



Avian Flu Pandemic Preparedness Survey Report

Spring 2006

We encourage you to read Mercer Human Resource Consulting's white paper **The Emerging Global Pandemic: Human Resource Implications** to further your understanding of avian flu and the appropriate risk mitigation strategies essential to protecting the health and welfare of your employees.

The white paper can be found on Mercer's avian flu website, www.mercerhr.com/avianflu, which was developed in response to growing client concerns regarding the avian flu outbreak and its potential to mutate into a human influenza pandemic.

This website contains a range of resources that will assist organizations in defining the nature of the risk and acting decisively to protect the well-being of their employees in the event of a pandemic.

If you would like more information, please contact avianflu@mercer.com.

About Mercer Human Resource Consulting

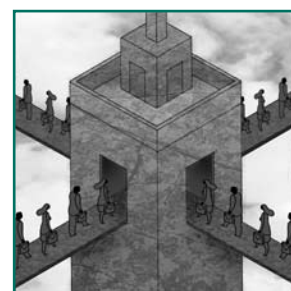
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Table of contents

Research methodology	2
Avian flu background	3
Survey results	4
■ Executive summary	
■ Gap between organizational concern and preparedness	
■ Establishment of a pandemic budget	
■ Impact of SARS on pandemic preparedness	
■ Expected financial impact	
■ Crisis leadership	
■ Workforce planning	
■ Employee communication	
■ Organizational preparedness by industry	
■ Revenue impact	
■ Employee absenteeism	
■ Pandemic budget	
■ Customer demand	
■ Human resource policy trends	
■ Compensation	
■ Leave	
■ Travel and evacuation of expatriates	
■ Working remotely	
■ Hygiene and preventive health	
■ Insurance coverage	
■ Conclusion and recommended actions	
Appendices	15
■ Countries	
■ Industries	
■ Named participants	
■ Survey questions	





Research methodology

Mercer invited organizations globally to participate in an online survey during early March 2006 via Mercer's dedicated avian flu website, www.mercerhr.com/avianflu.

For many organizations, participation in the Mercer Avian Flu Pandemic Preparedness Survey (Mercer Survey) represented a critical first step in conducting an inventory of their current level of preparedness for a pandemic crisis from a human resource standpoint.

The findings contained in this report are underpinned by data gathered from 450 respondents across 38 countries and 26 industries, with respondents from Australia, Canada, People's Republic of China, Hong Kong, Singapore, United Kingdom and United States comprising 75 percent of total respondents. The top six industries, comprising 60 percent of participants, were manufacturing, finance, professional services, computer services, insurance and education.

There are five key indicators that Mercer has utilized to gauge organizational pandemic preparedness. In isolation, each of these indicators provides an insight into the priorities that organizations have established in their pandemic preparedness planning. In combination, they provide a broader assessment of the overall state of an organization's preparedness for such a contingency. These are the key indicators:

1. Establishment of a budget for pandemic preparedness.
2. Formation of a crisis leadership management team.
3. Development of a pandemic business continuity plan.
4. Workforce planning (including skills inventory).
5. Development of an employee communication strategy.

There were 11 questions that covered a comprehensive range of topics. Depending on the question, respondents were asked to rate the questions on scales of Not Important to Very Important, Negative Change to Positive Change, Likely to Unlikely and No Impact to High Impact. The topics included:

- Impact on organizational success factors
- Crisis leadership
- Employee communication
- Skills inventory for workforce planning
- Remote working procedures
- International assignees and corporate travelers
- Compensation and leave policies
- Insurance coverage
- Hygiene, quarantine and preventive health measures
- Employee assistance
- Business continuity planning

The data from the online survey was analyzed using quantitative techniques for patterns in responses. The survey report was developed by identifying themes and issues that evolved from the responses and provides insight into the current state of organizational preparedness for a pandemic. Most important, the report identifies the key issues that are fundamental to managing the people consequences of a global crisis on this scale.

Avian flu background

The avian flu outbreak currently sweeping the globe has gripped the public consciousness with concerns that the virus will mutate into a human influenza pandemic with potentially devastating consequences for global commerce and the community at large.

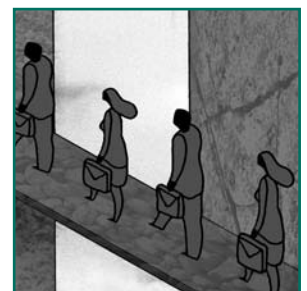
The World Bank has estimated a global economic impact at US\$800 billion for a human influenza pandemic. To put this into perspective, the 2003 SARS crisis cost the Asia Pacific economies US\$40 billion and reduced air traffic in the region by 45 percent yet only 8,000 people were infected.

In order to understand the concerns expressed by the World Health Organization (WHO), the U.S. Center for Disease Control and Prevention (CDC) and national governments, it is necessary to briefly document the facts concerning avian influenza.

The vast majority of avian influenza viruses do not infect humans. However, the strain responsible for the recent outbreak, H5N1, has been identified as a strain with pandemic potential, since it may ultimately mutate into a strain that is contagious among humans. Once this adaptation occurs, it will no longer be an avian virus – but a human influenza virus.

Over the past 12–18 months, the disease has evolved from one that was essentially confined to Southeast Asia to one that now threatens wild birds and domestic poultry populations across Asia, Europe and Africa. While relatively limited in numbers, there have been 208 infections that have resulted in 115 human deaths, which implies a mortality rate of 55 percent versus a SARS mortality rate of less than 10 percent of those infected.

The WHO is the pre-eminent authority charged with coordinating the global community’s response to a potential pandemic. In this pre-pandemic period its advice to business leaders and the general community is simple and direct – be prepared.





Survey results

Executive summary

The results of the Mercer Survey provide a multi-dimensional insight into how different industries, regions and countries are planning for a pandemic.

Mercer believes that this data will provide companies with the capacity to benchmark their capability to respond to a major pandemic crisis and develop appropriate business continuity planning strategies.

These are the critical themes to emerge from this report:

- There is a considerable gap between organizational concern about the impact of a pandemic and organizations current state of pandemic preparedness.
- Those countries that endured the Asian SARS crisis of 2003 are generally more advanced in the pandemic preparedness planning.
- Conversely, for the United States and other economies that were not impacted by SARS and have not had direct exposure to the avian flu, planning is in its relative infancy.
- Labor intensive industries have recognized the profound consequences that a pandemic may inflict.
- Although results differ considerably by region and industry type, organizations globally are predicting that a pandemic will result in financial hardship.

As evidence mounts for the global spread of avian flu, organizations around the world are beginning

to recognize the profound implications if the virus were to mutate to a strain that would allow people to readily infect others.

While world opinion may be divided on the degree of urgency required in establishing pandemic preparedness plans, there is almost universal agreement among respondents as to the impact that such an event would have.

Gap between organizational concern and preparedness

Overall, the Mercer Survey shows that there is a considerable gap between organizational concern about the impact of a pandemic and actual pandemic preparation. An emphasis on preparedness is defined as having a business continuity plan (BCP), a budget for pandemic preparedness, a workforce plan, a crisis management team and an employee communication strategy.

While 90 percent of respondents forecast moderate to high impact due to high absenteeism associated with a pandemic, only 47 percent of respondents have established a business continuity plan. Depending upon the severity of the strain of human influenza pandemic that may occur, the WHO predicts that absenteeism rates are expected to be at least 25 percent of the workforce.

Consistent with the above forecast, 80 percent of respondents also anticipated loss of productivity and

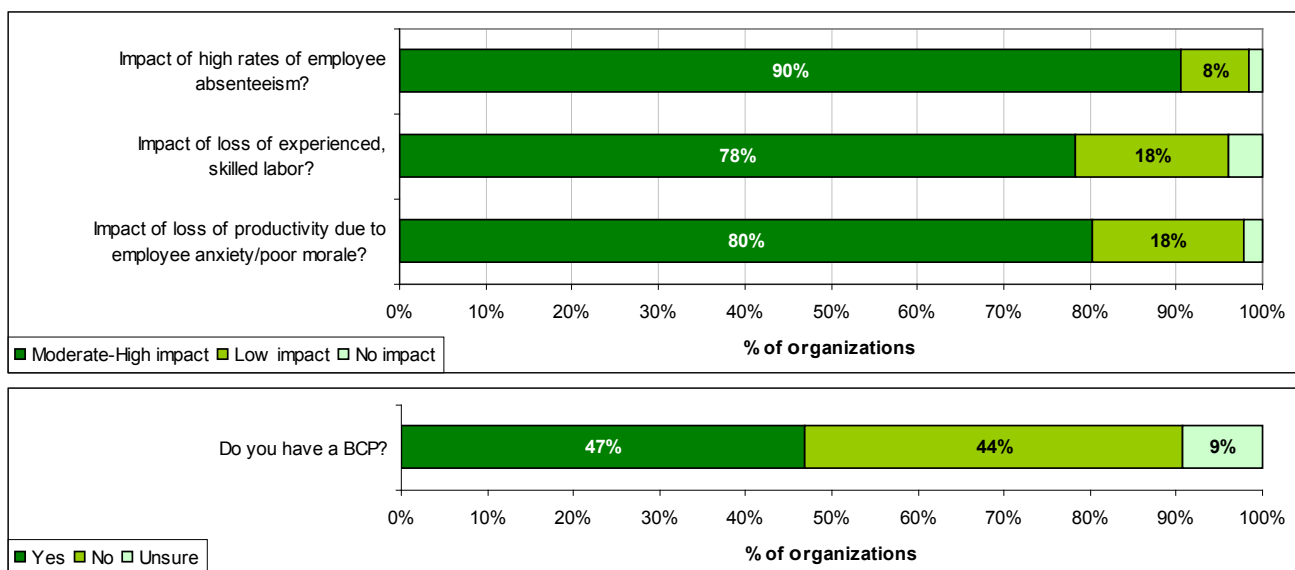


Figure 1 – Organizational preparedness and BCP

experienced skilled labor arising from a pandemic. (See Figure 1.)

Examining the financial consequences of a pandemic highlighted some interesting contrasts, which again showed the distinction between organizational concerns and actual actions. Almost 70 percent of organizations responded that a pandemic will have a negative impact upon profits. Yet, only 17 percent have allocated a budget to deal with pandemic preparedness. (See Figure 2.)

Establishment of a pandemic budget

A critical element to pandemic preparedness planning is the establishment of an organizational budget for developing a pandemic BCP. This may include the redeployment of internal resources, the contracting of external expertise where required and the purchase of physical resources to augment existing supplies.

As mentioned earlier, only 17 percent of respondents have established a pandemic budget. Twenty nine percent of respondents from mainland Chinese organizations have implemented a budget for pandemic planning. Singaporean respondents achieved 22 percent. Hong Kong respondents registered the average response rate of 17 percent while at the lower end of the scale are respondents from the United States, where the positive response

rate was only 7 percent. In Canada the rate climbs to 9 percent while Europe recorded 12 percent. (See Figure 2.)

Mercer data analysis suggests that it is those countries that were most exposed to the Asian SARS crisis that feel an urgency have been conditioned to the need to immediately in building a comprehensive level of pandemic preparedness. The achievement of this goal is dependent in no small part upon these executive teams who are prepared to dedicate resources to this task.

Impact of SARS on pandemic preparedness

The gap between organizational concern about the impact of a pandemic and actual preparation is not as wide in the Asia Pacific region. Countries in Asia Pacific appear to be better prepared, with 25 percent of respondents having committed to a budget, compared to the United States and European figures of 7 percent and 12 percent respectively.

This divergence in experience may be due to the following reasons:

1. Asia is at the epicenter of the avian flu crisis, while the US and Europe have, thus far, largely been spared.
2. The US and Europe were mostly spared from the 2003 SARS crisis, while Asia was directly exposed.

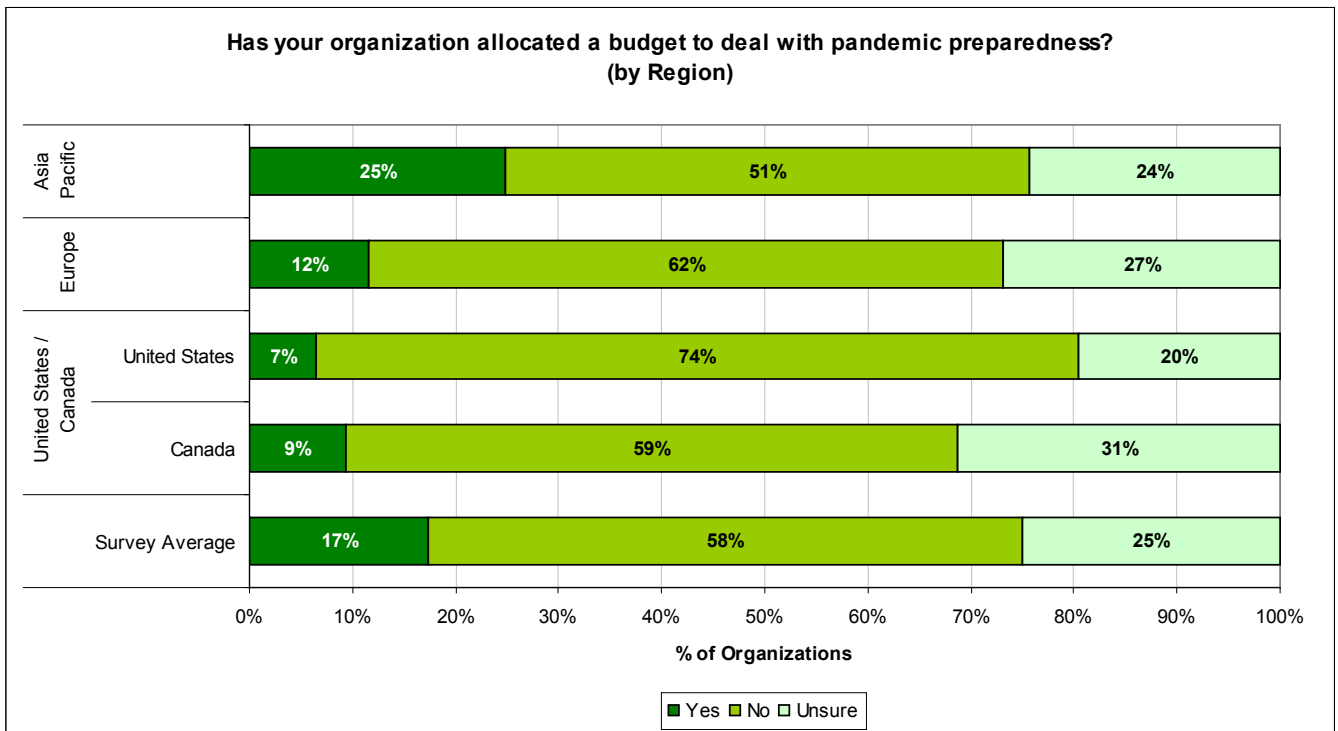


Figure 2 – Budget Allocation to deal with pandemic preparedness



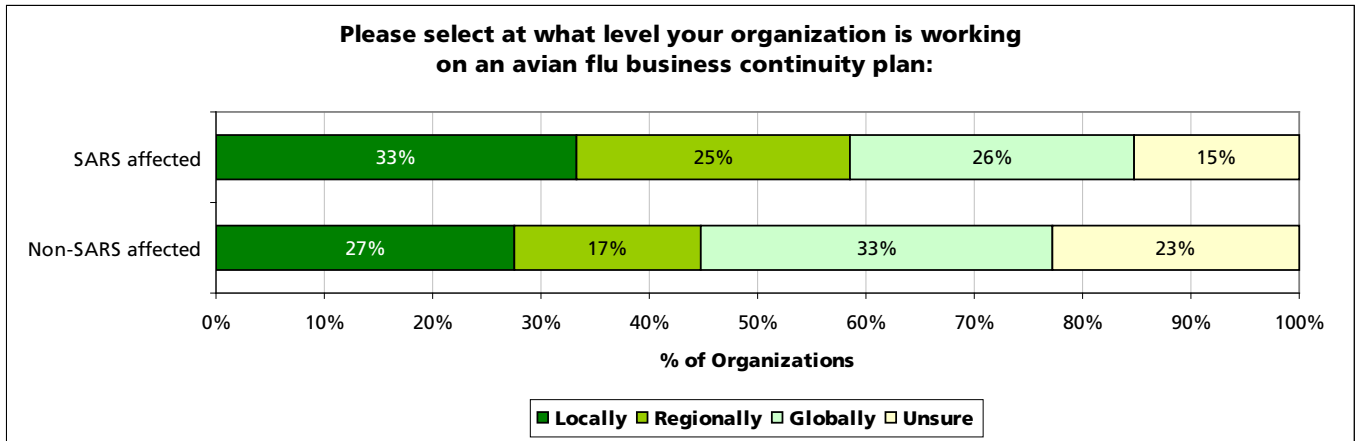


Figure 3 – Locally, regionally or globally driven BCP planning

The survey results also show that 58 percent of respondents from SARS-affected countries (Canada, Hong Kong, China, Taiwan, Singapore and Vietnam) have taken the lead to prepare and plan at a local or regional level rather than being reliant upon receiving direction on a global basis.

Mercer's interpretation of this data is that the lessons learned from the SARS experience have provided the foundations for these organizations to actively drive the BCP process.

The results from Singapore reinforce this point:

- 22 percent have established budgets.
- 45 percent have formed a crisis management team.
- 37 percent have developed a communication strategy.
- 21 percent have undertaken a skills inventory.

By comparison, respondents from non-SARS-affected countries, for example, the United States or the United Kingdom, appear to be more likely to take their direction from global headquarters, reflecting the view that this may still be considered an Asian problem. (See Figure 3.)

Expected financial impact

Consistent with the World Bank's estimate of the global economic consequences of a pandemic, almost 70 percent of respondents are factoring in profit reductions. However, what is interesting to note is that Singaporean respondents were considerably less

pessimistic concerning their financial exposure to a pandemic.

In total, 56 percent of Singaporean respondents expect a negative financial impact, compared to 80 percent in the United States. There may be multiple reasons for this stark contrast in financial expectations.

First, we need to carefully consider the predominant industries that have responded across different regions. In the case of Singapore, the experience is skewed by the significant presence of telecommunication organizations that may experience increased demand during a crisis such as a pandemic.

Second, it is quite feasible that Singaporean organizations have, in relative terms, a more positive prognosis regarding the financial impact of a pandemic, due to the positive manner in which the Singapore government managed the SARS crisis.

Further insight into this perspective can be gleaned from the experience of Hong Kong, where the Mercer Survey results across the key pandemic preparedness indicators demonstrate that Hong Kong is essentially as well prepared as Singapore.

Yet 80 percent of Hong Kong respondents forecast that a pandemic will have a negative impact upon profits, compared to the survey benchmark of 68 percent. This discrepancy between the experience of Singapore and Hong Kong may be due to the greater difficulty experienced by Hong Kong during the SARS crisis. (See Figure 4.)

Crisis leadership

The Mercer Survey results show that there is support among respondents in developing and implementing a proactive crisis leadership strategy. For example:

- 94 percent of respondents indicated that the formation of such a team should include cross-functional representation.
- 77 percent of respondents were in favor of representation across different regions.
- 76 percent of respondents rated the level of seniority as being an important consideration.

In total, 43 percent of respondents have already formed a crisis management team to specifically address pandemic preparedness planning. The United Kingdom recorded 52 percent, China 50 percent and Singapore 45 percent.

The United States (38 percent) and Australia (35 percent) are at the opposite end of this scale. What is interesting to note is that both of these countries have recorded below-average levels of preparedness across four of the key indicators to organizational preparedness for a pandemic:

- Establishment of a pandemic budget.
- Implementation of a skills inventory.
- Formation of a crisis management team.

- Development of an employee communication strategy.

Another trend that was evident in crisis leadership came from China where respondents did not place emphasis upon the need to have representation across different regions.

These trends indicate that Chinese companies are more inclined to deal with pandemic preparedness in a centralized management structure. This view is further reinforced by the fact that 41 percent of respondents from China indicated that pandemic preparedness is being addressed as a regional initiative, exactly double the survey average.

In relation to industry trends, several industries have been particularly active in establishing crisis management teams:

- 48 percent of telecommunications respondents
- 50 percent of health care respondents
- 54 percent of insurance respondents
- 56 percent of pharmaceutical respondents
- 57 percent of finance and FMCG respondents
- 67 percent of hospitality respondents

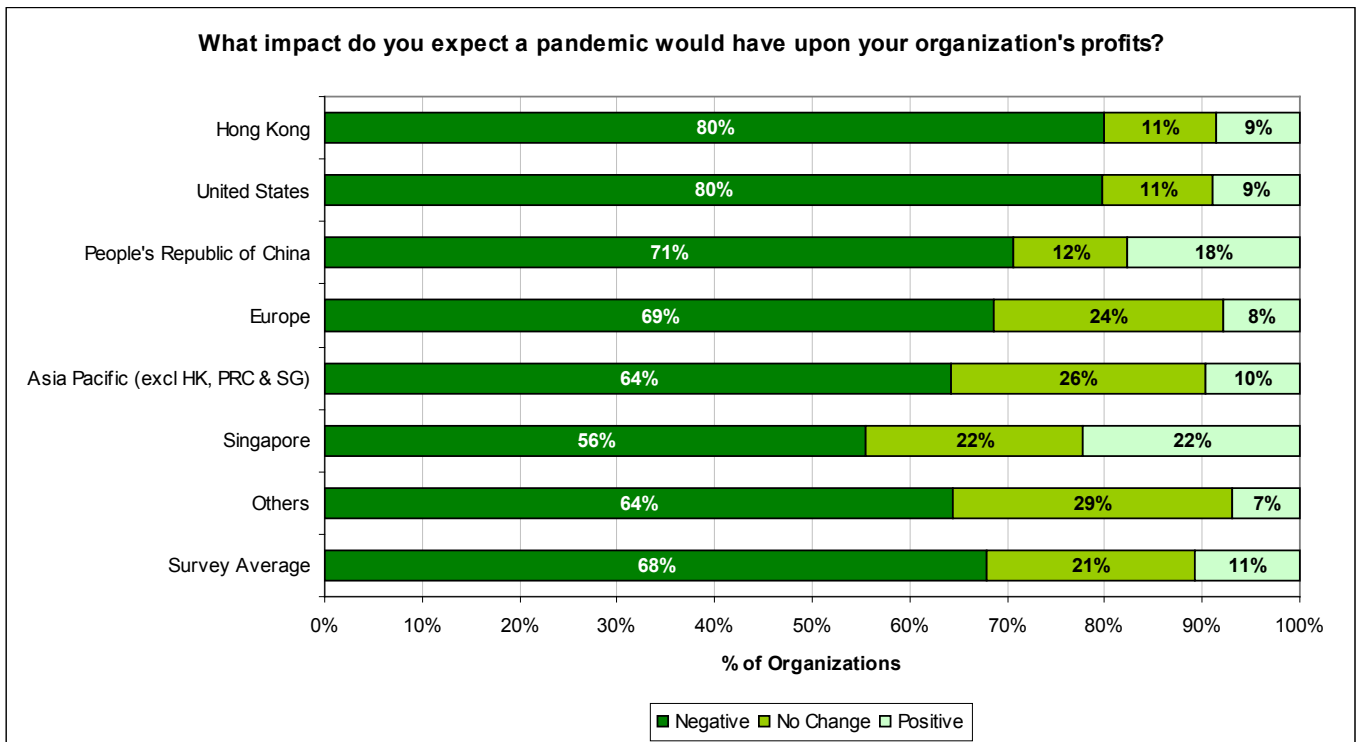


Figure 4 – Profit impact





Workforce planning

The development of workforce planning strategies constitutes another of the key indicators in gauging organizational preparedness for a pandemic. The Mercer Survey asked respondents to consider the importance of defining those activities essential to maintaining business operations during a pandemic, along with conducting a skills inventory measuring organizational capacity against these activities. Other considerations included instituting cross-training and skills development and the establishment of a backup site for business-critical functions.

Overall, 97 percent of respondents considered that it was important to define business critical activities, with 82 percent also in favor of conducting a skills inventory. Yet, at the time of completing this survey, only 19 percent of organizations surveyed had successfully done so.

Those industries that were positively disposed to conducting a skills inventory were telecommunications (33 percent), hospitality and recreation (33 percent), finance (30 percent), pharmaceuticals (25 percent) and professional services (22 percent). These organizations are characterized by the fact that they are labor intensive industries employing highly trained and remunerated personnel who will either experience an increase in demand during a pandemic or whose skills are in short supply.

Countries to score high on workforce planning were Canada (27 percent), the United Kingdom (25 percent), China (24 percent) and Singapore (21 percent). With the exception of the United Kingdom, these countries all had exposure to the Asian SARS crisis.

It would seem apparent that those organizations that endured this crisis have a heightened state of

awareness of the critical need to undertake these workforce planning strategies in order to ensure that business-critical activities continue to be performed.

Countries to score low on workforce planning were Australia (9 percent), the United States (12 percent) and Hong Kong (15 percent).

Employee communication

As mentioned previously, a critical component of organizational preparedness for a pandemic is developing an employee communication strategy. As mentioned in Mercer's white paper *The Emerging Global Pandemic: Human Resource Implications*, the implementation of an employee communication strategy is considered critical for fulfilling employees' expectations of the organization as a reliable source of information during times of crisis.

The Mercer Survey results show there is a gap between organizational intent and current practice. For example, 94 percent of respondents agreed that it is important to accurately define the nature of a pandemic threat and to communicate the organization's capacity to manage this threat through a BCP, yet only 32 percent of respondents have developed an employee communication strategy. (See figure 5.)

Organizational preparedness by industry

There are several trends that emerge when we examine the Mercer Survey results by industry type. Here are the four key indices that we have focused upon in this section are:

1. Revenue impact

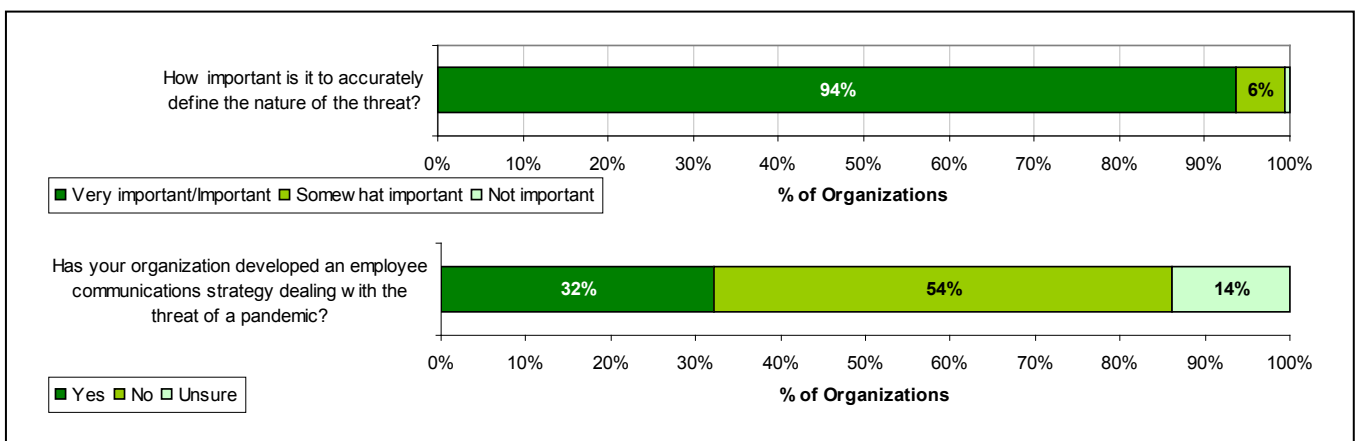


Figure 5 – Employee communication

2. Employee absenteeism
3. Pandemic budget
4. Customer demand

extent, demand for professional services would also be negatively impacted, with a consequential revenue impact, which is confirmed by the results in Figure 6.

Revenue impact

The Mercer Survey results reveal that labor intensive industries have the highest level of concern, as indicated by their expectation of the pandemic’s impact upon profitability. Those industries with a pessimistic financial outlook include transportation, hospitality, professional services, health care and manufacturing. (See Figure 6.)

There are several factors that come into play when analyzing organizational preparedness by industry results. In industries such as transport, hospitality and manufacturing, the financial pessimism is largely due to the anticipated slowdown in travel and global trade that would coincide with a pandemic. To a certain

Employee absenteeism

Those industries expressing the greatest concern regarding employee absenteeism were hospitality and recreation, education, health care, retail, professional services, financial services, insurance and manufacturing. Consistent with our previous observations, these are people-intensive industries who fear that a pandemic will strike at the very core of their operations – human resources. For example, during the SARS crisis in which employees experienced fears of contamination, many schools were closed, hotels and retail shops were emptied and hospital workers experienced heightened fears for their personal and family health.

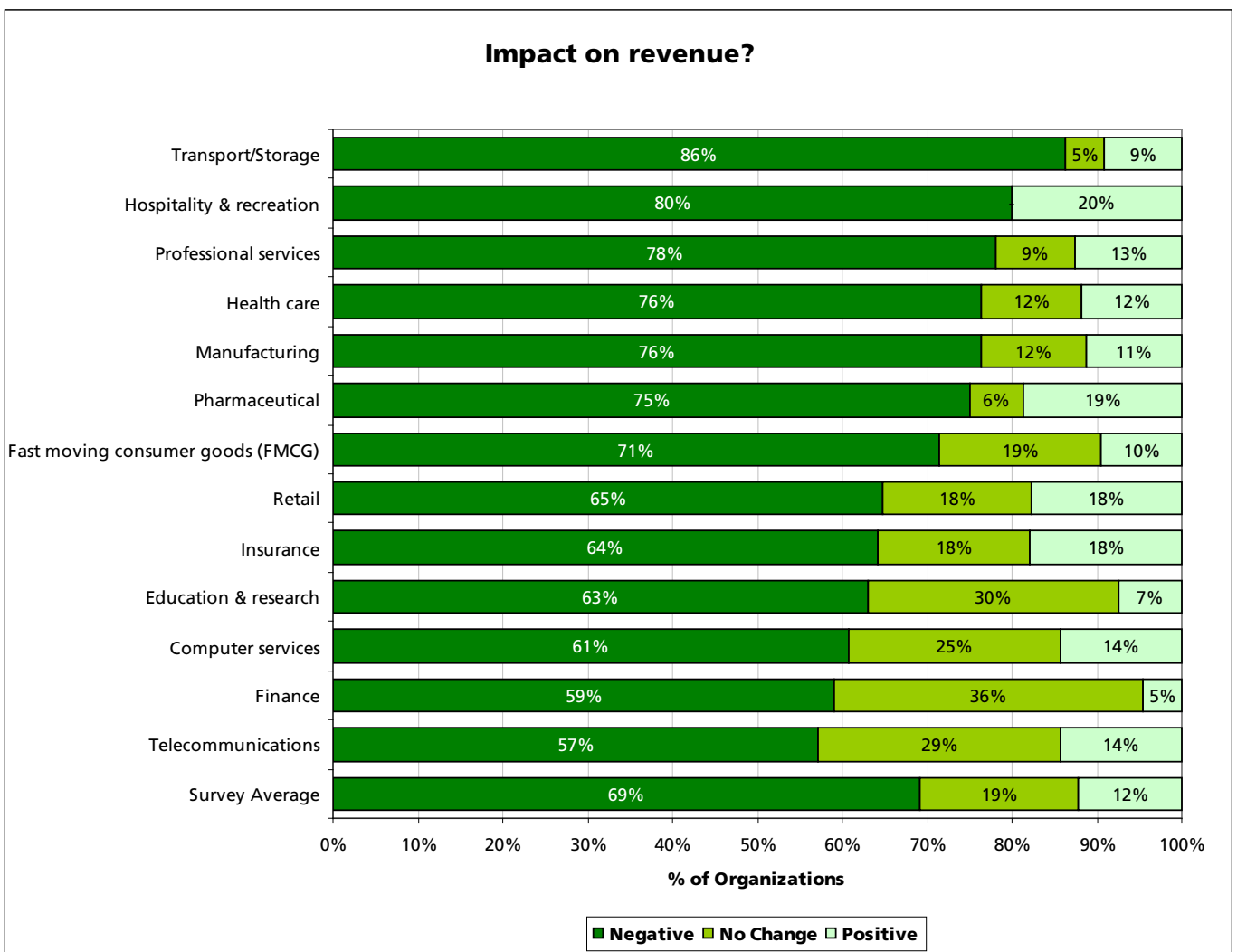


Figure 6 – Impact on revenue





Pandemic budget

There are some interesting correlations between the establishment of pandemic budgets and customer demand. The telecommunications and pharmaceutical industries provide some evidence of this. The Mercer Survey results identified that 29 percent of telecommunications and 25 percent of pharmaceutical organizations that responded have established pandemic preparedness budgets. It is these same two industries that top the list of those expecting an increase in customer demand. (See Figure 7.)

Customer demand

The Mercer Survey results show that participating insurance and pharmaceutical organizations are expecting an increase in customer demand. Insurance respondents are expecting a 39 percent positive impact on customer demand and pharmaceutical

respondents are expecting a 38 percent positive impact. It is also worth pointing out that 24 percent of telecommunications and health care organizations that responded are also forecasting an increase in customer demand. (See Figure 8.)

At the opposite end are hospitality, fast-moving consumer goods, transport, manufacturing, professional services and retail industries. A global pandemic would have a huge impact on the supply chain of these industries if there were a decline in consumer confidence. For example, manufacturing, retail and transport would all be impacted because there is a high level of interdependency.

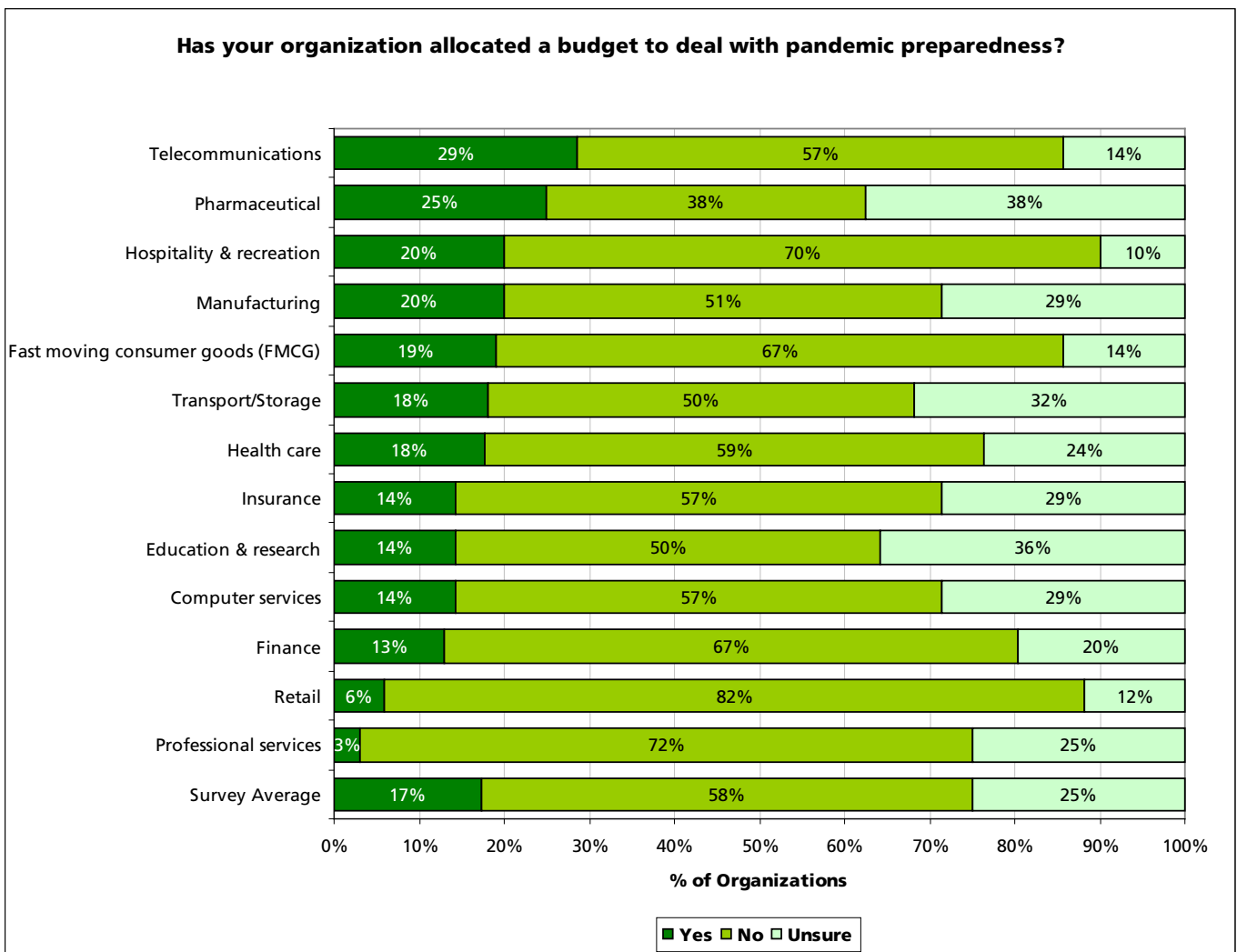


Figure 7 – Pandemic budget by industry

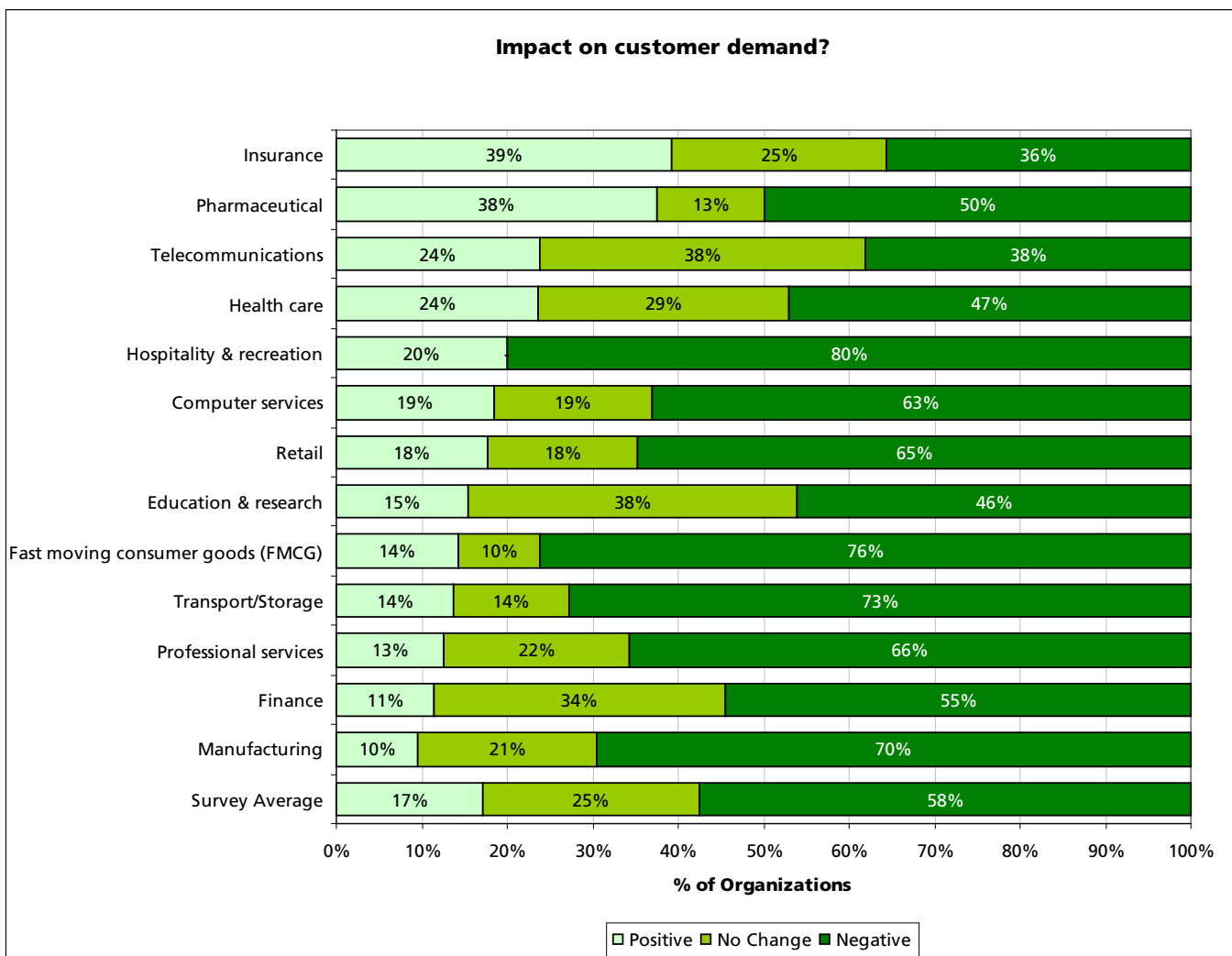


Figure 8 – Impact on customer demand

Human resource policy trends

Across the board there were several notable trends showing that organizations intend to manage the human resource consequences of a pandemic.

The issue that generated the greatest degree of consensus was that of enforcing quarantine provisions to isolate healthy employees so that they are able to maintain business-critical activities and to screen employees and visitors to prevent infected persons from entering the workplace.

This theme of business continuity is also evident in the strong organizational response on the subjects of employee assistance and hygiene matters. There was almost universal support for direct intervention measures such as vaccinations, medical assistance,

supply of antiviral drugs and employee advice regarding the purchase of face masks and gloves.

In order to maintain a healthy work environment and maintain business continuity, there was also strong interest recorded in reviewing hygiene requirements concerning the general office environment, air-conditioning systems and employee advice specific to home hygiene.

Compensation

The Mercer Survey results show that the majority of respondents are unlikely to increase compensation for employees taking on additional responsibilities to maintain business-critical activities.





For example, only 26 percent of respondents indicated that they would provide an increase in compensation for employees taking on additional responsibilities, while 15 percent agreed that they would increase compensation for international assignees working in a pandemic infected region.

Running counter to this trend, United States respondents displayed a greater willingness to adjust compensation as a result of a pandemic. Some 39 percent of United States respondents indicated that they were willing to increase compensation for those employees taking on additional responsibility. In addition to this:

- 11 percent of US respondents were willing to increase compensation for those working from home.
- 16 percent of US respondents were willing to increase compensation for those in pandemic-infected regions.

Contrast this to the United Kingdom and Hong Kong where support for increased compensation for employees taking on additional responsibilities to maintain business-critical activities falls to 17 percent.

Leave

Survey respondents were more positive about extending leave provisions in the event of a pandemic than for increasing compensation for employees taking on additional responsibilities to maintain business-critical activities.

For example:

- 48 percent of organizations that responded indicated that they would be likely to extend sick leave provisions.
- 40 percent of respondents said they would increase family leave.
- 41 percent of respondents said they would increase compassionate leave.

The only exception to this trend was found in China, where support for leave provisions varied between 30 and 35 percent.

Travel and evacuation of expatriates

Only 28 percent of respondents were in favor of repatriating international assignees in the event of a pandemic. When the same question was posed to participants with the caveat that only those employees not engaged in business-critical functions be evacuated, the response rate rose from 28 percent to 38 percent.

Predictably, 85 percent of respondents were in favor of communicating region-specific travel warnings and updates, and 80 percent would implement revised travel approval processes.

Working remotely

In the event of a human flu pandemic or other global crisis, working remotely is considered very important for organizations to maintain critical business functions. In all, 71 percent of respondents indicated they would encourage employees to work from home or remote locations.

The industry breakdown reveals that 94 percent of respondents from professional services supported employees working from home, marginally ahead of computer services (86 percent), finance (78 percent), telecommunications and fast-moving consumer goods (76 percent). (See Figure 9).

What these industries have in common is that they feature highly remunerated, professional and mobile workforces.

Hygiene and preventive health

On the issue of organizational intent to review hygiene policies, there was overall support from respondents for the maintenance of a health of work environment. On the matter of reviewing hygiene standards in the office, there was 73 percent and 62 percent support, respectively, for providing employees with advice on home hygiene and the purchase of face masks and gloves.

Organizations were strongly in favor of providing their employees with direct assistance in medical terms to either avoid contracting the influenza strain that will be responsible for a pandemic or treatment in the event that they contract the virus. In all, 72 percent were in favor of providing vaccinations and 47 percent were predisposed to the supply of anti-viral drugs. In general terms, 56 percent expressed support for providing medical assistance.

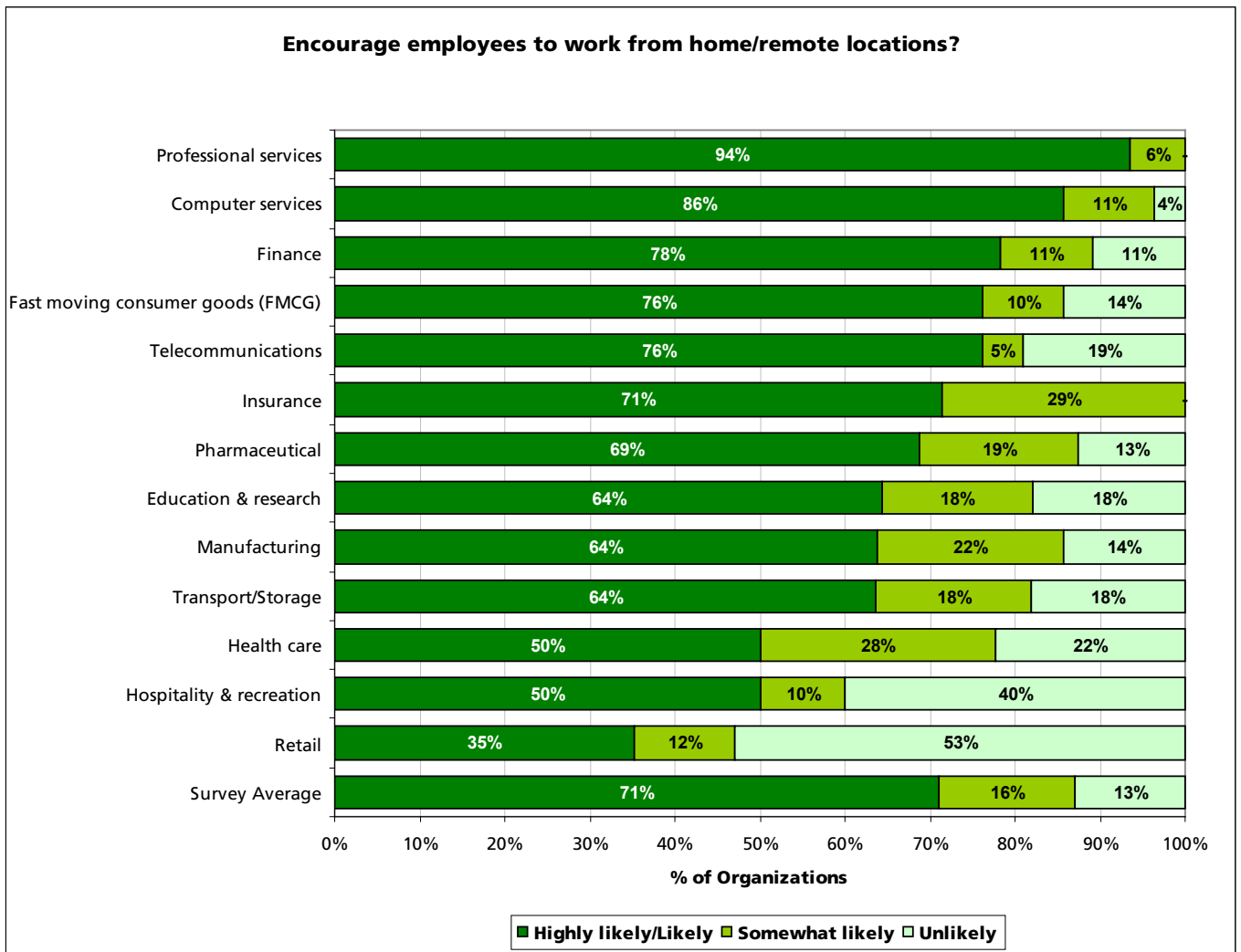


Figure 9 – Working remotely

Insurance coverage

Survey respondents showed an appetite for reviewing employee insurance coverage, with 28 percent of organizations that responded already commencing a review of their insurance policies.

There were notable variations by industry type and geography, with 40 percent of professional services having conducted a review, 36 percent of computer services and 33 percent of telecommunications.

By geography, the highest positive response rate was recorded in Singapore, with 37 percent while the United States was also above the average, recording a response rate of 32 percent.

The policies that received highly likely/likely responses (see Figure 10) for supporting reviews by type of insurance were:

- 47 percent - emergency assistance,
- 40 percent – business travel insurance,
- 37 percent – health insurance,
- 31 percent – disability insurance,
- 29 percent – life insurance,
- 26 percent – salary continuance insurance.

The level of organizational willingness to review employee-related insurance policies is at a premium when benchmarked against support levels for increasing compensation. Combined with the level of organizational support for hygiene and preventive health initiatives documented previously, this clearly indicates that employers feel a sense of obligation to ensure that employees' health and welfare is protected.



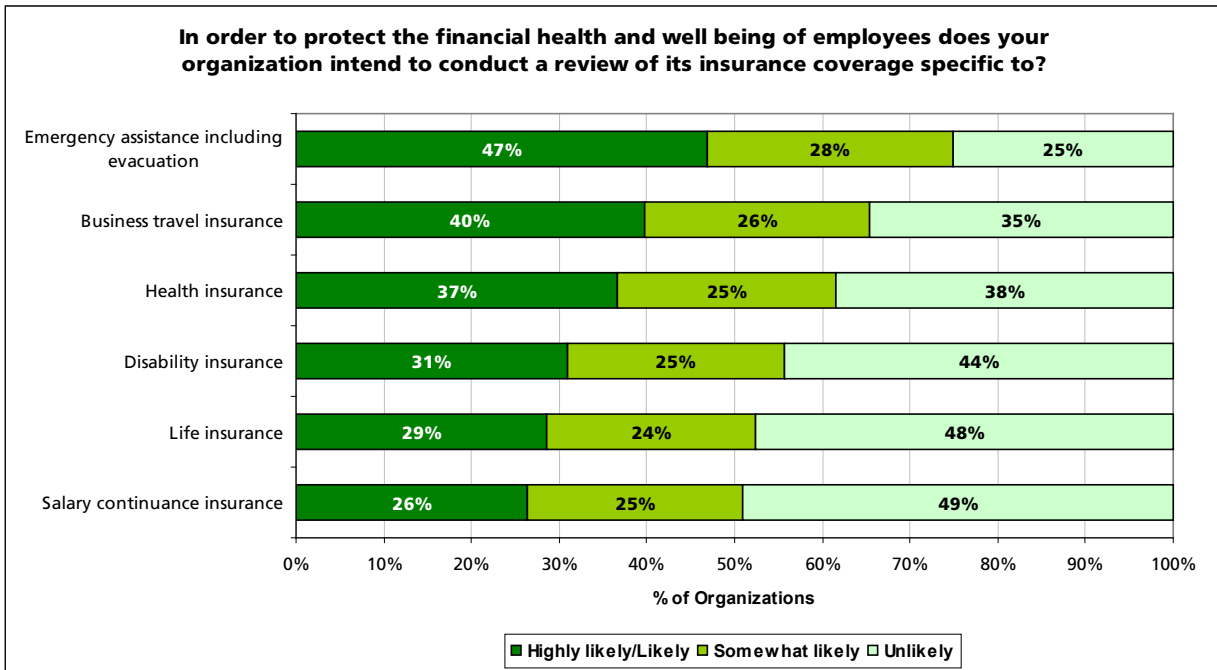


Figure 10 – Insurance coverage reviews

Conclusion and recommended actions

The Mercer Survey results provide important reading for organizations on the current state of organizational preparedness for a pandemic or similar global crisis. The results indicate the following:

- There is a considerable gap between organizational concern about the impact of a pandemic and organizations current state of pandemic preparedness.
- Those countries that endured the 2003 Asian SARS crisis are generally more advanced in their pandemic preparedness planning.
- Conversely, for the United States and other countries that were not impacted by SARS and have not had direct exposure to the avian flu, planning is in its relative infancy.

While we do not know with 100 percent certainty whether a pandemic will occur, what is troubling about the gap between organizational concern and preparedness is that the WHO and other authorities on this subject have repeatedly warned that “once a pandemic virus emerges, it is too late to begin planning or to begin collaboration. There will only be a 20-to-30-day window between emergence and pandemic.”

The Mercer Survey results demonstrate that there is a high level of awareness of the consequences and

impact that a pandemic may have on organizations and the community at large. This acute sense of awareness is critical to the development of a BCP that factors in the unique circumstances of a pandemic.

Mercer recommends the following organizational priorities for establishing pandemic preparedness:

- Establish appropriate budgetary parameters that accommodate the development of a rigorous business continuity plan specific to a pandemic.
- Establish a crisis management team that will take responsibility for developing the pandemic preparedness plan and assume responsibility for business-critical decisions in the event of a pandemic.
- Develop a workforce plan that maps out critical business functions, including an employee skills inventory.
- Review HR policies for employee benefits, working remotely, leave and absence, travel, compensation, labor, health and hygiene, quarantine and crisis support
- Develop an employee communication strategy that recognizes the necessity of educating employees concerning:
 - The immediate nature of the threat during this pre-pandemic phase.
 - The capacity of the organization to respond to this threat through a business continuity plan.
 - The changing nature of the threat.



Appendices

Appendix 1: Countries that participated

- 1 Argentina
- 2 Australia
- 3 Belgium
- 4 Brazil
- 5 Canada
- 6 Chile
- 7 Denmark
- 8 France
- 9 Gabon
- 10 Germany
- 11 Hong Kong
- 12 Hungary
- 13 Iceland
- 14 India
- 15 Indonesia
- 16 Ireland
- 17 Italy
- 18 Japan
- 19 Luxembourg
- 20 Malaysia
- 21 Netherlands
- 22 New Zealand
- 23 Norway
- 24 Pakistan
- 25 People's Republic of China
- 26 Philippines, The
- 27 Poland
- 28 Republic of China (Taiwan)
- 29 Romania
- 30 Singapore
- 31 Spain
- 32 Sweden
- 33 Switzerland
- 34 Thailand
- 35 United Kingdom
- 36 United States
- 37 Venezuela
- 38 Vietnam

Appendix 2: Industries that participated

- 1 Charitable institutions
- 2 Chemical/Petroleum manufacturing
- 3 Computer services
- 4 Construction/Engineering
- 5 Education & research
- 6 Electrical/Metals manufacturing
- 7 Energy
- 8 Fast-moving consumer goods (FMCG)
- 9 Finance
- 10 Food manufacturing
- 11 Health care
- 12 Heavy equipment manufacturing
- 13 Hospitality & recreation
- 14 Industry/Professional association
- 15 Insurance
- 16 Mining
- 17 Other manufacturing
- 18 Paper manufacturing
- 19 Pharmaceutical
- 20 Professional services
- 21 Public administration/Defense
- 22 Retail
- 23 Telecommunications
- 24 Textiles manufacturing
- 25 Transport/Storage
- 26 Water & utilities

Appendix 3: Participants willing to be named

Abacus International
ABC
Accredited Surety & Casualty
ACH Food
ACI Worldwide (Canada) Inc
Acumen Group Limited
AIG
Air Liquide
Airfoil Technologies International
Allen & Overy
Allergan Asia Ltd.
Alstom Power Asia Pacific
American Airlines
American Express International Inc
Apache Canada Ltd.
Apax Partners
Asiaworld Shipping Services
Assab Steels
Assurant
AT&T
Aviva Australia
B&Q Asia Ltd.
Barilla America, Inc.
Baring Asset Management (Asia) Limited
BD
BD India Pvt. Ltd.
Bethany Care Society
BHPBilliton Indonesia
Black & Decker (Suzhou) Ltd.
Boehringer Ingelheim
Borden Ladner Gervais LLP
Brook Asset Management Limited
Burnham Holdings, Inc
California Casualty Management Company
Canadian Association of Broadcasters
Canadian Bank Note Company, Limited
Cargill Asia Pacific Holdings
Catalina Marketing, Inc.
CCH Canadian
Cedara Software
Center for International Forestry Research (CIFOR)
CFUSA, Inc.
CH2M HILL
ClickTheCity.com
CN Group
Cognos Incorporated
Comgas
Comgroup Australia
Compuware
Consumers Energy
Cougar Express Logistics
Cultruisitic Travel
CWAO
CWI International China Inc
D. A. Stuart Company
DaimlerChrysler
Dainik Bhaskar
Delphi Automotive Systems
Directory Distributing Associates
DKSH Hong Kong Ltd.
Dow Chemical Indonesia
DuPont
Edith Cowan University
Elizabeth Arden
Emergis
Emerson Process Management
Environment Waikato
Ericsson
Ernst & Young
Federated Insurance Companies
Ferrero International
FGV-EAESP
Forest Laboratories
Franklin Templeton Investments Corp.
Frito-Lay, Inc.
Fuel Accessory Service Technologies
Fujitsu System Business
Gallaher
GMAC-RFC
Gore Mutual Insurance Company
Griffith Laboratories Ltd.
Griffith Laboratories USA
Hatch
Healtheries of NZ Ltd.
Honda (Australia) Motorcycle & Power Equipment
Hunter Douglas Canada LP
ICC
IMS Health
Ingram Micro Europe
Integrated Private Debt Corp.
Intel
International Textile Group
Janssen Cilag Asia Pacific
JM Family
Joy Global
Keppel Corporation
Kimberly-Clark
Kinectrics Inc
Komatsu Asia & Pacific
Kraft Foods
Lanxess
Leica Microsystems
Levis Strauss
LIMRA International
Lord Baltimore Capital Corporation



L'Oreal
Lucasfilm Animation Company
Lyondell
Manila Broadcasting Company
MBIA
MCM Technologies
Merck
Minter Ellison
Molex
Monagro Kimia
Monash College Group
MortgageIT
Motorola
Mount Saint Vincent University
Nanyang Academy of Fine Arts
NCYPE
New South Wales Treasury – Office of State Revenue
New York Life International LLC
Newalta Corporation
Nike
Nitecs
Nokia
Norske Skog
Northeastern Catholic District School Board
Novartis Corporation
Numico Asia Pacific
NVIDIA Corporation
Odlum Group
OGI Pte
Oodstuffs
Optodev Inc.
Opus Recruitment
Ottawa-Carleton District School Board
Owens Corning
Pacific-Antai Life Insurance Company
Palliser Furniture
Peak Plastic & Metal Products
PepsiCo
Pilmico Foods Corporation
Pixtel Media Technology
Praxair Healthcare Services
Punda Mercantile
QUT
Radiance Communications
Rainbow's End Farm
Ranbaxy Laboratories
RAP Consulting
Reporte
Ricoh
Rocla Quarry Products
Royal Automobile Association
Ryder System
SABMiller
SBS
Schenectady
Schering-Plough
Seneca College
Siemens
Sky City
St. Elizabeth Medical Center
St. Jude Medical
Standard Life
Statewide Financial Management Services
Stephenson Harwood & Lo
Stratus Technologies
STT Communications
Swire Shipping
Sykes
Syngenta Crop Protection
Taisil Electronic Material
Taiyo Yuden
TD Bank Financial Group
The Australian Wine Research Institute
The Polyolefin Company
The Travel Doctor-TMVC
The Wrigley Company
Thomas & Betts
Thomson Guangdong Display Co.
Tianjin Jin Mei Beverage Company Limited
TIDI Products
Times Publishing Limited
TNT Express Worldwide
Transat A.T. inc.
Trillium Health Care Products Inc
T-Systems Enterprise Services GmbH
TVNZ
Tyco Electronics
Tyco Flow Control
UFCW National Health and Welfare Fund
University Cooperative Bookshop Limited
University of Indianapolis
University of Toronto
UPS Jetair Express
URS Corporation
USS
Varian Medical Systems Pacific
VIA Rail
Victoria Racing Club
Visa
Vishay Intertechnology
Vision Super
Welsh, Carson, Anderson & Stowe
Wrigley Confectionary
Wyeth
XL America
Zimmer
Zuellig Pharma

Appendix 4: Survey questions

Avian Flu Pandemic Preparedness Survey

1. Pandemic impact

What is your expectation of how the following issues would impact your organization in the event of a pandemic?

	No impact	Low impact	Moderate impact	High impact
High rates of employee absenteeism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restrictions on travel to/from pandemic-infected regions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of experienced, skilled labor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of productivity due to employee anxiety/poor morale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Significant changes to employment practices, including work rosters and shift patterns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Leadership

In building a crisis management team, how do you rate the importance of the following factors?

	Not important	Somewhat important	Important	Very important
Cross-functional representation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of seniority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Representation across different regions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pandemic preparedness training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Yes	No	Unsure
Has your organization formed a crisis management team to deal with the threat of a pandemic?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Employee communication

How important are the following attributes in your organization's pandemic employee communication strategy?

	Not important	Somewhat important	Important	Very important
Accurately define the nature of the threat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicate the organization's capacity to manage this threat through a business continuity plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication through multiple channels recognizing that phones and other essential services may be interrupted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide timely, regular communication around any change in the level of pandemic threat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide network security to employees working off-site or in remote locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Include links to external sources of authority on your intranet (for example World Health Organization)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide employees with the means to communicate questions/comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Yes	No	Unsure
Has your organization developed an employee communication strategy dealing with the threat of a pandemic?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Skills inventory/Development

As part of a business-continuity-plan, what level of importance do you attach to the following activities?

	Not important	Somewhat important	Important	Very important
Define those core activities essential to business survival	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conduct a skills inventory measuring organizational capacity against these activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Institute cross-training and skills development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continual monitoring through the course of a pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishment of a backup site for business-critical functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Yes	No	Unsure
Has your organization undertaken a skills inventory in preparation for a pandemic?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Quarantine procedures

In the event of a pandemic, what is the probability that your organization would implement the following quarantine procedures?

	Unlikely	Somewhat likely	Likely	Highly likely
Encourage employees to work from home/remote locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase use of phone and video conferencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourage flexible working hours in order to avoid public transport during peak hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Screening of people entering company premises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enforced quarantining of employees/visitors who show symptoms of influenza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. International assignees/Corporate travelers

At the outset of a contagious diseases pandemic, what is the probability that your organization would adopt the following measures?

	Unlikely	Somewhat likely	Likely	Highly likely
Communicate region-specific travel warnings and updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implement revised travel approval processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evacuate all expatriate employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evacuate expatriate employees not engaged in business-critical functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribute personal health guidelines, face masks and gloves to travelers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Compensation and leave policies

What is the probability that your organization would modify its compensation and leave policies around the following pandemic contingencies?

	Unlikely	Somewhat likely	Likely	Highly likely
Increase in remuneration for employees taking on additional responsibilities to maintain business-critical activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase in remuneration for employees working from home/remote locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase in remuneration for international assignees working in a pandemic-infected region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extended sick leave provisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extended family leave provisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extended compassionate leave provisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Insurance coverage

In order to protect the financial health and well-being of employees, does your organization intend to conduct a review of its insurance coverage specific to...?

	Unlikely	Somewhat likely	Likely	Highly likely
Health insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disability insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salary continuance insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business travel insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency assistance including evacuation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No	Unsure
Has your organization commenced a review of some/all of these policies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Hygiene matters

Does your organization intend to review its hygiene policy/advice around the following contingencies?

	Unlikely	Somewhat likely	Likely	Highly likely
General office environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance of air-conditioning systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee advice regarding purchase of personal protective equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee advice on the subject of home hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Employee assistance

In seeking to assist employees and their families survive a pandemic, what is the likelihood that your organization would provide direct assistance with the following measures?

	Unlikely	Somewhat likely	Likely	Highly likely
Employee advice regarding purchase of face masks and gloves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vaccinations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supply of antiviral drugs such as Tamiflu or Relenza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subsidized accommodation for international assignees evacuated to a quarantine environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Business continuity plan

What impact do you expect a pandemic would have upon your organization's critical success factors?

	Strong negative change	Moderate negative change	No change	Moderate positive change	Strong positive change
Revenue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer demand/purchasing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supply chain performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand reputation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Locally	Regionally	Globally	Unsure
Please select at what level your organization is working on the avian flu business continuity plan:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No	Unsure
Has your organization allocated a budget to deal with pandemic preparedness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If yes, what is the budget?

12. Other comments:

MERCER

Human Resource Consulting

Argentina

Australia

Austria

Belgium

Brazil

Canada

Chile

China

Colombia

Czech Republic

Denmark

Finland

France

Germany

Hong Kong

Hungary

India

Indonesia

Ireland

Italy

Japan

Malaysia

Mexico

Netherlands

New Zealand

Norway

Philippines

Poland

Portugal

Puerto Rico

Singapore

South Korea

Spain

Sweden

Switzerland

Taiwan

Thailand

Turkey

United Kingdom

United States

Venezuela

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