

The background of the image shows a blurred scene of people in a meeting or office environment. In the foreground, a person's arm and hand are visible, wearing a watch, and gesturing while speaking. Another person's hand is visible in the background, also gesturing. The overall tone is professional and collaborative.

P@SHA

Pakistan Software Houses Association for IT & ITES

EMERGING PAKISTAN

Global ICT Opportunities in the 'New Normal'

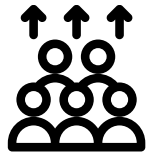
5th May 2020



Covid19 and Pakistan Tech Sector

Presented by
Shahzad Shahid, Chairman P@SHA

Numbers at a Glance



Total Population 220M

(Equal to Japan + Germany)

- **29%** b/w 15 & 29 Years *(equal to total of UK)*
- **75%** under 45 Years
- **66%** under 35 Years
- **50%** under 25 Years



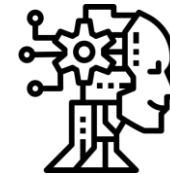
49% English Speaking



173 HEC recognized Universities



700,000 students graduate each year



23,000 IT/Eng students graduate each year



165M Cell phone users



65M Smart phone users



76 Broadband users
(4th fastest growing in the world)

IT industry Highlights



USD 3B+ Industry

(2.5B Exports, 500M Domestic)



100+ investment deals

last 4 years (Local + International)



Doubled in 4 years

Doubling again by 2023



7000+

Tech Companies



300,000 IT professionals

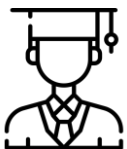
4th largest Freelancing Population



E-commerce crossing

USD 1B this year

(originally forecasted for 2020)



23,000

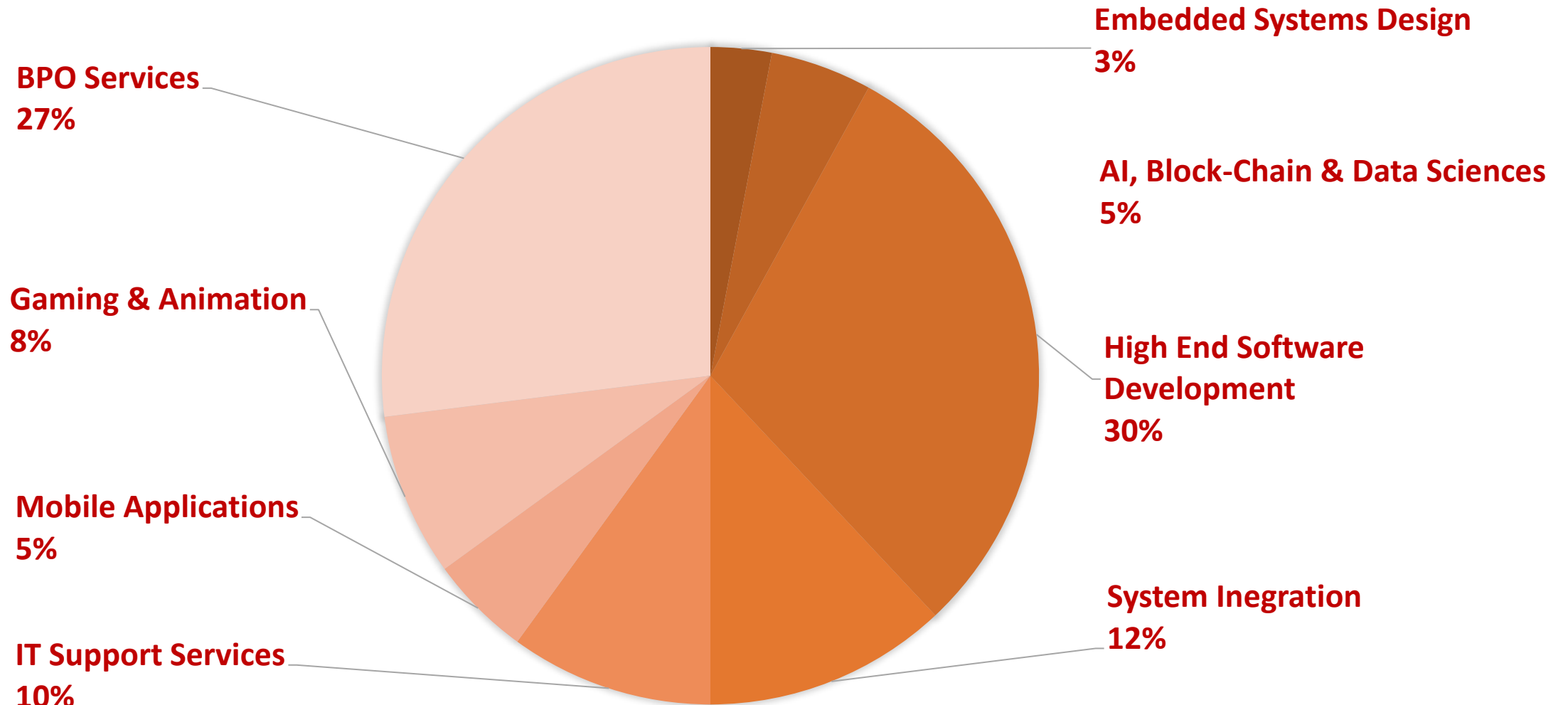
IT graduates annually



Ranked 9th Globally

for Booming Digital Economy

Current Composition – IT Service Exports



Covid19 and Pakistan's IT BPO

Initiatives taken to manage the risks

- **Conducted Sector's Survey** on risks of loss of business and employments within March
- **BPOs/Call Centers given exemption early on**; the whitelisted ones saw a closure of a day or two only
- **IT firms approved to operate during lockdown**; with limited capacity and under SOPs
- **P@SHA proposed Safe Home Delivery SOPs** for E-commerce purchases; Govt adopted it
- **Workplace Guidelines** issued for members to protect their employees against infection
- **Active engagement** with member companies through whatsapp groups and other channels
- **Participating in Webinars** to create awareness on WFH and highlighting opportunities
- **Central Bank offered Wages Loan at 4%** compared to 13% commercial rate
- **Organized Awareness Webinars** for members to avail various government loan schemes like Export Refinancing
- **Encouraged Engagement** for hiring among the members
- **Companies Ordinance to suit Startups and ICT**; Govt approves the Stock Options

Opportunities

World won't be the same; invest wisely and collaborate

- WFH is the new Normal, reducing costs and improving talent availability
- Race for e-commerce and Safe Delivery
- Digital Payments; Contactless Payments
- B2B besides B2C
- Cross-border e-commerce and digital payments
- Online Education; higher quality to become available
- Focus on Local content, Local language
- Tele-health
- Digital Government

Opportunities for collaboration

Outsourcing

- Digital Financial Technologies
- BPO and Call Centers
- EdTech
- TeleHeath
- Embedded System Design
- Data Science, Machine Learning, & IOT
- AI & Block Chain Development
- High-end Software Development
- Gaming & Animation
- IT Support Services

Joint Ventures

- Partnership or JVs with Pakistani Companies
- Back-Office or Global Delivery Centers

Acquisitions

- Investment in Pakistani Companies
- Acquisition through VC or PE Funds