

# CONTEÚDO DINÂMICO PME DIGITAL

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## A liderança na Indústria de Manufatura / Materiais da Europa - Principais tendências

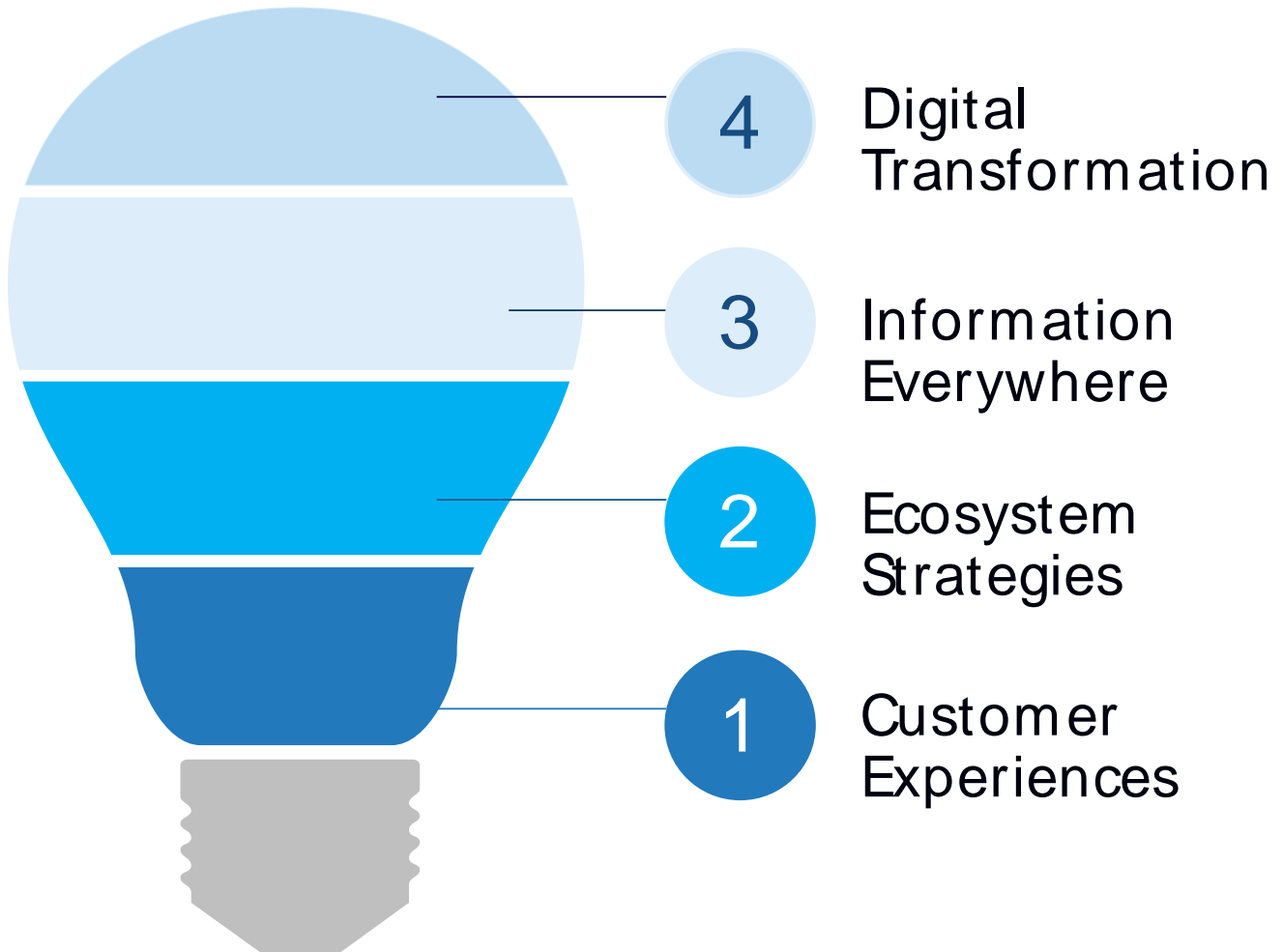
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## CONTEÚDO

## Manufacturing thought leadership themes - Topics that are trending

## Innovation drivers in manufacturing



Source: IDC, 2018

▪ **End Users 3-years implications:**

- Implications of ecosystem strategies, information-based products and services leveraging dynamic, potentially real time business ecosystems
- Next generation automation and collaboration (IDC InTech model)
- Realizing IoT value
- Exploiting networked factories & distributed manufacturing capabilities
- BOVC & automotive: convergence of direct-to-consumer and future of commerce business models and its impact on digital supply chains

▪ **Vendors 3-years implications:**

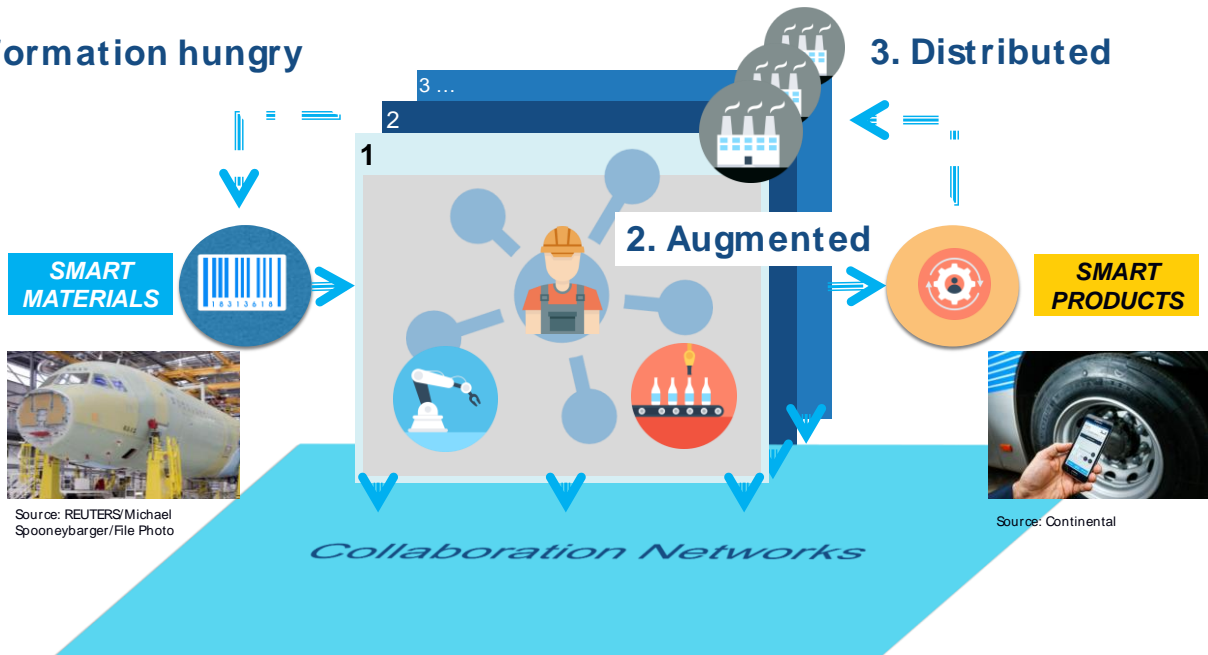
- Guide customers around business model reimagination, using agile approaches.

- Creating user-centric IT Support end users building digital value propositions, infusing intelligence into products and processes.
- Becoming trusted advisors
- Transform developing / support teams to stay relevant in the market: from a programming approach to consulting approach

## The Smart Factory

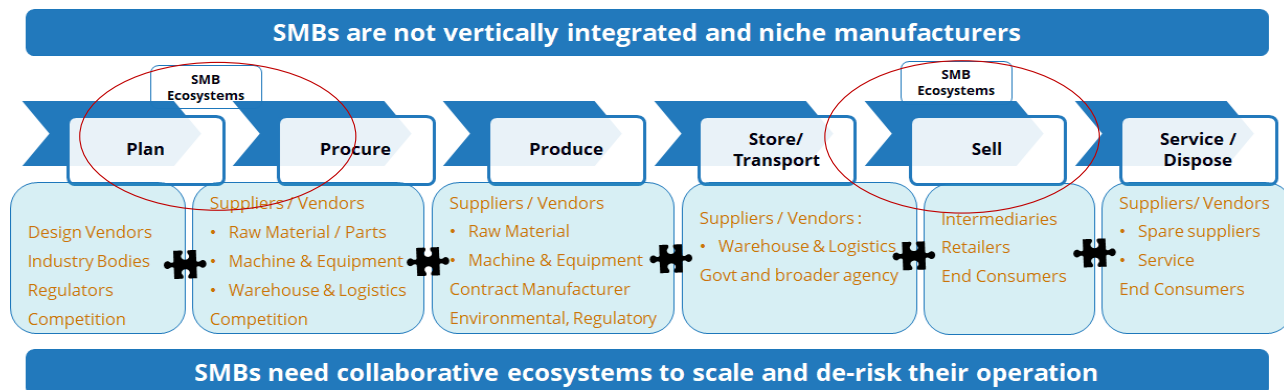
### 1. Information hungry

### 3. Distributed



Source: IDC, 2018

## Ecosystems' Impact on Manufacturing SMBs



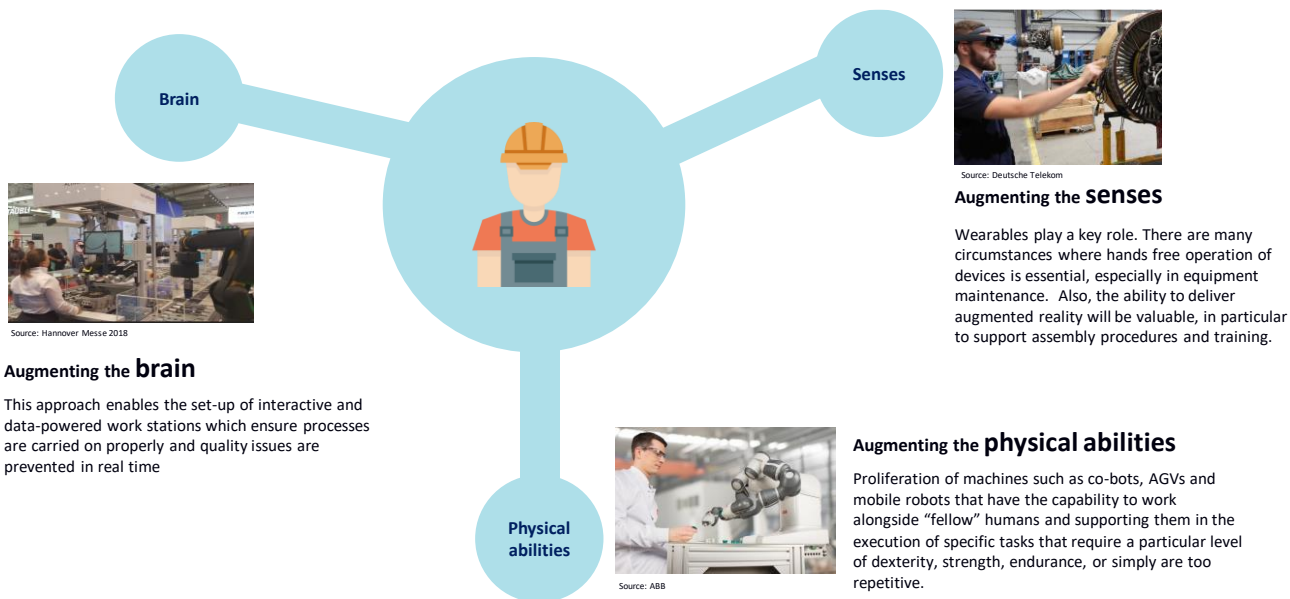
By 2025, new archetypes of 'extreme' automation and collaboration will eliminate the need for human intervention in 70%–80% of B2B and B2B2C processes in manufacturers' business ecosystems.

Technology vulnerability to create more SMB led manufacturing ecosystems



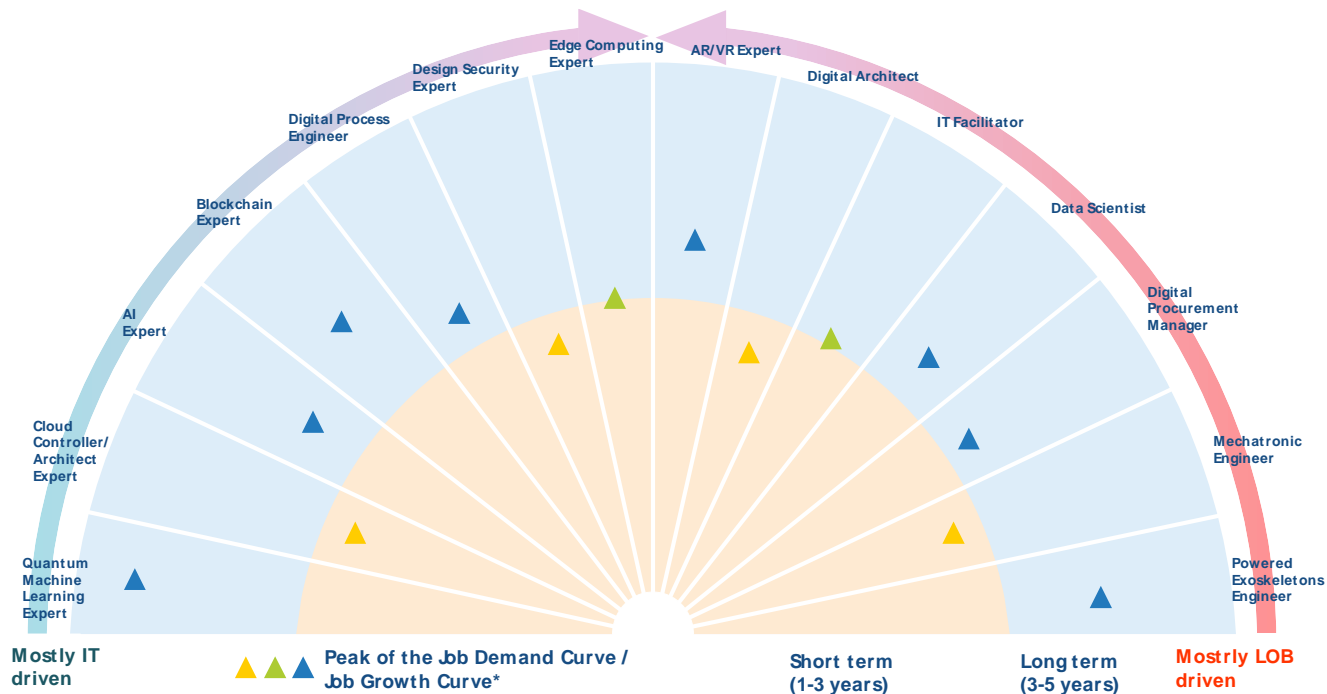
Source: IDC, 2018

### The augmented worker



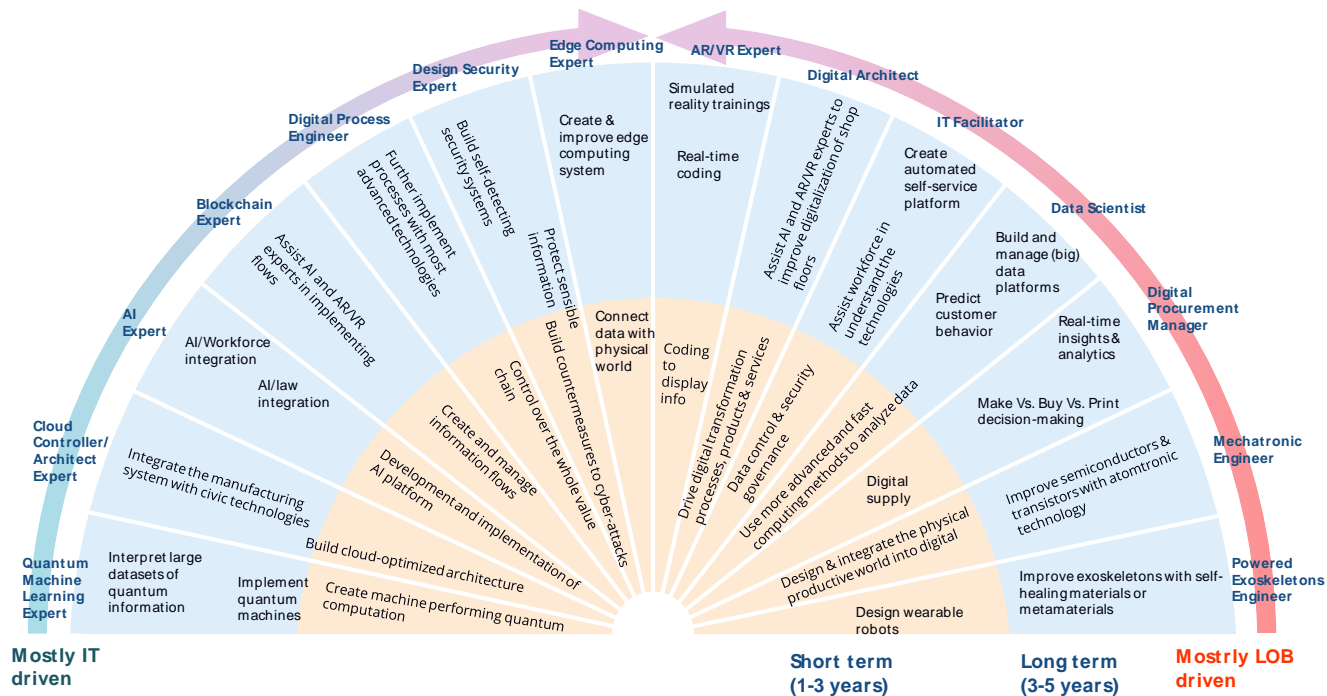
Source: IDC, 2018

## Jobs of the Future - Featuring: job demand peak



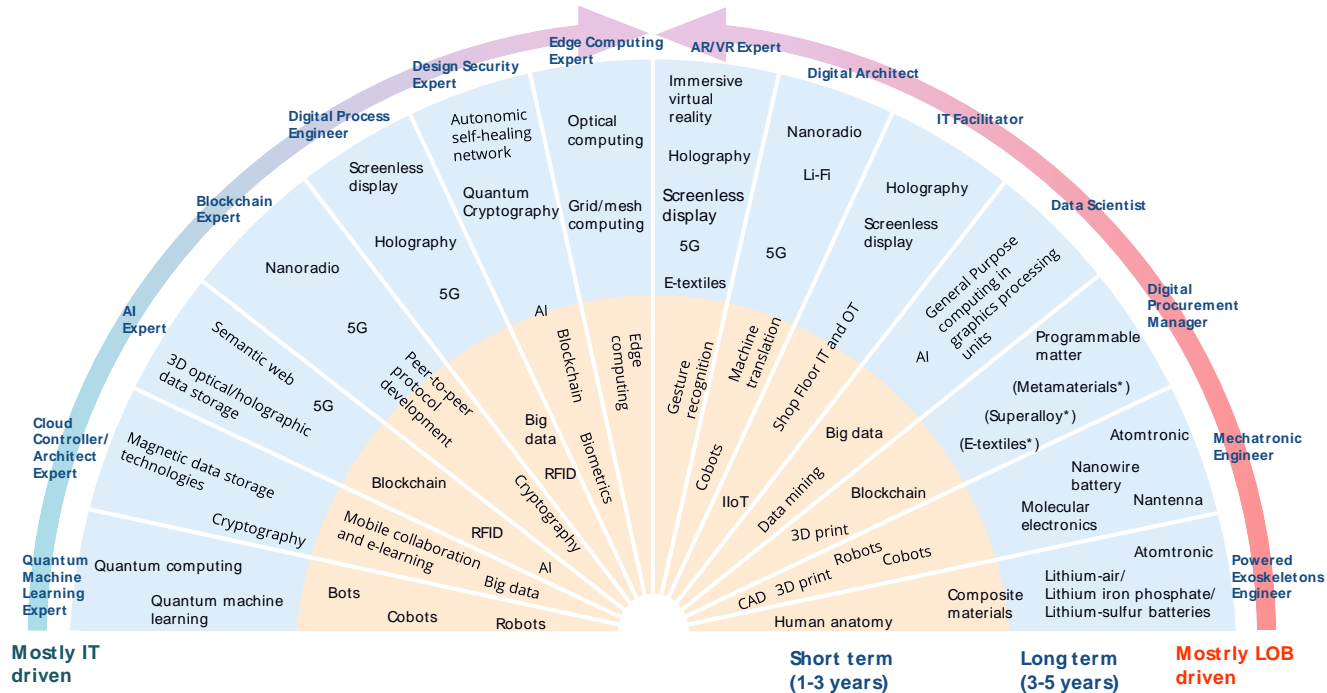
Source: IDC, 2018 | Note: \*colors of the Peak of the Job Demand Curve / Job Growth Curve change according to the position on the chart

## Jobs of the Future - Featuring: capabilities



Source: IDC, 2018

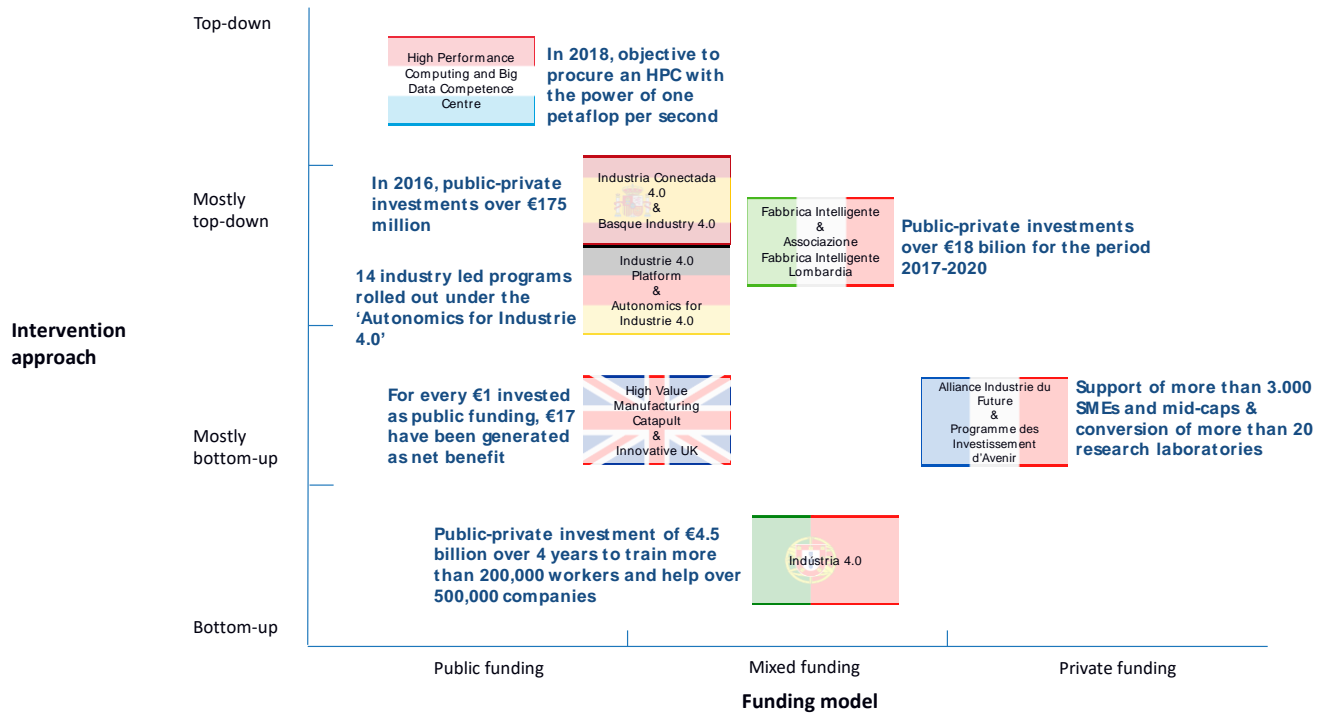
## Jobs of the Future - Featuring: technologies used



Source: IDC, 2018 | Note: \*next-gen materials

## How European governments support the growth of Industry 4.0 in manufacturing

### Funding initiatives



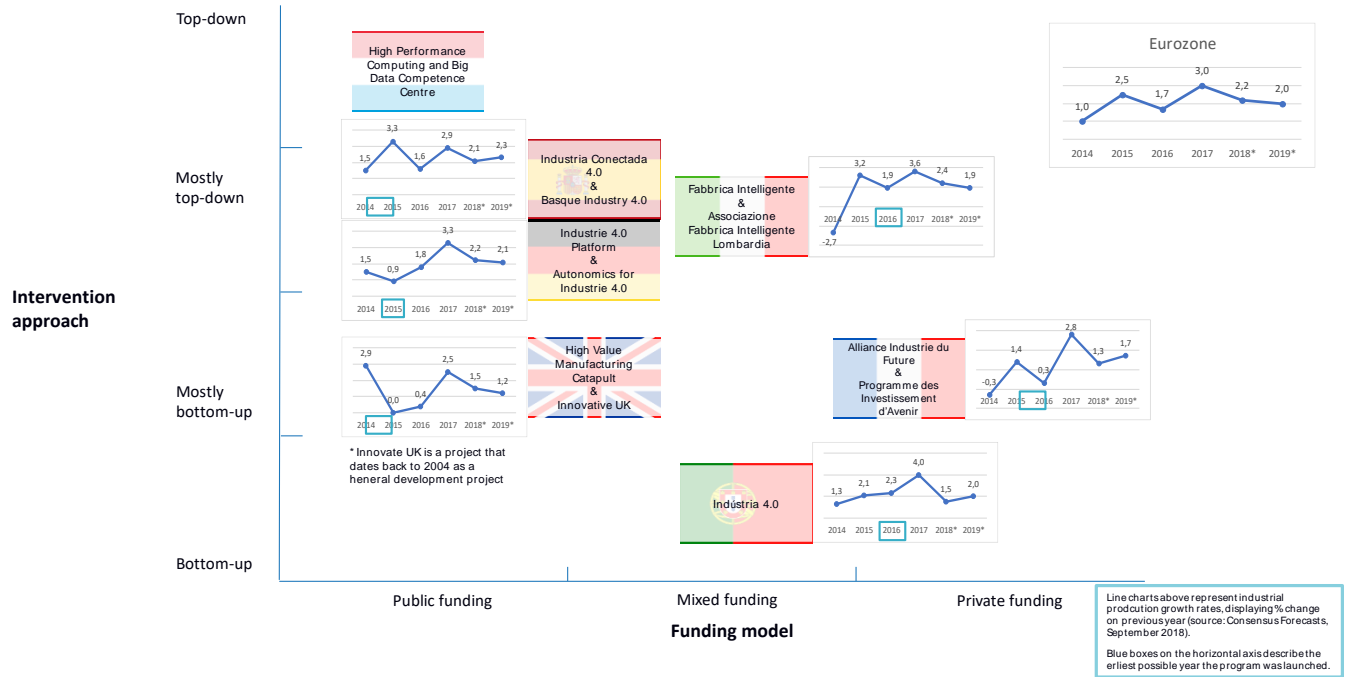
Note: The vertical axis should be interpreted as follows:

- Bottom-up: the government sets only the general guidelines while companies autonomously decide how to implement Industry 4.0 initiatives;
- Top-down: the government sets both guidelines and detailed policies for intervention and implementation of Industry 4.0 initiatives.

For further information on each country's positioning, please refer to the notes section below.

# How European governments support the growth of Industry 4.0 in manufacturing

## Funding initiatives & industrial production growth rates



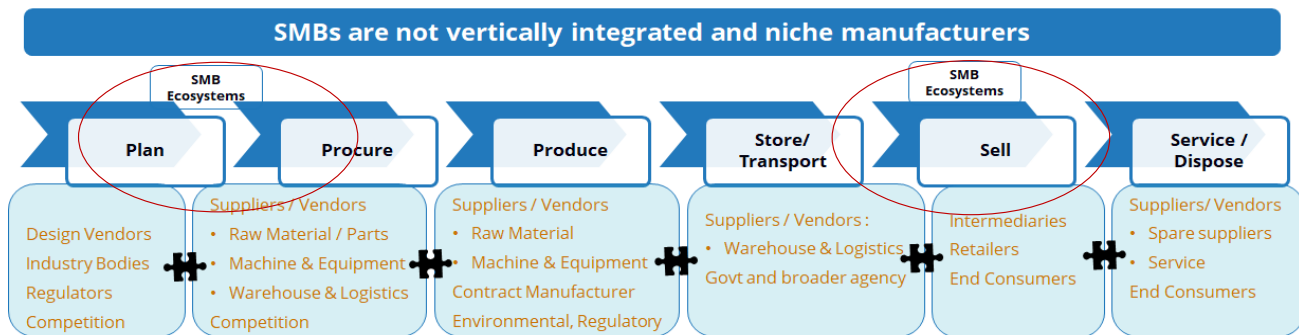
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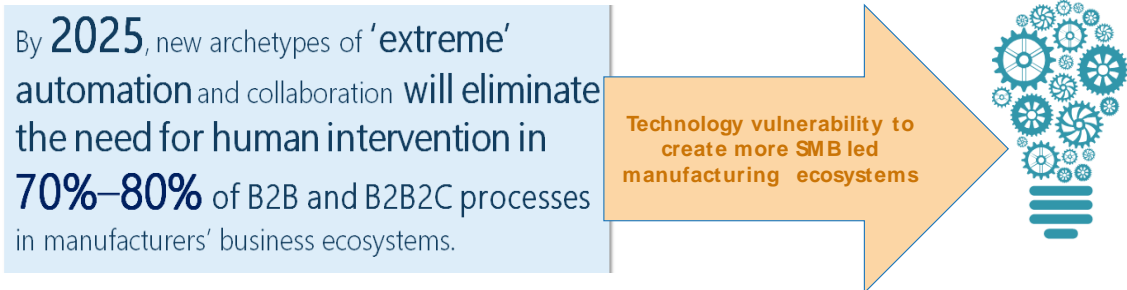
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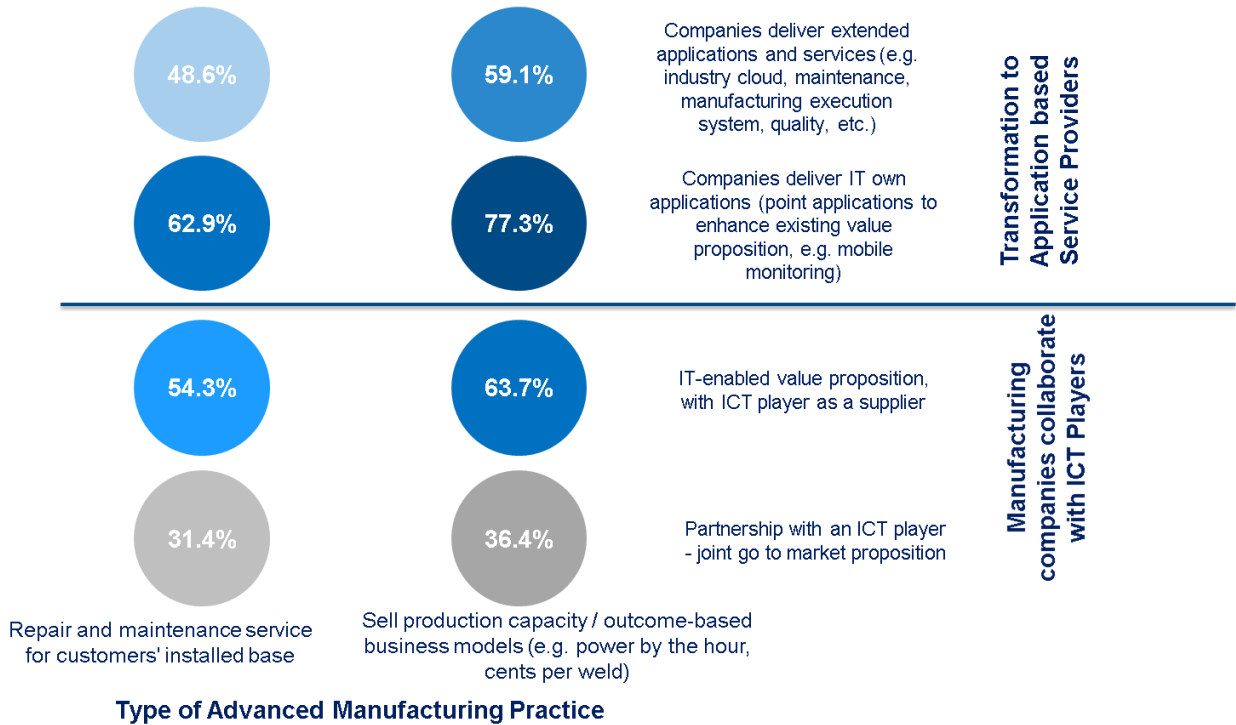
**SMBs need collaborative ecosystems to scale and de-risk their operation**



Source: IDC, 2018

## Shifting to new revenue models

### The transformation in European industrial machinery segment



Source: IDC, 2018

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