

Regensburg, 21 December 2020

Dear Valued Customer,

The worldwide spread of the coronavirus disease (COVID-19) and the associated restrictions are still impacting the world economy and particularly affect supply chain, logistics, production capacities and travel.

As previously mentioned in our last customer letter the Government of Malaysia had decided to implement an Enhanced Movement Control Order ("EMCO") from 7 December 2020 until 20 December 2020 to address the again increasing numbers of COVID-19 infections in Malaysia.

**The Malaysian government has now extended this period until 31 December 2020.**

The EMCO is the most strict form of lockdown in Malaysia, where residents of a particular area are restricted from going out of the area, barring medical emergencies. Unlike the partial lockdown imposed by the Malaysian Authorities earlier this year where organizations like OSRAM were able to make applications for exceptions for its employees to travel to work, there is no such provisions for the EMCO.

On this occasion, for the state of Penang where our OSRAM factories are situated and where a significant number of OSRAM personnel is located, the Malaysian Authorities imposed specific EMCO related measures. The persons affected by these measures are unable to go to work as the area is restricted by authorities. Despite the fact, that our operations are still ongoing, the EMCO has a significant impact on our production.

**As a result of the above situation which clearly constitutes a "force majeure" event which is beyond the reasonable control of OSRAM, we are forced to implement certain measures:**

The extension of the restrictions by the Malaysian-Government requires us now to re-evaluate all affected orders and scheduling agreements and to re-confirm all orders that currently cannot be supported. This extensive process has been started already and will be finalized by next week. With this measure, we will provide you the greatest possible transparency under the current challenging circumstances.

The situation is dynamic and circumstances may change due to factors beyond our control such as local/official restrictions, subcontractor and other pre-material supplies during this challenging period.

On this basis we will keep you updated with regards to your delivery situation, as soon as possible. Please be assured that we continue to strive to support you in the best possible way to limit the impact on your supply chain and to improve the situation as soon as circumstances permit.

Yours sincerely,

**Gunnar Klick**

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