

## Most commonly cited mid-term trends impacted by COVID-19

Impact  
Breadth  
Timing  
Duration

### TECHNOLOGY ADOPTION

|  |  |  |     |  |
|--|--|--|-----|--|
| Remote asset monitoring and remote control to reduce onsite human involvement.           |  |  | '21 |  |
| Remote collaboration tools, training and operating practices.                            |  |  | Q1  |  |
| Real-time visibility into availability of raw materials, finished goods, people, assets. |  |  | Q4  |  |
| Use of machine learning to rapidly assess situations and re-plan activities.             |  |  | '21 |  |
| Robotic process automation (RPA) to support low value, labor intensive activities.       |  |  | Q2  |  |
| Use of mobile technology / AR to enable workers to perform tasks without training.       |  |  | '21 |  |
| Use of digital twins with remote support to improve asset availability.                  |  |  | '21 |  |
| 3D printing of spare parts that are stuck in the supply chain.                           |  |  | Q1  |  |
| AGVs and drones reduce reliance on people for logistics and warehousing.                 |  |  | Q2  |  |

### STRATEGY CONSIDERATIONS

|  |  |  |     |  |
|--|--|--|-----|--|
| Chinese national champions increase M&A in Made in China 2025 domains.             |  |  | Q3  |  |
| Increased government access to data and control over digital infrastructure.       |  |  | Q2  |  |
| Existing digitalization trends accelerate and Big Tech gets stronger.              |  |  | '21 |  |
| Market share gained by companies with liquidity to invest in growth opportunities. |  |  | Q3  |  |

### BUSINESS TRANSFORMATION

|   |  |  |     |  |
|---|--|--|-----|--|
| OEMs add DaaS/SaaS offerings to hardware to create reoccurring revenue sources. |  |  | '21 |  |
| Industrial GTM mix shifts toward online and inside sales.                       |  |  | Q2  |  |
| Widening growth gap between companies that sustain innovation and others.       |  |  | Q4  |  |
| Open innovation / strategic partnership to share R&D expenses.                  |  |  | '21 |  |

### OPERATIONAL SHIFTS

|   |  |  |     |  |
|---|--|--|-----|--|
| Shift from on-premise to cloud to take advantage of scalability, security and services. |  |  | Q3  |  |
| Adoption of X-as-a-Service pricing to reduce fixed costs.                               |  |  | Q3  |  |
| Localization of R&D and customer service centers.                                       |  |  | '21 |  |
| Reduce focus on JIT and increased supply regionalization to increase resilience.        |  |  | Q2  |  |
| Accelerated shift to e-commerce necessitates restructuring of supply chains.            |  |  | '21 |  |

|            |                 |  |     |    |  |
|------------|-----------------|--|-----|----|--|
| <b>Key</b> | <b>Impact</b>   | How significant is the trend for impacted companies? |     |    |  |
|            | <b>Breadth</b>  | Will few or many companies will be impacted?         |     |    |  |
|            | <b>Timing</b>   | When did or will companies begin to react?           | 'YY | Q# |  |
|            | <b>Duration</b> | Will the impact be sustained after the crisis ends?  |     |    |  |