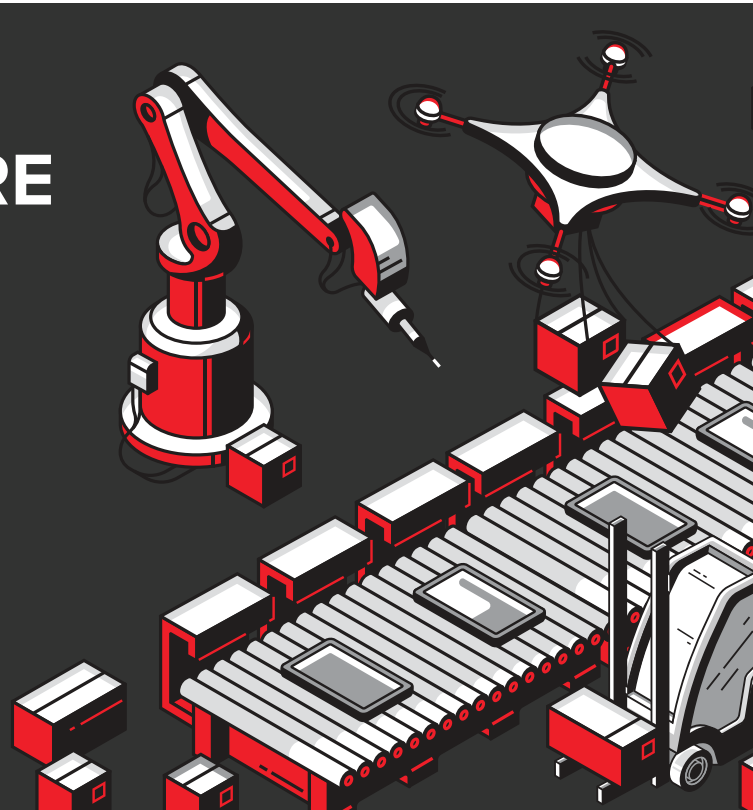


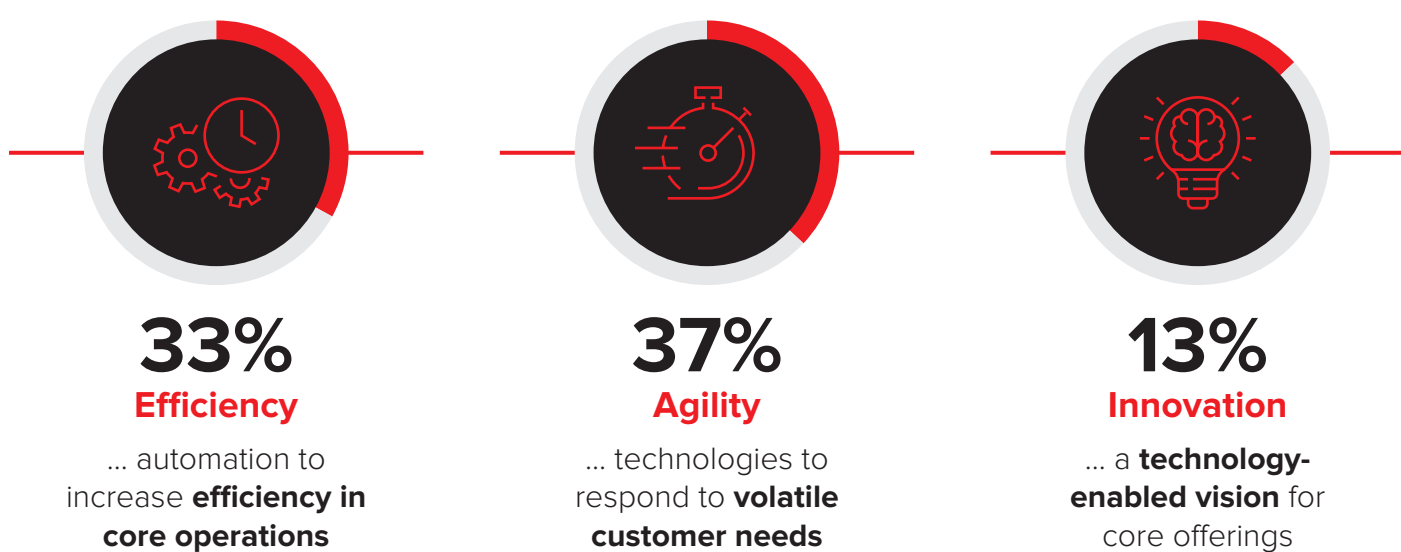
BUILDING THE RIGHT ARCHITECTURE FOR DATA-ENABLED INNOVATIONS IN MANUFACTURING

Manufacturing companies are investigating ways to generate new revenue streams and digital business models. Given the challenges resulting from the COVID-19 pandemic, manufacturing companies are preparing for the next normal by continuing their **digital transformation**.



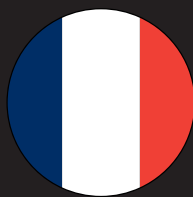
47% of manufacturing companies in Europe plan technology investments to **close existing gaps** in **digital transformation** efforts.

To tackle future challenges, it's imperative for manufacturers' C-suites to invest in ...



For manufacturers, **supply chain operations** are considered core processes.

Among French manufacturers, the strategic priority for **digital transformation of the supply chain** will **shift from effectiveness to resiliency**:



Efficiency and effectiveness

Being resilient to potential external supply chain disruptions

Today

55%

In three years

24%

21%

60%

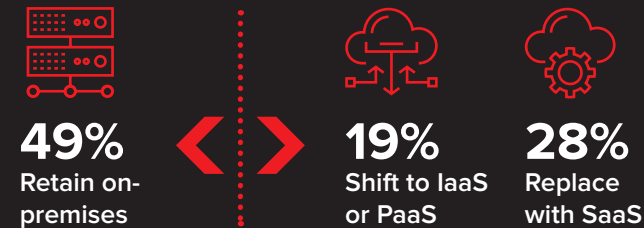
TWO MAJOR PILLARS OF DIGITAL TRANSFORMATION: DATA AND CLOUD

Utilizing data plays a major role in any digital transformation initiative.

39% of manufacturing companies in Europe have prioritized **data capitalization and monetization** to achieve their digital transformation vision.

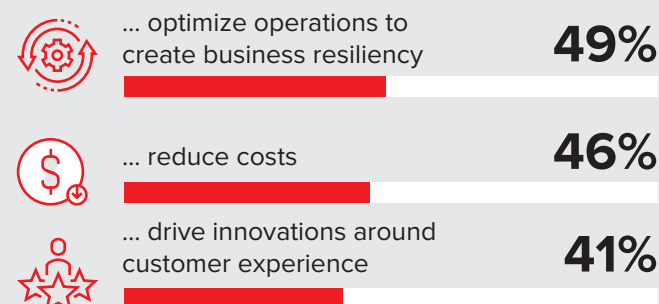


2020 technology road map — plan for **data management workloads**:

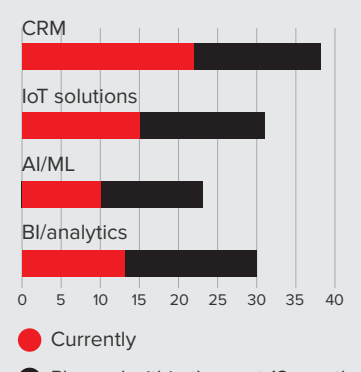


Depending on the data processing tasks, manufacturing companies will continue to store and process data at the edge but also in the cloud.

Manufacturers' investments in cloud architectures are designed to ...



Which of the following solutions are already deployed or will be deployed in the public cloud?



Manufacturers will use a variety of different cloud-based solutions for various use cases.

19% of European manufacturers are already **using multicloud concepts** or will start to use them in the next 12 months.

Multicloud management will be on the rise.

Key applications around capturing and utilizing data will increasingly also run in public clouds.

DIGITAL TRANSFORMATION WILL SHIFT FROM THE ENTERPRISE TO ECOSYSTEM COLLABORATION

Among French manufacturers, the biggest business opportunities from an **ecosystem collaboration** perspective are:

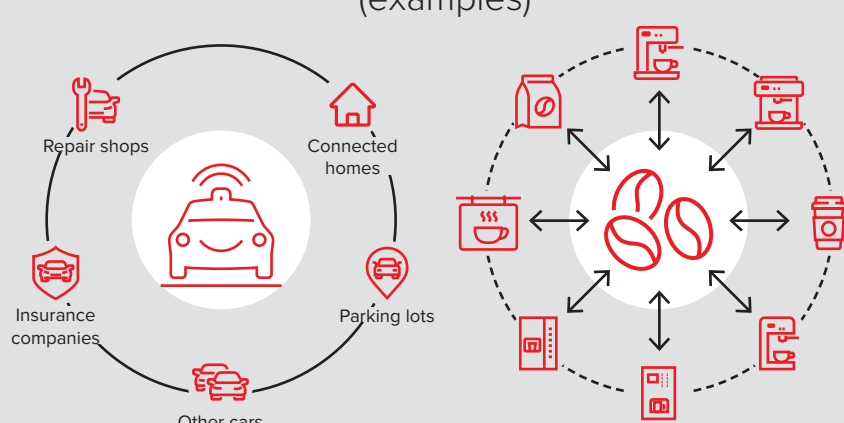


As a result of the COVID-19 pandemic, business models will likely need to be permanently extended to include **new ecosystems**.



37%

Product-innovation-related ecosystem partnerships (examples)



Ecosystem-specific cloud deployments



Ecosystem connection of customers, suppliers, and partners

Multicloud management

This will drive the need for:

- Interconnection solutions** that facilitate digital exchange points for enterprises to connect to each other's networks and to connect with cloud providers, managed service providers, and network or content providers.
- Carrier-neutral facilities** that offer direct one-to-one, one-to-many, or many-to-many connectivity as required, as well as low-latency, secure, and scalable bandwidth.

33% of French manufacturers have adopted edge computing in geographically distributed data center facilities, directly linked to core data centers and to the cloud.



IDC RECOMMENDATIONS

