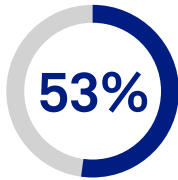


How COVID-19 has impacted US ICT Markets

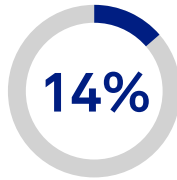
Businesses worldwide have been disrupted by the global COVID-19 outbreak, with reduced demand, supply chain disruptions and lockdown measures restricting operations.

To identify technological challenges and forecast the industry outlook post-recovery, Telstra commissioned GlobalData¹ to interview 120 business leaders across three continents on their organisation's response to the pandemic. Here are some key findings from the report.

Business Continuity Plan (BCP)



Had remote working arrangements for only half of their workforce or less, prior to COVID-19.



Said their BCP fully prepared them to deal with the pandemic.

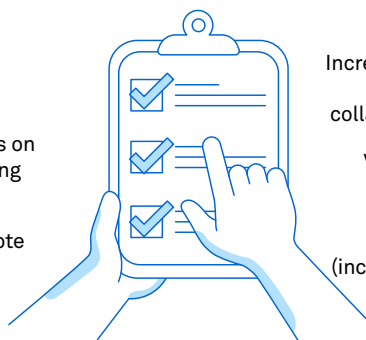


Now have remote working arrangements for employees.

Key business priorities

Top 3 key priorities

- Safeguarding employee health
- Increasing efforts on supporting existing customers
- Ramping up remote working



Top 3 remote working investments

- Increasing licenses for existing collaboration tools
- Virtual desktop applications
- Hardware (including laptops)

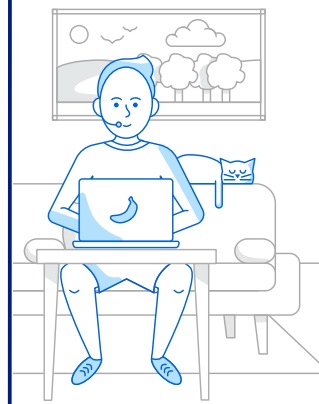
More than half respondents plan to introduce or expand existing online unified communications and collaboration tools.

Obstacles to remote working

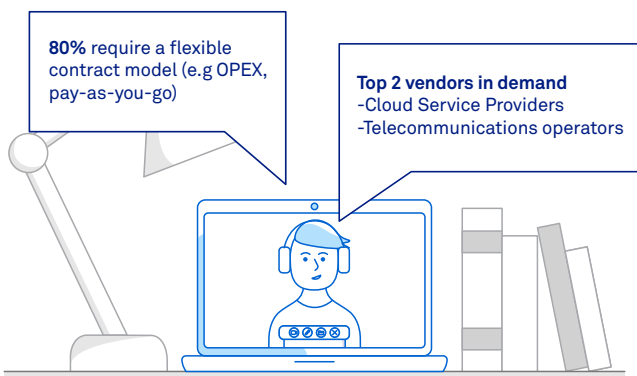
More than half respondent businesses have employees who are unable to work remotely due to technology issues – such as accessing corporate systems from home.

Top 2 remote working challenges

- Improving security posture
- Addressing skill shortages



When engaging service providers



¹GlobalData, Business Continuity, Flexible Working and Adaptive Infrastructure: Five Actions for When the Economy Reopens, May 2020

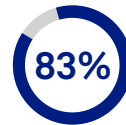
After COVID-19



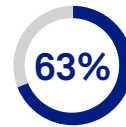
Say video conferencing will increasingly replace face-to-face meetings.



Will enable more employees to work remotely.



Will accelerate their move to the Cloud to support evolving work and IT requirements.



Say COVID-19 will change their business forever.

About Telstra

We have a long history of investment in the Americas. In fact, this year marks our **25th anniversary** here!

Telstra has people in **14** states and offices in **6** major US Cities, including New York, San Francisco and Washington DC.

All in all we deliver.



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