

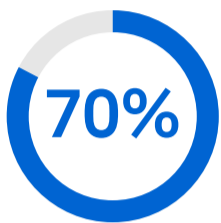
How COVID-19 has impacted European ICT Markets



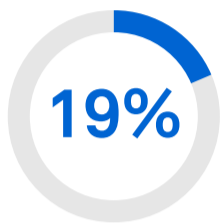
Businesses worldwide have been disrupted by the global COVID-19 outbreak, with reduced demand, supply chain disruptions and lockdown measures restricting operations.

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.

Digital Transformation



Had an active Digital Transformation Strategy

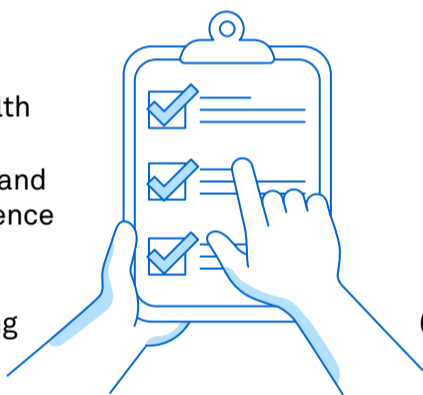
Top 3 drivers of Digital Transformation Strategy

- Increase top-line revenue streams
- Improve cost structure
- Deliver personalised customer experiences

Key business priorities

Top 3 key priorities

- Safeguarding employee health
- Improving ICT and security resilience
- Ramping up remote working



Top 3 remote working investments

- Cloud-based collaboration
- Additional VPN capacity
- Hardware (including laptops)

Top 2 remote working challenges

- Improving security posture
- Ensuring regulatory compliance

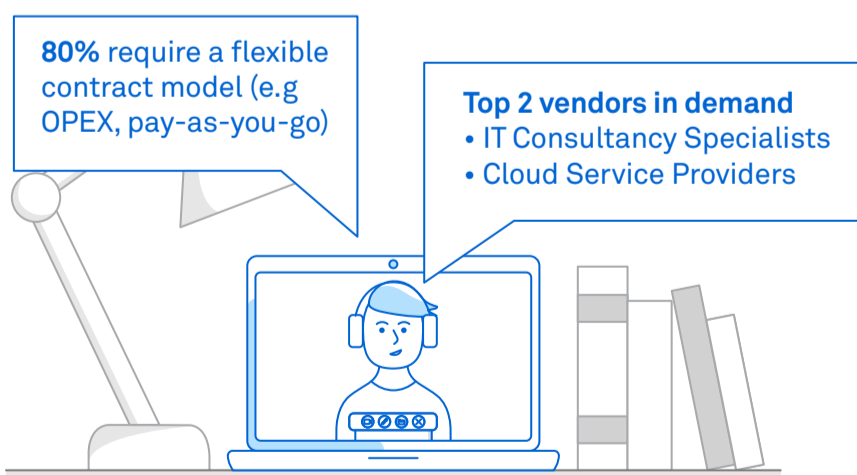


Top 3 strategic areas of focus to manage changing security posture

- Secure Remote
- Formal security policies and procedures for remote working
- Identity and access management

77% of respondents plan to introduce or expand existing online unified communications and collaboration tools.

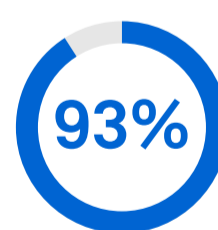
When engaging service providers



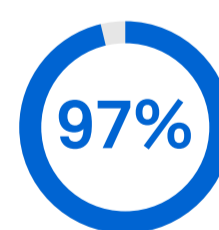
After COVID-19



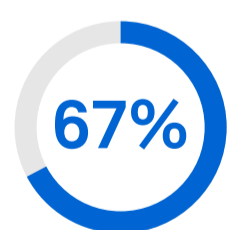
Say video conferencing will increasingly replace face-to-face meetings.



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.

¹GlobalData, Business Continuity, Flexible Working and Adaptive Infrastructure: 5 Actions for When the Economy Reopens, May 2020

Contact your Telstra account representative for more details.

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