Pakistan is expected to decrease from 3.3% to 2.0%. Resultantly, GDP at constant prices will reduce from \$335 billion to \$331 billion. As depicted in the chart, a GDP (%) decrease of (-1.30%) is expected in industries sector, followed by services sector (-5.30%). On the other hand, agriculture sector is expected to witness a percentage reduction of -0.20%. In Sindh, the greatest hit will be on industries sector (-3.66%), followed by services sector (-1.39%). Therefore, based on parameters/principles defined for the Socio-economic assessment by sub-committee on COVID-19 economic analysis, the overall GDP losses in Sindh will be (-0.366%) and reduction from \$101.19 to \$98.94 billion.



Year	Region	GDP at constant prices (World Bank & IMF estimates) 3.3% Growth	GDP Loss Percentage scenario 2 (1.3% reduction in expected GDP)		
			GDP Percentage Decline after COVID 19	change in GDP (loss/increase )	Total Net GDP
2020	<b>Pakistan</b>	335	-1.30%	-5	331
	Agriculture	62	-0.20%	-0.120	62
	Industries	68	-2.70%	-3.48	64.43
	Services	205	-1.30%	-0.99	204.09
2020	<b>Sindh</b>	101.19	-3.66%	-2.26	98.94
	Agriculture	16.25	-1.22%	-0.19	16.07
	Industries	29.67	-3.51%	-1.89	27.78
	Services	55.27	-1.39%	-0.53	54.75

## Assumptions of Job Losses

- Job losses figures for Pakistan have been derived from economic analysis conducted by sub-committee established for economic analysis on COVID-19<sup>4</sup>;
- Sector wise job losses for Pakistan have been computed through sector wise employment shares given in the Labor Force Survey (2017-18)<sup>5</sup>;
- Job losses in Sindh have been estimated through Sindh share of employment (23%) in overall employment, as derived through Labor Force Survey (2017-18); and
- Sector wise job losses in Sindh are computed by applying sector wise employment percentage on total Sindh share of job losses using the Labor Force Survey.

## Analysis of Expected Job Losses

<sup>4</sup> Ibid

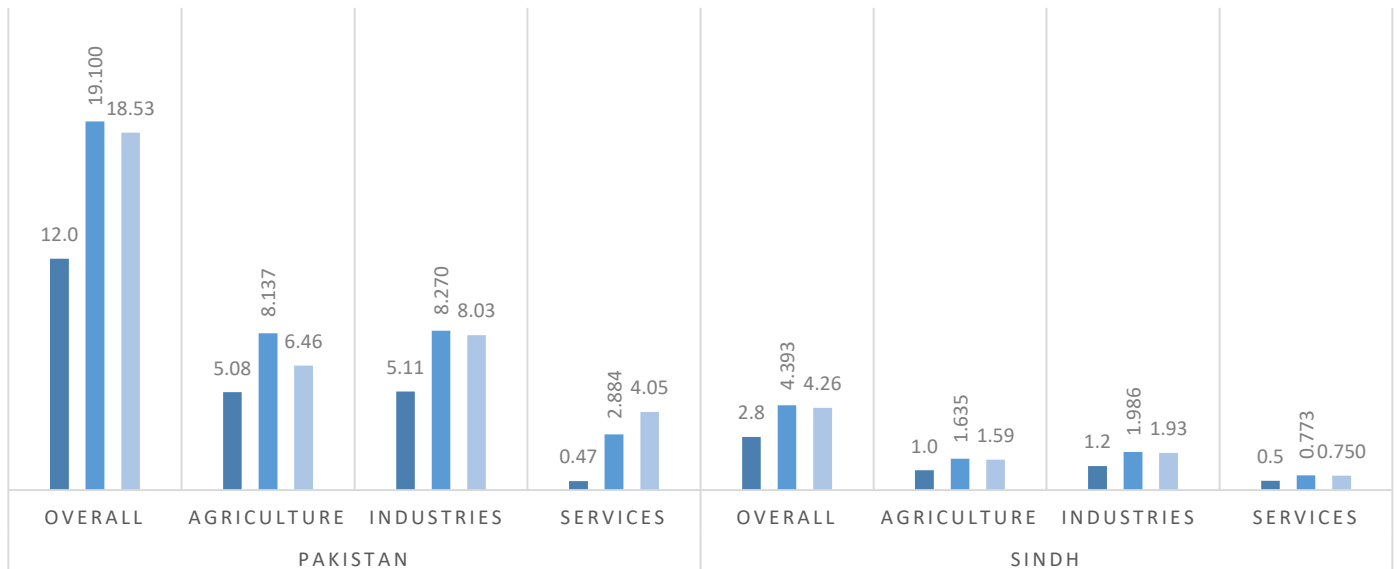
<sup>5</sup>Labor Force Survey (2017-18):

[http://www.pbs.gov.pk/sites/default/files//Labour%20Force/publications/lfs2017\\_18/Annual%20Report%20of%20LFS%202017-18.pdf](http://www.pbs.gov.pk/sites/default/files//Labour%20Force/publications/lfs2017_18/Annual%20Report%20of%20LFS%202017-18.pdf)

In scenario 1, job losses in Pakistan are estimated at 12.0 million with the highest effect in industries (5.08 million) and agriculture (5.11 million), respectively. Sindh has a share of 23% in total employed persons in Pakistan which translates into expected job losses of 2.8 million in the province. The highest share again will be in industries (1.2 million) and agriculture (1 million), respectively

## JOB LOSSES IN MILLIONS DUE TO COVID 19 IMPACT

- Job Losses (millions) Estimates Scenario 1: Job losses (Moderate Slow Down of Economic Activity)
- Job Losses (millions) Estimates Scenario 2 Job losses by decrease in GDP share in relation to expected growth
- Job Losses (millions) Estimates Job Losses by PIDE Vulnerability assessment data



In scenario 2, job losses are expected to increase to 19.0 million in Pakistan and Sindh's share is expected to increase to 4.3 million from 2.8 million, as given in scenario 1. The highest increase in job losses will be in industries sector (1.2 million), followed by agriculture (1.0 million). Pakistan Institute of Development Economics (PIDE) has also conducted a similar analysis on job losses based on Labor Force Survey (2017-18). Based on their estimates, job losses in the worst-case scenario are expected to reach 18.53 million in Pakistan. In Sindh, the resultant losses could reach 4.26 million. The table below provides comparison and analysis of different scenarios.

**Region Sectors Job Losses (millions) Estimates**

		<b>Scenario 1: Job losses (Moderate Slow Down of Economic Activity)</b>	<b>Scenario 2 Job losses by decrease in GDP share in relation to expected growth</b>	<b>Job Losses by PIDE Vulnerability assessment data</b>
<b>Pakistan</b>	<b>Overall</b>	12.0	19.100	18.53
	Agriculture	5.08	8.137	6.46
	Industries	5.11	8.270	8.03
	Services	0.47	2.884	4.05
<b>Sindh</b>	<b>Overall</b>	2.8	4.393	4.26
	Agriculture	1.0	1.635	1.59
	Industries	1.2	1.986	1.93
	Services	0.5	0.773	0.750





# Social Protection Assessment

In addition to the estimations of GDP and Employment losses, Social Protection Assessment is crucial in determining the segments of the population that would be affected by the outbreak. The vulnerable population would largely include people who are susceptible to economic shocks to an extent that it may drive them below the income poverty line.

Estimating the number of vulnerable people would help the decision-makers in devising social protection strategies that will help this population to cope with the shock by providing a social safety net to fall back on.

## Methodology for Poverty Estimations

### PSLM 2014 Data for Poverty Estimations<sup>6</sup>:

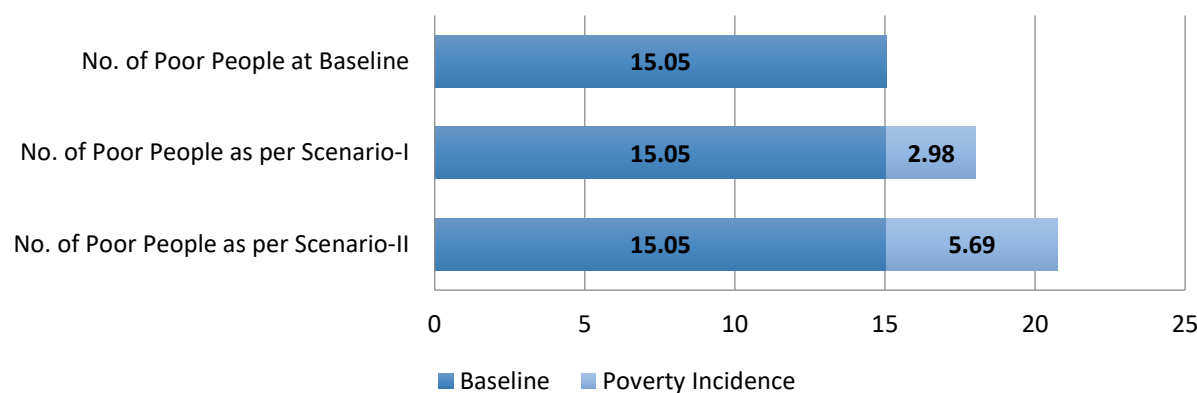
No. of Poor People-Pakistan	No. of Poor People-Sindh	Sindh's Poverty Share (%) in Total Poverty in Pakistan
47,092,000	14,048,000	29.8

Presently, 24.3% of population is living below the \$1.90 poverty line at PPP in Pakistan. This essentially means that 50.49 million out of 207.78 million people are below poverty line.

Assuming Sindh's share of **29.8%** in terms of total poor population in Pakistan, it means that **15.05 million** people in the province are living below poverty today (i.e. 29.8% of 50.49 million total population living below the poverty line in the country).

<sup>6</sup> District Development Portal Data4Pakistan, <http://www.data4pakistan.com/map.html>

## COVID-19 Impact on Sindh Poverty Incidence (Million People)



### Estimated Impact of COVID-19 on Poverty in Sindh-Based on Sub-Committee of National Coordination Committee for COVID-19 on Economic Analysis:

Sub-Committee of NCC for COVID-19 on Economic analysis has estimated that the poverty headcount will increase from 24.3 percent to 29 percent in Scenario-I and to 33.5 percent in Scenario-II<sup>7</sup>. The estimation is predicated on the assumption that aggregated consumption of households will fall by 5 percent (Scenario-I) and by 10 percent (Scenario-II). The number of **additional people who could fall below poverty line in Pakistan** ranges from about **10 million in Scenario-I** (29 percent headcount ratio) to **19.1 million in Scenario-II** (33.5 percent headcount ratio).

Assuming Sindh's share of 29.8% in terms of total poor population in Pakistan, following are the estimates for additional people that may fall below the poverty line in the province as per Scenarios 1 (i.e. 29.8% of 10 million) and 2 (29.8% of 19.1 million):

<sup>7</sup> COVID-19 Impact: Preliminary Macro-Economic and Socio-Economic Assessments, Sub-Committee of NCC, <https://www.thenews.com.pk/print/649600-covid-19-scenario-govt-fears-gdp-growth-to-go-down-by-1-3pc>

Additional Number of Poor People in Sindh	Scenario-1 (29 % Headcount)	Scenario-2 (33.5% Headcount)
	2.98 million	5.69 million

This essentially means that the total number of people below poverty line in Sindh could range from **18.03 million** to **20.74 million** people due to COVID-19 Impact.

## Monetary and Multi-Dimensional Poverty

Total number of poor people in Sindh was 14,048,000 which was 47,092,000 in Pakistan according to PSLM 2014.<sup>8</sup> This means that 29.8% of the total poor people of Pakistan reside in Sindh. In Pakistan, 24.3% of population is living below the \$1.90 poverty line at PPP, (i.e. 50.49 million out of 207.78 million people).<sup>9</sup> Assuming Sindh's share of 29.8% in terms of total poor population in Pakistan, it means that 15.05 million people in the province are living below poverty today. Sub-Committee of NCC estimate that number of additional people who could fall below poverty line in Pakistan ranges from 10 million in Scenario-I (29 percent headcount) to 19.1 million in Scenario-II (33.5 percent headcount). Extrapolating these numbers to Sindh would mean that an additional number of 2.98 million (Scenario-I) to 5.69 million (Scenario-II) people could fall below the poverty line as a result of the outbreak-related economic shocks.

It is worth mentioning that the income/consumption-related poverty rate is highly correlated with Multi-Dimensional Poverty Index in Sindh with a correlation coefficient of +0.94<sup>10</sup>. This means that people who are suffering from income poverty are also severely deprived in terms of health, education and standard of living indicators in the province. It is worth mentioning that Sindh's Multi-Dimensional Poverty Head-Count is 43.1%. Hence, the social protection

<sup>8</sup> PSLM 2013-14, <http://www.data4pakistan.com/map.html>

<sup>9</sup> Pakistan Economic Survey 2018-19, [http://www.finance.gov.pk/survey/chapters\\_19/15-Social%20Protection.pdf](http://www.finance.gov.pk/survey/chapters_19/15-Social%20Protection.pdf)

<sup>10</sup> Multi-Dimensional Poverty in Pakistan 2014-15

<<https://www.undp.org/content/dam/pakistan/docs/MPI/Multidimensional%20Poverty%20in%20Pakistan.pdf>>

measures should incorporate a comprehensive package to address the multiple deprivations faced by the vulnerable segments of population.

## Food Insecurity Estimations using National Nutrition Survey 2018 and Population Census Data 2017:

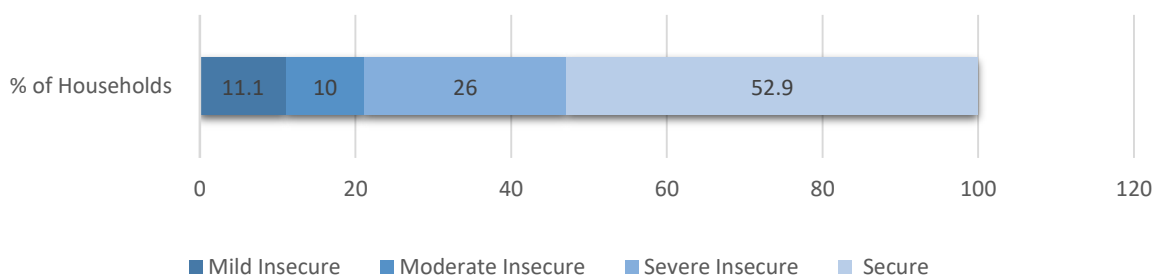
According to NNS 2018, almost **47.1%** of people living in Sindh are considered to be **food insecure** with 11.1%, 10.0% and 26.0% of households experiencing mild, moderate and severe food insecurity respectively. Following are the estimations of food insecure households out of a total of 8,585,610 households in Sindh as per Census 2017 data.

### Food Insecurity Level % of HHs Food Insecure No. of HHs as per Census 2017

Food Insecurity Level	% of HHs Food Insecure	No. of HHs as per Census 2017
<b>Mild</b>	11.1	953,003
<b>Moderate</b>	10.0	858,561
<b>Severe</b>	26.0	2,232,259
<b>Total</b>	<b>47.1</b>	<b>4,043,822</b>

According to NNS 2018, 4.04 million out of 8.59 million households in Sindh are food insecure. Out of the food insecure households, about 2.23 million households suffer severe food insecurity while 1.81 million households are mildly or moderately food insecure.

### Percentage Level of Food Security in Sindh



## State of Food Security in Sindh

Pakistan is considered a lower middle-income country and has the sixth largest population in the world. According to the World Bank, it is estimated that average adult should have at least 2,350 calories to meet its daily requirements and maintain a healthy body<sup>11</sup>. However, within Pakistan there is a great dispersion in availability and accessibility to food between various income quintiles (groups) and also varies between regions. The average daily household caloric consumption per adult in Pakistan is equivalent to 2,033 calories<sup>12</sup>, which is 13% lower than the officially recommended level of 2,350 calories per day defined by World Bank.

Sindh and Baluchistan are considered to be the most food insecure provinces within Pakistan. Almost 47.1% of people living in Sindh are considered to be food insecure with 11.1%, 10.0% and 26.0% of households experiencing mild, moderate and severe food insecurity respectively<sup>13</sup>. This essentially means that about 4,043,822 out of 8,585,610 households in Sindh are food insecure. Out of the food insecure households, 2,232,259 households suffer severe food insecurity while 1,811,563 households are mildly or moderately food insecure. Average caloric consumption of households in the poorest consumption quintile i.e. (bottom income quintile), at 1,570 calories, is 23% lower than the recommended level, and 27% lower than the average caloric consumption of households in the richest consumption expenditure quintile (the richest households), at 2,501 calories<sup>14</sup>.

According to the Integrated Food Security Phase Classification (IPC) report, the province of Sindh has been analyzed closely in terms of food insecurity where 7 most food insecure districts namely (Badin, Dadu, Sanghar, Tharparkar, Umerkot, Jamshoro, and Shahdadkot) were studied.

According to an analysis conducted by IPC, it is found that province of Sindh is prone to multiple hazards. Drought or drought-like conditions have been prevailing in parts of Sindh since 2013, particularly in the southeastern and

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<sup>11</sup> [Worldbank.org/PGLP/Resources/povertymanual\\_ch3.pdf](http://siteresources.worldbank.org/PGLP/Resources/povertymanual_ch3.pdf)  
<http://siteresources.worldbank.org/PGLP/Resources/PovertyManual.pdf>

<sup>12</sup> [Worldbank.com/Child Undernutrition in Pakistan What Do We Know?//http://documents.worldbank.org/curated/en/810811493910657388/pdf/WPS8049.pdf](http://documents.worldbank.org/curated/en/810811493910657388/pdf/WPS8049.pdf)

<sup>13</sup> [National Nutrition Survey Pakistan/ 2018//https://www.unicef.org/pakistan/reports/national-nutrition-survey-2018-key-findings-report](https://www.unicef.org/pakistan/reports/national-nutrition-survey-2018-key-findings-report)

<sup>14</sup> [World Bank / Child Undernutrition in Pakistan: What Do We Know/ 2017/http://documents.worldbank.org/curated/en/810811493910657388/pdf/WPS8049.pdf](http://documents.worldbank.org/curated/en/810811493910657388/pdf/WPS8049.pdf)

western districts: Tharparkar, Umerkot, and Sanghar (along the eastern border with India) and Jamshoro, Dadu, Shahdadt (along the Western border of the province). The areas impacted by drought are heavily reliant on monsoon rainfall and with repeated years of low or in some cases complete absence of rainfall, the drought conditions have significantly deteriorated. The land of these 7 districts is considered as Barren / Arid. This essentially means that the entire harvest is totally dependent on rain and monsoon systems.

Analyzing the seven districts revealed that almost 57% population i.e. 1.27 million people were falling under severe to extreme food insecure population out of total population of 2.22 million people. Almost 60% of the Thar, Umerkot, and Sanghar's population were facing severe food crises and shortage of basic food commodities. However, Shahdadt, Badin and Jamshoro are facing second highest incidence of food crisis i.e. between 50 to 55%. The crop area and production of major cereal crops has shown an overall reduction across all seven districts, and not just in the drought-notified areas. The crop area and production of wheat has reduced by 24% each since 2014-15 in these 7 districts. However, crop area and production in 2018-19 is estimated to be 17% (at 294,159 hectares) and 10% (at 960,701 metric tons) less than in 2017-18.<sup>15</sup>

As far as Sindh's diet-related food security is concerned, only one in seven children (12.6%) aged 6–23 months receive a meal with minimum dietary diversity, with at least four different food groups. One in four children (16.9%) receives the minimum number of meals a day. Complementary foods that meet the requirements of a minimum acceptable diet to ensure optimal growth and development for children aged 6–23 months are provided to less than one in 20 children (2.2%).<sup>16</sup>

According to NNS 2018, only 12.7% of Sindh's Population has been covered under the Social Protection Schemes to minimize the incidence of poverty and food insecurity. However, with the recent Corona Virus wave, social protection coverage would have to increase to address the vulnerable segments of population and to mitigate the economic impact of COVID-19.

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<sup>15</sup>Integrated Food Security Phase Classification (IPC)/ Acute Food Insecurity Analysis/ October 2018 – October 2019// <https://reliefweb.int/report/pakistan/sindh-pakistan-ipc-acute-food-insecurity-analysis-october-2018-october-2019-issued>

<sup>16</sup> National Nutrition Survey Pakistan/ 2018//<https://www.unicef.org/pakistan/reports/national-nutrition-survey-2018-key-findings-report>

# Economic Response Plan of Government of Sindh:

## Addressing Economic Vulnerabilities – Employment & Enterprises

To limit the fallout of the COVID 19 pandemic, Government of Sindh's response should include a stimulus package that includes support for business investments, and cash flow assistance for small and medium sized businesses and employees. A series of measures designed to stabilize markets, enhance liquidity and stimulate growth are already underway at both the Federal as well as Provincial level.

The economic stimulus package announced by the Federal Government contains a whole range of fiscal measures (tax breaks, financial support via utilities payment deferrals, fuel and transport subsidies, concessions and tax refunds) to protect exporters and business entities. The government has also announced a separate package worth PKR 100 billion (\$600.42 million) just for SMEs.

The State Bank of Pakistan (SBP) has announced a Temporary Economic Refinance Facility to fuel new investment. This will offer subsidized loans to the manufacturing sector and a Refinance Facility to allow banks to get loans at zero mark-up, which they can offer to hospitals at 3% for five years. Provincial governments are also preparing their own financial packages and they have some fiscal room to expand the federal government's cash transfer measures, and other fiscal instruments.

In the same context, it is also important that interventions mentioned above, and others being planned by the Government correspond with the rapid

economic impact assessment. Prior to COVID 19, GDP for Pakistan was expected to increase by 3.3%. The rapid economic impact assessment reveals that Pakistan's GDP could fall from 0.7 to 1.6% in the current fiscal year. In Sindh, the greatest hit will be on industries and services sector, as Karachi is the hub of industrial sector in Pakistan. The overall GDP losses in Sindh are expected to range between \$2.25 billion to \$2.317 billion in two analyzed scenarios. In Industrial sector, losses will range between \$0.690 billion to \$1.8945 billion while in services sector losses will be around \$0.5256 billion to \$0.876 billion. In agriculture, losses will range from \$0.1858 to \$0.425 billion. To stimulate economic activity, provincial governments need to adopt multiple policy responses

The choices that governments make to restart their economic engine, including the long-term social, economic, and environmental co-benefits they seek to achieve through their stimulus investments, will be extraordinarily consequential in ensuring that they can build back stronger and better. For that purpose, World Bank has developed a draft sustainability checklist<sup>17</sup> (to be refined in the coming months) that government ministries can use to assess or rank stimulus proposals. It is a useful tool that provides granular guidance for policymakers.

Essentially, the Government should divide response in two timescales: short-term needs to deliver as many jobs, income, and economic demand as quickly as possible, and the longer-term need to deliver sustainable growth and prosperity. In the short-term, the focus should be on:

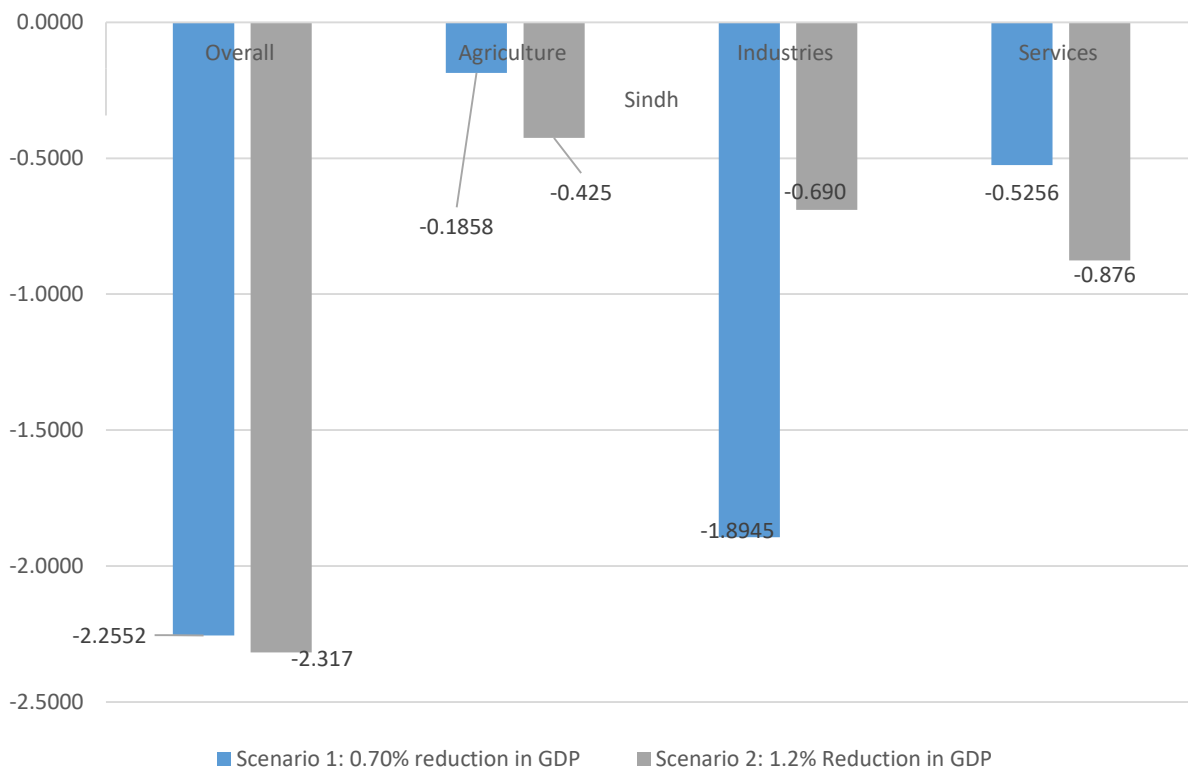
- Developing mechanism to regularly update and register unemployed workers
- Conducting rapid assessment(s) and undertake analysis to identify sector-specific needs
- Develop mechanisms for distribution of compensation package to support livelihoods of unemployed workers

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<sup>17</sup> Link to the WB Checklist: <http://pubdocs.worldbank.org/en/223671586803837686/Sustainability-Checklist-for-Assessing-Economic-Recovery-Investments-April-2020.pdf>



### Scenario Based Expected GDP Losses in Sindh Relative to expected Growth (\$ Billions)



## Supporting Businesses

SMEs form close to 90% of all enterprises in Pakistan and generate 40% of non-agriculture employment. In Sindh 41% of employed persons are engaged in informal sector and 54.48% of individuals earn income of Rs.15, 000 and below.<sup>18</sup> According to estimates of Pasha, H and Karder, S (2020) paper<sup>19</sup>, 10.5 million people will be temporary out of employment which includes daily wage and contractual workers. So, it is estimated that in Sindh (23% share of employment), 2.4 million people will be temporarily out of employment. Additionally, as impact of COVID-19 transpires, 2.8- 4.3 million people will be out of jobs in Sindh<sup>20</sup>

To support micro, small and medium businesses in Sindh's agriculture value chain, wholesale funding could be extended to the Sindh Enterprise Development Fund. Other key players in essential consumable value chains

<sup>18</sup> Labor Force Survey (2017-18)

<sup>19</sup> Pasha, H and Karder, S (2020), Economic Impact of Corona Virus and the Relief Package

<sup>20</sup> Estimates for Sindh based on COVID-19 Impact: Preliminary Macro-Economic and Socio-Economic Assessments, Sub-Committee of NCC,

should be identified and supported to give breathing space and generate economic activity. The table below summarizes the possible area of support, and the respective interventions and responsible government departments/entities.

<b>Area of Support</b>	<b>Intervention(s)</b>	<b>Relevant Government Department(s)/Implementing Partner</b>
Supporting Businesses	<p>Monitor the impact of the crisis on SMEs and enhance the governance of SME related policy responses;</p> <p>Identification of key value chains in agriculture and other consumables;</p> <p>Access to finance through grants, equity and debt instruments to support working capital, growth capital and wage subsidy to Medium Small and Micro Enterprises;</p> <p>Support Startups and entrepreneurs (especially in the technology, information and communication space) through the National Incubation Center, and other accelerators and incubators</p>	<p>Sindh Enterprise Development Fund, Sindh Bank, Industries and Commerce Department, PPP Unit, Finance Department, National Incubation Center, Sindh Small Industries Corporation, Commercial Banks</p>

	<i>operating in Sindh</i>	
<i>Sector Specific Protocols</i>	<p><i>Government of Sindh to develop sector specific SOPs particular for high value added and vulnerable sectors</i></p> <p><i>Support e-commerce through implementing tax exemptions and other measures;</i></p> <p><i>Implement tax exemptions to e-commerce</i></p>	<i>Public-health leaders, industry associations, and Planning and Development Department</i>
<i>Mitigate effect of Sector wise GDP Losses</i>	<p><i>The expected GDP losses in Sindh will range between \$2.25 billion to \$2.317 billion. Particular focus should be on services and industrial sector in form of following interventions</i></p> <ol style="list-style-type: none"> <li><i>1) Strategies should be developed to mobilize funds and inject investments equating to at least 10-15% of GDP loss.</i></li> <li><i>2) Develop phase wise subsidies schemes for vulnerable industries (transportation and retail industries included)</i></li> <li><i>3) Permitting delays in the deposits of tax liabilities</i></li> </ol>	<p><i>Sindh Board of Revenue (SBOR)</i></p> <p><i>Sindh Board of Investment (SBOI)</i></p> <p><i>Sindh Exercise and Taxation Department</i></p> <p><i>Industries and Commerce Department</i></p> <p><i>Labor Department</i></p> <p><i>Finance Department</i></p>

	<p>and reduction in tax rates (especially through the halving of the minimum turnover tax). This includes cement, iron and steel, fertilizer, chemicals, paper and board,</p> <p>4) Tax refund and duty relief schemes to exporting industries</p> <p>5) Deferment of appropriate share of loan balance. Cost to be picked up by Banks assuming there is no compounding of interest charges on the delayed servicing of the debt.</p>	
<p>Wage Support Scheme</p>	<p>It is expected that 2.4 million people will be temporarily out employment in Sindh. So based on this estimate, actual identification of partial unemployment and working hour reduction in daily wagers and vulnerable employees needs to be undertaken</p> <p>Identification of partial unemployment and working hours reduction in daily wagers, particularly the vulnerable employees</p> <p>The government may develop a mechanism to finance temporary layoffs; and incentivize businesses to</p>	<p>Finance Department, Industries and Commerce Department</p> <p>Labor Department</p>

	<p><i>discourage layoffs;</i></p> <p><i>Leverage G2P Payment Infrastructure for cash transfers using solutions like mobile money and e-transfers, etc.</i></p>	
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# Social Protection Response to Mitigate the Effect of COVID-19 Outbreak

To mitigate the effect of COVID-19 outbreak in Sindh on the vulnerable segments of the population, Social Protection measures need to be re-oriented towards identifying and addressing the needs of affectees who are susceptible to falling below the poverty line.

The provincial estimations, computed from the socio-economic estimations of Sub-Committee of NCC, posit that the additional number of people falling below poverty line in Sindh may range from 2.98 million to 5.69 million.

If estimations from Pakistan Institute of Development Economics (PIDE) are considered for Sindh, then a much worse situation would have to be confronted in terms of employment and poverty. PIDE estimates that expected layoffs among the vulnerably employed might range from 3.3 million to 4.2 million people. Similarly, the additional number of people falling below poverty line in Sindh may range from 6.26 million to 21.16 million.<sup>21</sup>

In terms of Government's Social Protection response to COVID-19, Federal Government's Ehsaas Program is in the process of disbursing Rs. 144 billion to 12 million families with Rs. 12000 per family. Government of Sindh launched a Corona-Virus Relief Fund of Rs. 3 billion on March 17 to fight the pandemic for which the contributions have exceeded Rs. 3 billion. Government of Sindh has released two financial tranches for procurement and distribution of ration bags that add up to Rs. 1.080 billion. Rs. 580 million was released on March 26 with Rs.

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<sup>21</sup> Pakistan Institute of Development Economics April 2020, <https://www.pide.org.pk/pdf/PIDE-COVID19-EBook.pdf>

20 million released for each of the 29 districts and Rs. 500 million were released on April 6.

To cater to the COVID-19 impact through social protection measures, the Government of Sindh can expand the ambit of its Poverty Reduction and Social Protection programs to cater to three broad areas of **Social Assistance, Social Insurance and Labor Markets**. The Government has earmarked about Rs 12.3 billion for Social Protection and Poverty Reduction in ADP 2019-20.

**Social Assistance** is centered on non-contributory in-kind or cash transfers targeted towards the impoverished and vulnerable population. Government of Sindh has multiple social assistance programs executed through various Departments. For example, Zakat & Ushr Demand disburses education stipend, stipend to madrassas, marriage assistance, healthcare assistance, rehabilitation allowance, etc. Planning & Development Department through People's Poverty Reduction Program provides Community Investment Funds to impoverished women as a loan with flexible terms for income generating activities. Worker's Welfare Board provides assistance to workers' families including scholarships for students, financial aid for marriage and death grant for widows. Finance Department also provides assistance to the vulnerable people through its Sindh Social Relief Fund.

For an integrated effort towards social assistance to COVID-19 affectees, the harmonization of social assistance programs can yield amplified impacts. Recently notified 'Social Protection Strategy Unit'<sup>22</sup> can serve as an umbrella organization to consolidate and rationalize social protection efforts. This includes rolling out rapid identification surveys to assess economic vulnerability due to the outbreak, identifying the coverage and funding gap to improve resilience and streamlining financing mechanisms for timely disbursement of social assistance. National Socio-Economic Registry Data can be used as a frame of reference for the impoverished households in Sindh. Rapid vulnerability surveys can be administered to augment the database and designing evidence-based social protection packages accordingly.

**Social Insurance** is centered on facilitating households and individuals for mitigation to ensure protection against risk factors like old age, disability, ill health and unemployment. In Sindh, social insurance is limited to old age

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<sup>22</sup> Sindh Social Protection Policy Note, April 2019, <http://documents.worldbank.org/curated/en/941321557209507700/pdf/Sindh-Social-Protection-Policy-Note.pdf>

pensions and healthcare for workers in the formal sector. Government of Sindh offers Employee Group Insurance for government employees and Health Insurance service for government employees to receive healthcare services from private hospitals in case of specialized medical treatment. People's Poverty Reduction Program's (PPRP) Micro-Health Insurance is a social protection measure for the most destitute and vulnerable households (who lie in the 0-18 poverty band). The objective of the MHI is to protect impoverished families from health shocks that may push them deeper into poverty. MHI is for poor households covering parents, married couple with children up to 18 years old and the service package includes OPD, day care, diagnostic services, and hospitalization (for more than 24 hours' stay) and maternity care.

The ambit of social insurance in Sindh can be expanded considerably to include impoverished people, informal workers, daily wagers, piece-rate workers, street vendors and other vulnerably employed segments of population. Rural Support Programs (SRSO, TRDP, etc.) can be utilized to identify vulnerable households with existing poverty scorecards database along with rapid vulnerability assessment to offer health insurance services. Expanding the scope of MHI already being offered under PPRP can help reduce out of pocket expenditures considerably, especially for impoverished and vulnerable households. Active linkages with proximate health services, along with a pro-active awareness campaign to improve utilization by the impoverished communities, need to be pursued pro-actively. The provision of health insurance also needs to be expanded to urban impoverished communities who are disproportionately affected by COVID-19.

**Labor Market Programs** are centered on promoting employability and labor welfare to promote citizen's self-sufficiency through income generating activities and graduation from poverty. Sindh Technical Education and Vocational Training Authority (STEVTA) is the umbrella unit which comprises of Sindh Skills Development Project and Benazir Bhutto Shaheed Youth Development Programme (BBSYDP) (that is now Benazir Bhutto Shaheed Human Resource Research & Development Board). BBSHRRDB has trained 320,000 youth in 89 sectors till date. People's Poverty Reduction Program also has Vocational Training Program and Income Generating Grants to impart vocational training and give out small grants/loans to impoverished women.

Active Labor Market Programs (ALMP) are public sector labor market interventions that help the unemployed population find work. In Sindh's COVID-



19 response effort, ALMP needs to be harnessed through STEVTA for the unemployed or vulnerably employed segments of population. Three broad areas of intervention would include public employment services, vocational training programs and employment subsidies. STEVTA is well-positioned to cater to the recently unemployed by providing critical employment-related information, augmenting skill-set of the unemployed (with monthly stipends) and engaging the recently unemployed in public-work programs. On the research front, STEVTA can initiate surveys to capture labor demand and supply dynamics through livelihood mapping, skills gap and employability analysis.

Other broad areas of intervention that fall under the purview of Social Protection include **Social Care Services and General Subsidies**. In terms of Social Care Services, Social Welfare Department has undertaken projects to rehabilitate street children, provide shelter to women victims of violence and rehabilitate disabled persons. Women Development Department has also developed projects to provide support through day-care centers to working women, skills development of women and alternate dispute resolution centers for women.

Government of Sindh already prioritizes providing subsidies to farmers, primarily through the Agriculture Department. These subsidies include wheat subsidy to maintain the support price and reduce fluctuation in the price of flour, subsidy on urea fertilizers to reduce input costs for farmers and subsidy to support small sugar-cane growers. Other subsidies include provision of tractors, solar-pumps/tube-wells and agricultural machinery at subsidized rates.

Government can build on the existing **social care services** to support the most vulnerable segment of population, especially women and children. Social welfare and women development projects can be expanded to bolster the relief efforts of the Government through identification of vulnerable women and children in need of cash, in-kind and social support services. Remedial education for children in vulnerable households can be initiated along with skills development program for marginalized women to cope with the economic impact of COVID-19. Behavior change communication programs and community awareness programs can be conducted to raise awareness on social distancing and other healthy behaviors. Psycho-social support can also be provided to the mentally stressed individuals with provisions of both remote and in-person consultations.

The scope of **subsidies** can be restructured with an 'equity' objective of addressing poverty and vulnerability. Targeted subsidies to support the

impoverished and vulnerable households need clearly delineated identification criteria (e.g. economic vulnerability assessment) to help the marginalized segments of population cope with socio-economic shocks associated with COVID-19. Streamlined process of identification and targeting can amplify the positive impact of subsidies without putting added pressure on the resource envelope. Seven most vulnerable districts in terms of food security (Badin, Dadu, Sanghar, Tharparkar, Umerkot, Jamshoro, and Shahdada Kot) can be prioritized in terms of provision of food subsidies. Provision of subsidies must be prioritized based on vulnerabilities and deprivations.

### Development Priorities for Social Protection Response to COVID-19 Impact

<b>Area of Support</b>	<b>Intervention(s)</b>	<b>Relevant Government Department(s)</b>
<i>Social Assistance</i>	<i>Identification of vulnerable households</i>  <i>Streamlining disbursement of social assistance</i>  <i>Harmonization of Efforts to address coverage and funding gaps</i>	<i>Social Protection Strategy Unit, PPRP, Ehsaas (PASS), Finance Department, Zakat &amp; Ushr Department</i>
<i>Social Insurance</i>	<i>Expand the ambit of health insurance to include unemployed and vulnerably employed</i>	<i>Finance Department, Health Department, PPRP</i>
<i>Labor Market Programs</i>	<i>Active Labor Market Program:</i>  <i>Public Employment Services</i>  <i>Vocational Training Programs</i>	<i>STEVTA, Finance Department, Works &amp; Services, Labor Department</i>

	<i>Employment Subsidies</i>	
<i>Social Care Services</i>	<p><i>Bolster relief efforts by identification of vulnerable women and children</i></p> <p><i>Support remedial education to affected children</i></p> <p><i>Support skills development initiatives for impoverished women</i></p> <p><i>Social support service extension (e.g. mental health)</i></p>	<p><i>Social Welfare Department, Women Development Department, Social Protection Strategy Unit, STEVTA, PPRP</i></p>
<i>General Subsidies</i>	<p><i>Restructure scope of subsidies with 'equity' objective</i></p> <p><i>Conduct economic vulnerability assessment for identification and targeting</i></p> <p><i>Prioritize phase-wise provision of subsidies based on vulnerabilities</i></p>	<p><i>Agriculture Department, Food Department, Finance Department, PPRP</i></p>



# Conclusion

The assessment of estimated GDP Loss, Job Loss and Poverty Incidence has been conducted with the intention of providing quantifiable macro-economic and socio-economic impact possibilities of COVID-19 on Sindh. The overarching idea of conducting the assessment is to ascertain the quantum of response to guide economic recovery and social protection efforts of the province. Possible economic recovery and social protection responses have also been provided to respond to the emergent situation. It is acknowledged that the COVID-19 situation is uncertain and dynamic, but this document can serve as a frame of reference for the provincial government to keep assessing the evolving situation and strategizing based on the evidence at hand.

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**COVID-19-SINDH'S SOCIO-  
ECONOMIC IMPACT  
ASSESSMENT AND  
DEVELOPMENT RESPONSE  
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