Considering potential business impacts of the COVID-19 outbreak in Telecoms

24 March 2020

The COVID-19 outbreak has been declared a pandemic by the World Health Organization, causing huge impact on people's lives, families and communities.

As the international response continues to develop, we know that organisations are facing potentially significant challenges to which they need to respond rapidly.

We are working closely with organisations globally to help them to prepare and respond, by sharing our experience in working with companies, governments, regulators, NGOs and international organisations around the world to respond to some of the most high profile outbreaks (including Ebola, MERS, SARS and bird flu).

Common issues that many organisations are facing from COVID-19

Workforce
Protecting wellbeing and welfare, especially those living in affected territories

Supply Chain
Re-routing, delays, disputes and knock-on impact on customers

Decline in sales
Leading to cash flow and covenant issues

Operations
Reduced resilience in key functions, infrastructure and services, or locations become unavailable

Travel
Restricted or prohibited to some locations, and impacting business and leisure demand more generally

Regulation
Compliance challenges in certain sectors

24 March 2020

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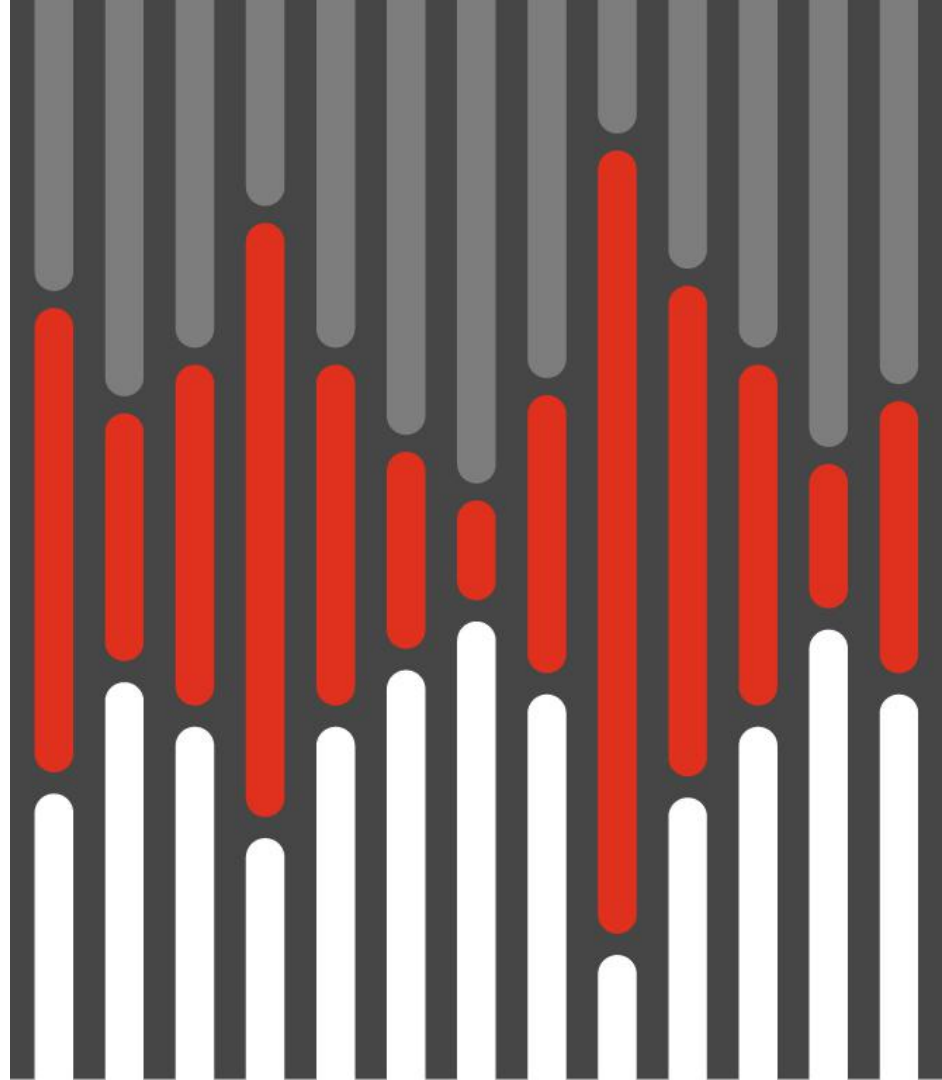
COVID-19 is impacting the Telecoms sector along various areas including supply chain, employees and operations

Supply Chain issues - imports delayed / cancelled	Managing employees in affected countries	Unusual demand patterns disrupting operations	Event cancellations - revenue loss and operational disruption

Supply Chain: Telecom providers relying on Chinese companies such as Huawei and ZTE for their network gear, are impacted due to supply chain disruptions. Suppliers struggle to meet the contract deadlines in affected areas due to manufacture shut down and logistics. High profile examples include:

- Huawei: local factory closures in Hubei, but all factories in Guangdong, bordering on Hubei, have now reopened

- Fibre optics suppliers based in Wuhan

- With the spread of the virus, more manufacturing sites have closed outside China, such as Samsung site in South Korea

Wellbeing & Support: Managing employee well being and queries due to this outbreak is critical in mitigating the overall situation

- Communicating with employees and developing and applying suitable HR policies (e.g. quarantine periods, return to work after illness, repatriation, sending mobile workers to locations known to have had cases, etc.)

- The situation is fluid and developing (e.g. restriction of access within Northern Italy)

Workforce challenges

- Sector is heavily staffed by call centres; poses risk if employees are ill

- Large workforce that may require digital upskilling rapidly

Operations: Disrupted operations leading to increased pressure on other operations that are working. The sudden increase in demand for teleworking has placed a strain on providers and suppliers

- Critical third party facility suppliers may lack the capacity to deliver due to staff quarantine / travel restrictions

- Overseas outbreaks lead to key functions / services (offshore) stop functioning

- Maintaining the network - potential impact of staff not being able to get into their NoC and SoC; workers not being able to get to base stations to repair

- Customer services - if shortage of agent will affect service levels

- Year end audit impacted if offices are closed

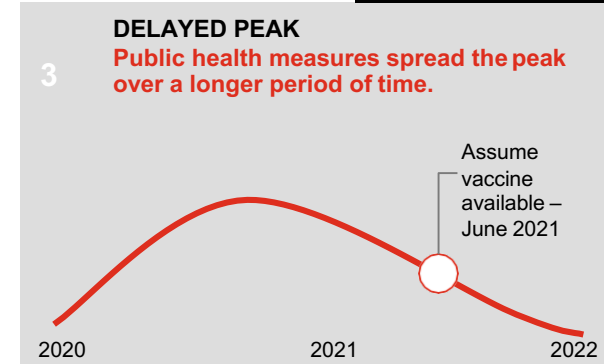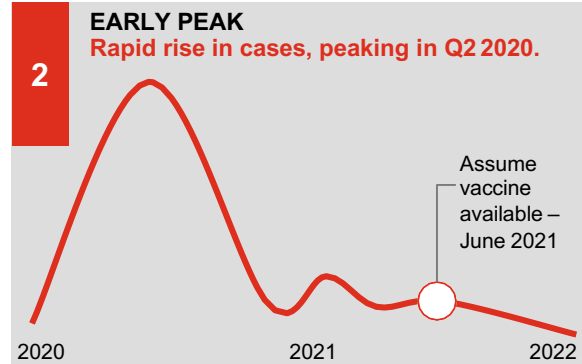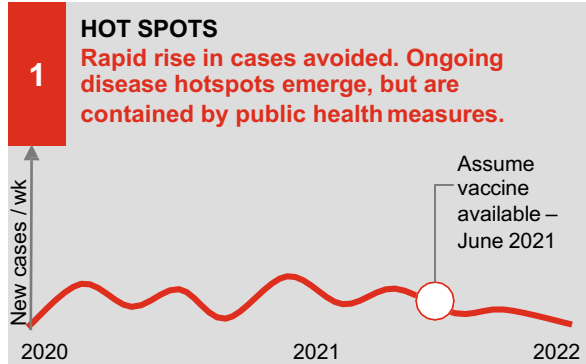**Event Cancellations:** Scheduled events have been cancelled resulting in unpredicted loss of revenue,

- Cancellation of Mobile World Conference in Barcelona has severely limited annual networking with hardware vendors about telecoms and networks innovation

Several potential COVID-19 scenarios need to be considered

1 — HOT SPOTS
Rapid rise in cases avoided. Ongoing disease hotspots emerge, but are contained by public health measures.

New cases / wk

Assume vaccine available – June 2021

2020   2021   2022

Assumptions:
- Not all cases are detected, allowing spread at a reduced frequency.
- Successful contact tracing and quarantine around emerging cases prevents a rapid increase in cases.

Impact:
- **Workforce**: Increased home working and travel restrictions in existing and newly affected countries.
- **Supply chain**: Reduced output from affected countries impacts supply chain.
- **Economy**: Ongoing uncertainty has longer term impact on markets. Affected countries more significantly impacted.
- **Timeframe:** 12 to 18 months. the severity of the pandemic.

2 — EARLY PEAK
Rapid rise in cases, peaking in Q2 2020.

Assume vaccine available – June 2021

2020   2021   2022

Assumptions:
- Contact tracing and population distancing controls fail to prevent a rapid growth in cases.
- Cases peak in summer 2020, with a decline as population immunity levels increase.
- Potential for further peaks depending on the seasonality of the virus.

Impact:
- **Workforce:** Major global disruption, including increased home working, travel restrictions and morbidity and mortality in the workforce. Significant impact on health systems.
- **Supply chain:** Global shortage of some goods due to production slowdown.
- **Economy:** Increased risk of global recession dependent on the severity of the pandemic.
- **Timeframe:** 12 to 18 months, peaking within 3 months.

3 — DELAYED PEAK
Public health measures spread the peak over a longer period of time.

Assume vaccine available – June 2021

2020   2021   2022

Assumptions:
- Contact tracing and population distancing controls have some effect, spreading the impact of the disease over a longer period of time.

Impact:
- **Workforce**: Major global disruption, including increased home working, travel restrictions and morbidity and mortality in the workforce. Impact on health systems somewhat reduced compared to early peak scenario.
- **Supply chain**: Global shortage of some goods due to production slowdown.
- **Economy**: Increased risk of global recession dependent on the severity of the pandemic - longer period of uncertainty than with an early peak.
- **Timeframe:** 12 to 18 months, peaking in 6 to 9 months.

A general COVID-19 response should be considered: example strategy and operating model checklist

SELECTION

Strategic considerations

- ❑ Establish a cross-functional steering committee, led by a C-suite member. Ensure senior representation from business divisions plus specialist leadership such as HR, Legal, IT, Operations, Risk, Communications, Finance, Health and Safety, Procurement, Sales and Crisis and Business Continuity.
- ❑ Establish and agree process for decision making and agree critical milestones.
- ❑ Determine reasonable worst case scenarios to inform planning assumptions. Consider likely trigger points for decision-making. Review and refresh Crisis, Continuity and specialist plans (e.g. pandemic/COVID-19). Stress test assumptions and exercise plans.
- ❑ Prepare your core Incident Management Team (IMT) to coordinate response and containment efforts.
- ❑ Map critical stakeholders and agree communication strategies for them. Base the immediate response and communications on established facts from reliable, trusted sources.
- ❑ Appoint functional workstreams and owners, and align activity with response objectives.
- ❑ Ensure alignment with organisation reputation, purpose and values (e.g. supporting the wider community response).
- ❑ Agree communications to staff and stakeholders - and feedback loops. Balance transparency and preparedness with not wanting to appear to be over reacting.

Set up an Incident Management Team to coordinate your response

- ❑ Set clear roles, accountabilities and objectives.
- ❑ Agree meeting cadence and team ways of working.
- ❑ Agree communications and stakeholder engagement strategy.
- ❑ Use approved sources of information to monitor the spread of the virus and emerging clusters of cases.
- ❑ Embed an incident reporting mechanism.
- ❑ Identify critical decision triggers to manage and contain the virus (e.g. travel restrictions; office closing/work from home; meeting restrictions/virtual solutions).
- ❑ Deploy a rapid response process for your own cases and develop personnel recovery plans.
- ❑ Verify that technology infrastructure can support remote operations.
- ❑ Review supplier service availability and resilience.

Scenario planning

- ❑ Evaluate COVID-19 specific scenarios for your organisation. Identify potential risks and assess impacts.
- ❑ Ensure business continuity plans include arrangements and processes for handling an infectious disease outbreak, epidemic and pandemic.
- ❑ Model the financial impact of scenarios and potential triggers for urgent action (e.g. breach of covenants).
- ❑ Identify strategic interventions to stabilise your organisation.

Moreover for Telecoms operators workforce, operations and supply chain, communication strategy need consideration...

COVID-19 response strategy

Workforce

Protect your people and plan your workforce

Across the Telecommunications sector, the workforce is varied – and includes IT contractors, call centre workers, field-force workers – so the challenges will be diverse. All companies need to ensure that they have a plan in place to protect individuals in their organisations whilst future proofing their business.

❑ Have you completed workforce profiling to understand where work levels are likely to decrease or increase due to the impact of COVID-19?

❑ How can you enable flexible working arrangements in the event of quarantine and do you have the necessary infrastructure in place?

❑ Have you identified the critical projects and established a plan to remediate risks related to key roles?

❑ What steps can be taken to facilitate home working?

❑ Have you reviewed your HR policies (e.g. flexible working, immigration, travel, and other relevant policies and regulations)?

❑ Do you have a system in place to monitor changing laws and regulations (e.g. travel restrictions) affecting your workforce?

❑ How are you managing staff exporsure visiting homes for problem resolution or CPE installation?

Operations and supply chain

Maintain business continuity and protect your supply chain

75% of companies report that COVID-19 has disrupted their supply chain*. The Telecommunications sector could be one of the most impacted particularly from any delay to the rollout of 5G. Several fiber optics suppliers are based in Wuhan, where the coronavirus outbreak originated. Many, who rely on a vast Chinese workforce to manufacture their products, network equipment and spare parts are starting to see cutbacks which will place downward pressure on all manner of device shipment volumes, along with the overall pace of 5G rollout.

❑ Have you performed an operational risk assessment and considered the impact of disruptions on critical business functions?

❑ Have you liaised with key third parties to ensure they will be able to continue to deliver desired service levels during the coming period?

❑ Have you evaluated strategies for alternative sourcing, including the impact of tariffs to cost?

❑ Do you have a communications strategy in place for key supply chain stakeholders?

Communications strategy

Provide clarity to employees and stakeholders and enable business continuity

Organisations must ensure there is a communication plan in place for employees, as well as customers, especially for those businesses that have a global workforce. The wellbeing of employees should be at the heart of every comms plan.

❑ Have you created an internal and external stakeholder map for key communications (considering staff, customers, suppliers, regulators, etc)?

❑ How are you communicating with your workforce? How are you keeping employees regularly informed about the latest updates and guidance?

❑ Are you providing reassurance and consistent messaging to all staff and showing a duty of care?

❑ Do you have a clear communications strategy that can be implemented in a crisis to protect your reputation and maintain the trust of your stakeholders?

❑ How are your crisis communications aligned with your organisation's culture and communications requirements?

❑ Do you have a clear means for your employees to communicate issues to you?

... as well as focusing on data, customer and revenue impacts as well as head office functions

COVID-19 response strategy

Focus on data

Gain insight and assess your exposure to risk

The situation is very fluid and it's paramount that businesses have access to the right insight to make informed decisions. Telecommunications businesses need to play a key role in ensuring that the data they hold for clients is available and is trusted by businesses and consumers.

- ❑ Do you understand how an affected country / region might impact the commercial performance of your business?
- ❑ Do you understand the potential impact of a global or country-specific slowdown, on your business?
- ❑ Are you able to access robust data insights to underpin key decisions that you need to make?
- ❑ Do you have the time and skills to digest and analyse existing data sources in new ways to enable decision making?
- ❑ Are you able to rapidly automate data capture processes for new data sources?

Customers and revenue

Balance customer care with commercial priorities

Whilst many challenges exist, particularly for those in Telecommunications sector, there are also opportunities for businesses. For example, an increase in remote / home working may drive the need for IT hardware, VPNs and conferencing tools. Equally, as we spend more time at home, the demand for streaming service and online gaming is likely to rise hence putting a strain on OTT. However, it's key that with rising demand and pressures on the network, attention is still given to maintain service levels.

- ❑ Have you updated your sales and demand planning strategy, (including assessing changes in customer behaviour)?
- ❑ Do your policies reflect the need to protect both your customer and commercial interests (e.g. updating policies to be flexible on cancellations and changes, rationing products with insufficient stock sales to top customers)?
- ❑ Have you evaluated your competitive position under the new environment, identifying both risks and opportunities?
- ❑ How can you ensure the conversion from store dependence to on-line and call-center?
- ❑ How can critical availability and sale of devices be guaranteed?
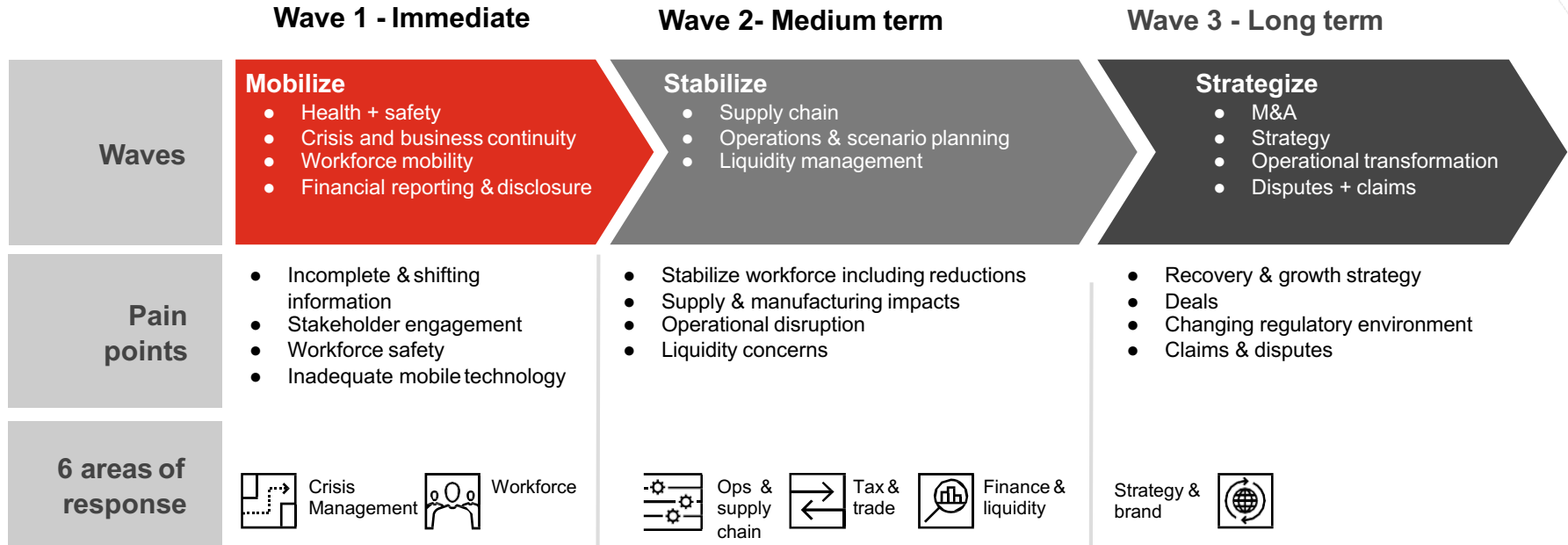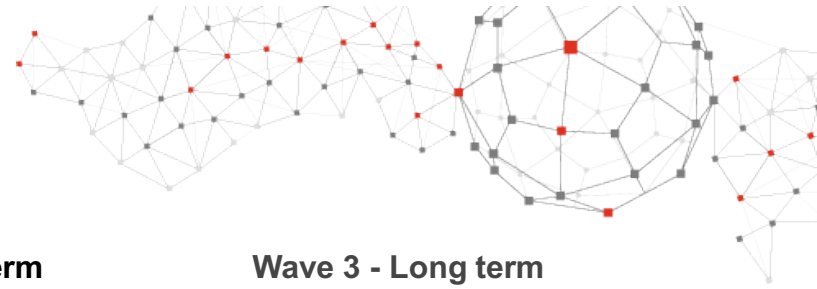- ❑ How can customers problems be solved effectively (e.g., requirement of a new SIM)?

Head office functions

Join-up efforts on a cross functional basis to ensure business continuity and resilience

Businesses need to ensure that they can continue functioning effectively but must explore where the risks lie for their business.

- ❑ Do you need to financially or operationally restructure your business to reduce risk and protect value?
- ❑ Have you updated your working capital plans and forecasts?
- ❑ What are your contractual obligations as a customer, and as a supplier?
- ❑ Are there tax and regulatory implications of moving people to alternative locations?
- ❑ What insurance policies and access to emergency insurance do you have in relation to your scenarios?
- ❑ What technology infrastructure and resilience capabilities do you have? Can your IT infrastructure support extensive remote access demands?
- ❑ Could Telecommunications companies encouraging remote working lead to an increased risk of a cyber attack?

Three waves can be considered for responding to the current crisis

	Wave 1 - Immediate	**Wave 2- Medium term**	**Wave 3 - Long term**
Waves	**Mobilize** ● Health + safety ● Crisis and business continuity ● Workforce mobility ● Financial reporting & disclosure	**Stabilize** ● Supply chain ● Operations & scenario planning ● Liquidity management	**Strategize** ● M&A ● Strategy ● Operational transformation ● Disputes + claims
Pain points	● Incomplete & shifting information ● Stakeholder engagement ● Workforce safety ● Inadequate mobile technology	● Stabilize workforce including reductions ● Supply & manufacturing impacts ● Operational disruption ● Liquidity concerns	● Recovery & growth strategy ● Deals ● Changing regulatory environment ● Claims & disputes
6 areas of response	Crisis Management Workforce	Ops & supply chain Tax & trade Finance & liquidity	Strategy & brand

There are several challenges which need to be tackled when you face in responding to COVID-19

Crisis response and management	• Establish a **crisis response structure** with established workstreams, clear responsibilities and accountabilities. • Develop **likely and reasonable worst case scenarios** and their potential impact, to support crisis and response planning.

Workforce	• **Assess potential impact and develop options** to identify and move labour with the key skills to support the P&L of the organisation. • Proactively manage **where, when and how disruption will impact the availability and effective utilisation of skills** in the business.	**Operations and supply chain**	• **Perform an operational risk assessment** and consider and plan for the impact of disruption on critical business functions. • Understand your COVID-19 **supply chain risks and impacts**, including third party suppliers.
Communications strategy	• Develop a **rapid communications plan** and approach to build and maintain trust and reputation during the crisis for key stakeholders. • Tailor **best practice templates** and **communications materials** such as emails, FAQs and intranet.	**Focus on data**	• **Identify data needs** and develop protocols for data extraction, preparation and analysis. • **Model the impact of scenarios** on industry sector or business-level commercial performance, and stress test commercial revenues against downside economic scenarios.
Customers and revenue	• **Revise your sales strategy** to deal with evolving customer behaviours and competitive environment (risks and opportunities). • Prioritise actions to **protect customer relationships** and commercial interests. • Model customer **behavioural change.**	**Head office functions**	**Legal, IT, Commercial and Insurance**: review existing insurance coverage, IT infrastructure and resilience, force majeure, contract clauses. **Finance, Treasury and Tax**: financing, restructuring and cash-flow. **Investor Relations**: market disclosure.

A COVID-19 scenario planning and review workshop can help

Developing a robust and commercially astute response to minimise the negative impacts of COVID-19, maintain the delivery of your critical business processes and protect your people and assets. The scenarios we help you draw up will be based on fact-driven insights from our economics and epidemiology experts.

Approach

A half/full-day workshop, which could be virtual, to support assessment of reasonable worst case scenarios.
Identify previously unconsidered risks and support response.

01

Identify the reasonable worst-case scenarios for your organisation.

Utilize a combination of own planning, open source material and experts' views on how the situation may develop to inform this discussion and identify a list of scenarios which merit more focused planning.

02

Identify and prioritise potential risks and impacts around:

- People
- Workplace
- Legal/Regulatory/Tax
- Supply and distribution chains
- Commercial/Finance
- Reputation
- Technology

Prioritise by assessing the impact and likelihood to inform allocation of effort and resource.

03

Facilitate the consideration of mitigating actions and preparedness plans:

1. Identify actions to mitigate risks.
2. Where risks cannot be mitigated, consider preparedness activities. This may be linked to crisis management, pandemic and BCM plans.
3. Agree clear owners for the risks identified, and key actions that must happen now.

As part of this discussion, consider triggers that will require decisions to be escalated to the senior decision-making team (e.g. Crisis Management Team or the Board).

Objectives

- Agree likely and reasonable worst-case scenarios.
- Identify potential risks and key impacts.
- Assess current levels of preparedness, including other sources of information which could be leveraged.
- Identify mitigating actions against the key potential impacts, identify and prioritise actions which need to happen now and agree clear owners.

Tailoring your approach

You may be in a different states of readiness and so, the workshop is used to review and challenge both their scenarios and existing plans.

Focus area: Workforce

Common challenges and worries

- **Limited insight into who truly drives your P&L** and who in the workforce could move to sustain those activities.

- **Limited visibility of your workforce's key skills and capability** of processes and systems to move your labour to sustain the value-creating areas of your business.

- **Limited insight into changing laws and regulations around COVID-19**, hindering your ability to move people appropriately to sustain the value-creating areas of your business.

- **Inability to predict where the likely current and future disruption** will have the greatest/least impact across your business and what this means for organisational skills gaps and therefore your ability to maintain operations.

- **Lack of remote working infrastructure** to support the critical areas of your organisation.

- **Lack of specific COVID-19 policies/communications** to effectively support the desired response, exacerbating the issue (e.g. no employee visibility of remote working).

- **Lack of policy change agility**, required to implement and embed policy changes to effectively combat disruption.

- **Balancing business needs with your pastoral duty of care** to employee wellbeing.

Suggested next steps

Stand-up a dedicated team to manage and implement the response. Pull together an overarching and flexible plan and team to action the following:

- **Define critical clusters of activity**/work to deliver on the P&L, establish which employees do this work and which employees across the organisation also have the required skills to support it.

- **Define the current and required skills** in your workforce and the processes/systems which are needed to deliver the response effectively (including changes required to those systems/processes).

- **Accelerate upskilling** to cover skills gaps in the value-creating areas of the business.

- **Move employees** within the organisation to sustain the value-creating areas of the business.

- **Identify and respond to legal/regulatory updates**, including effective governance to monitor and influence your organisation's response.

- **Proactively anticipate where disruption is most likely** to impact the organisation and refine responses accordingly.

- **Communicate early with employees** on policy and process changes, engaging with Trade Unions where appropriate.

Typical areas:

- Rapid strategy decode and operating model
- Workforce discovery
- Employment law and immigration

- Strategic workforce planning
- Policy, process and HR systems assessment and reconfiguration

- Labour and talent mobility
- Skills mapping and workforce architecture

- Employee engagement and communications
- Pensions and employment tax

Focus area: Working capital and cash management

Common challenges and worries

- **Unclear cash position and cash forecasts**, including currency effects.
- **Developing robust contingency plans and 'what if' scenarios** to model impacts (e.g. cash needs, changes in customer demand, failure in the supply chain, withdrawal of credit insurance, restriction on cross border payments, changes in regulation or other business shocks).
- **Understanding FX risk**, due to changes in supply chain/customer flows.
- **Weak cash controls** need to change so that responsible for cash recognise that 'business as usual' principles no longer apply (e.g. on-time customer payment, prioritising supplier payments align with business critical activities).
- **Liquidity or FX management tools are withdrawn or become unavailable** - such as bank accounts, facilities and derivatives.
- **Difficult relationships with struggling customers** who have liquidity issues/financial instability.
- **Unclear who critical suppliers are,** to continue your operational delivery.
- **High invoice error rates to customers**, causing delays in customer payments.
- **Fragmented sales, production and cost planning** - unable to assess current sales demand with adjusting production schedules and purchasing.
- **Unable to assess options to defer existing purchases or forward orders**, such as consequences if credit insurance cover is pulled.
- **Responding to requests from other financial stakeholders** where additional liquidity is being sought.

Suggested next steps

Although each situation, organisation and set of stakeholders is different, we have found the following steps are key to success:

- **Develop a dynamic, rolling 13-week short-term cash flow forecast** ("STCF") and ongoing process.
- **Flex the STCF to model** various scenarios and mitigating actions including the impact of FX on cash position and covenants. Develop a list of mitigating actions that could be taken.
- **Identify any net funding shortfalls** and engage with shareholders and other funding providers.
- **Review current cash and FX reporting processes and controls** (e.g. authorisation limits, payment approval processes, hedging strategies).
- **Prepare a list of key suppliers and critical payments** that must be made to ensure operational continuity.
- **Establish cash conservation levers**, including existing purchase order review and purchasing needs to assess the ability to cancel or defer.
- **Develop a clear communications plan for external stakeholders** to accompany any potential ask.
- **Establish inventory flow visibility** and optimise stock management in the face of potential lead time changes and demand volatility.
- **Identify pockets of excess working capital** and establish initiatives to quickly convert this into cash.
- **Identify surplus assets** that could provide short-term liquidity.

Typical areas:

- Short-term cash flow review
- Effective cash management and FX risk strategies
- Rapid cost reduction
- Working capital management and optimisation
- Operational restructuring

- Financial restructuring
- Supply chain review
- Business planning
- Financial risk analysis and response
- Scenario modelling

- Independent business reviews
- Treasury, FX and cash management advisory
- Debt and capital advisory
- Accelerated M&A/managed exits
- Modelling of cash tax forecasts

Focus area: Customers and revenues

Common challenges and worries

- **Need for additional services based on customer needs** especially around working from home (e.g., additional quotas, VPNs, conferencing tools, load balancing)

- **Inability to predict impact on sales and demand** and impact on revenues as well as need to identify alternative ways to mitigating impact on revenues

- **Need for planning to shift from off-line (store) channels to alternative channels**, given potential store closures, curfews, serving 65+ not able to go out

- **Inability to predict where the likely current and future disruption** will have the greatest/least impact across critical availability for example for SIM cards, devices/CPEs

- **Inability to resolve customer problems effectively** especially for enabling customers to carry out operations requiring physical presence (e.g., new contracts, cancellation of contracts, replacement/return of CPE)

- **Lack of policies to protect customers and commercial interests** for example with regards to changes to overall contractual obligations and need to defer payments

- **Limited visibility on competitor moves** with regards to how competitors are shaping up their overall market facing strategies (e.g., communication, services, tariffs)

Suggested next steps

- **Review current products and services** and identify changing customer requirements; revisiting IT pipeline planning accordingly

- **Carry out agile sales and demand planning** to minimize impact on revenues and establish mitigation plant for identifying alternative sources/ways of achieving revenues

- **Review sales and service strategy** to ensure transition from off-line channels to alternative channels

- **Carry out risk/impact assessment** to prevent critical disruptions e.g., availability of SIM cards, devices/CPEs

- **Identify alternative customer services strategies** eliminating/reducing need for physical presence

- **Revisit overall customer policies** to ensure protection of customers and commercial interest

- **Establish/strengthen competitor intelligence with respect to COVID-19 response**

Typical areas:
- Products and services review
- Agile sales and demand planning
- IT pipeline prioritization for current/new services

- Sales channel strategy review
- Risk/impact assessment across all customer touch points including evaluation of changing customer needs

- Contractual terms/customer policies review

Focus area: Operations and supply chain

SELECTION

Common challenges and worries

- **Labour availability** along the supply chain.
- **Volatile demand** caused by panic buying.
- **Critical service providers** - understanding their availability and the ability of platforms to remain at an acceptable level of operation.
- **Scarcity of critical parts or ingredients** to support continued manufacturing.
- **Understanding availability and constraints** of supplies.
- **Defining supply priorities** of critical products.
- **Routing products globally**, whilst avoiding closed markets and considering increased security and screening.
- **Inventory issues** disrupting supply model due to a slowdown in global supply chains.
- **Loss resolution** - understanding and getting a fair and equitable result.

Suggested next steps

- **Use modelling to aid decision making** and identify opportunities for labour, logistics, cost, service and flexibility improvements as well as understand direct and indirect tax implications.
- **Identify supply constraint remediation levers** and validate them (e.g. enable alternate suppliers, secure overtime or expedited freight) and cost alternative supply chains.
- **Stand-up a 'situation room'** where mitigations can be coordinated.
- **Communicate regularly with supply chain stakeholders** and establish closed-loop communication protocols for sensitive issues.
- **Build a tiered factual base of supply**, establishing what's available and constrained, and set the mechanism to regularly update the data.
- **Understand the impact that delays could have** on supply/production lead-times, and consider your inventory position.
- **Review how border requirements** differ for alternative shipment routes.
- **Insurance claims** - review and implement actions.
- **Use technology aided re-tendering** to appoint new suppliers.

Typical areas:

- Dynamic risk assessment and business continuity planning to prepare you for the coming months
- Credit assessments of critical parties to identify potential risks of supplier insolvencies
- Proprietary rapid supply chain analytics platform to provide an understanding of supply chain to inform decision-making
- Margin impact/revenue displacement to understand the impact on profitability/cash flow/tax profile

- Tariff assessments and mitigation for changing supply chains, including support with border requirements for alternative shipment routes
- Supply chain resilience and network agility testing; to 'stress test' how well it would operate under additional pressure
- Deploy AI and RPA technology to relieve stretched workforce of transactional tasks
- Supply chain intelligence to support dynamic routing of product and introducing new suppliers

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To find out how we at PwC are responding to the COVID-19 outbreak, please visit:

COVID-19: Four essential crisis management lessons
www.pwc.com.tr/responding-to-covid-19

PwC's COVID-19 Navigator
www.pwc.com.tr/pwc-covid-19-navigator

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