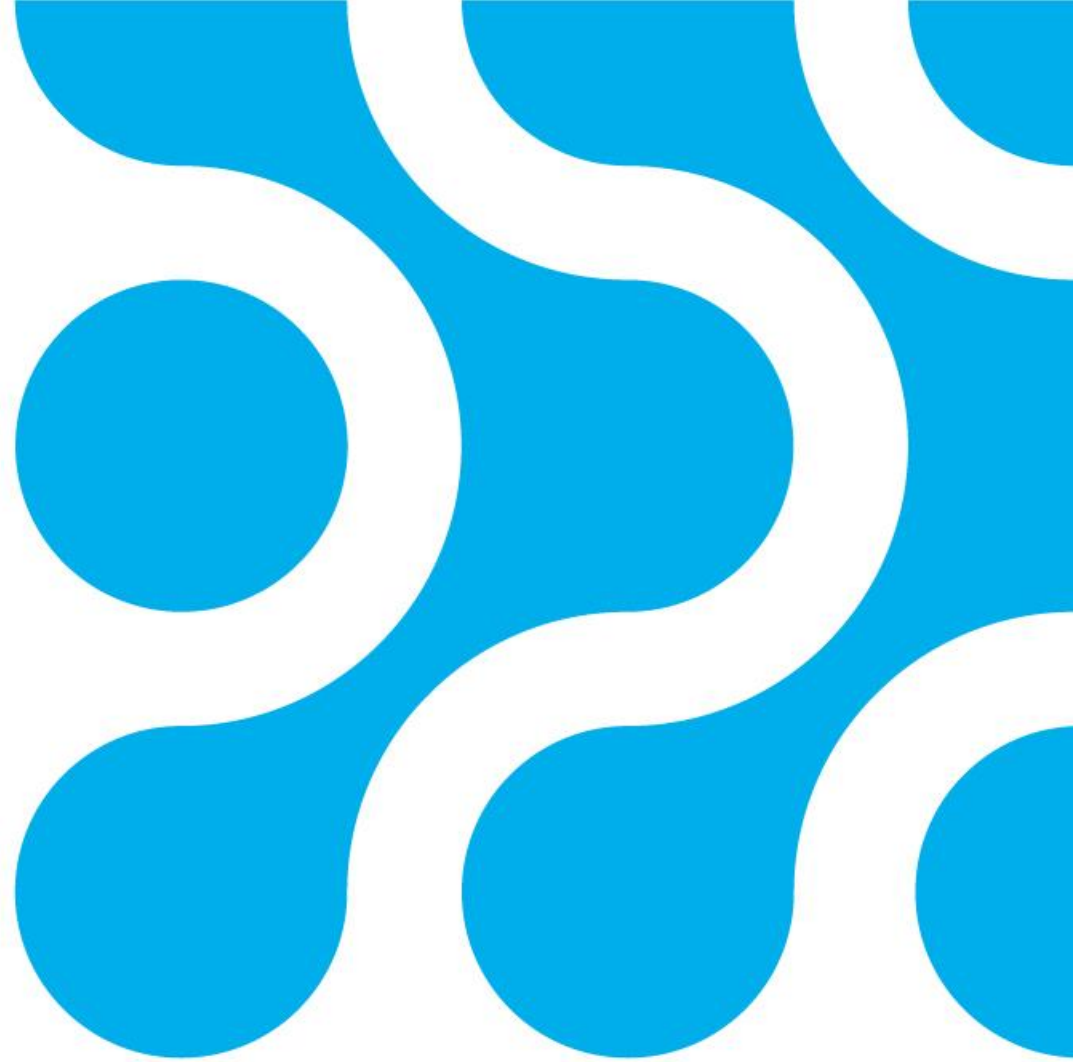**ECIA Member Webinar**
**Covid-19**

Presented by ECIA Staff

March 27, 2020

# NOTICE

Please note that Covid-19 is a very fluid situation, changing daily. Any statements made in this seminar should be considered as friendly advice with best information at the time of the call, not a formal recommendation from ECIA. All companies should consult their local counsel and work closely with their state and local governments.

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# Agenda

- Introduction of ECIA actions – David Loftus, ECIA President & CEO

- Electronics as an Essential Business – Robin Gray, ECIA General Counsel

- Latest Covid-19 survey results – Dale Ford, ECIA Chief Analyst

- Other Covid-19 resources, web site tour – Dale Ford
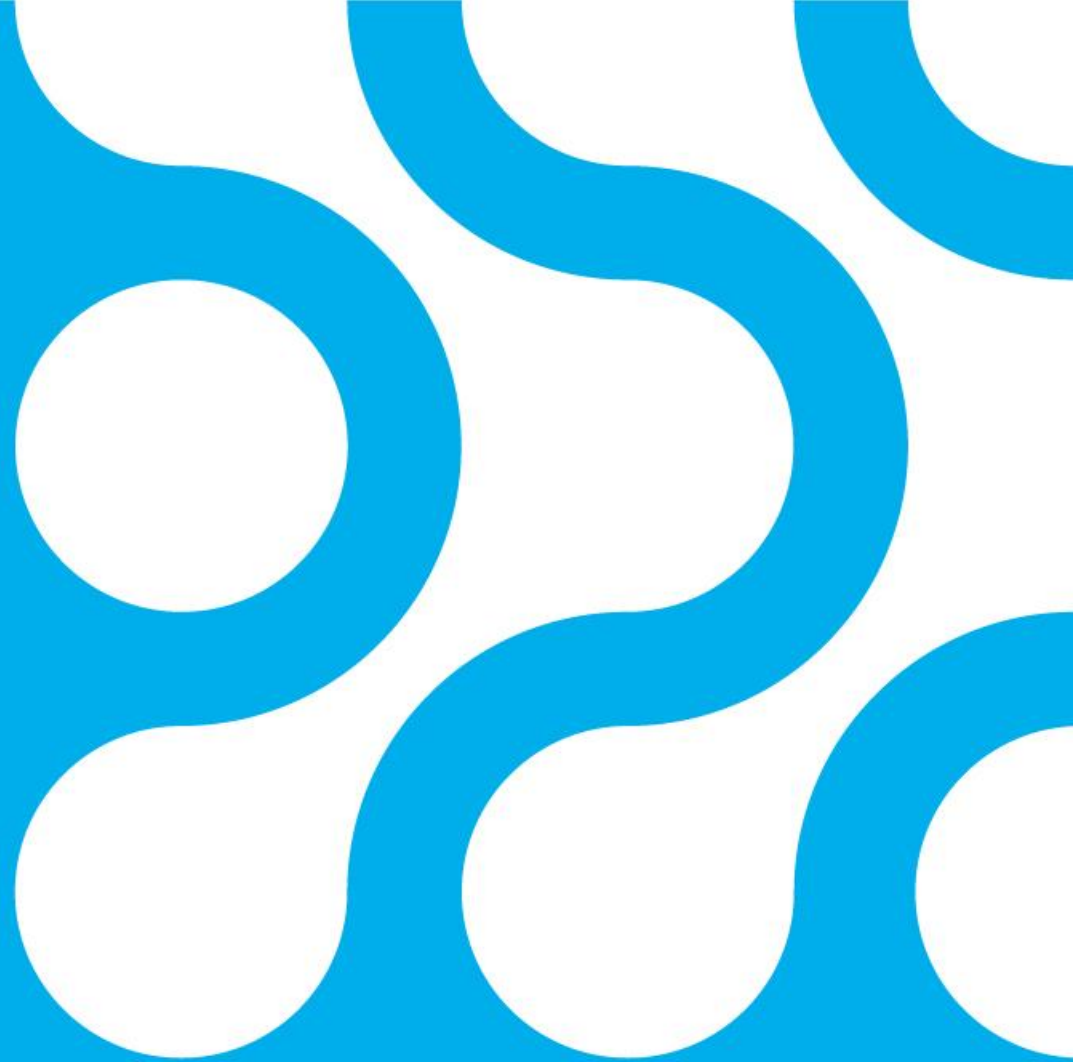
- Member questions

- Summary

David Loftus   Robin Gray   Dale Ford

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# Introduction

# ECIA Recent Actions

- Gathering/posting valuable links to other sites, ie CDC, WHO, NAM

- Monitoring, consolidating, and assessing government orders

- Press releases on Electronics Industry as an "Essential Business"

- Seeking CISA recognition of electronics manufacturers and supply chain

- Market updates

- Coronavirus surveys

- Council and Board discussions on best practices

- Support EDS cancellation

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# CISA Gives Guidance on Essential Infrastructure



**Guidance on the Essential Critical Infrastructure Workforce: Ensuring Community and National Resilience in COVID-19 Response**

Version 1.1 (March 23, 2020)

## THE IMPORTANCE OF ESSENTIAL CRITICAL INFRASTRUCTURE WORKERS

Functioning critical infrastructure is imperative during the response to the COVID-19 emergency for both public health and safety as well as community well-being. Certain critical infrastructure industries have a special responsibility in these times to continue operations.

This guidance and accompanying list are intended to support State, Local, and industry partners in identifying the critical infrastructure sectors and the essential workers needed to maintain the services and functions Americans depend on daily and that need to be able to operate resiliently during the COVID-19 pandemic response.

This document gives guidance to State, local, tribal, and territorial jurisdictions and the private sector on defining essential critical infrastructure workers. Promoting the ability of such workers to continue to work during periods of community restriction, access management, social distancing, or closure orders/directives is crucial to community resilience and continuity of essential functions.

https://www.cisa.gov/sites/default/files/publications/CISA_Guidance_on_the_Essential_Critical_Infrastructure_Workforce_508C_0.pdf

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# CISA Defines Critical Infrastructure



ECIA maintains electrical components are vital to majority of these markets

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# Pushing for Explicit CISA Recognition

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March 26, 2020

TO: Cybersecurity and Infrastructure Security Agency

The Electronic Components Industry Association (ECIA) is an industry trade association whose members are manufacturers and distributors of electronic components. ECIA requests CISA to include electronic component manufacturers (NAICS code 3344) and their authorized distributors (NAICS 4238) within the definitions of critical infrastructure industry sectors as set forth in the "Guidance on the Essential Critical Infrastructure Workforce" dated March 19 and updated March 23, 2020.

ECIA members manufacture everything from microprocessors to capacitors to sensors that are essential to OEMs in making products defined by CISA as "critical manufacturing." In the language of the CISA guide, electronic components are "needed for medical supply chains, and for supply chains associated with transportation, energy, communications, food and agriculture, chemical manufacturing, nuclear facilities, the operation of dams, water and wastewater treatment, emergency services, and the defense industrial base." In addition, these electronic components are crucial to the repair and maintenance of manufacturing equipment. It would be difficult to find an industry sector that doesn't need electronic components to manufacturer products or provide services that are vital to this country's health and safety.

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# Electronics Supply Chain as an Essential Business

Shelter in Place

Robin Gray
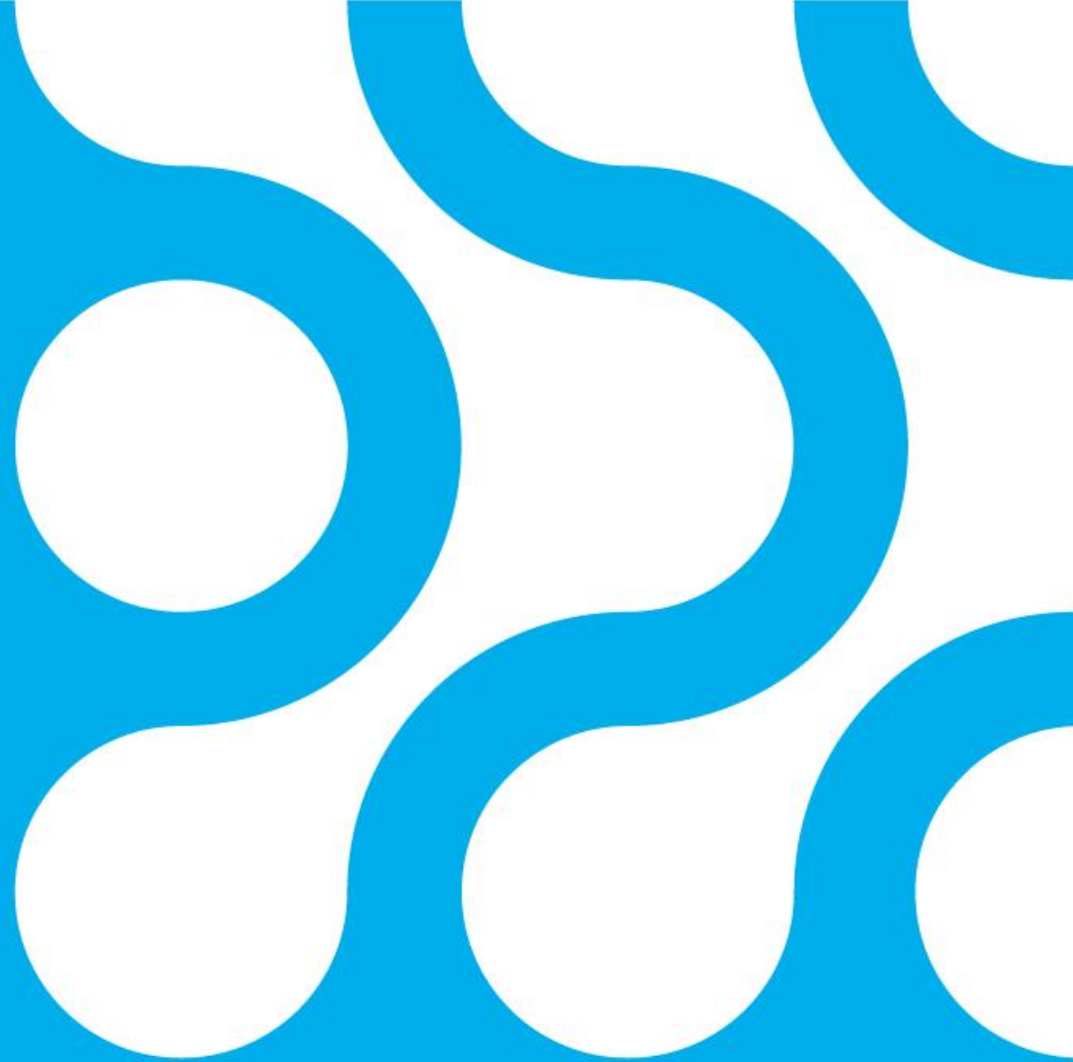
# Guidance for Manufacturers and Distributors

- Ensure safety of employees by following the CDC guidelines for employers

- Determine if business qualifies as essential business: CISA, state and local supercede

- Consider obtaining official document from your state/local government designating your facility and its workers as an essential business

- Consider a self-declaration. Support the declaration with written documentation

- Letters from your customers who are essential businesses can be used to demonstrate your role in the supply chain as an essential business

- Determine which employees are necessary for your company to operate while providing essential manufacturing and distribution services

- Determine which locations meet definition for essential services.  One does not mean all

- Keep informed of all state and local developments

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# Summary of State Covid-19 Orders on ECIA Site

**Exemption of State Covid-19 Orders to Electronic Components Industry**

**Please consult with regulators within the appropriate jurisdiction and your legal counsel before about specific application to your company's operations**

| STATE | Applies to Mfg & Dist | Manufacturer | Distributor | Need Clarification |
|---|---|---|---|---|
| Alabama | none | YES | YES | Yes--State Health Officer |
| Alaska | none | YES | YES | |
| Arizona | none | YES | YES | |
| Arkansas | none | YES | YES | |
| California | non-critical infras | | | |
| Colorado | reduce workforce, Denv | | | |
| Connecticut | shelter-in-place | | | |
| Delaware | stay-in-place | | | |
| Florida | none | | | |
| Georgia | Atlanta--shelter i | | | |
| Hawaii | stay at home | | | |
| Idaho | none | | | |
| Illinois | shelter-in-place | | | |

State and Local Covid-19 Response Information

States - Main Info (Tab 1)    States - Additional Info (Tab 2)    Localities - Main Info (Tab 3)    Localities - Additional Info (Tab 4)

**Dashboard provided by MultiState Associates (www.multistate.us)**

*Toggle between different tabs in the upper left hand corner of the screen. The tabs are organized as follows: state-level activity is shown on tabs 1 and 2; local-level activity is shown on tabs 3 and 4.*

| State | Link to Health Department's Coronavirus (COVID-19) website | Key Contacts | State of Emergency Doc. | Executive Orders | Session Changes/Capitol Closures | Travel Restrictions / Info | Official Sources (Twitter, etc.) | Last Checked | New Info (3/26) |
|---|---|---|---|---|---|---|---|---|---|
| Alabama | Alabama Department of Public Health - 2019 Novel Coronavirus (COVID-19) | Burnestine Taylor, M.D. - 334-206-5100 Karen Landers, M.D. - 256-383-1231 | State of Emergency Issued | | | For Those Who Have Recently Traveled Internationally | @ALPublicHealth | 3/25/20 - 1:04 pm | ☐ |
| Alaska | Alaska Department of Health and Social Services - COVID-19 | Alaska Section of Epidemiology (907) 269-8000 | Gov. Dunleavy declares a public health disaster emergency in response to COVID-19 (3/11/20) | COVID-19 Health Mandates | Adjournment expected to be pushed up to Friday, March 27 | Health Mandate 10: Requires travelers to self quarantine for 14 days, punishable by fine or imprisonment | @Alaska_DHSS | 3/25/20-8:58 pm | ☐ |
| Arizona | Arizona COVID-19 Response | Hotline: 211 | Gov. Doug Ducey Issues Declaration of Emergency (3/11/20 pm) | Executive Order 2020-12: Prohibiting the Closure of Essential Services | March 23 - Lawmakers pass budget, suspend session until April 13 | | @AZDHS | 3/25/20- 5:28 pm | ☐ |
| Arkansas | Arkansas Department of Health-COVID-19 Website | 1-800-803-7847; after hours emergency number 501-661-2136 | Declared Public Health Emergency (EO 20-03) | EO allowing for the expansion of telemedicine. | Governor issues call for Special Session (on 3/26) to make budgetary adjustments. | Link for traveler information | @ADHPIO | 3/26/20 - 8:12 am | ☑ |
| California | CA Department of Public Health-Coronavirus Disease 2019 (COVID-19) | Dr. Sonia Angell, CDPH Director & State Health Officer | Gov. Newsom Declares State of Emergency to Help State Prepare for Broader Spread of COVID-19 | Governor Newsom issues Exective Order to Fight the COVID-19 Surge. | Legislative session suspended until at least April 13 | | @CAPublicHealth | 3/26/20 - 9:48am | ☐ |

https://docs.google.com/spreadsheets/d/e/2PACX-1vRlJWZJ7OkGUW57_rdA2n3xBJ3qjW6u4Z9N6K9Y5L4bM_6H7-S308qdKmJfpVstYWf300nyujvZPFSy/pubhtml?urp=gmail_link

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# Example Employee Travel Authorization Letter

**SAMPLE LETTER TEMPLATE FOR EMPLOYEE TRAVEL**

**Place on Company Letterhead**

**Critical Infrastructure Exempt Worker Certificate**

Issued to:   (Insert Employee Name and, if applicable ID or badge number)

To Law Enforcement and Whomever It May Concern:

(Insert Company Name) is part of this country's critical infrastructure and is considered an "essential business" as defined by the Cybersecurity and Infrastructure Security Agency (CISA) within the Department of Homeland Security and any applicable state and local COVID-19 related order or travel ban.  As such, the individual named above is a critical infrastructure worker serving an essential business and should be considered exempt from state and local restrictions such as curfews, shelter-in-place, and other travel restrictions when reporting to, returning from, or performing his or her work functions.

Should you have any questions concerning this letter, please contact (Insert Name, Title, Company and Phone Number).

Certified by:

(Insert Signature, Name, Title, Phone Number of Authorized Company Official)

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# Guidance for Reps

- Manufacturers' sales and marketing not considered essential

- By extension, independent manufacturers' reps not considered essential

- Familiarize yourself with any state and local orders during the pandemic

- Ensure that your firm's employees have the tools to work from home

- Coordinate with your principals on how to they are operating

- Get contact information for the principals' and customers' employees that may be working from home

- Train teams to use Zoom or other virtual tools to stay in touch with customers

- Utilize short webinars to continue to promote principals' products to customers

- Regularly update your customers on your principals' supply chain fluctuations

- Create virtual modules to continue to help train distributor sales teams

# Covid-19 Resources

Dale Ford
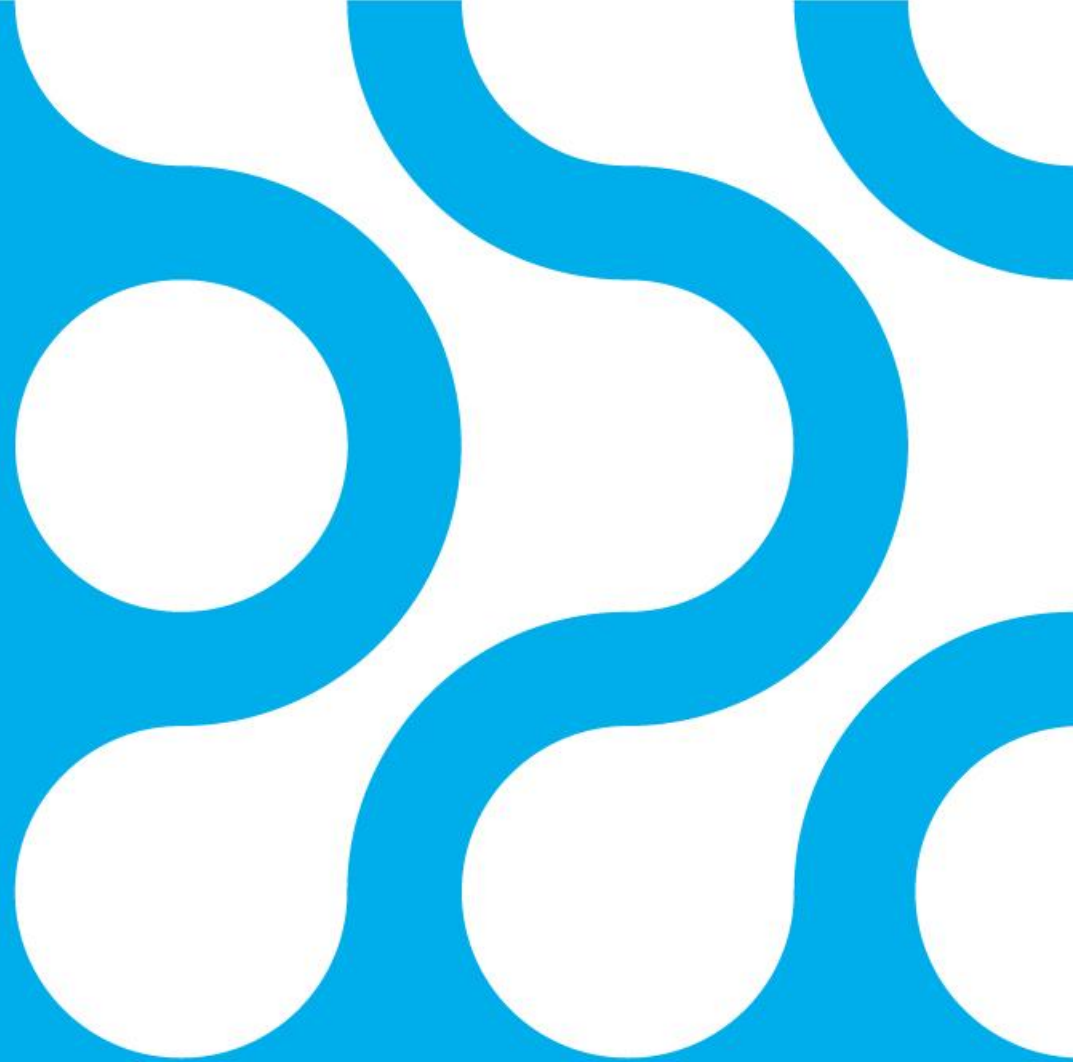
Rate your level of concern regarding these issues due to the Coronavirus / COVID-19 impact through 2020.

Severe ■ Serious ■ Moderate ■ Minimal ■ None

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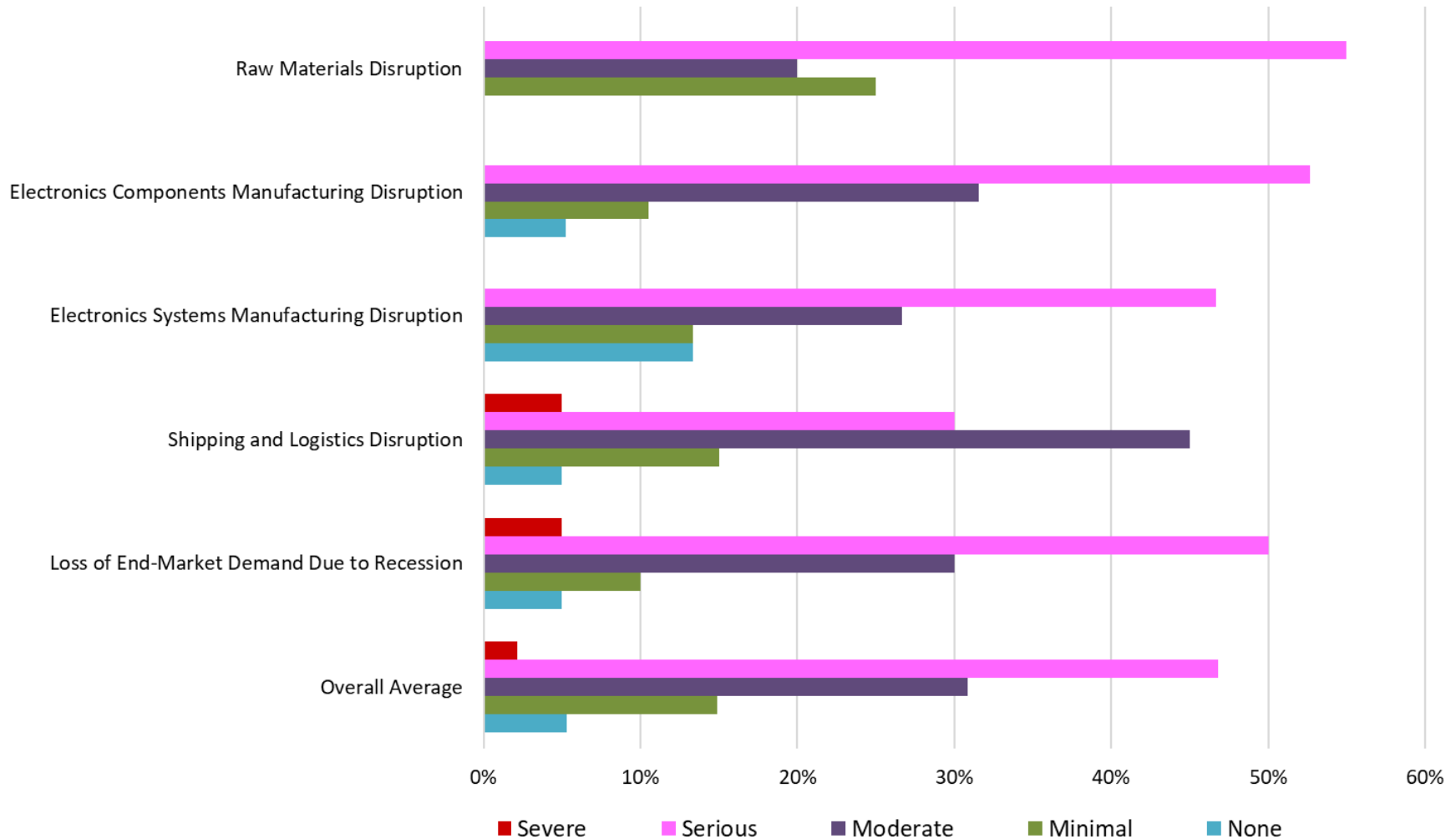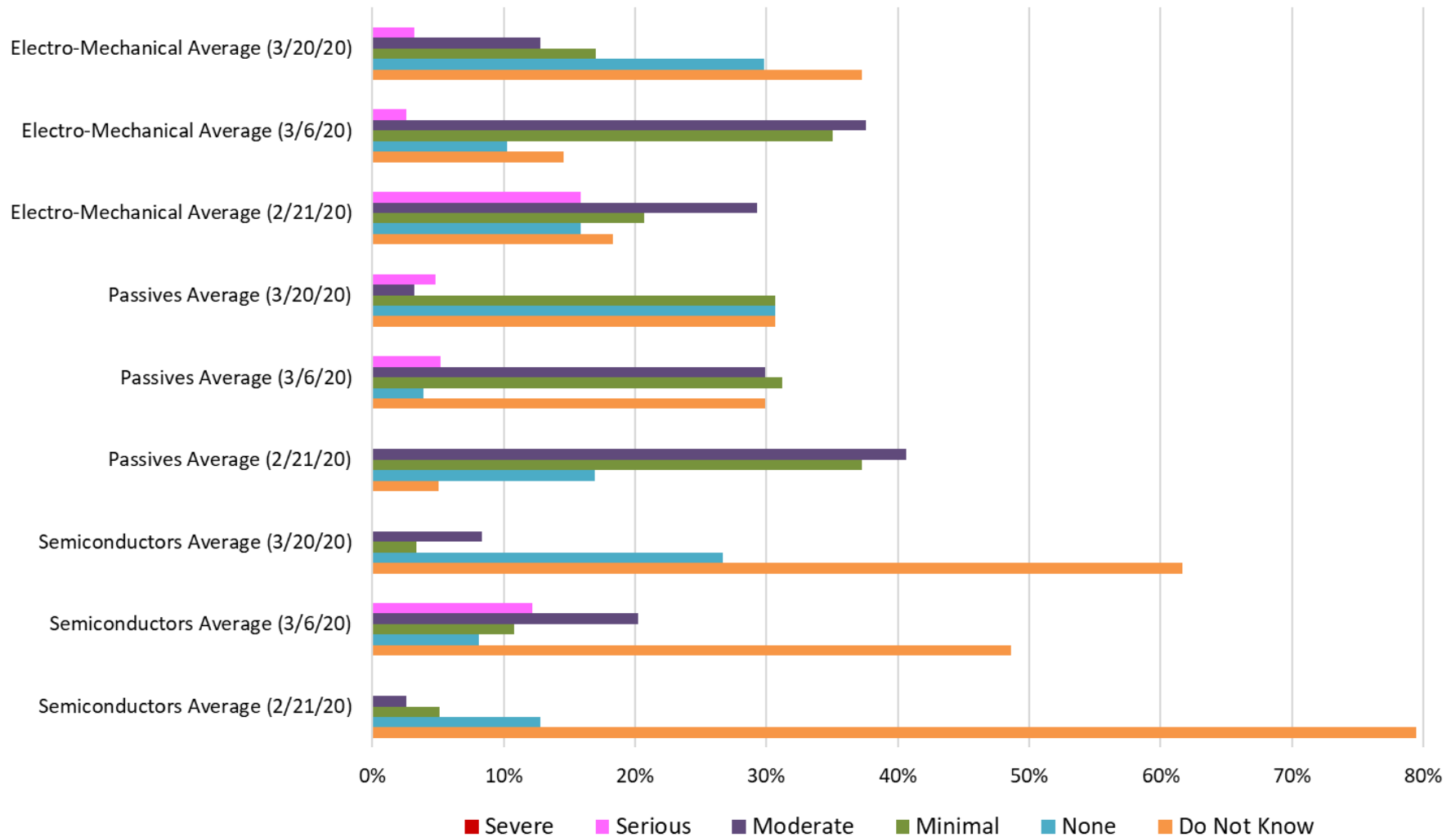
# What % do you think this will impact C1Q's electronics production vs. previous plans?

Survey Date: March 5-8    Respondents: ~4000    Location: Worldwide/China focus (~85% China)    Who: Active Electronics Industry Professionals
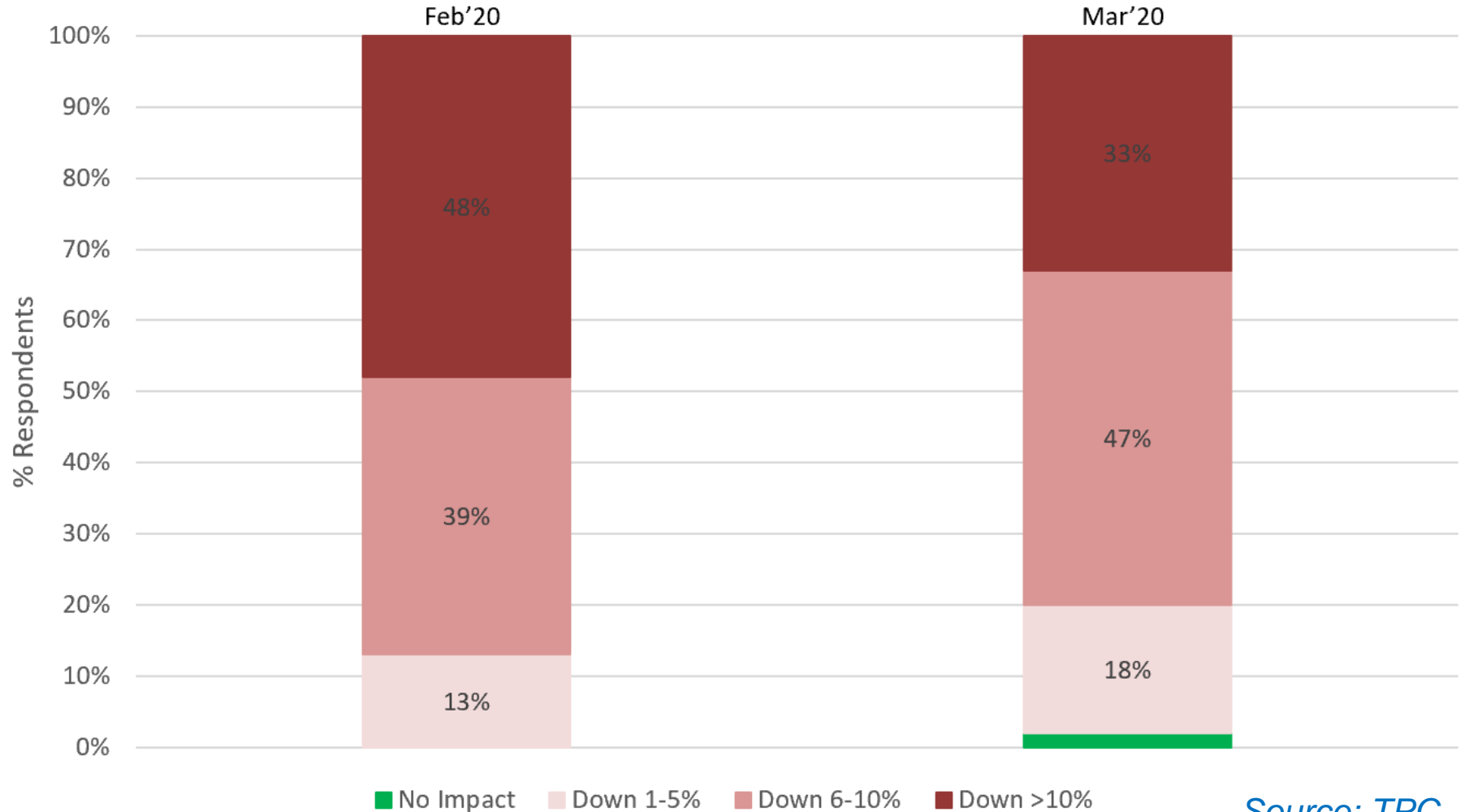


*Source: TPC*

# If production delta will not be recovered in C2Q, why?
## (multiple answers OK)

*Source: TPC*
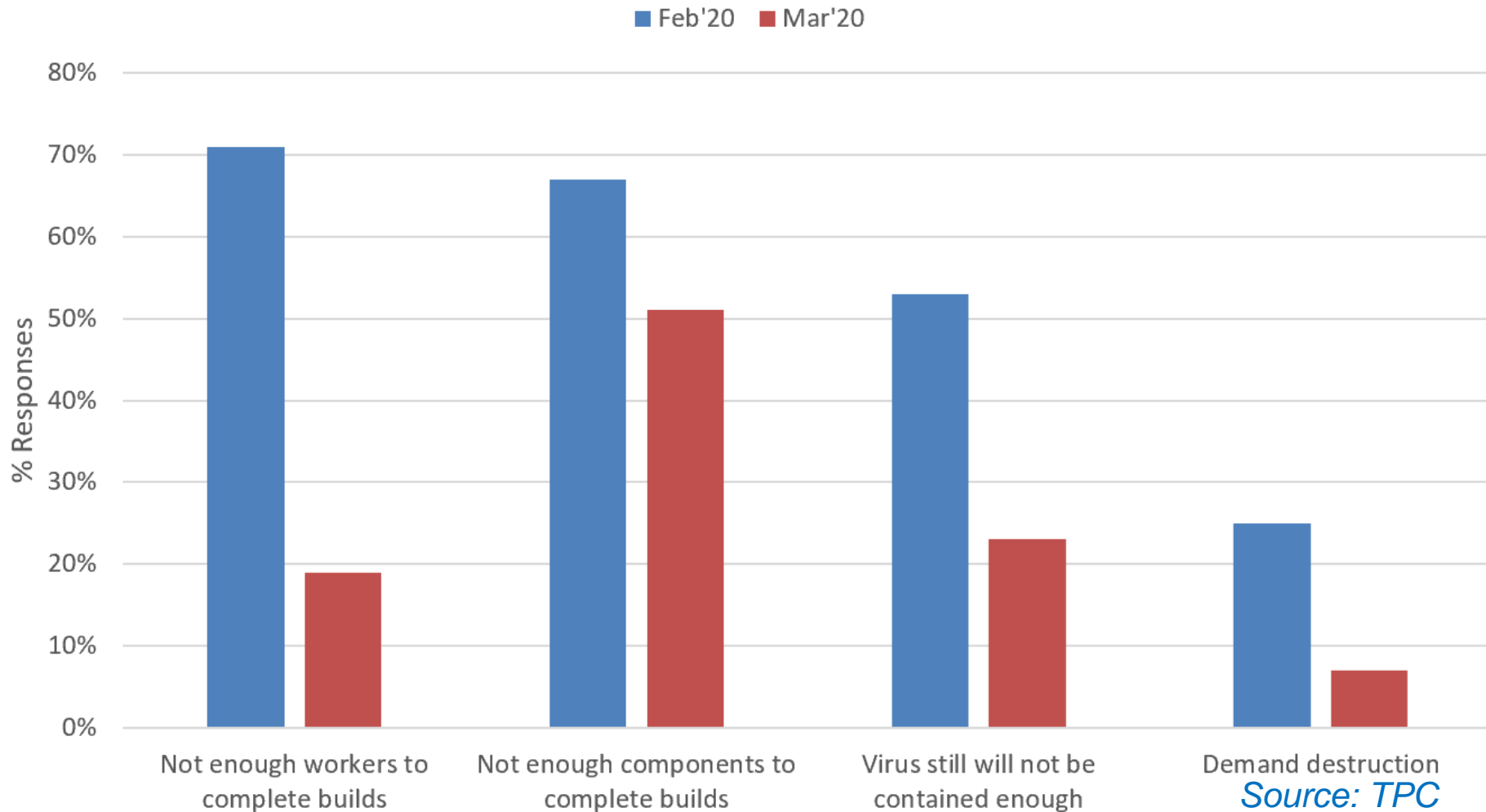
How much will demand for your products from your customers increase or decrease due to the impact on demand due to the Coronavirus / COVID-19?

Strong Increase ■ Moderate Increase ■ No Change ■ Modest Decline ■ Strong Decline ■ Do Not Know
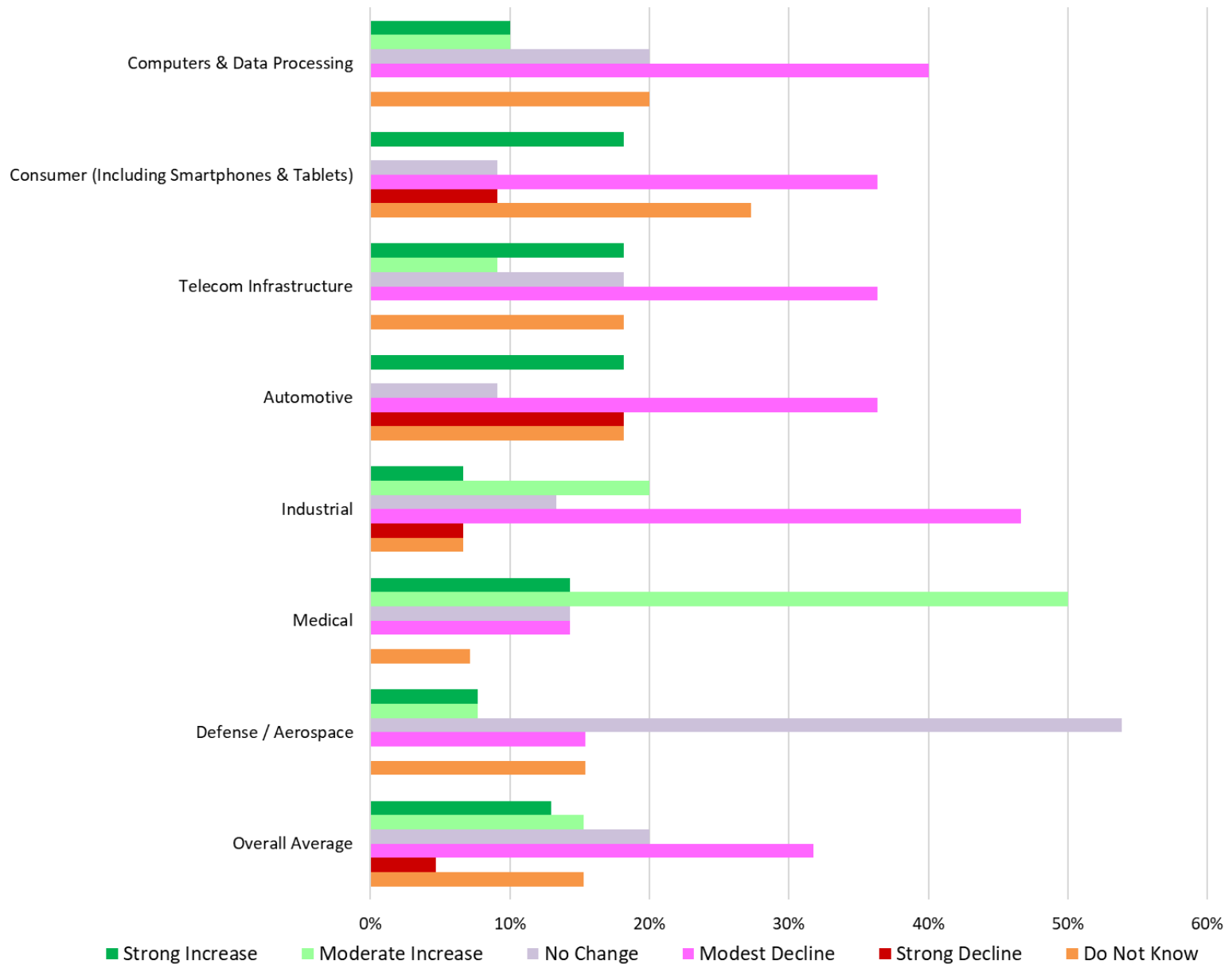
# Semiconductor Revenue Growth Cycle
## GDP Relationship



Source: IHSM Global Insight and Informa Tech
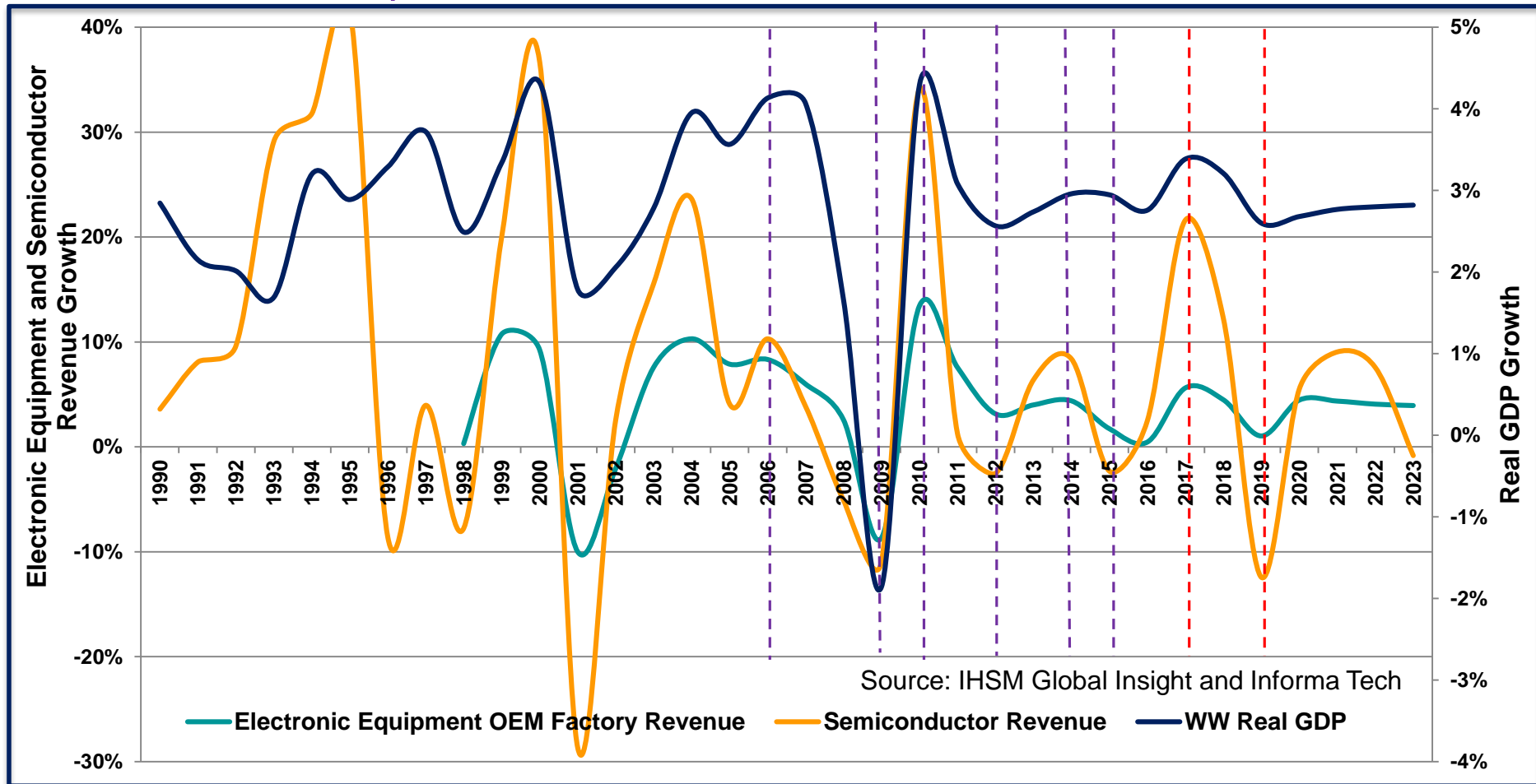
**Current Cycle – Continues 20-year pattern of alignment with GDP**

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# Semiconductor / Electronics Components Market Outlook – Near-Term

## Multiple potential scenarios:

- "Containment" of virus by March / April

  - Market dip through H1

  - Market snapback in H2 that could drive revenue growth up to 3% to 5%

- Large, regionally focused outbreaks extend into Q3

  - Market will not recover in 2020 and potential for revenue collapse by 20%

- Global pandemic continues into Q4

  - Global economic decline could suppress semiconductor market for multiple years

  - Potential for multiple company failures and market consolidation

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# Where the Electronics Supply Chain Comes Together

The Electronic Components Industry Association (ECIA) is made up of the leading electronic component manufacturers, their manufacturer representatives and authorized distributors. ECIA members share a common goal of promoting and improving the business environment for the authorized sale of electronic components. Comprised of a broad array of leaders and professionals representing all phases of the electronics components supply chain, ECIA is where business optimization, product authentication and industry advocacy come together. ECIA members develop industry guidelines and technical standards, as well as generate critical business intelligence.

Visit ECIA's Coronavirus Resource Page

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|---|---|---|---|---|---|

Username

dford@ecianow.org

Password

••••••••  👁

Retrieve Username  |  Reset Password

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**Upcoming Events**

Fri Mar 27, 2020
Coronavirus Update
Category: Webinar

Mon Apr 20, 2020
GIPC Quarterly Webinar Update
Category: Webinar

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| --- | --- | --- | --- | --- | --- |

**HELLO**
my name is

**Mr. Dale L Ford**

Electronic Components Industry Association

See something wrong? **Update your profile!**

**Member Directory** | **Individual Directory Search** | **My Profile** | **Event Calendar**

## Welcome to the ECIA Member Community!

This page will help get you started on engaging and utilizing the various resources available from the ECIA (Electronic Components Industry Association). Your company has made the choice to invest in the ECIA via membership, and as an employee of your company, you have the ability to interact and engage with a variety of resources the ECIA has to offer:

## Meetings and Conferences:

**Quick Links**

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Component Search

Create A Profile

**Upcoming Events**

Fri Mar 27, 2020
**Coronavirus Update**
Category: Webinar

Mon Apr 20, 2020
**GIPC Quarterly Webinar Update**
Category: Webinar

Fri Apr 24, 2020
**Independent Manufacturer Rep Council Open Call**

# Coronavirus Resources

## ECIA Resources

[Members should log in to access additional information.](#)

**Dale Ford, ECIA Chief Analyst**

- ECIA Coronavirus Webinar Data Slides ([ECIA members only](#))
- Market Update 3/6/2020:[Webinar Recording](#); [Presentation Slides](#); [Presentation Slides Updated 3/13/2020](#)
- Coronavirus Survey Results - [Update 3, March 24](#); *[Detailed survey results are available to ECIA Members here](#)*.
- Coronavirus Survey Results - [Update 2, March 6](#) ; *[Detailed survey results are available to ECIA Members here.](#)*
- Coronavirus Survey Results - [Update 1, February 21](#); *[Detailed survey results are available to ECIA Members here](#)*.
- Coronavirus Survey Results - [February 7th Report.](#)

**Robin Gray, ECIA COO and General Counsel**

- [Statement to Federal Government re CISA Guidelines](#)
- Guidance for Manufacturers and Distributors ([ECIA members only](#))
- Guidance for Independent Manufacturer Reps ([ECIA members only](#))
- Travel Template ([ECIA members only](#))
- [Federal Guidelines on Essential Infrastructure March 23, 2020](#)
- Updated 3/26 - [Exemption of State Covid-19 Orders to Electronic Components Industry](#)
- [ECIA's Update on Government's Response to the Coronavirus March 2, 2020](#)

**TPC Electronic Industry Coronavirus Impact Survey:** [March Report](#); [February Report](#)

## External Sites

# Complete Presentation Slide Deck Posted on Coronavirus Resources Section
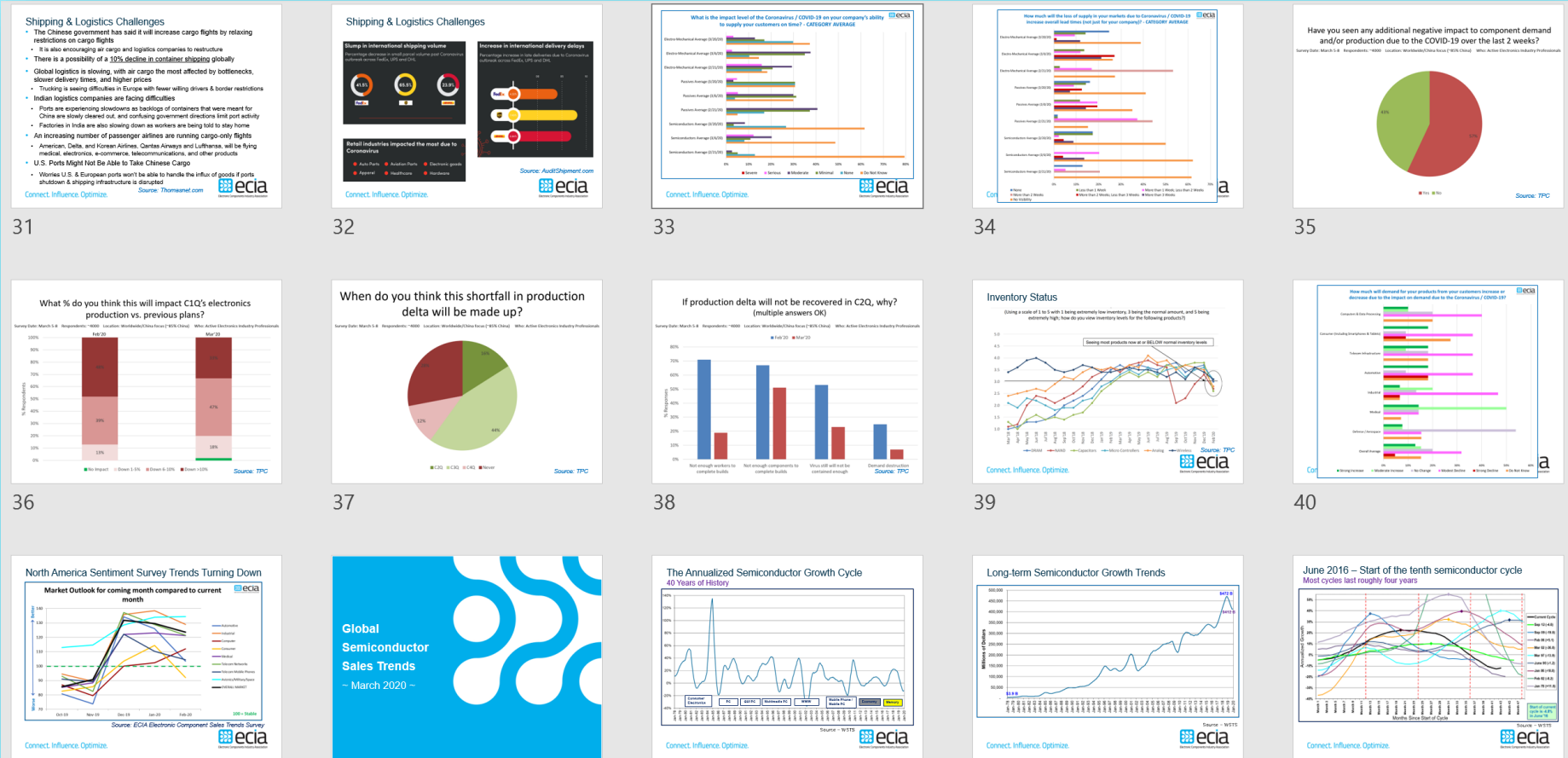
**Figure 2 – Supply Chain Issues**



Rate your level of concern regarding these issues due to the Coronavirus / COVID-19 impact through 2020.

Categories (top to bottom): Raw Materials Disruption, Electronics Components Manufacturing Disruption, Electronics Systems Manufacturing Disruption, Shipping and Logistics Disruption, Loss of End-Market Demand Due to Recession, Overall Average

Legend: ■ Severe ■ Serious ■ Moderate ■ Minimal ■ None

*Source: ECIA*

## Top Level Averages

Even though the industry has previous experience with the disruptive SARS epidemic, the regional distribution of electronics production and structure of supply chains has changed significantly in the intervening years. Despite the exponential growth of Coronavirus around the world, this survey shows a major jump in positive expectations regarding the impact on the ability of companies to supply customers on time. There is a large shift toward "no impact" and "minimal impact" in all three component segments with the largest share of responses falling in these categories. In addition, the largest group now expect no disruption in the supply chain. However, this is not consistent with inputs on questions regarding concerns about impact at the

**Figure 3 – On Time Supply Impact Average on Top Level Categories**



What is the impact level of the Coronavirus / COVID-19 on your company's ability to supply your customers on time? - CATEGORY AVERAGE

Categories (top to bottom): Electro-Mechanical Average (3/20/20), Electro-Mechanical Average (3/6/20), Electro-Mechanical Average (2/21/20), Passives Average (3/20/20), Passives Average (3/6/20), Passives Average (2/21/20), Semiconductors Average (3/20/20), Semiconductors Average (3/6/20), Semiconductors Average (2/21/20)

Legend: ■ Severe ■ Serious ■ Moderate ■ Minimal ■ None ■ Do Not Know

*Source: ECIA*

March 26, 2020

**ECIA Statement to CISA on the "Essential Critical Infrastructure Workforce"**

The Electronic Components Industry Association (ECIA) is an industry trade association whose members are manufacturers and distributors of electronic components. ECIA requests CISA to include electronic component manufacturers (NAICS code 3344) and their authorized distributors (NAICS 4238) within the definitions of critical infrastructure industry sectors as set forth in the "Guidance on the Essential Critical Infrastructure Workforce" dated March 19 and updated March 23, 2020.

ECIA members manufacture everything from microprocessors to capacitors to sensors that are essential to OEMs in making products defined by CISA as "critical manufacturing." In the language of the CISA guide, electronic components are "needed for medical supply chains, and for supply chains associated with transportation, energy, communications, food and agriculture, chemical manufacturing, nuclear facilities, the operation of dams, water and wastewater treatment, emergency services, and the defense industrial base." In addition, these electronic components are crucial to the repair and maintenance of manufacturing equipment. It would be difficult to find an industry sector that doesn't need electronic components to manufacturer products or provide services that are vital to this country's health and safety.

CISA should also be mindful of the risk that counterfeit products pose as unscrupulous individuals take advantage of the current crisis. Federal, state and local governments should carefully craft their definitions of essential businesses to exclude unauthorized sellers who are at greater risk for selling counterfeit products. Ventilators are but one example among a long list of products that require the inclusion of many types of electronic components and are at risk for the introduction of counterfeit components.

Electronic component manufacturers have an authorized distributors network to distribute and sell genuine components. Many of these distributors have begun to prioritize the fulfilment of orders from companies making medical equipment. Many electronic component distributors provide value-added manufacturing such as programming, connector and harness assembly, and managed inventory for customers. Authorized electronic component distributors fulfill a vital role in the supply chain and should also be considered part of the critical infrastructure and designated as essential businesses.

**Federal Guidelines on Essential Infrastructure**
*Robin B. Gray, ECIA COO and General Counsel*

The U.S. government through its Cybersecurity and Infrastructure Agency (CISA) issued on March 19, 2020, its Guidance on the Essential Critical Infrastructure Workforce. The document is guidance that may be used by states to define what are considered to be "essential" businesses during the current Covid-19 pandemic. This document is a guideline (not mandatory) to be used by state and local governments in crafting their own responses to the health emergency. There will not be a uniform Federal mandate or directive. The U.S. Constitution reserves police powers over public health issues to the states. As a result, it is up to each state to define what is an essential business and exempt from closure orders. However, CISA has prepared this guideline to assist states in preparing their own response.

In general, manufacturers and distributors of electronic components would be considered essential if producing/distributing products/components that are needed by the industries as noted in the CISA document:

> "Workers necessary for the manufacturing of materials and products needed for medical supply chains, and for supply chains associated with transportation, energy, communications, food and agriculture, chemical manufacturing, nuclear facilities, the operation of dams, water and wastewater treatment, emergency services, and the defense industrial base. Additionally, workers needed to maintain the continuity of these manufacturing functions and associated supply chains."

> "Workers who support the essential services required to meet national security commitments to the federal government and U.S. Military. These individuals, include but are not limited to, aerospace; mechanical and software engineers, manufacturing/production workers; IT support; security staff; security personnel; intelligence support, aircraft and weapon system mechanics and maintainers."

> "Personnel working for companies, and their subcontractors, who perform under contract to the Department of Defense providing materials and services to the Department of Defense, and government-owned/contractor-operated and government-

## External Sites

**CDC:** [Resources for Businesses and Employers](#)

**Fisher Phillips Attorneys:** [FAQ for Employers](#)

**Johns Hopkins University:** [Resource Center with map](#)

**McKinsey Report:** [Company Action Plans](#)

**NAM:** [Emerging state and local emergency orders affecting manufacturing operations](#)

**OSHA Guidelines:** **[https://www.osha.gov/SLTC/covid-19/index.html](https://www.osha.gov/SLTC/covid-19/index.html)**

**Reuters:** [Global Outbreak Map](#)

**State and Local Information:** [COVID-19 Resource Information Summary](#)

**USA.Gov:** [State Health Departments](#)

**World Health Organization:** [Getting Your Workplace Ready for COVID](#)

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# NAM: Emerging state and local emergency orders affecting manufacturing operations



**NATIONAL ASSOCIATION OF Manufacturers**

**Last updated March 26, 2020 10:00 AM EDT**

As more cities, states and counties issue and revise emergency orders to stop the spread of COVID-19, the National Association of Manufacturers is working to help manufacturers nationwide assess and understand the implications of these orders and emphasize the <u>essential</u>

**The following resource is intended as a snapshot to help navigate this rapidly-changing environment.** Please consult with regulators within the appropriate jurisdiction and your own stakeholders including legal counsel before making a determination on how to best proceed with your company's operations

**MARCH 26 UPDATE:**

**With the critical support of the NAM's state partners, states are beginning to understand the essential role manufacturers play in the coronavirus response effort. Key updates include orders in CO along with a slew of local orders in FL and NC. We continue to monitor statewide activity in North Carolina, Florida, Texas and elsewhere for additional developments.**

**Key state updates within the last 24 hours include:**

- Overnight, Colorado issued a stay in place order that includes broad exemptions for critical manufacturing, which is deemed an essential business operation
- Counties in Florida and North Carolina have issued stay in place orders in the absence of statewide activity, though with language designating manufacturing as essential
- **We have added new resources to help companies navigate stay in place orders and other operational matters**

**The NAM is advocating for states to at least adopt the federal CISA guidelines for essential businesses, specifically by <u>incorporating by reference</u> those guidelines in any executive order or similarly binding declaration.** (This helps to strengthen the linkage between state and federal guidance from a legal perspective.) **Please review individual state portions for more details about new orders and restrictions as well as added detail on**

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# CDC: Resources for Businesses and Employers

Show totals | Show rates

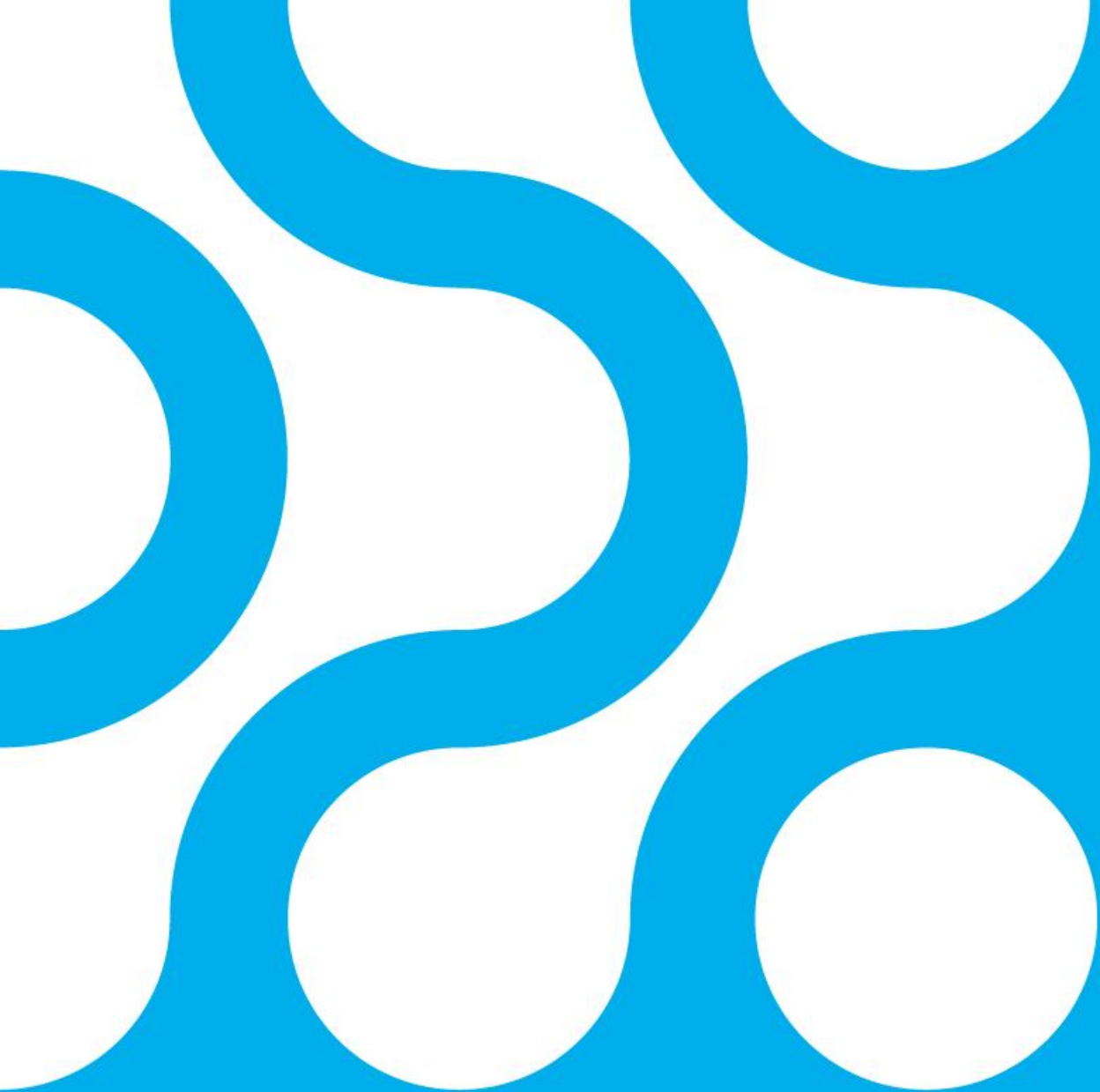| Location | Status of cases | Total with change from previous day | | |
|---|---|---|---|---|
| | | Cases | Recovered | Deaths |
| Mainland China | | 81,285 | 74,051 | 3,287 |
| Overseas total | | 407,738 (+18,150) | 44,047 (+3,874) | 18,825 (+874) |
| **Total** | | **489,023 (+18,150)** | **118,098 (+3,874)** | **22,112 (+874)** |
| Italy | | 74,386 | 9,362 | 7,503 |
| United States | | 67,954 (+107) | 428 (+49) | 999 (+21) |
| Spain | | 56,188 (+6,673) | 7,015 (+1,648) | 4,089 (+442) |
| Germany | | 39,502 (+2,179) | 3,959 (+412) | 222 (+16) |
| Iran | | 29,406 (+2,389) | 10,457 (+832) | 2,234 (+157) |
| France | | 25,233 | 3,900 | 1,331 |
| Switzerland | | 11,316 (+419) | 131 | 171 (+18) |
| United Kingdom | | 9,529 | 135 | 456 |
| South Korea | | 9,241 | 4,144 (+414) | 131 |
| Netherlands | | 7,431 (+1,019) | 2 | 434 (+78) |
| Belgium | | 6,235 (+1,298) | 675 (+128) | 220 (+42) |
| Austria | | 6,001 (+413) | 112 (+103) | 42 (+12) |
| Portugal | | 3,544 (+549) | 43 (+21) | 60 (+17) |

# Member Questions

Debbie Conyers
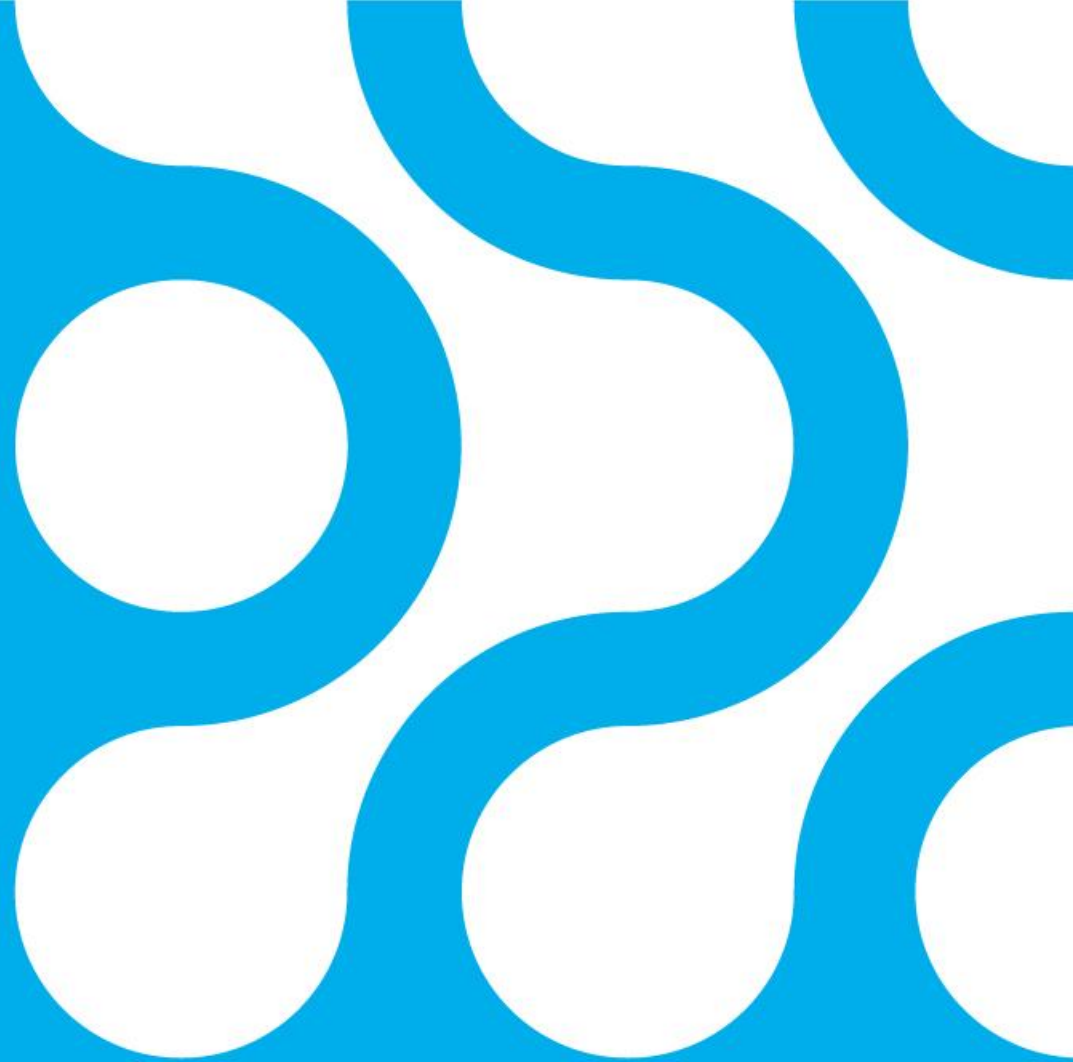
# Summary

- ECIA is here to help you

- MEMBERS: Please review material on members-only area of ecianow.org

- Continued updates as we receive improved guidance from US, state, and local governments

- One more Coronavirus survey launched Monday, results posted early April

- Let us know how we can be of service to you and your business

- Stay safe!

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