疫情下的硅谷Austerity in Silicon Valley 20200618

Austerity in Silicon Valley

硅谷的紧缩政策

The next garage

下一个“车库”

The crisis has hit tech’s **spiritual** home hard, but it is already planning ahead

这场危机严重打击了科技公司的精神家园，但是它已早做打算。

Firing somebody is hard under any circumstances.But doing it over a video call is **brutal**.“It’s not the best **environment** for this, with people at home and kids in the background,” observes Marwan Forzley, the boss of Veem,a startup based in San Francisco which allows firms to **transfer** money cheaply. He recently had to let go 30 of its employees.

无论如何，解雇某人是一件很困难的事。但是通过视频电话来做这件事情很残忍。“这并不是一个适用于解雇的最佳环境，因为家里有人，背景中有孩子，”Veem的老板马尔万·福兹雷这样说道。Veem的总部位于旧金山，允许公司以低廉的成本转移资金。他最近不得不解雇了30名员工。

Mr Forzley speaks for many in Silicon Valley. The largest American tech firms may be the winners from a **global** **pandemic**. Demand for their online services has exploded among people and businesses in lockdown. But many startups in tech’s heartland are hurting. Hardly a day goes by without news of more lay-offs and firms going out of business. Yet amid the doom and gloom, **venture**-capital (vc) firms and entrepreneurs are already doing the thing they believe they do best: divining the future in their **crystal** balls.

福兹雷先生代表了硅谷的许多人。最大的美国科技公司也许是这场全球疫情的赢家。封锁下，人们和企业对其在线服务的需求呈爆炸式增长。但是科技腹地的许多创业公司正在遭受伤害。几乎每天都会传来更多裁员和公司倒闭的消息。然而尽管前途无望，风险投资公司和企业家们已经在做他们认为自己做的最好的事情：用水晶球预测未来。

Californian tech firms and their financiers were among the first in America to take the **threat** of coronavirus seriously.Some **venture** capitalists began refusing to shake hands at the beginning of February (and were ridiculed for it).

加州科技公司和他们的投资者是美国第一批严肃对待冠状病毒威胁的公司。在二月初，一些风险投资家开始拒绝握手（并因此受到嘲笑）。

The moneymen also moved quickly to “triage” companies in their **portfolio**, classifying them according to how likely they were to **survive** and what they should do. Mostly this involved letting people go.“The shocking thing is how fast everything has moved,” says Marco Zappacosta, who runs Thumbtack, a marketplace for local professionals from plumbers to dog trainers, which laid off 250 of its 900 employees.

这些投资人也迅速开始将自己投资组合中的公司进行“情况鉴别分类”，根据他们存活的可能性以及应该做的事情给他们归类。通常，这也包括辞退别人。Thumbtack的运营者马尔科·扎帕科斯塔表示“一切变化的如此的快，太令人震惊了”。Thumbtack是一个面向本地专业人士的市场，从水管工到训狗师，该公司解雇了900名员工中的250个员工。

Definitive figures are hard to come by.When big firms cut back it makes the news.Airbnb and Uber recently **announced** they would let go 1,900 and 3,700 workers respectively.Layoffs.fyi, a website that **tracks** dismissals in the tech industry by adding up numbers from press reports, has **counted** about 17,600 jobs lost since mid-March.But this misses many sackings at smaller startups.Although still well below the national average and the peak during the financial crisis of 2007-09, **unemployment** in the region is edging up.

权威数字很难得到。当大公司削减开支时，这就成了新闻。爱彼迎和优步最近宣布它们会各自解雇1900名员工和3700名员工。Layoffs.fyi是一家通过统计新闻报道中的数字来追踪科技行业的裁员情况，在三月中旬以来，该公司已经统计了约17600人失业。但是这一数据缺失了许多小型创业公司的裁员数据。尽管该地区的失业率仍远低于全国平均失业率，以及2007-09年金融危机期间的失业率峰值，但他仍在缓慢上升。

Some vcs expect workforces to shrink by 15% on average, adding up to total job losses in **excess** of 125,000.

一些风投公司预计员工数量将平均减少15%，裁员总数将超过12.5万人。

Yet Silicon Valley's denizens are not ones to dwell on bad numbers. vcs are scouting for **promising** firms whose valuations have dropped and which need fresh capital. Investments in America are only down by 25% compared to before the **pandemic**, according to PitchBook, a data provider. For startups with cash in the coffers, it is an **opportunity** to **scoop** up weaker rivals. On May 12th it emerged that Uber, a shrinking ride-hailing service with a growing meal-**delivery** arm and $9bn in the bank, is seeking to **acquire** GrubHub, which also delivers food. A few days earlier Uber led a $170m funding round in Lime, an ailing startup that rents out electric scooters and bicycles. Expect more such deals—and more criticism that the likes of Uber are trying to use the **pandemic** to monopolise markets.

不过，硅谷居民们不会在意那些糟糕的数字。风投公司正在寻找估值已经下降且需要新资本注入的大有前途的公司。根据数据提供商亿美金(PitchBook)提供的数据显示，新冠爆发后美国的投资只比之前下降了25%。对于资本较为雄厚的初创公司来说，此时正是收购实力较弱的对手的时机。5月12日有消息称，银行存款达90亿美元的优步(Uber)因其叫车服务不断萎缩且送餐业务不断增长，目前正计划收购格鲁(GrubHub)——一家同样提供外卖服务的公司。就在几天前，优步(Uber)带领利姆单车(Lime)进行了一轮1.7亿美元的融资。利姆单车(Lime)是一家经营电动车和自行车租赁业务的初创公司，但其经营境况不佳。类似交易预计还会频发，优步(Uber)等公司企图利用疫情来垄断市场的行为也将受到外界越来越多的批评。

Silicon Valley's leading vc firms are also trying to seize new opportunities. More than one sees the tech industry's sweet spots moving from services that **cater** to consumers and **involve** the physical world, such as electric scooters and online ticketing, to offerings for business that are delivered virtually, including specialised webbased software and digital infrastructure.

此外，以硅谷马首是瞻的各家风投公司也在努力抓住新机遇，它们多数已经窥探到，科技公司的“甜蜜地带”正从迎合消费者的现实服务，比如电动摩托车和在线售票，转向为企业提供虚拟服务，其中包括基于网络的专业软件和数字基础设施。

Much of the **venture** capital **flowing** in recent weeks has been aimed at deeply **technical** targets, such as Confluent, which manages **corporate** data. The firm raised $250m in April. Startups in telemedicine and online education are also doing well. And business is improving for some firms that had looked less **resilient** to the **virus**, such as Veem and Thumbtack. Firms want to move money cheaply and people stuck at home are planning to give their nests a makeover, driving demand for local services.

在近几周的风险投资中，有很大一部分瞄准了高度技术性的公司，比如Confluent，一家管理企业数据的公司。该公司在4月份筹集了2.5亿美元。远程医疗和在线教育领域的初创企业也表现良好。还有一些公司正在调整自身业务，比如薇漫(Veem)和图钉(Thumbtack)，它们对病毒的抵抗力似乎较弱。企业想用较低的成本转移资金，被困在家里的人们也正计划对自己的“巢穴”进行改造，这使得对本地化服务的需求急剧上升。

Looking further forward, the **debate** now revolves around how the **pandemic** will change Silicon Valley—and with it much of the tech industry. The crisis will **accelerate** existing trends. The Valley will continue to **spread** out, reckons Randy Komisar of Kleiner Perkins, another vc firm. Even before the **virus** hit, an **exodus** of sorts was under way. Exorbitant **property** prices, near-**permanent** traffic jams and the jarring number of homeless people have pushed a growing numbers to leave.

进一步来看，目前争论的焦点是“这场流行病将如何改变硅谷以及与之相关的大部分技术产业”。危机将使得现有趋势加速发展。兰迪·科米萨，来自另一家风投公司凯鹏华盈(Kleiner Perkins)，他认为，在新冠出现之前硅谷就已有大批员工计划离开，未来的硅谷将继续分崩离析。房价过高、几乎永久性的交通堵塞、以及数量惊人的无家可归者，这些问题将导致更多的人选择离开。

Startups have been moving away or have become “fully distributed”, with only their most important employees living in San Francisco and the rest **spread** across the world. Such dispersion is likely to speed up if a **consequence** of covid-19 is that working remotely becomes the **norm**. It looks likely. Big Silicon Valley companies, including Facebook and Google, are letting employees work from home until the end of the year. Twitter says they can do so indefinitely.

初创企业一直在搬离，或者已经“完全分散”，只有其元老级别的员工仍然住在旧金山，其他员工则分散在世界各地。如果说新冠带来的一个后果是让远程办公成了常态，那么这种分散可能还会加快。而远程办公似乎有可能变为常态。包括脸书和谷歌在内的大型硅谷公司目前允许员工在年底之前在家办公。推特更是表示员工可以无限期在家办公。

Another question is whether **venture** capital, Silicon Valley's lifeblood, will go virtual and distributed as well. Some hope that the crisis will **disrupt** what Pete Flint of Nfx calls the “**archaic** world of **venture** capital”. In April, his firm launched an online service where startups can input the information that investors want, from founders' biographies to business plans, and then get a **decision** on funding within nine days.

另一个问题是，作为硅谷命脉的风险投资是否也将走向虚拟和分散。一些人士希望这场危机能够打破皮特·弗林特所谓的“陈旧的风险投资世界”，皮特·弗林特来自Nfx公司，今年4月该公司推出了一项在线服务，初创公司可以输入投资者想要的信息，信息范围从创始人传记到商业计划，之后他们会在九天内拿到融资决定。

Silicon Valley may no longer be the only place that matters as startups hunker down in cheaper locations with fewer distractions. Frontier is one such firm. It has decamped to Vancouver to build a marketplace for **remote** workers. It was founded a few months before the **virus** struck and got its first funding a few weeks ago. Elliot O'Connor and his co-founders are holed up in an Airbnb, using DoorDash and other **delivery** services to feed themselves. It feels like working in the proverbial garage, he says—not in the Valley, but of the Valley.

硅谷的独霸地位可能会下降，因为初创公司都选择在成本更低、干扰更少的地方安家。Frontier就是这样一家公司，它已经迁往温哥华为远程办公的员工开拓市场。该公司成立于病毒爆发的前几个月，几周前它拿到了第一笔资金。埃利奥特·奥康纳和他的联合创始人们则躲在爱彼迎(Airbnb)(美国短租平台)里，利用DoorDash(外卖平台)和其他的送货服务来养活自己。他说：感觉就像在车库里工作——不在硅谷，却来自硅谷。