

# How the crisis impacts High Tech



## DEMAND DISRUPTION



## SUPPLY DISRUPTION



## WORKFORCE IMPACT



### SHORT-TERM IMPACT

Short-term global demand for almost all products will decline

Complex B2B product sales harmed by cancellation of conferences, travel bans and WFH

Surge in demand for work from home & remote learning products (e.g. laptops, printers, mobile devices, collaboration SW)

China supply chains returning to normal by end of March

Europe and NA plants risk of closure or reduced capacity

Component shortage means further delays when plants reopen

Reduction in air and other travel modes harm logistics and final delivery

Fast and massive shift to WFH required

High Tech industry better equipped than other industries to adapt

Rise in need for employee and employer workforce flexibility

Extended period of social distancing and 'shelter in place' impacts employee morale



### MID/LONG-TERM IMPACT

Increase long-term demand for WFH, remote learning and home centric products

Accelerating demand for cloud and infrastructure to support distributed workforce

Enable shift from product to 'as a service' based business model

Investment in digital supply chain and control tower capabilities improves future agility

Companies will diversify supply chains across suppliers and locations

Ramped up factory automation will reduce impact that labor shortages have on supply

Companies will have more robust WFH and 'elastic workforce' capabilities

Many employees will value enhanced flexibility of WFH options