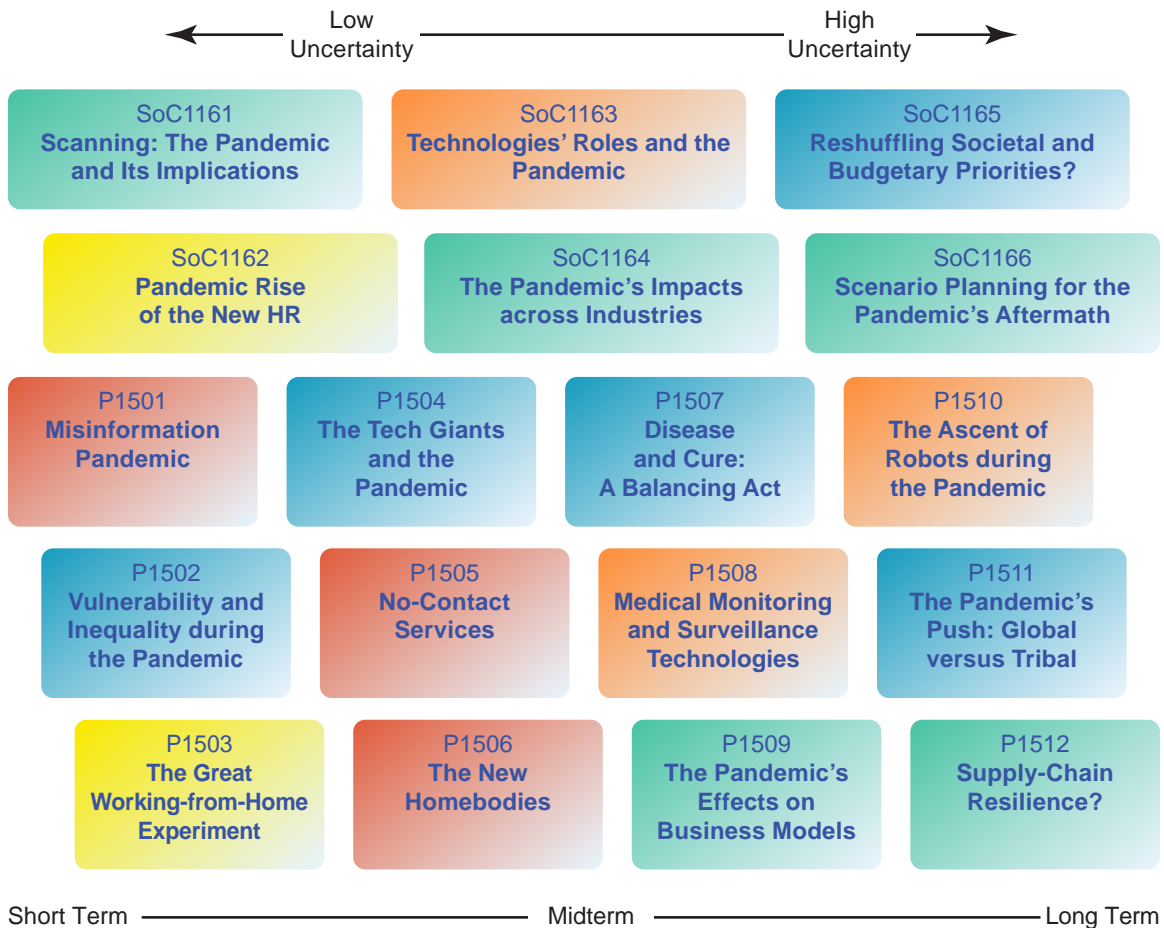


Strategic Synopsis 126

June 2020

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Scan Framework



- Infrastructure: Support, Resources, Market Structure, Legislation
- Organization: Strategy, Operations, Company Structure
- Talent: Human Resources, Company Culture, Collaboration
- Creation: Design, R&D, Materials, Enabling Technologies
- Marketing: Market Research, Advertising, Distribution, Pricing

June 2020 Signals of Change

SoC1161 — Scanning: The Pandemic and Its Implications

The occurrence of the covid-19 pandemic and the resulting economic slowdown were not unforeseeable.

- The emergence of a new virus in 2019 is a predictable surprise.
- The pandemic introduced new dynamics in the business, political, and societal realms.

SoC1162 — Pandemic Rise of the New HR

Plausibly, the coronavirus and the covid-19 pandemic will lead to long-lasting changes in human-resources (HR) practices.

- The pandemic has forced employers to allow many more employees than ever before to work from home.
- Companies have been looking for ways to develop more flexible workforces for some time.

SoC1163 — Technologies' Roles and the Pandemic

A look at technologies' roles during the pandemic could provide cues about the technologies' uses when the pandemic ends.

- Large tech companies are already in a strong position to weather the impacts of the pandemic.
- Enabling the autonomous or remote performing of tasks could transform various industries.

SoC1164 — The Pandemic's Impacts across Industries

A growing economic crisis is challenging businesses and creating great uncertainty going forward.

- The hospitality, tourism, and travel industries were some of the first industries to experience strong negative impacts from the spread of the coronavirus.
- Amazon and other grocery-delivery-service providers are actually struggling to meet the huge spike in demand.

SoC1165 — Reshuffling Societal and Budgetary Priorities?

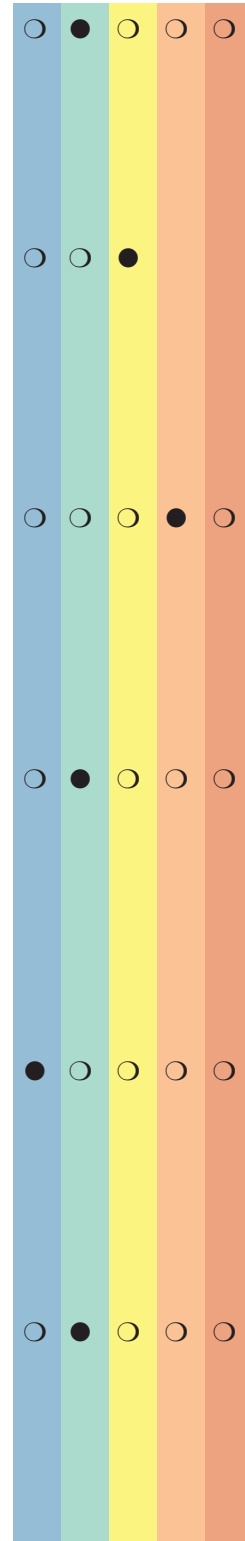
Policy makers will reconsider societal priorities and the allocation of financial resources.

- The covid-19 pandemic could shift nations' opinions about what sectors deserve additional funding.
- Changes in prioritization must go beyond merely shifting money to considering more flexible uses of that money.

SoC1166 — Scenario Planning for the Pandemic's Aftermath

Custom scenario-planning efforts can help decision makers move from gaining awareness of a changing world to preparing for such a world.

- General scenarios remain valuable starting points to trigger strategic thinking.
- Custom scenarios and strategy development are indispensable in preparing companies for the future.



● Most Relevant

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**June 2020 Patterns
(Results of the Scan™ Meeting on 6 May 2020)**

P1501 — Misinformation Pandemic

Like the current pandemic, a wave of misinformation and disinformation has spread around the world.

- Research groups are tracking the flow of and exploring ways to combat the spread of misinformation.
- Researchers are gaining a better understanding of the roles that social-media networks play in informing the public.

P1502 — Vulnerability and Inequality during the Pandemic

The pandemic will not only have a large death toll but also put a spotlight on polarized societies.

- A significant proportion of students lack home access to computers and the internet.
- Companies in several sectors are cutting jobs and implementing furloughs because of the covid-19 pandemic.

P1503 — The Great Working-from-Home Experiment

People are working from home and learning online on a scale that almost no organization planned for.

- Collaboration-tools and online-education providers became two of the few types of companies to benefit from the pandemic.
- Many employees appear to be adjusting well to working from home.

P1504 — The Tech Giants and the Pandemic

Although uncertainties exist, the pandemic could increase the tech giants' influence on digital life.

- The tech giants could emerge from the pandemic stronger than ever.
- The outlook for the tech giants is not all positive, and differences exist among the companies.

P1505 — No-Contact Services

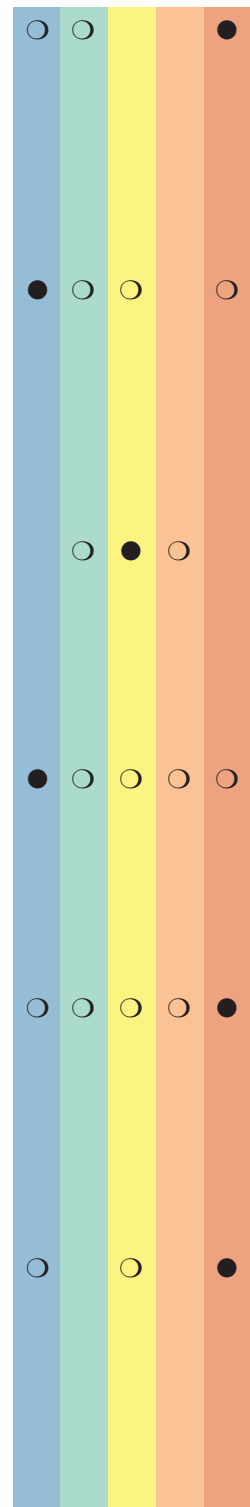
The pandemic is creating opportunities for companies that are operating under the current social-distancing conditions.

- Both Postmates and Instacart have introduced no-contact drop-off services.
- Social-distancing and shelter-in-place measures have influenced consumer-spending habits.

P1506 — The New Homebodies

The pandemic's forcing many people to stay at home is resulting in a variety of behavior changes, some of which may be permanent.

- In New York, New York, animal-welfare organizations are reporting high demand for dog adoptions during the pandemic.
- Many people who are unable to socialize in person are playing video games with others online.



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June 2020 Patterns—Concluded

P1507 — Disease and Cure: A Balancing Act

Determining which responses to the pandemic best balanced medical needs and economic considerations will take years.

- Given the economic effects of governments' heavy-handed covid-19 interventions, some observers have called for more measured approaches.
- A strong social-distancing policy may have not only health benefits but also positive economic effects in the long run.

P1508 — Medical Monitoring and Surveillance Technologies

Governments and organizations are using monitoring and surveillance technologies to help manage the spread of the coronavirus.

- Contactless temperature-detection systems are already in use in several major cities in China.
- Tunisia began using Enova Robotics' PGuard security robot to patrol the streets to aid in enforcing the government's lockdown order.

P1509 — The Pandemic's Effects on Business Models

The pandemic could change some business models permanently.

- Many social gatherings have moved to the virtual realm.
- New business models are emerging in health care, retail operations, office work, and education.

P1510 — The Ascent of Robots during the Pandemic

Current lockdown and social-distancing measures are expanding opportunities for service robots.

- In a recent article, an international team discusses the roles that robotics could play during the current and eventual pandemics.
- Several companies are building robots that use ultraviolet light to disinfect surfaces.

P1511 — The Pandemic's Push: Global versus Tribal

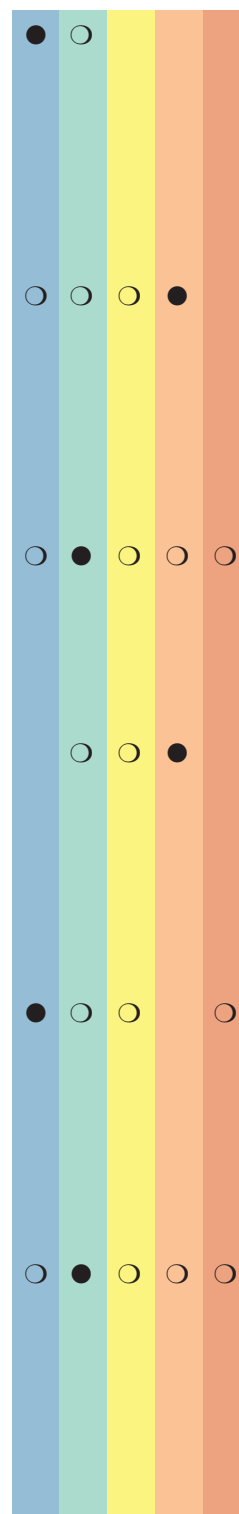
Many reasons exist for increasing global collaboration during the pandemic; however, the opposite might happen.

- Countries need to collaborate, acting in solidarity to develop national responses that will not conflict with one another.
- Many analysts foresee potential developments that will reverse the globalization of past decades.

P1512 — Supply-Chain Resilience?

The early stages of the pandemic highlight the strengths and weaknesses of current-generation global supply chains.

- A lack of parts from suppliers in China resulted in Hyundai Motor Group's suspending operations at its Ulsan, South Korea, industrial complex.
- The covid-19 pandemic is affecting consumer demand, which further complicates logistics operations during the pandemic.



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