IDC Manufacturing Insights

3rd Platform Technologies & Smart Manufacturing:

Value-Driven Technology for Intelligent Industries

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IDC North and French Africa

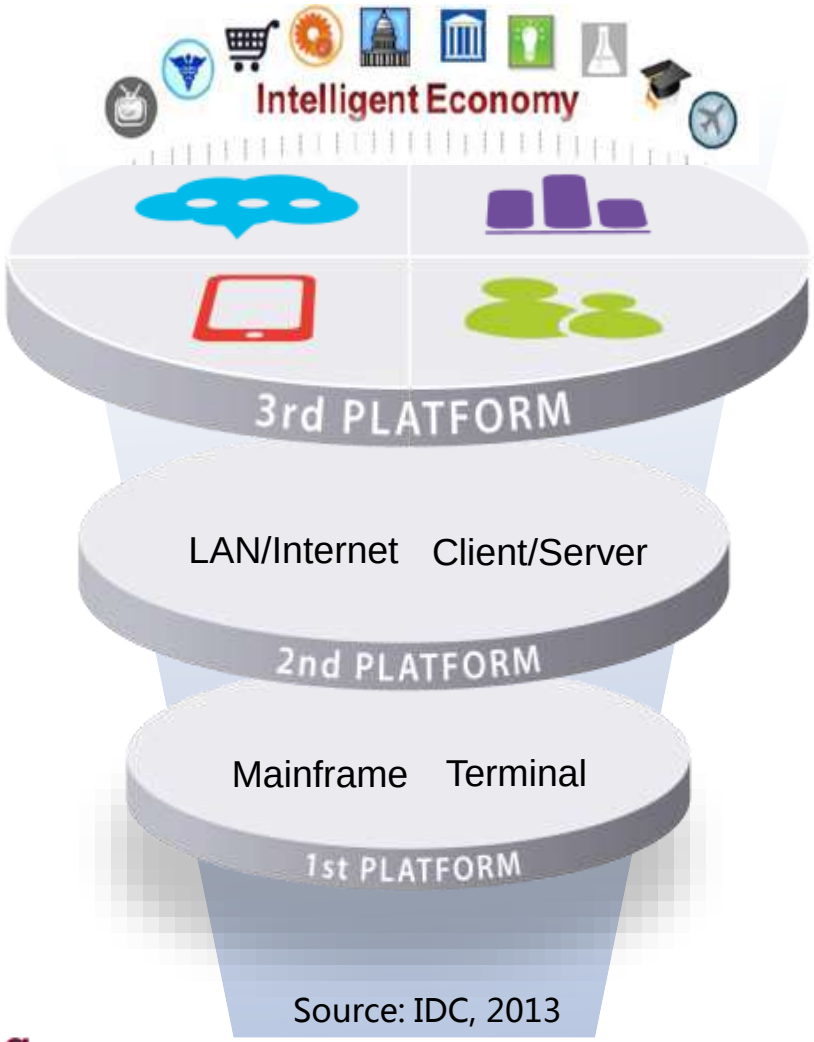
3rd Platform Technologies

Cloud

- By 2016, more than **60%** of enterprise-grade storage capacity will be provisioned in cloud.
- By 2016, global cloud spending will reach **US$179** billion.
- Asia/Pacific (excluding Japan) cloud spending will reach **US$19.5** billion by 2016.

Mobility

- By 2020, every connected household will have an average of **12.5** devices in use.
- By 2016, global Mobility spending will reach **US$800** billion.
- In 1Q13, smartphones have had more shipments than feature phones for the first time ever. China is the highest globally at over **300** million units shipped.



Big Data

- Total amount of data created and replicated will double every two years between now and 2020. Size will reach **40ZB** by 2020.
- By 2016, global Big Data & services spending will reach **US$23.8** billion.
- Asia/Pacific (excluding Japan) Big Data spending will reach **US$603** million in 2013.

Social Business

- By 2020, **40%** of Global 2000 companies will use the new social media platform to redefine their marketing and customer services.
- By 2016, the global social business software market will reach **US$10.3** billion.
- Weixin subscribers has exceeded **300** million(Facebook has over 236 million in Asia)

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Smart Manufacturing

Traceable Supply Chain | **Omnichannel Consumers** | **Connected Vehicle** | **Personal Manufacturing**

Intelligent Industries

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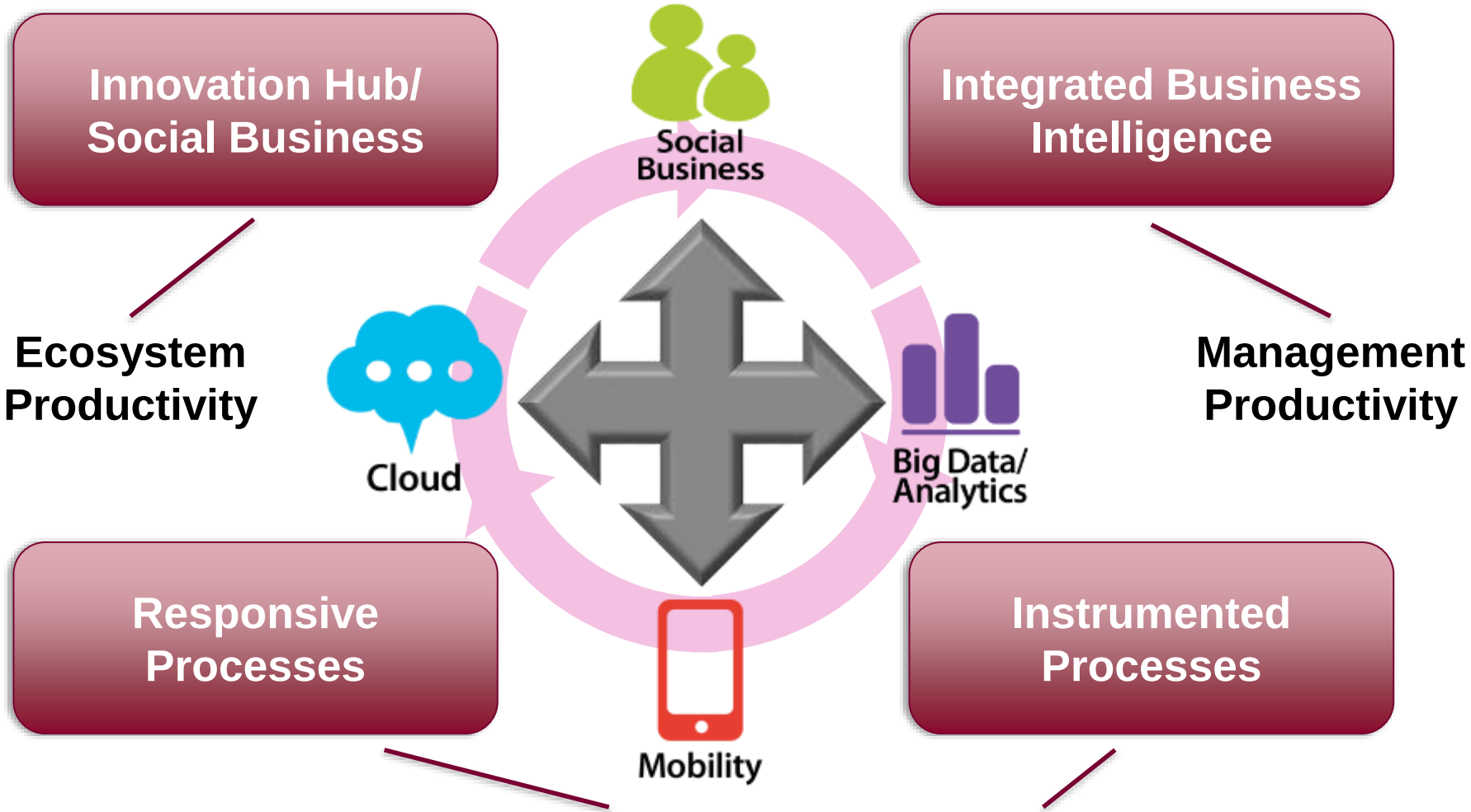
4 Pillars & Smart Manufacturing



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Business Values of 4 Pillars

Manufacturing Business Drivers	 Big Data / Analytics	 Mobility	 Cloud	 Social Business
Cost Reduction	Better & Faster Decisions	Self-Service & Automation	Virtualization & Economies of Scale	Unified Communications
Attract New Customers	Segmentations to sell, up-sell & cross-sell	Customer Engagement	Speed to Market	Presence & Influence
Improve Productivity	Process & Information Automation	Connected Workforce	Process Standardization & Integration	Collaboration Platform
New Facilities / Geo Expansion	Process & Information Visibility	Connected Operations	Virtualization & Speed of deployment	Inter-Enterprise Integration & Collaboration

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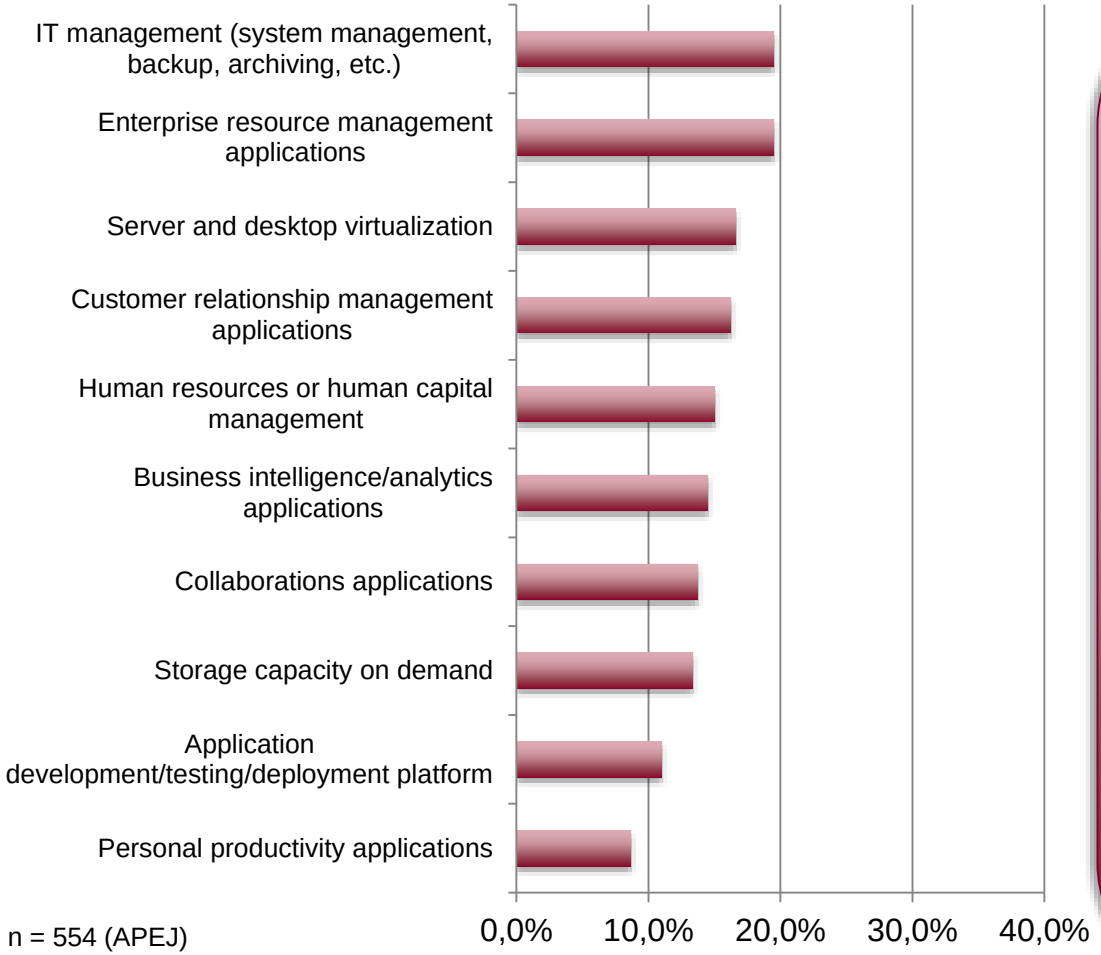
Current Cloud Adoption

Where do you use most of the cloud technologies now?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Top drivers for cloud adoption:
  - **Speed of deployment**
  - **IT outsourcing**
  - **Need for inter-enterprise integration**
- Top barriers for cloud adoption:
  - **Security**
  - **Data portability**
  - **Pay-per-use costs more**
- Top applications are IT outsourcing services & enterprise resource management applications

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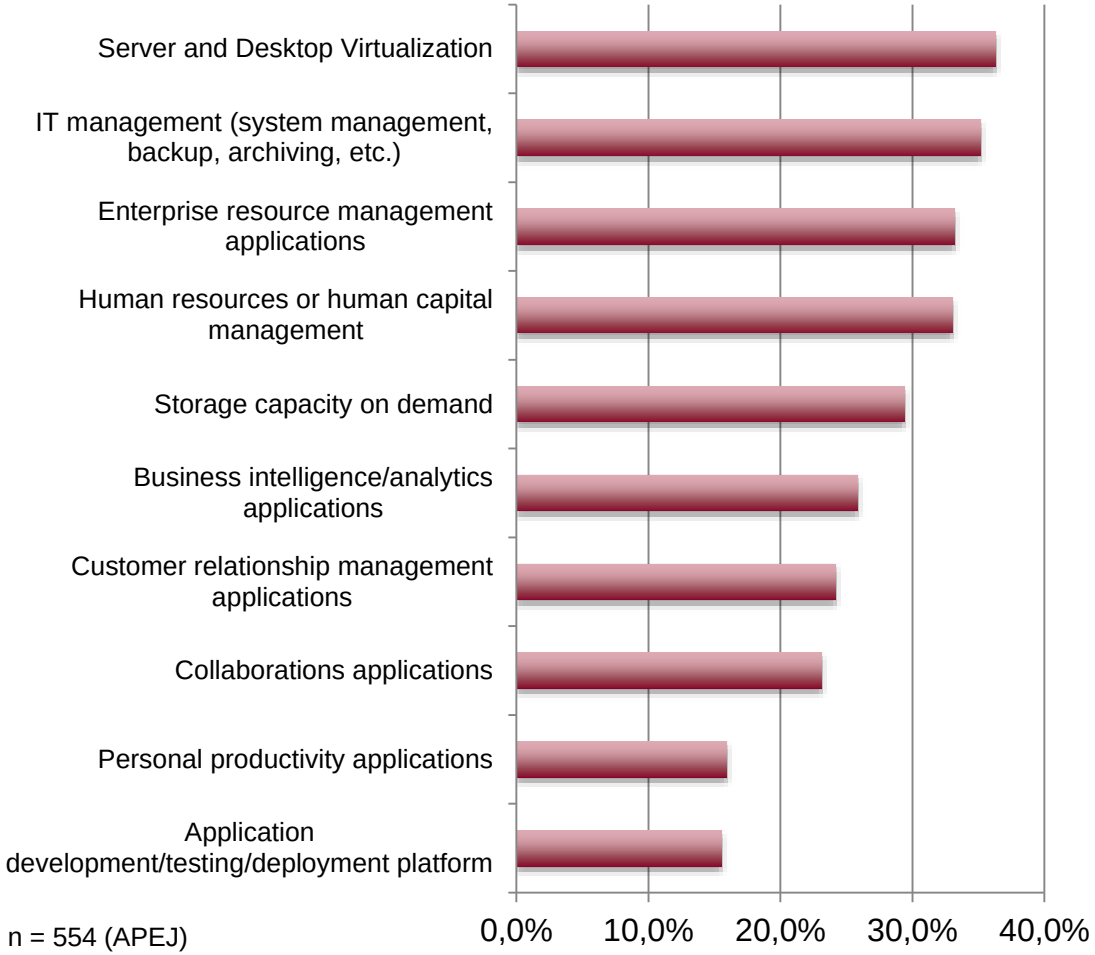
Trends of Cloud Adoption

Where do you expect to use cloud technologies in the future?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Cloud is still seen as an **"IT" tool.**
- Cloud **adoption is still relatively low** among Asia/Pacific manufacturers.
- Cloud-based solutions can enable **SMBs to utilize IT in a cost-effective manner.**
- Cloud computing and mobility combine to create a level of **collaborative connectivity.**
- Cloud is ideal for hosting **collaboration and intra-enterprise applications** like ERP, HR, and BI/BA applications.

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Essential Guidance

- **Focus on time to value.** Deliver IT resources quickly and efficiently when and where the business needs them, at an acceptable price point.

- **Focus on standardization as a starting point.** Create consistency across the organization, through access to information and analysis, collaboration, and business process enablement.

- **Focus on transformation.** Give the business a means to drive innovation and adapt to changing market requirements and to optimize business performance.

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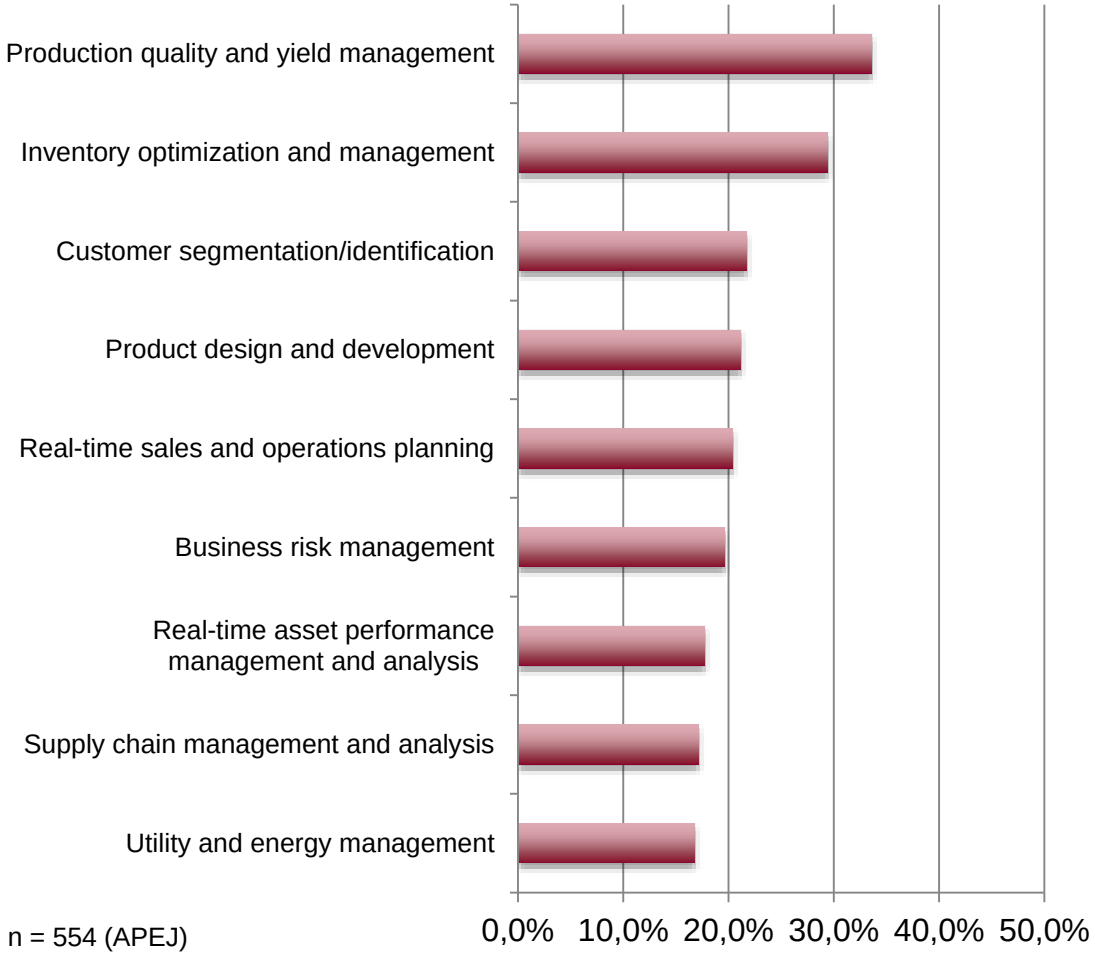
Current Big Data Adoption

Where do you use most of the big data/analytics technologies now?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Top drivers for big data/analytics:
  - **Availability of enterprise and shopfloor data**
  - **Shorter time to market**
  - **Rising cost pressure**
- Top barriers for big data/analytics:
  - **Lack of understanding**
  - **Lack of data scientist**
  - **Poor information integration**
- Top applications are **production yield** and **inventory management**

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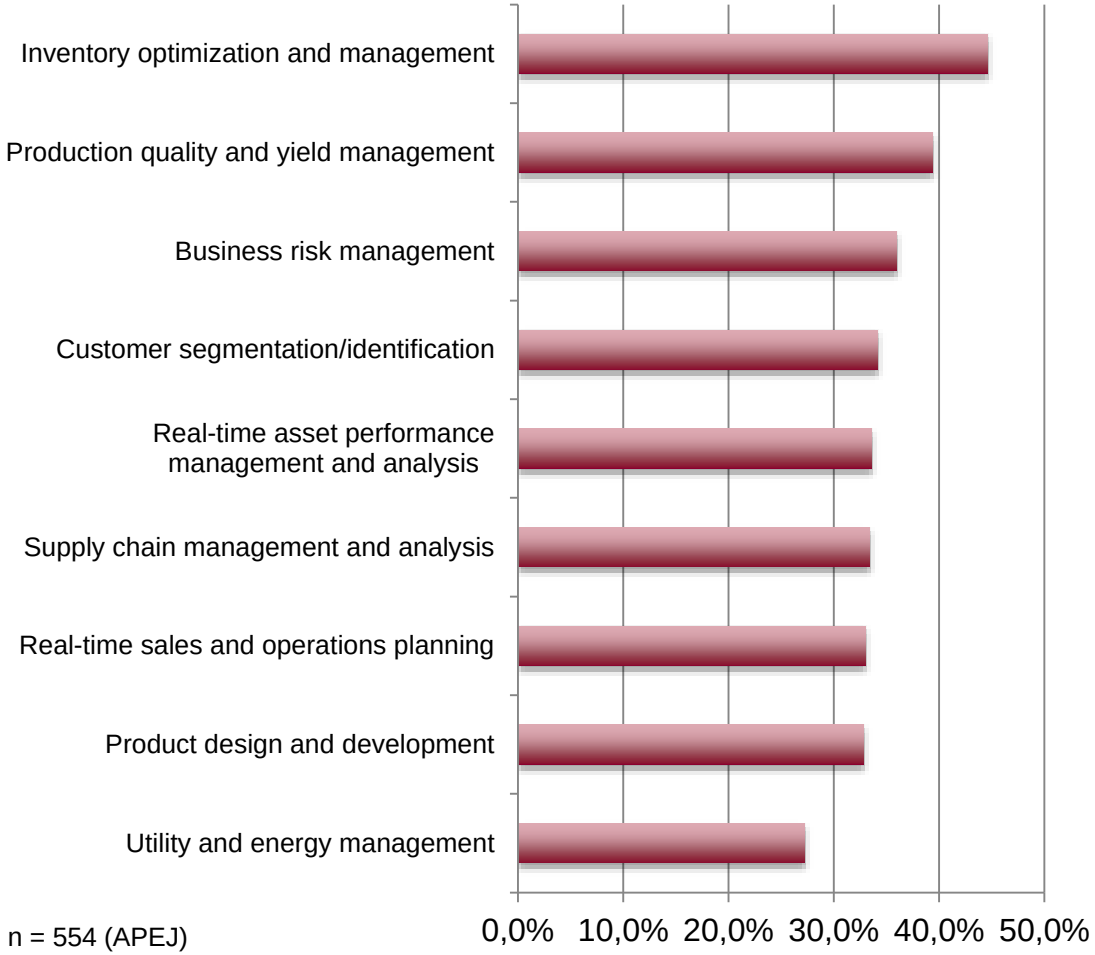
Trends of Big Data Adoption

Where do you expect to use big data/analytics technologies in the future?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- **Inventory and production yield management** will be the top applications for analytics.
- Brand-oriented value chain **(BOVC)** manufacturers have the **highest adoption.**
- Complexity of **business risk management** is the next key area for big data/analytics application.
- **M2M** applications in manufacturing will **drive big data analytics adoption** for asset performance management and analysis.

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Essential Guidance

- **Focus on information integration.** Consolidate data/information from multiple sources to give a richer content and representation.

- **Focus on "What-if" analysis.** Question existing assumptions and processes, using data and analytical results to make informed conclusions and recommendations.

- **Focus on business case.** Business decision makers are only interested in insights that matter to the business. Work with business users to determine what data is to be made available.

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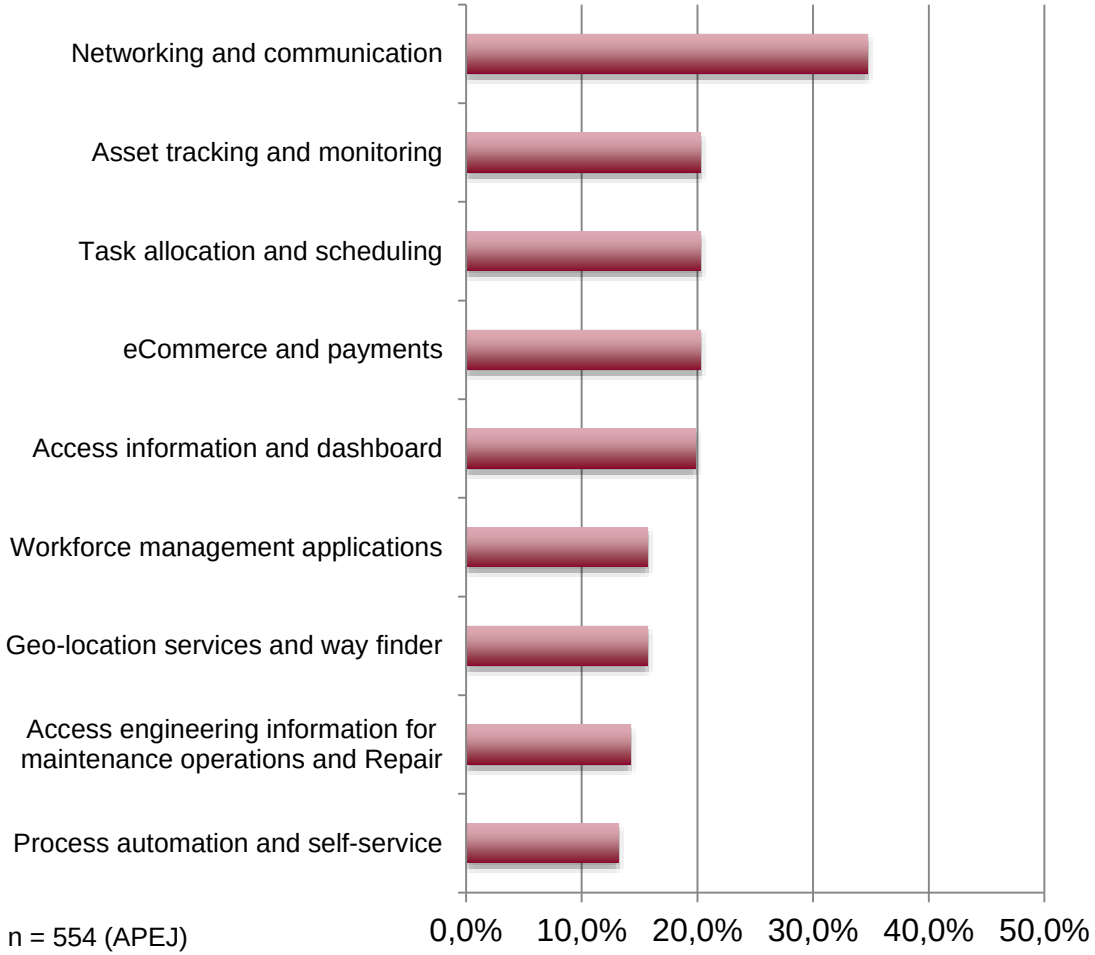
Current Mobility Adoption

Where do you use most of the mobility technologies now?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Top drivers for mobility
  - **Workforce demographics**
  - **Pervasiveness of mobile devices**
  - **Informatization of Mfg**
- Top barriers for mobility
  - **Cost of ownership**
  - **Difficult ROI**
  - **Mobile security**
- Top application is still primarily for **networking** and **communications**

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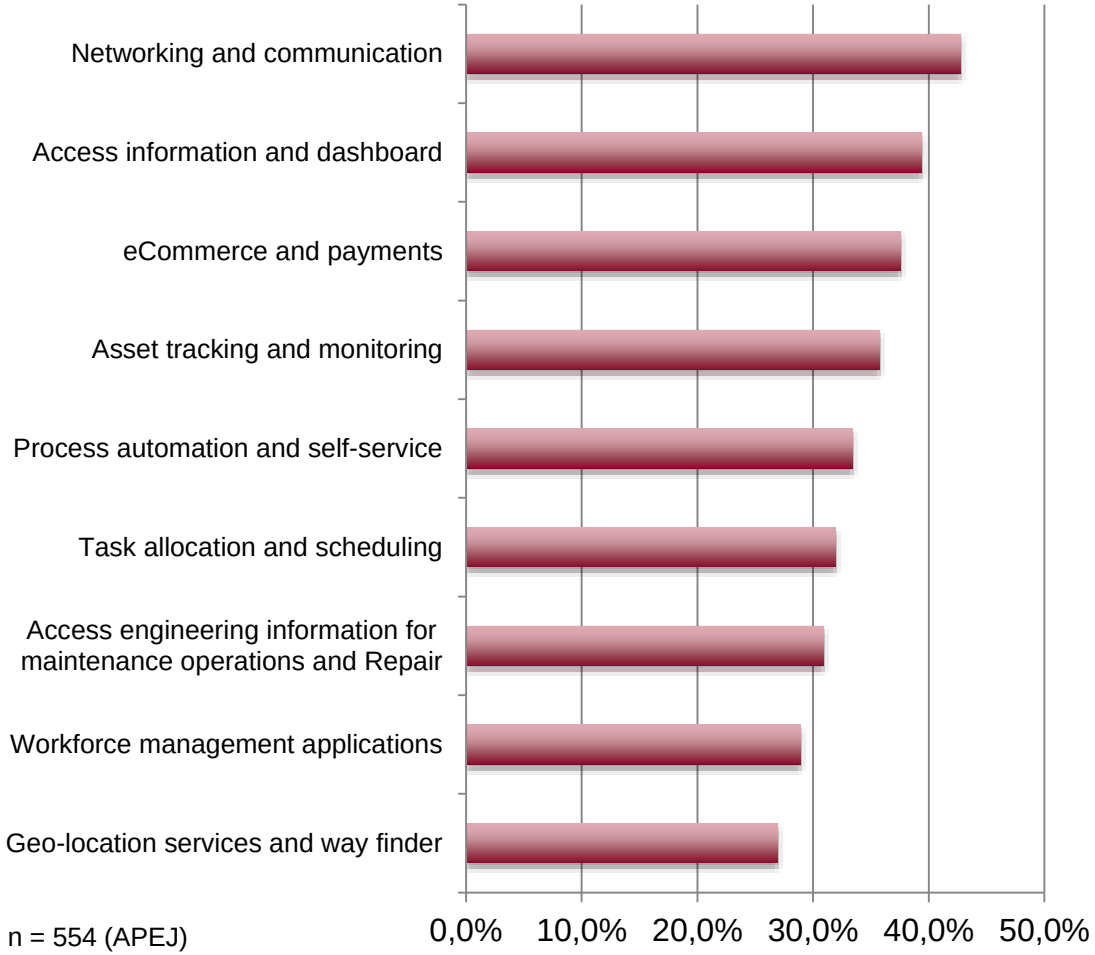
Trends of Mobility Adoption

Where do you expect to use mobility technologies in the future?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- **Networking and communications** will be the most common mobile applications.
- eCommerce and payment on mobile will improve the **sales enablement** process.
- The need to **improve overall equipment efficiency** and utilization will drive mobility and M2M adoption for asset management.
- Productivity for cost reduction will drive more **process automation** and **self-service** through mobility.

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Essential Guidance

- **Focus on total value of ownership.** Mobility solutions are typically not a replacement technology, thus cases for cost of ownership are few. Value proposition from associated transformative process changes enabled by the mobility solutions should be evaluated instead.

- **Focus on empowering the workforce.** Process automation and self-service through mobility deployment are key to drive productivity and cost reduction.

- **Focusing on building a "connected" workforce.** Deployment of mobile devices to the workforce can enable effective P2P communications in a connected work environment for management productivity.

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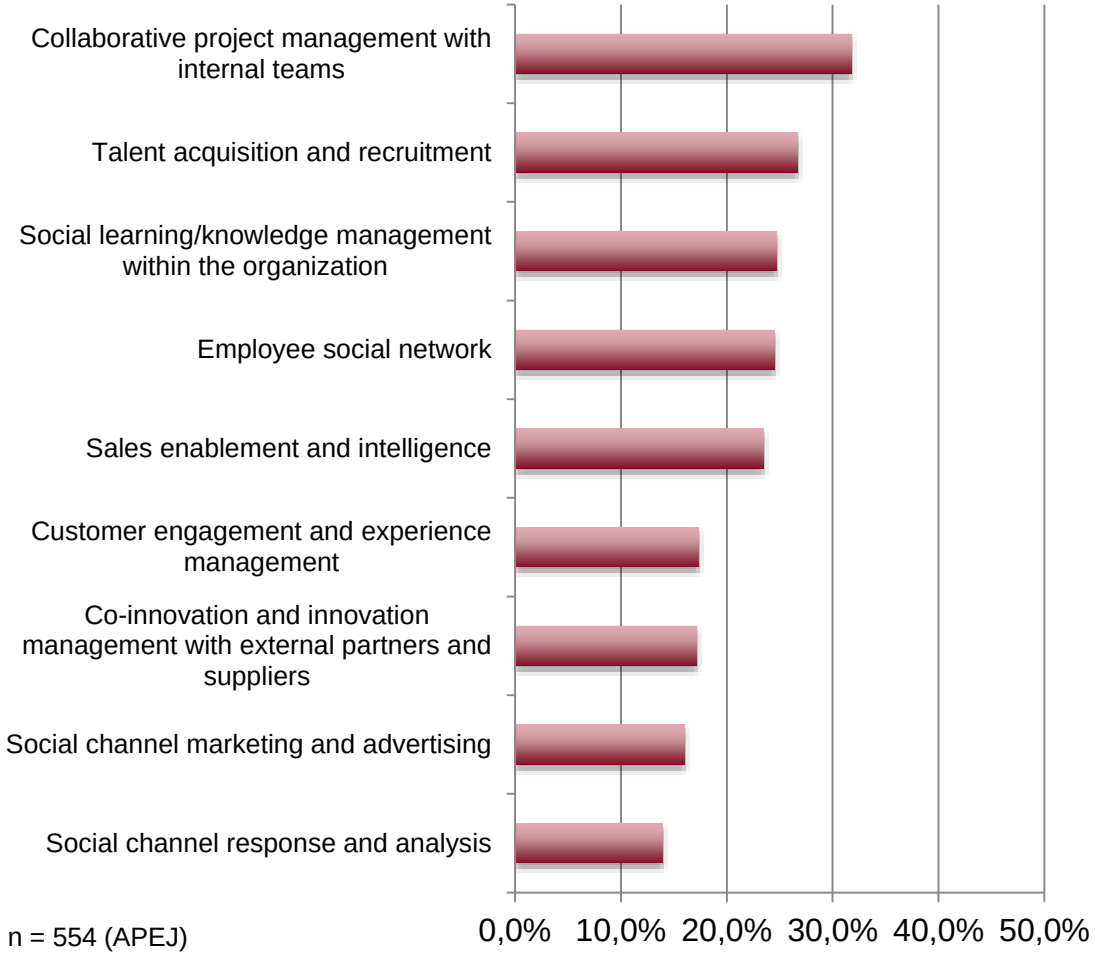
Current Social Business Adoption

Where do you use most of the social business technologies now?



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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Top drivers for social business
  - **Extended enterprise**
  - **Workforce demographics**
  - **Mobility adoption**
- Top barriers for social business
  - **Information security**
  - **Compliance**
  - **Culture**
- Top applications are **collaborative project management, enterprise communications,** and **recruitment.**

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Trends of Social Business Adoption

Where do you expect to use social business technologies in the future?

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Source: *IDC Manufacturing Insights, Biz and IT Priorities Survey,* March 2013

- Key applications of social business technologies in manufacturing will be for **internal enterprise collaboration** in project management, **knowledge management,** and enterprise **communication.**
- External applications will be next for **sales enablement** and **co-innovation** with external partners.
- Generally, social business adoption is still **relatively low in the region.**

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Essential Guidance

- **Focus on people, not on technology.** Social is about being people-centric and technology is just the enabler. Enabling and improving internal and external communications is the key objective.

- **Focus on employees' social responsibility.** Information security and compliance cannot be addressed by technologies and processes only. Employees' awareness of their corporate responsibility and role is essential to adoption.

- **Focus on driving ecosystem productivity.** Effective use of enterprise social network can enable inter-enterprise integration and collaboration for ecosystem productivity.

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Global Smart City Maturity Model:
A Roadmap for Assessment and Action

Agenda

- Brief Situation Overview
- What do we mean by a smart city?
- The Maturity Model
  - Purpose
  - Overview of stages
  - Overview of measures
  - Measure across the stages and the effect on stakeholders
  - Where cities are today
  - Short and long term trends
  - Essential Guidance

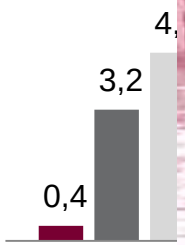
A New City Model

The Smart City is a model for technology enabled local government transformation

"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."

– Charles Darwin

Structural Volatility



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Technological and Demographic Trends Create Pressing Need

Digital Universe to Reach **40,000 Exabytes**

Government **Largest** Big Data Consumer

1 Billion Vehicles Worldwide in 2020

72% Urban Population Increase by **2050**

By 2015, more US consumers **access Internet by mobile device than PC**

45% of new apps will be **mobile** in 2013 in local government

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Create A Value Generating Architecture

Smart City Goals

Economic Development **Sustainability of Life** **Higher Quality**

Industry Solutions

Citizen & Stakeholder Engagement | Predictability | Cost Avoidance | New Products & Services | Competitive Advantage

Value Generation

Open data & Transparency | Manage Risk | Increase Productivity | Better Citizen Service | Innovation

Business Imperatives

3rd PLATFORM

Enabling Technology

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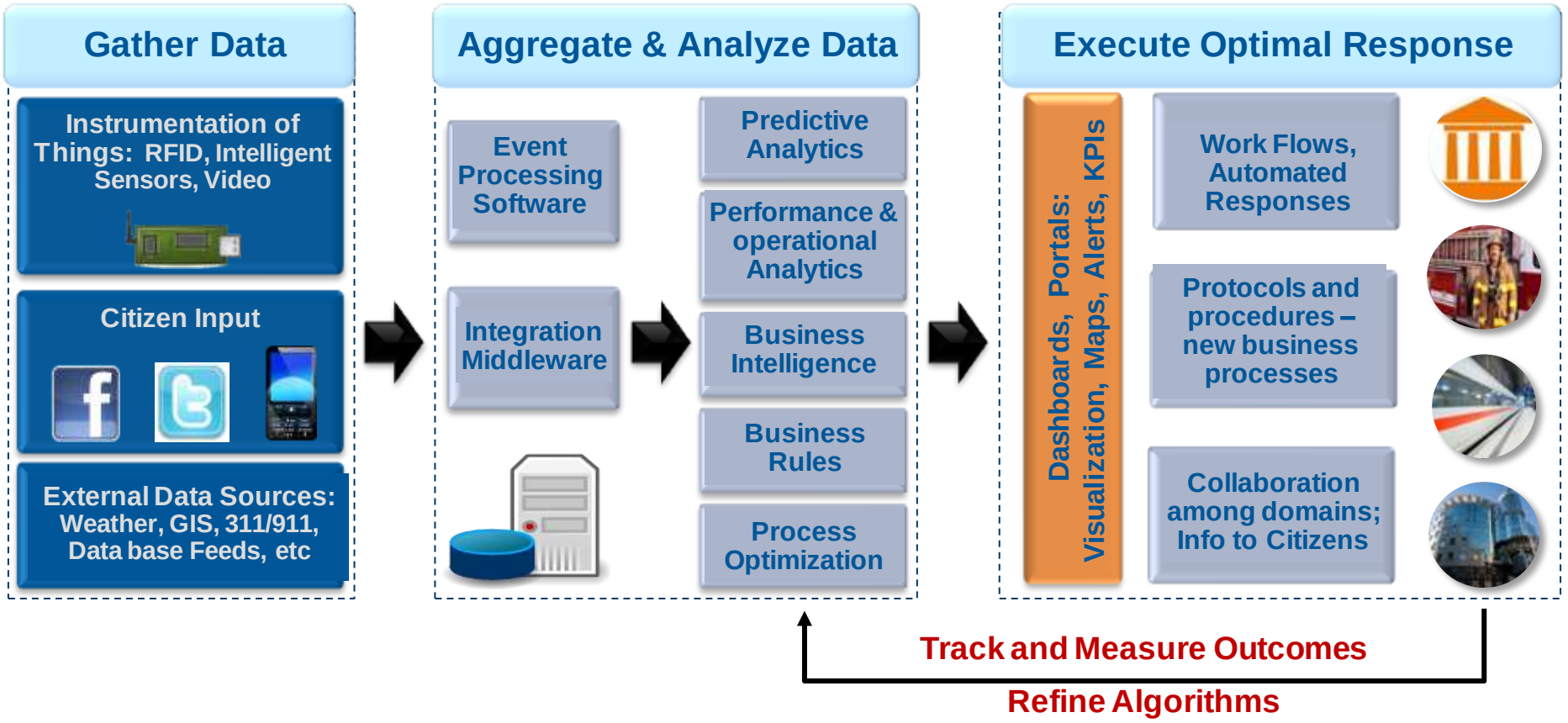
Smart Cities Focus On….

- Being part of a movement : Social change/ behavior change
- Outcomes not transactions
- Innovation and the use of emerging technologies
  - To attract and retain younger workers
  - To engage with citizens
  - To foster productivity and efficiencies
- Citizen & stakeholder engagement and sourcing (Open data and transparency)

What is a Smart Project?



Pervasive Broadband Platform

Data Services · Conferencing & Communications · Wireless Sensor Networks · Bluetooth · WiFi · Cellular · NFC

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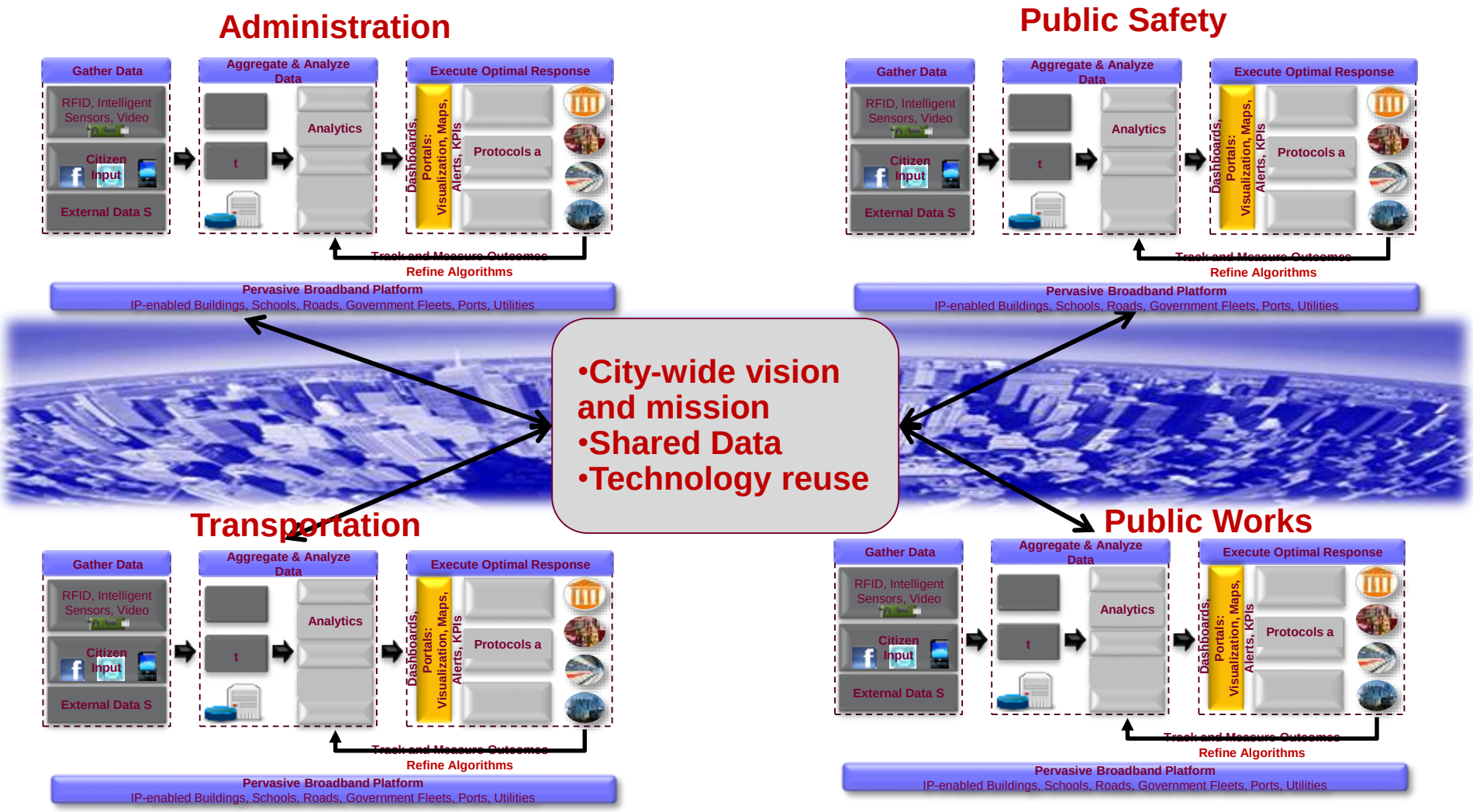
Smart Cities Integrate Smart Projects



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IDC's Smart City Maturity Model

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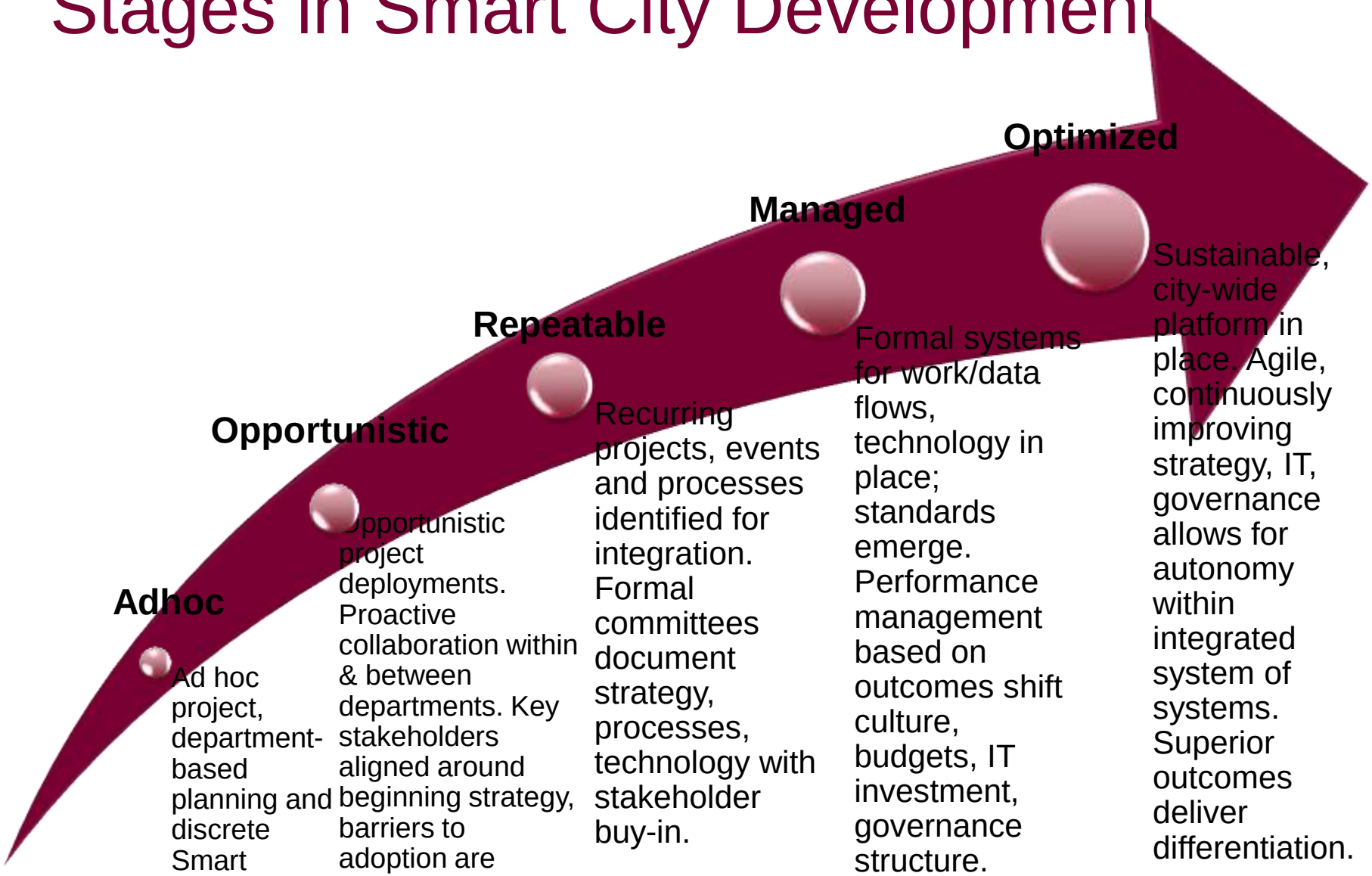
Purpose of the Maturity Model

- Identify the high-level stages, critical measures, necessary actions of a Smart City roadmap
- Assess current competency and maturity
- Define short- and long-term goals and plan for improvements
- Prioritize technology, partnership, staffing, and other related investment decisions
- Uncover maturity gaps among departments, business units, or between functional and IT groups

Stages in Smart City Development



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IDC's Smart City Maturity Model At-A-Glance

	Ad hoc	Opportunistic	Repeatable	Managed	Optimized
Key Characteristic	Siloed	Intentional	Integrated	Operationalized	Sustainable
Goal	Tactical Services Delivery	Stakeholder Buy-In	Improved Outcomes	Prediction & Prevention	Competitive Differentiation
Outcome	Proof of concept and business case development via ROI from pilot projects	Cross-organization deployments and development of foundational strategy and governance	Repeatable success in project process and outcomes across multiple organizations	Enterprise-wide strategy, process, data, etc bring improved service delivery via adaptive sense-and-respond systems	Agility, innovation, and continuous improvement in service delivery bring competitive advantage

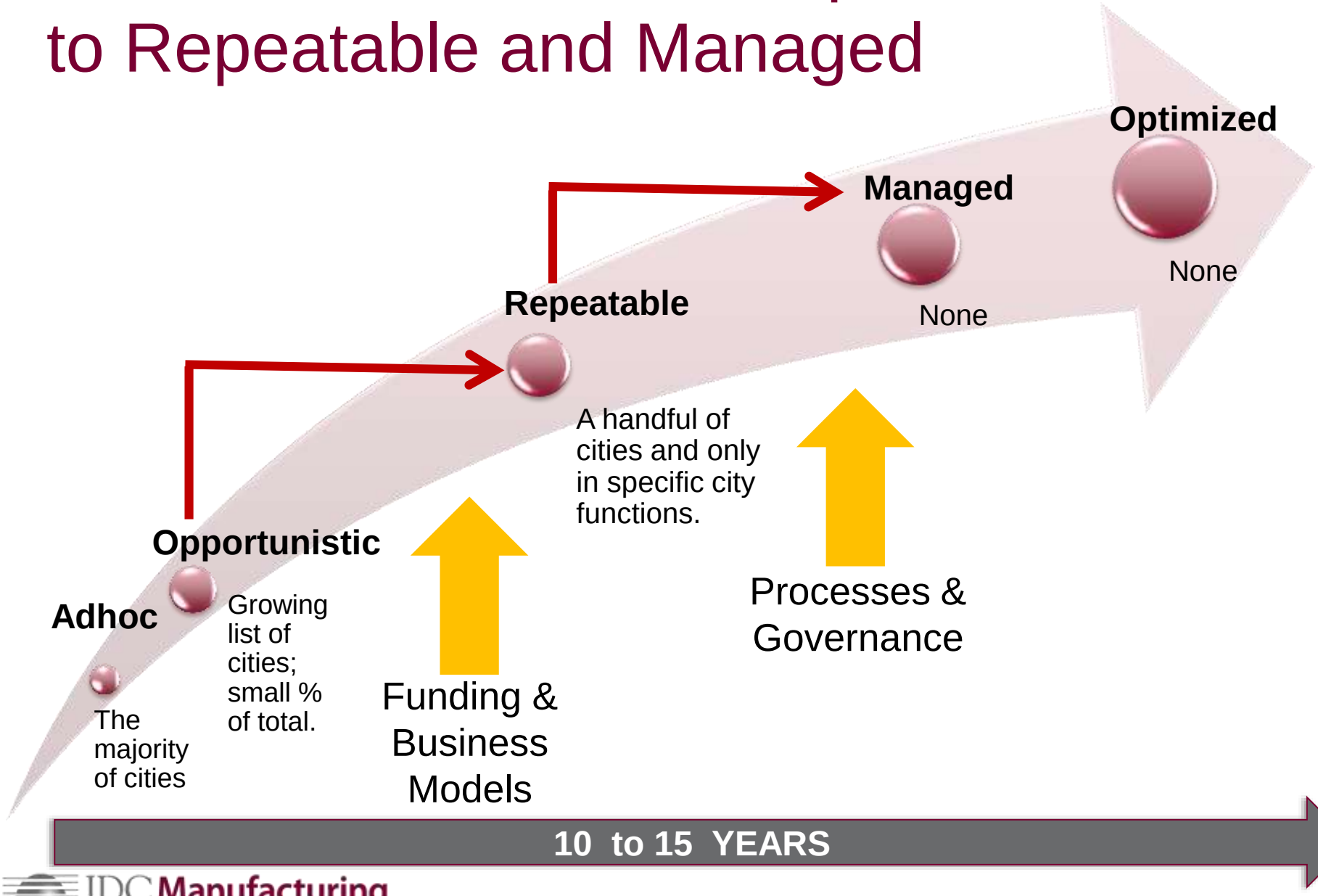
Poll Question

Based on the stages just described, in which stage is your city today?

(If you are not in city government, in which stage do you think most cities worldwide fall?)

- Ad Hoc
- Opportunistic
- Repeatable
- Managed
- Optimized

More Effort and Time Required To Get to Repeatable and Managed



Key Measures Of Progress

Strategy — Vision — Leadership — Business Case

Culture — Innovation; Citizen & Community Engagement

Process — Governance — Partnerships

Technology — Architecture — Adoption

Data — Use — Access

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Culture Through The Stages

Ad Hoc

- Government has no formal process to **engage** those with new ideas inside or outside of government
- Pockets of **innovation** exist within risk-averse culture

Opportunistic

- Government experiments with citizen participation via social networks and mobile apps as a new channel
- Opportunistic innovation where there is department-level support

Repeatable

- Government proactively engages citizens though partially personalized direct communications
- Innovation culture supported by processes that allow risk
- New projects that capitalize on 3rd platform technologies are funded

Process Through The Stages

Ad Hoc

- Traditional **Client- Provider - Supplier relationships** managed by separate departments.
- **Governance** is characterized siloed budgeting and decentralized decision-making

Opportunistic

- Government begins to test new models of engagement with partners.
- Some multi-department budgets and decision-making based on projects.

Repeatable

- Partnerships models evolve to include gain-sharing, co-development.
- There are stable joint committees that bring together high-level officials to address Smart City needs.
- Sustainable funding for initiatives is a focus area

Data Through The Stages

Ad Hoc

- Data is **under-utilized** and housed in disparate systems.
- **Access** is limited to single organizations due to issues with data integrity, privacy/security and integration.

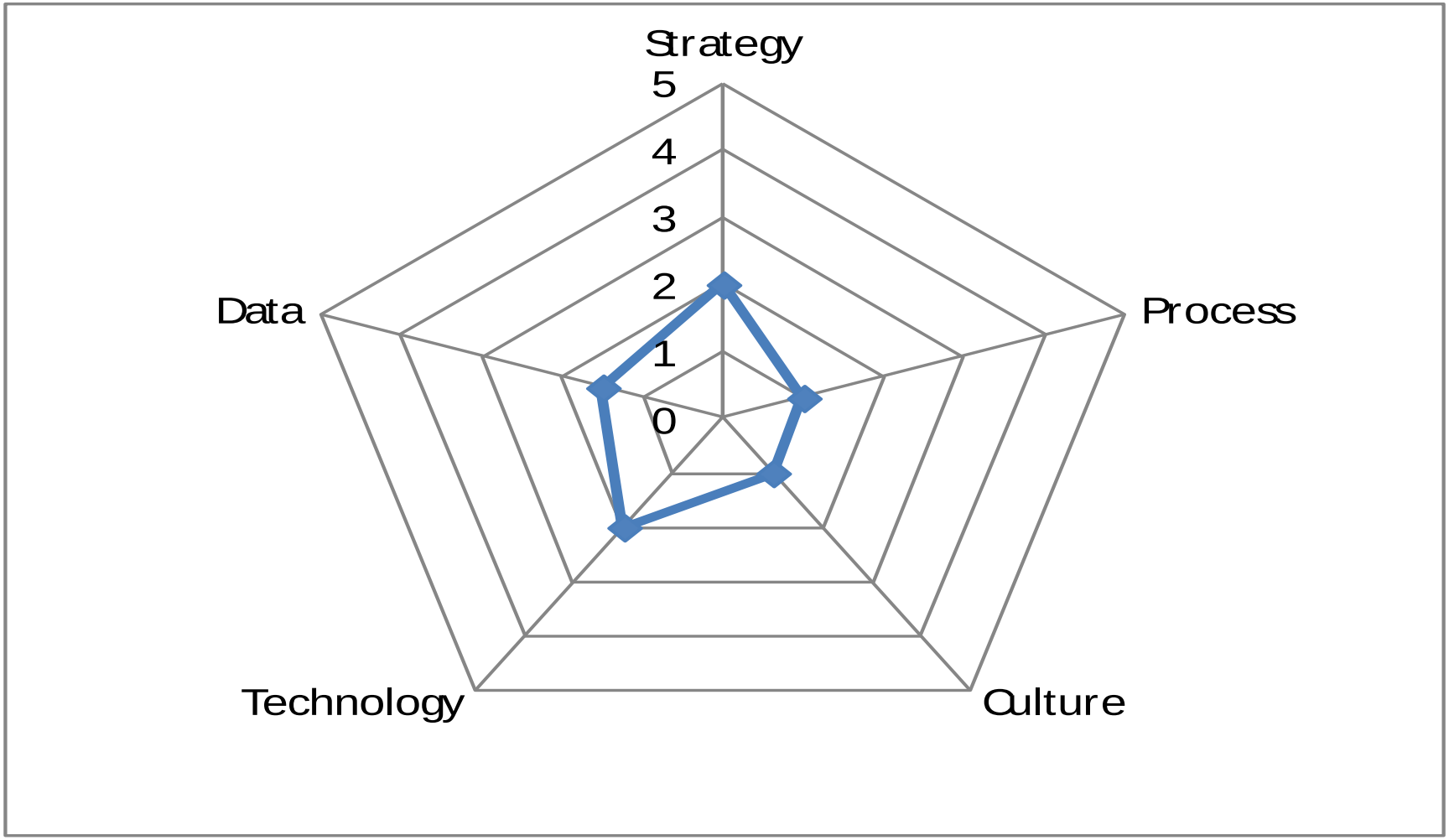
Opportunistic

- Data integrity is more fully addressed as data is used in Big data and advanced analytics projects.
- Some data sets are opened to the public.
- Data becomes more widely shared across departments.

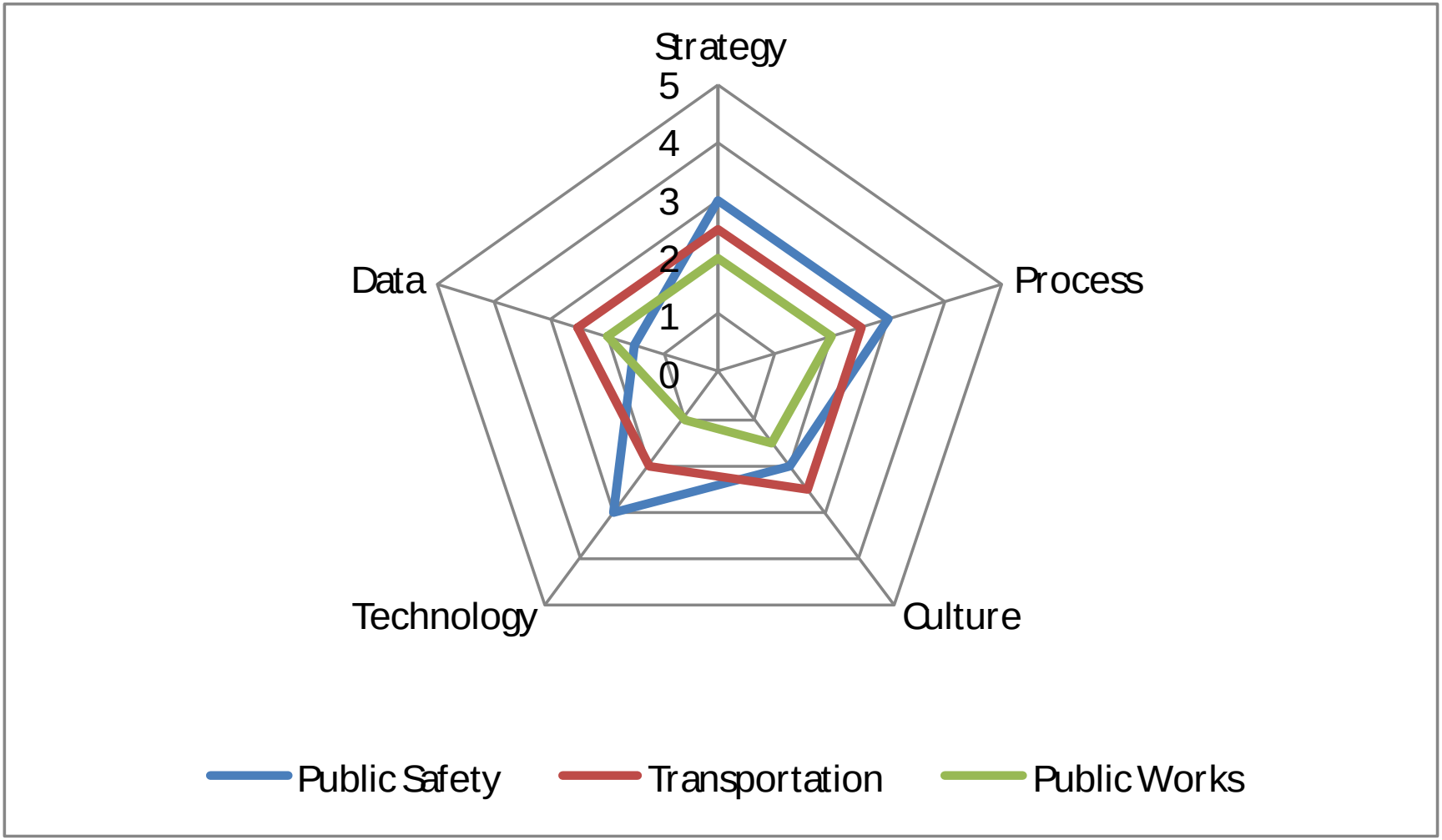
Repeatable

- Data use is focused on maintaining quality for Big Data and analytics use cases.
- Progress is made in accuracy, semantic consistency.
- Open Data becomes strategic to leverage skills and ideas from many organizations and citizen/ community groups.

Cities Today Most Mature in Strategy and Technology



Cities in Next Two Years: Varies by Department



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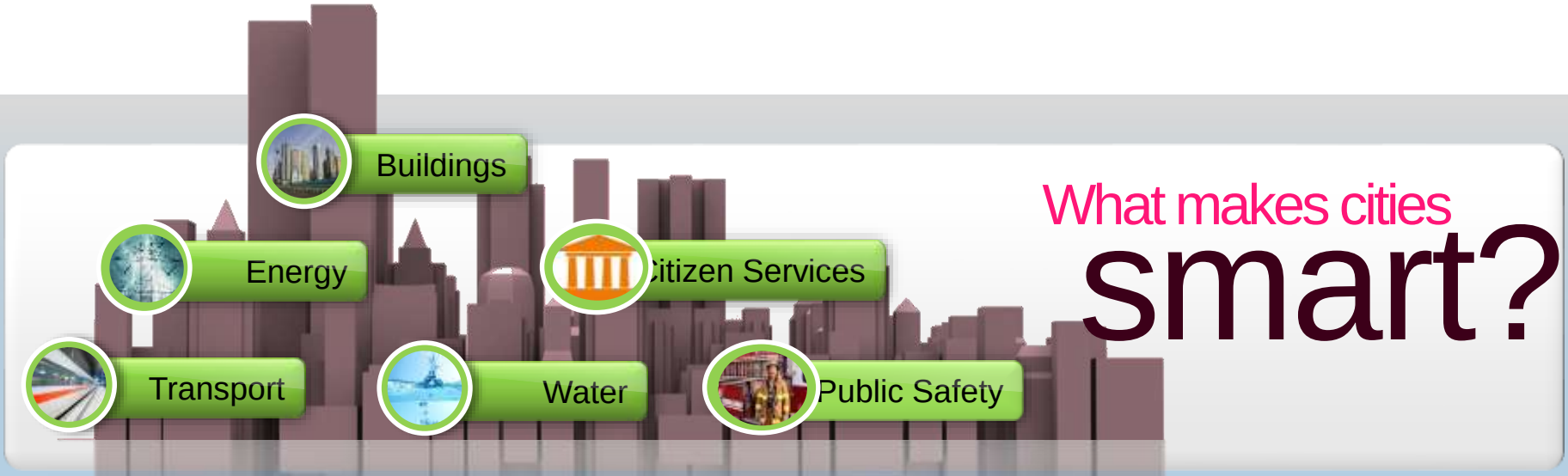
Short Term Trends: There is Risk of Stalled Progress

Strategy	•Cities state big visions; specifics may not be fully developed. •Departments test pilots, vendors market successes, increases awareness. Innovators frustrated by lack of progress
Culture	•Small set of early adopters pushing innovation provide success factors; Civic innovation models spread •Citizen engagement varies by region. Digital divide a concern. •Mobile apps/ sensors source information from citizens.
Process	•Partnership models link cities, academia, vendors –help with sustainable business models, use cases •Consulting firms offer services to assist with governance & policy.
Technology	•Rapid build out of ICT infrastructure & data capture devices. •Cities inventory assets to leverage across projects/ departments. •Architecture in theoretical stage, progress stalls if no standards emerge. •Performance measures on outcomes has challenges
Data	•Many IT-led BDA projects lack connection to business goals, slows adoptions & project funding. •BDA solutions incorporate multi-structured, multi-source data •Information mgt, governance, security, privacy command increasing portion of data mgt budget.

Longer Term Trends: Transformation is Underway

Strategy	•Cities develop own brand of Smart City; themes develop
Culture	•Growth of innovation offices with greater influence city-wide •Citizen engagement runs risk of backsliding •Cities grapple with high cost of engagement
Process	•Cities reorganized around outcomes – departments, budgets merge – especially in areas key for tourism, economic development •Vendors figure out model to serve mid-sized cities
Technology	•Cities harness growing information from physical objects. Analytics available to largest number of customer-facing & operational employees. •Standards improve interoperability across stack & vendor solutions. Vendors provide platforms for add-on development by partners and cities.
Data	•BDA standards emerge internationally, data as accounting asset •People opt to share personal information, backlash for misuse •Data sharing rests on case law, policy, for security & privacy •Scrutiny of country of origin as risk of data loss or contamination increases.



What makes cities smart?

Aggregate & Gather Data

- Data gathered in real-time or near real-time from a variety of sources (sensors, mobile devices, social media, etc)
- Data is communicated and transported via pervasive broadband networks

Discover & Analyze Information

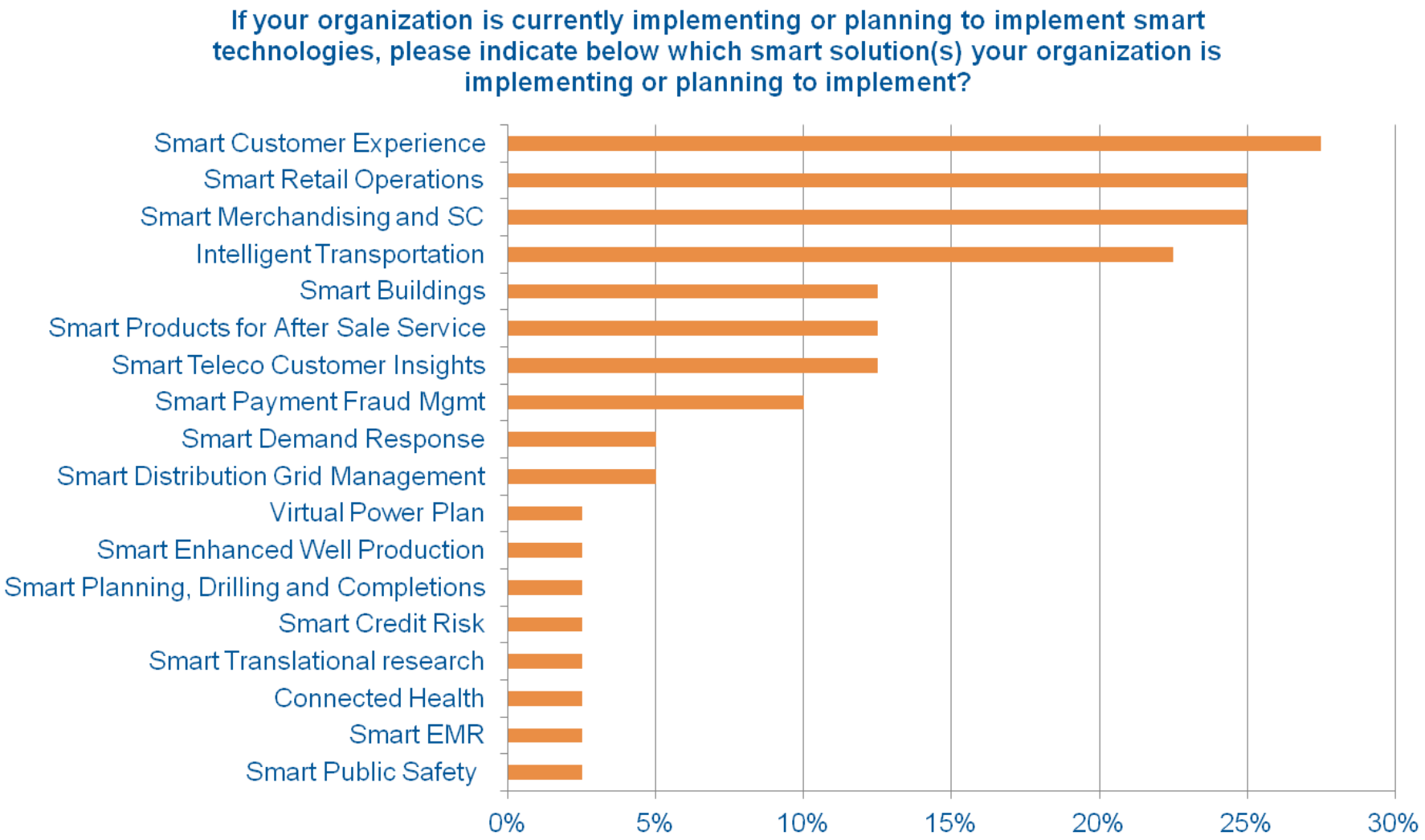
- Software & services used to process, understand and display collected data
- Trends discovered and/or outcomes predicted using BI/analytics and predictive analytics

Plan & Execute Optimal Response

- Processes are in place to act on information, execute an optimal response, and measure outcomes
- Optimal response leads to more sustainable development, and better citizen quality of life

Enabling Factors: government leadership, engaged citizens, technology infrastructure, private public partnerships

Smart Technology Projects Underway



Source: IDC Survey Administered to GDS CIO US Summit Attendees. March, 2011
Data shows % of respondents who indicated the selection. Multiple responses allowed. n= 40

Yokohama Smart City Project

Diverse three areas in Yokohama

- **Urban: Minatomirai 21 Area**
  - Highly developed urban center
  - High-rize office buildings, international convention center
- **Residential: Kohoku New Town**
  - 60s development zone designed to address Yokohama's housing demand
  - Suburban commuter zone with low-rises and shopping centers
- **Industrial: Yokohama Green Valley**
  - Industrial redevelopment area on reclaimed land
  - Home to Yokohama's local small to medium sized factories, amusement parks and housing complexes

Source: City of Yokohama, Japan

Yokohama Smart City Project

YSCP Vision and Objectives

As one of the largest cities in Japan, Yokohama aims to build the "Next Generation Energy Infrastructure and Social System" that maximizes CO2 reduction in the forefront of innovation. The know-how will be leveraged to deploy abroad as a city-scale infrastructure package.

Background

- Increasing need for energy security
- Economic development (green innovation)
- Cities as center of CO2 emissions
- Environmental Model City

YSCP Vision and Objectives

Ambitious CO2 reduction target (30% by 2025)
Export overseas as a city scale infrastructure package

Assemble Advanced Knowledge, Build in Yokohama, Expand Abroad

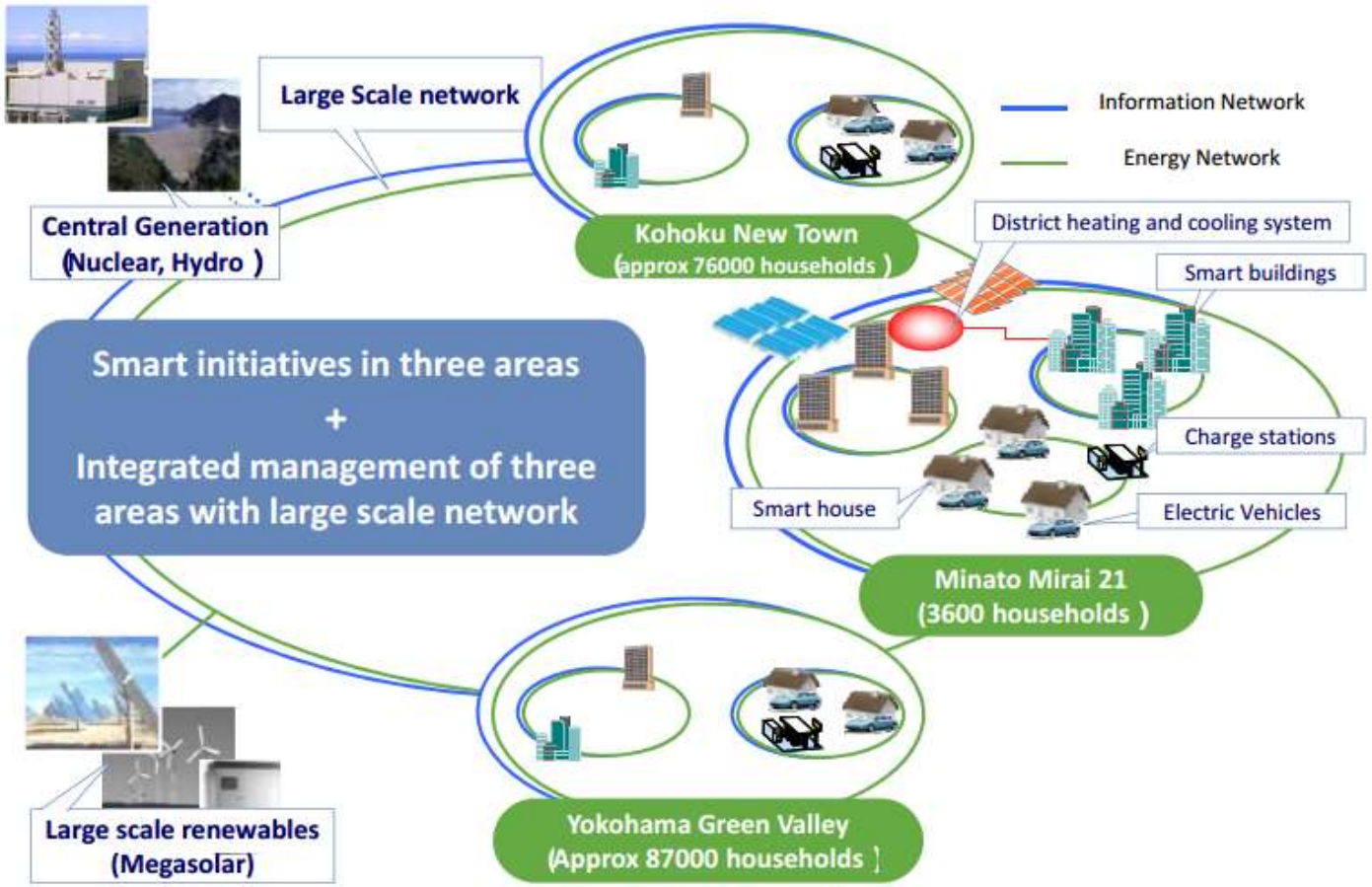
- Retrofit solution development

Source: City of Yokohama Japan

Yokohama Smart City Project

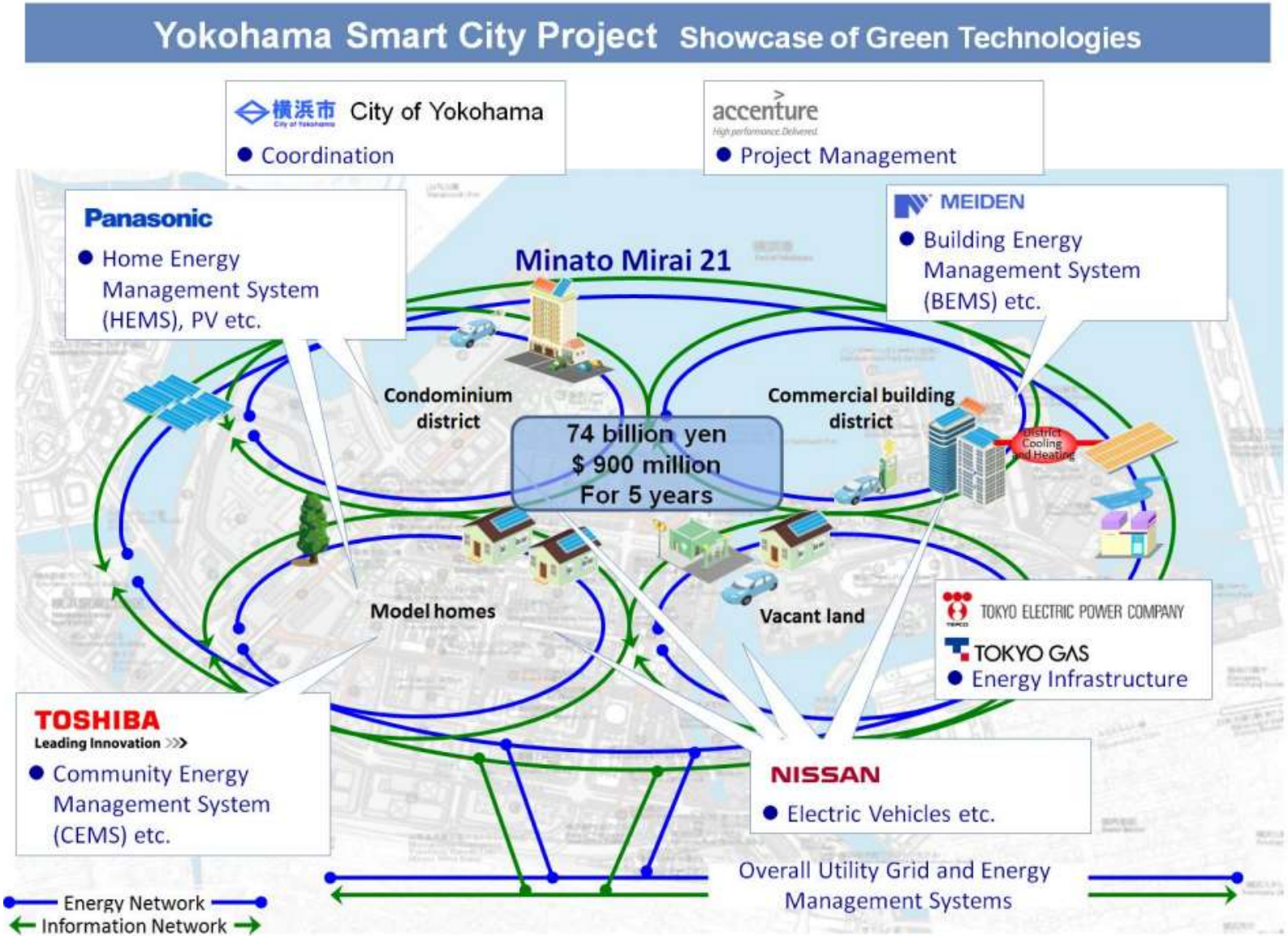
Highlight 1: Community Energy Management System

Absorbs power output fluctuation from renewables by integrating stationary battery with Home Energy Management Systems and Building Energy Management Systems



Source: City of Yokohama, Japan

Yokohama Smart City Project



Source: City of Yokohama, Japan

Key Questions on Smart Cities Strategies

- ***As a government leader, how do I create a road map for deploying a Smart Solution in my city or metropolitan area? Which city domains do we start with?***
- ***What role should CIOs/CTOs play in the planning and rollout of smart?***
- ***What use cases can I turn to around Smart? What are other similar cities doing successfully?***
- ***What are the criteria for assessing which cities/regions are "ready to be smart"?***
- ***As a CIO, how do I get myself (and IT) involved in the Smart discussions taking place among industry leaders and policy makers?***

Essential Guidance

- Identify and cultivate innovators and change agents
- Use maturity model to socialize idea of Smart City transformation to city leaders
- Coordinate progression in each of the five measures
- Use performance measures to define success of each stage
- Think of new models of engagement and how to manage procurement process
  - Build innovation in to RFPs
  - Help build innovation ecosystem

Appendix

IDC Overview

- IDC is the premier independent global market intelligence, events, and advisory firm for information technology, telecommunications, and consumer technology markets
- IDC is a subsidiary of IDG, the world's leading technology media, events and research company
- IDC has been delivering IT intelligence, industry analysis, market data, and strategic guidance since its 1964 founding by Patrick McGovern
- More than 1,060 IDC analysts, including in-house statisticians and economists, provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries
- Our multilingual, multicultural workforce surveys over 300,000 technology users and decision makers annually, delivering unrivaled coverage
- We advise IT professionals on making more effective technology decisions by providing insightful fact-based research and consulting services

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IDC Insights Research on Line of Business Issues

IDC Insights research practices assist business and IT leaders in making more effective technology decisions by providing insightful fact-based research and consulting services. Our global research and analysis is focused on mitigating technology risks and maximizing the effectiveness of IT investments.

IDC Health Insights

- Connected Health
- Electronic Medical Records (EMR)
- Accountable Care
- Personalized Medicine
- Life Sciences Supply Chain

IDC Manufacturing Insights

- Supply Chain Optimization
- Connected Vehicle
- Smart Services
- Next Generation Product Lifecycle Management
- Operations Technology

IDC Government Insights

- Smart Government Services
- Smart Cities
- Public Safety
- Government Infrastructure Modernization

IDC Financial Insights

- Risk Management
- Customer Experience Management
- Mobile Payments
- Bank Infrastructure Modernization

IDC Energy Insights

- Oil and Gas Smart Exploration
- Smart Grid
- Smart Buildings

IDC Retail Insights

- Customer Experience
- Retail Sourcing Optimization
- Merchandising and Marketing Analytics
- Retail Infrastructure Modernization

IDC Manufacturing Insights

IDC's IT Executive Programs

Why IDC IT Executive Programs

IDC's IT Executive Programs consists of a family of research programs intended to help today's time-constrained IT executives make more effective technology decisions.

The program offers accurate and timely fact-based research and programs that will assist IT executives in mitigating technology risks, maximizing the effectiveness of IT investments, identifying and capitalizing on new opportunities, and bringing forth solutions that are aligned with the organization's business objectives.

Our IDC IT Executive Program offers you:
- Flexible options for a program that is right for you
- Easy analyst access
- A CIO Advisor
- Peer group through the CIO Executive Council

IDC Manufacturing Insights

IDC's CIO Agenda Practice

Why IDC's CIO Agenda

IDC's CIO Agenda research program recognizes that an IT executive's time is better spent engaging the business around IT than managing day-to-day IT operations.

CIO Agenda supports IT executives in creating a business-based IT organization by providing strategies, best practices, frameworks, and advice around the most important issues on a CIO's agenda:

- Emerging IT Strategies
- Case Studies on IT Transformations
- Peer Benchmarking on Best Practices
- IT Performance Metrics
- IT Spending Surveys

IDC Manufacturing Insights

IDC's IT Benchmarking and Sourcing Practice

Why IDC for Benchmarking and Sourcing

IDC's Benchmarking and Sourcing research is a set of solutions designed to ensure that your technology purchasing and deployment decisions are optimized.

With 50% of the Fortune 500 companies having accessed our research, IDC is the pioneer in helping organizations establish best in class and benchmarking metrics.

Our IT Benchmarking and Sourcing research will enable you to:

- Drive spending efficiencies to allocate savings towards innovation
- Get the best pricing for your strategic IT investments
- Validate costs against peers
- Stay ahead of market trends within the IT industry

IDC Manufacturing Insights

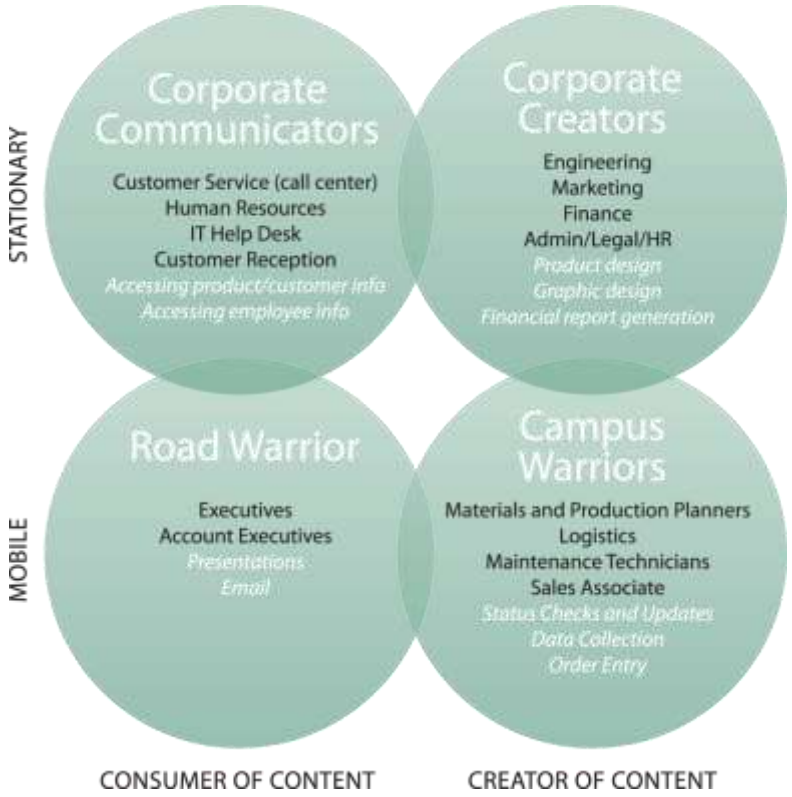
IDC's Mobility Practice

Why IDC for Mobility Decisions

Our fact-based global research team of 20 full time analysts and over 100 contributing analysts worldwide covering mobile devices, network infrastructure, telecommunication services, software, and semiconductors can help you with the following mobility decisions:

- How is mobile technology transforming the way our organization needs to interact with customers, employees, and partners?
- How do I manage corporate-liable and employee-liable devices?
- What is the threshold for Corp App Store adoption?
- What are my organization's must-have security, access management and compliance features for mobility?
- What are the different usability functions and security requirements for different workers and types of information?
- What security components do I incorporate into an app?
- What capabilities can mobile management systems provide to support CIO needs?

IDC's Mobile Device Decision Framework



IDC Manufacturing Insights

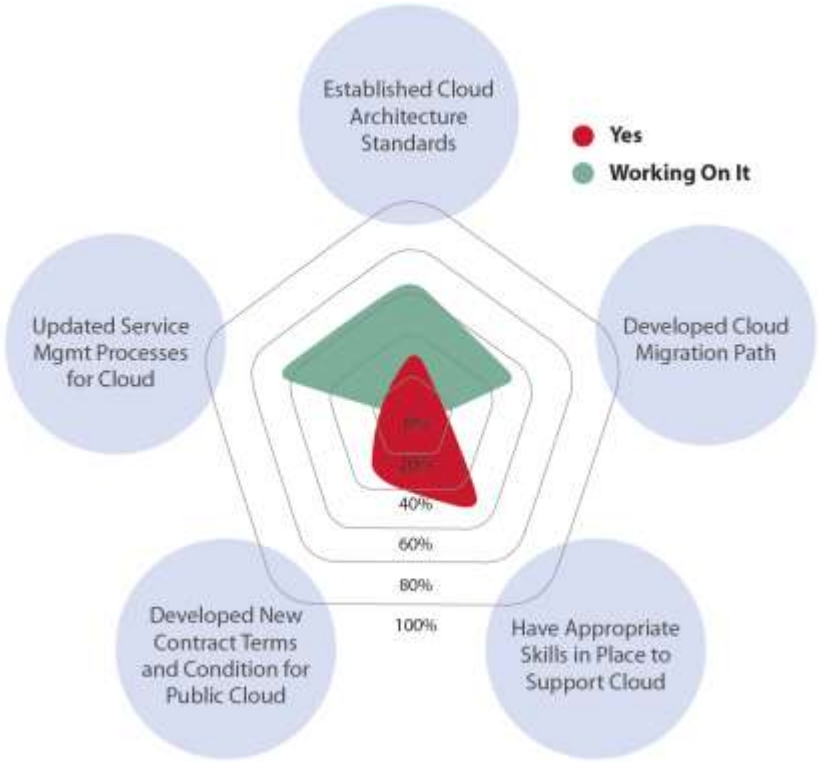
IDC's Cloud Practice

Why IDC for Cloud

Our fact-based global research team of 33 full time analysts and over 100 contributing analysts worldwide covering cloud applications, platforms, infrastructure and service around cloud help you with the following cloud decisions:

- How do organizations assess their readiness for cloud?
- What impact should cloud have on the data center?
- What should organizations be looking out for in cloud-based service-level contracts?
- What strategies should organizations deploy to ensure optimal cost/performance in their cloud contracts?
- What are strategies for buyers to link contracts and payments to user success?
- What options do companies have to protect their data and IP in cloud deployments?
- What do organizations need to know about secure cloud transactions?

IDC's Cloud Progress Monitor



Source: IDC Cloud Study, 2012

IDC Manufacturing Insights

IDC's Big Data and Analytics Practice

Why IDC for Big Data and Analytics

Our fact-based global research team of 7 full time analysts and over 100 contributing analysts worldwide covering analytics and data management software, industry applications, server and storage infrastructure, high performance computing, and professional services help you with the following big data and analytics decisions:

- How do I measure the readiness of my organization for effectively leveraging big data trends and technologies?
- How have my peers harnessed big data technologies and trends?
- What best practices are emerging?
- How have others defined and generated value?
- How will big data technologies evolve?
- What leading indicator should I use to pace the level of technology evolution around big data?
- How should I ready my IT infrastructure and architectures?

Big Data/Analytics Challenges

IDC Manufacturing Insights

IDC's Social Practice

Why IDC for Social Business

Our fact-based global research team of 21 full time social business analysts and over 100 contributing analysts worldwide covering social customer relationship management, enterprise 2.0 and collaboration, partner networks, supplier networks, unified communications, social commerce and social infrastructure, can help you with the following social business decisions:

- How can organizations use social business for a competitive advantage?
- How do CIOs enable and support the adoption of social business tools across the business?
- What's business value can be created by integrating social technologies with enterprise systems?
- How do organizations overcome the challenges they face when enabling /allowing employees to use social business tools?
- How do organizations calculate ROI and risk?
- How do CIOs create an architecture that can change as our expectations of the social network change?

Social Software Adoption

IDC Manufacturing Insights

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IDC Manufacturing Insights Community

Where Business + IT Professionals Connect