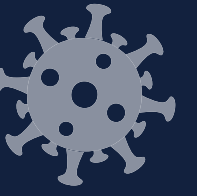
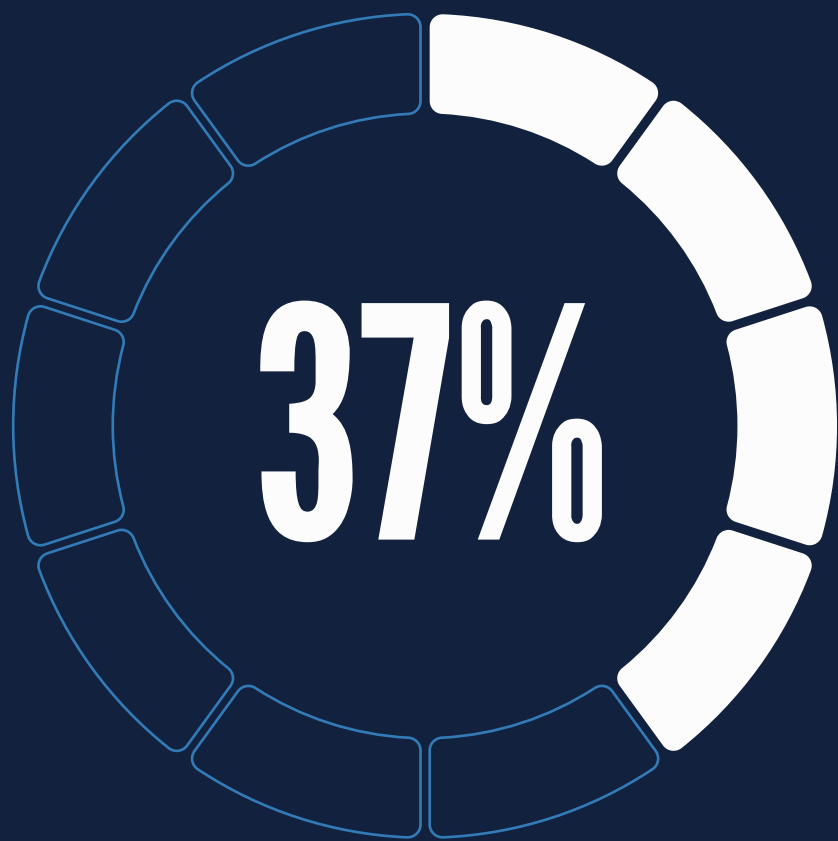


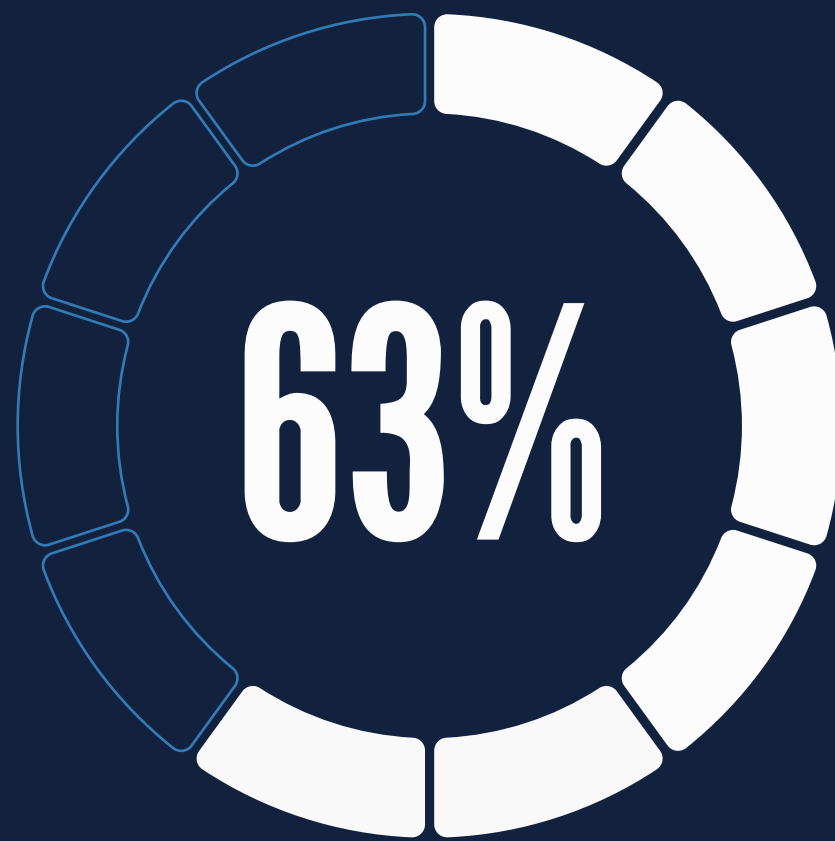
MORE THAN 1 IN 3 5G PROJECTS IN CHINA AND THE U.S. HAVE BEEN ACCELERATED BY COVID-19



SEE HOW HIGH THE ACCELERATION RATE IS IN TELCO



USA



CHINA

EVEN AT THE HEIGHT OF THE PANDEMIC IN THE U.S., MORE THAN ONE IN THREE 5G INVESTMENTS IN TELCO, MANUFACTURING, AUTOMOTIVE, AEROSPACE, AND HEALTHCARE ARE GETTING INCREASED ATTENTION.



IN THE TELCO SECTOR

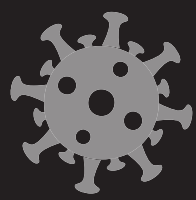
ACCELERATION IS EVEN MORE PRONOUNCED, WITH 70% OF PROJECTS IN THE U.S. AND 98% IN CHINA ON THE FAST TRACK

ADDITIONAL DATA AND INFOGRAPHICS AT:
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COVID-19 IS DRIVING A VAST SHIFT IN OVERALL STRATEGIC FOCUS IN THE U.S.



‘SOMEWHAT’ AND ‘VERY MUCH AGREE’ AS TO HOW COVID-19 HAS CHANGED FOCUS.

USA

RE-SKILLING	84%
ACCELERATING NEW BUSINESS MODELS	83%
AGILE APP DEVELOPMENT	82%
REFOCUS AROUND CUSTOMERS	82%
REAL-TIME DATA AND FEEDBACK	80%
CHANGING THE WAY WE DESIGN APPS	75%
GETTING MORE DX FOCUS	71%
HOW TO LOOK AT 5G AS AN ACCELERATOR	69%

IN CHINA THERE IS EVEN MORE FOCUS ON CHANGING THE WAY APPS ARE DESIGNED, AN INCREASED FOCUS ON DIGITAL TRANSFORMATION, AND ACCELERATION OF 5G INVESTMENTS.

RESEARCH CONDUCTED BY WIND RIVER FROM APRIL 12-23 IN THE U.S. AND CHINA WITH C-SUITE EXECUTIVES AND LEADERS IN DEVOPS AND IOT IN FIVE MAJOR INDUSTRIES TO EXAMINE HOW INVESTMENTS IN VARIOUS TECHNOLOGY AREAS LIKE 5G, CLOUD NATIVE DEVELOPMENT, CONTAINERS, AND DIGITAL TRANSFORMATION TECHNOLOGIES WERE BEING REASSESSED.

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COVID-19 IS CHANGING THE WAY WE THINK ABOUT WORK, ESPECIALLY IN THE U.S. COMPARED TO CHINA.



SEE HOW DIFFERENTLY THE U.S. PLANS TO WORK

ASKED APRIL 12-23, 2020
"HOW DO DEVOPS, DEVSECOPS AND IOT DEVELOPERS SEE THE FOCUS OF LEADERSHIP CHANGING ?"

USA CHINA

REMOTE WORKING IS THE NEW NORM

40%

30%

REDESIGNING HOW WE WORK TOGETHER

62%

35%

REDUCING OPEX NOW AND IN THE NEAR FUTURE

40%

29%

SPEEDING UP THE CONVERGENCE OF IT AND DEVOPS

46%

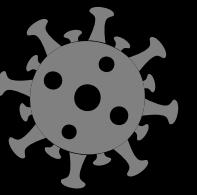
36%

AS CHINA AND THE U.S. ARE AT DIFFERENT STAGES OF THE COVID-19 PANDEMIC, WE CAN SEE HOW PEERS ACROSS THE WORLD ARE THINKING DIFFERENTLY ABOUT THE WAYS WE WILL FOCUS GOING FORWARD.

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90%+ OF THE C-SUITE AND SOFTWARE DEV LEADERS SAY COVID-19 HAS AFFECTED THEIR ENTERPRISE'S ABILITY TO DELIVER.

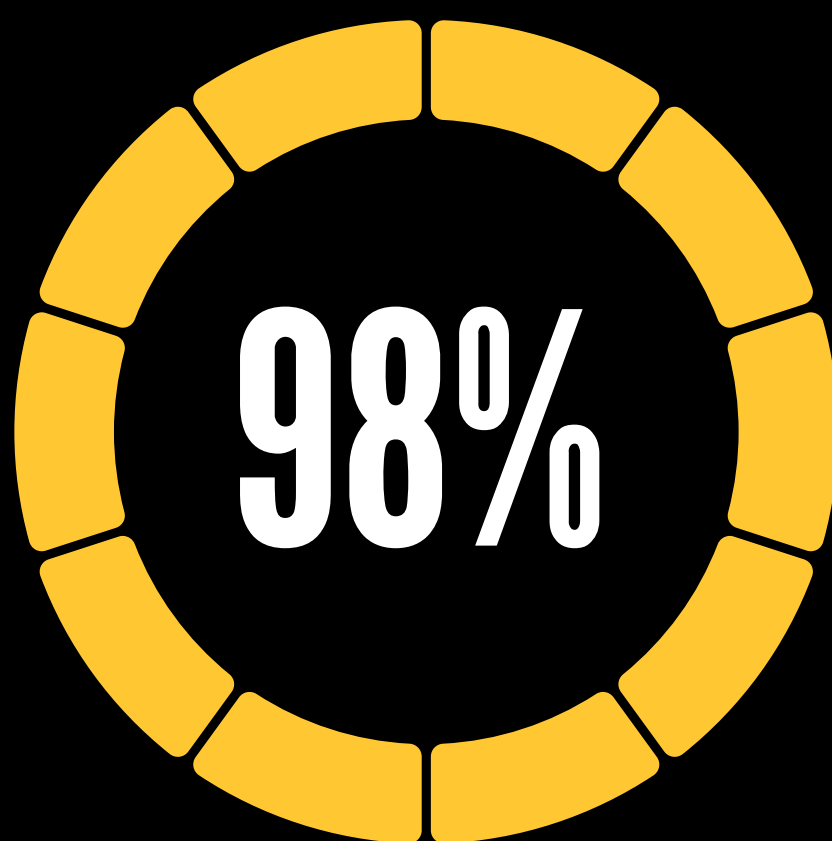


PEERS IN THE U.S. AND CHINA SHARE SIMILAR VIEWS EVEN THOUGH THE COUNTRIES ARE AT DIFFERENT STAGES OF THE COVID-19 PANDEMIC

PERCENTAGE OF DEVOPS, DEVSECOPS AND IOT LEADERS WHO SEE THE COVID-19 EFFECT ON MEETING CUSTOMER NEEDS AS EITHER SOMEWHAT OR SIGNIFICANTLY AFFECTING ABILITY TO DELIVER



USA



CHINA

BUILDING LONG TERM ABILITIES TO AUTOMATE PROCESSES IN THE EVENT OF A SECOND WAVE OF COVID-19 WILL BE IMPORTANT TO REDUCE THIS EXPOSURE.

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WIND™

COVID-19 HAS HAD DIFFERENT EFFECTS ON OPTIMISM IN THE U.S. AND IN CHINA

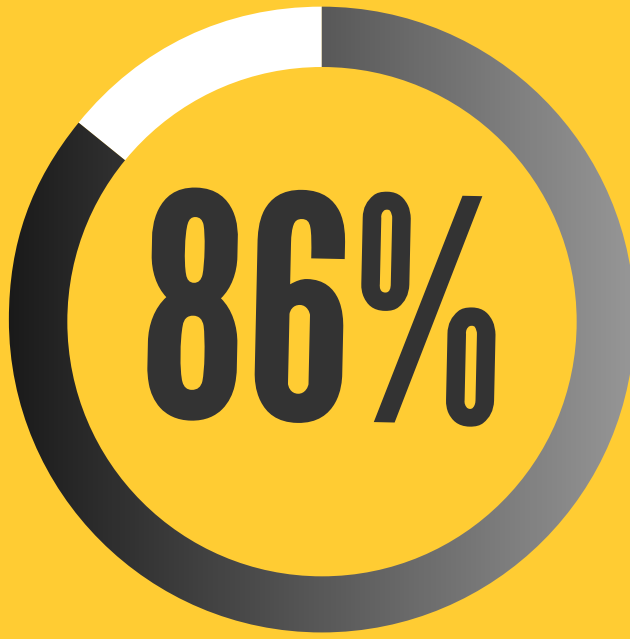
OPTIMISM IN CHINA IS 32% HIGHER IN TERMS OF THE CURRENT OUTLOOK

C-SUITE, DEVOPS, DEVSECOPS AND IOT LEADERS WHO SEE THE CURRENT OUTLOOK FOR THEIR ORGANIZATIONS AS SOMEWHAT TO VERY POSITIVE.

ASKED TO LOOK A YEAR AHEAD, THE U.S. RESPONSE GROWS BY 20%



USA



CHINA

AS CHINA AND THE U.S. ARE AT DIFFERENT STAGES OF THE COVID-19 PANDEMIC, WE CAN SEE HOW PEERS ACROSS THE WORLD ARE THINKING DIFFERENTLY ABOUT THE OUTLOOKS THEIR ORGANIZATIONS FACE. THE INDUSTRIES COVERED IN THE RESEARCH ARE TELCO, MANUFACTURING, AUTOMOTIVE, AEROSPACE, AND HEALTHCARE.

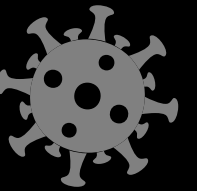


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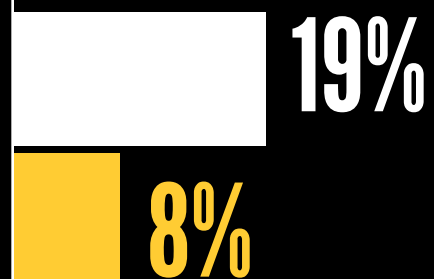
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EXECUTIVES AND TECHNICAL LEADERS SEE INCREASED IMPORTANCE IN THEIR ROLES EXITING THE COVID-19 PANDEMIC



USA

"MY ROLE IS NOW OF
TRANSFORMATIVE
VALUE"



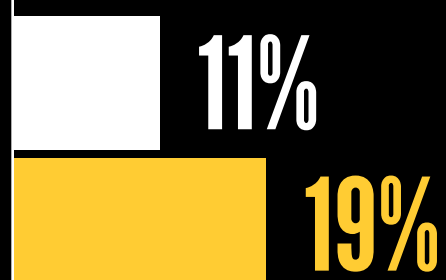
"MY ROLE IS
SIGNIFICANTLY
MORE IMPORTANT"



Q: NOW, THINKING JUST ABOUT YOUR
ROLE IN THE ORGANIZATION, HOW WILL
YOUR FUNCTION BE SEEN FROM TODAY
TO THE END OF THE YEAR?

CHINA

"MY ROLE IS NOW OF
TRANSFORMATIVE
VALUE"



"MY ROLE IS
SIGNIFICANTLY
MORE IMPORTANT"



RESEARCH CONDUCTED BY WIND RIVER BETWEEN APRIL 12TH
AND APRIL 23RD IN THE U.S. AND CHINA WITH C-SUITE EXECUTIVES
AND LEADERS IN DEVOPS AND IOT IN FIVE MAJOR INDUSTRIES TO
EXAMINE HOW INVESTMENTS IN VARIOUS TECHNOLOGY AREAS
LIKE 5G, CLOUD NATIVE DEVELOPMENT, CONTAINERS, AND
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REASSESSED.

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COVID-19 HAS CHANGED CORPORATE STRATEGY FOR 74%+ OF C-SUITE, IOT, AND DEVOPS LEADERS IN THE U.S. & CHINA



ASKED **APRIL 12-23, 2020** "THINKING ABOUT THE STATE OF SOFTWARE APPLICATIONS AND OVERALL DEVELOPMENT OPERATIONS, HOW, IF AT ALL, HAS COVID-19 CHANGED YOUR ORGANIZATION'S FOCUS?"

	USA	CHINA
OUR FOCUS IS ON SURVIVING COVID-19	39%	43%
COVID-19 IS PROMPTING US TO TRANSFORM	35%	33%
COVID-19 HASN'T CHANGED OUR PRIORITIES	26%	24%

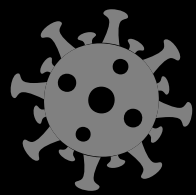
ALTHOUGH THE COVID-19 SITUATIONS IN THE U.S. AND CHINA ARE DIFFERENT AT THIS TIME, COMPANIES IN EACH COUNTRY ARE SIMILARLY SPILT IN TERMS OF THE STRATEGY TO DEAL WITH IT.

RESEARCH CONDUCTED BY WIND RIVER BETWEEN APRIL 12TH AND APRIL 23RD IN THE U.S. AND CHINA WITH C-SUITE EXECUTIVES AND LEADERS IN DEVOPS AND IOT IN FIVE MAJOR INDUSTRIES TO EXAMINE HOW INVESTMENTS IN VARIOUS TECHNOLOGY AREAS LIKE 5G, CLOUD NATIVE DEVELOPMENT, CONTAINERS, AND DIGITAL TRANSFORMATION TECHNOLOGIES WERE BEING REASSESSED.

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TO SCHEDULE AN INDUSTRY-SPECIFIC BRIEFING WITH AN EXPERT CONTACT INQUIRIES@WINDRIVER.COM

COVID-19 HAS DISRUPTED THE SUPPLY CHAINS OF OVER 80% OF MAJOR INDUSTRIES IN THE U.S. AND CHINA.



ASKED APRIL 12–23, 2020 “HOW, IF AT ALL, HAS YOUR CURRENT SUPPLY CHAIN BEEN DISRUPTED DUE TO THE CHALLENGES IN DELIVERY BROUGHT FORTH DUE TO COVID-19?”

	USA	CHINA
WE HAVE EXPERIENCED SIGNIFICANT DISRUPTION	43%	32%
OUR SUPPLY CHAIN HAS BEEN SOMEWHAT DIRSUPTED	45%	49%
COVID-19 HAS NOT IMPACTED OUR SUPPLY CHAIN	11%	18%

WHILE OVERALL IMPACT TO SUPPLY CHAIN SEEMS COMPARABLE ACROSS GEOGRAPHIES, SIGNIFICANTLY FEWER COMPANIES BASED IN CHINA ARE EXPERIENCING EXTENSIVE DISRUPTIONS. IS THIS A FUNCTION OF WHERE CHINA IS IN THE RECOVERY PROCESS?

ADDITIONAL DATA AND INFOGRAPHICS AT:
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COVID-19 HAS PROMPTED U.S. EXECUTIVES AND TECH LEADERS IN TRANSFORMATION-MINDED COMPANIES TO INCREASE INVESTMENT IN THESE TECHNOLOGIES



TRANSFORMING COMPANIES INVEST AT THESE RATES COMPARED TO AN INDEX OF 100 FOR COMPANIES IN SURVIVAL MODE

5G AS AN ACCELERATOR	179
CONTAINER-BASED DEVELOPMENT	173
DIGITAL TRANSFORMATION INITIATIVES	159
ARTIFICAL INTELLIGENCE	134
CLOUD-NATIVE APP DEVELOPMENT	133
IOT DEVELOPMENT	122

ON AN INDEX OF 100 FOR THOSE IN SURVIVAL MODE, TRANSFORMATIVE LEADERSHIP (C SUITE, DEVOPS, DEVSECOPS AND IOT LEADERSHIP) SEE INVESTMENTS IN THESE AREAS AS WORTH INCREASING FOCUS ON AS THEY VIEW THE IDEA OF PREPARING FOR A DIGITALLY TRANSFORMED POST COVID-19 WORLD AS IMPORTANT

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TELECOMMUNICATIONS COMPANIES IN THE U.S. AND CHINA ARE ACCELERATING A RANGE OF DECISIONS BECAUSE OF COVID-19.



FROM CLOUD NATIVE APPS TO AI, 5G, AND IOT DEVELOPMENT. THESE ARE THE AREAS WHERE FOCUS AND INVESTMENT ARE GROWING...



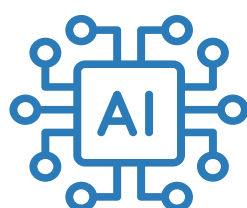
OPEN SOURCE SOFTWARE

U.S.	CHINA
63%	87%



CLOUD-NATIVE APP DEVELOPMENT

U.S.	CHINA
47%	69%



ARTIFICIAL INTELLIGENCE

U.S.	CHINA
49%	55%



5G INITIATIVES

U.S.	CHINA
30%	62%



IOT DEVELOPMENT

U.S.	CHINA
33%	63%



EDGE APPLICATIONS

U.S.	CHINA
22%	67%



CONTAINER-BASED DEVELOPMENT

U.S.	CHINA
38%	56%

WHICH OF THESE INITIATIVES IS YOUR COMPANY INVESTING IN?

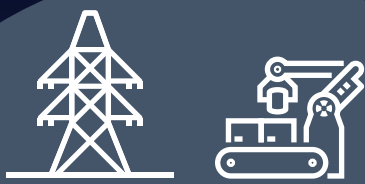
SEE WHAT ELSE INDUSTRY LEADERS SHARED: www.windriver.com/covid19-industry-impact

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COVID-19 HAS SHIFTED OPERATIONAL FOCUS TO SURVIVAL FOR COMPANIES IN KEY INDUSTRIES IN THE U.S. AND CHINA.



**BETWEEN ONE IN THREE AND ONE IN TWO LEADERS
ARE FOCUSED ON SURVIVING COVID-19**



ENERGY & MANUFACTURING

51%

FOCUSED ON
SURVIVAL

22%

FOCUSED ON
TRANSFORMATION

20%

NO
CHANGE



MEDICAL

43%

FOCUSED ON
SURVIVAL

36%

FOCUSED ON
TRANSFORMATION

14%

NO
CHANGE



TELECOMMUNICATIONS

42%

FOCUSED ON
SURVIVAL

26%

FOCUSED ON
TRANSFORMATION

32%

NO
CHANGE



TRANSPORTATION

35%

FOCUSED ON
SURVIVAL

32%

FOCUSED ON
TRANSFORMATION

21%

NO
CHANGE

IT'S ALL INDUSTRY DEPENDENT SO WHAT INDUSTRY ARE YOU IN?
SEE WHAT ELSE INDUSTRY LEADERS SHARED: www.windriver.com/covid19-industry-impact

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