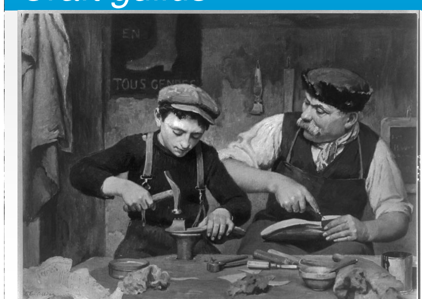
The 4th Industrial Revolution

5th March 2015

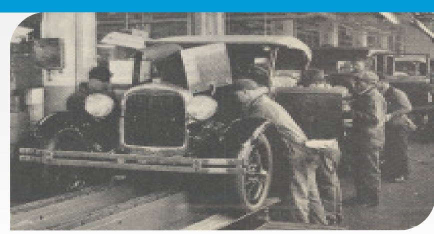

The world is changing fast
Disruptive tech
By 2025, ~2B new entrants in the consuming class
Demand fragment-ation
New entrants
Zero tolerance for lead time
Ever tougher competition on cost
Shift to emerging markets

4th industrial revolution is here

Pre-industrial area
Craft guilds



Industrial revolution
Assembly line

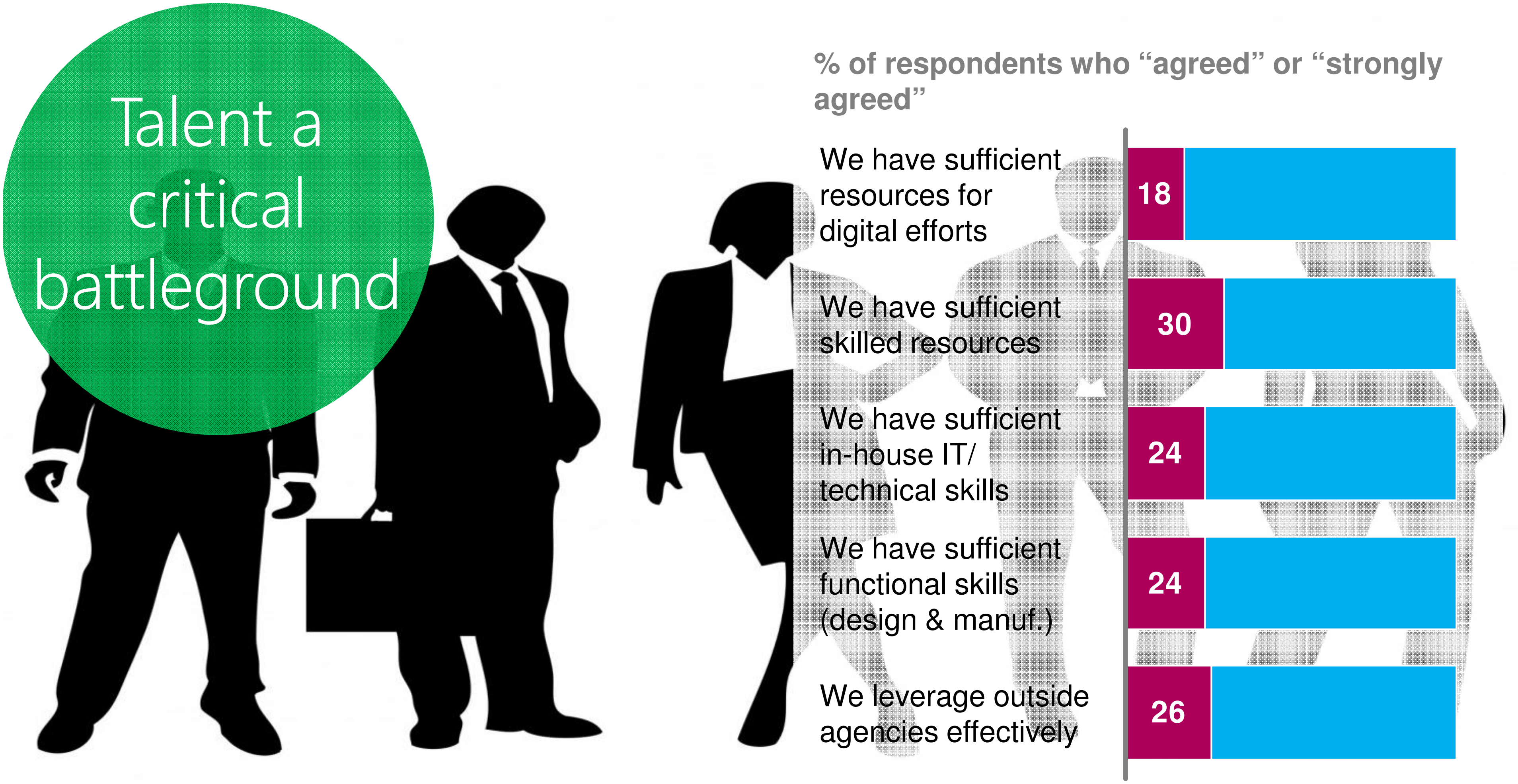


Current times
Toyota model

2025

???


Smart automated plants
+
Network of customer-centric plants
+
E-plant in a box in niche and remote markets
New plant models, new locations
SOURCE: McKinsey



SOURCE: McKinsey

Topic is top of mind across markets

See 4.0 as an opportunity?	91%	91%	80%
Feel prepared?	83%	57%	34%
% equipment replaced?	52%	41%	45%
Willing to outsource IT?	83%	68%	57%
..outside of home market?	23%	38%	23%

SOURCE: McKinsey

22% Productivity opportunity from automating in line with Germany or Japan

€200m Being invested by Germany in “Industry 4.0”

£100m Funding in Tech Centres in the UK since 2011

£1.1bn More invested by Fraunhofer Institute in De than Technology Strategy board in UK last year

Is Britain ready?

SOURCE: Press articles, The Times

Our Panel

Andrew Peters
Digital Factory MD
Siemens

Nigel Rowe,
SVP Global
Customer Solutions
Prologis

Ian Campbell,
Group Property
Director
Rolls-Royce

Louise Herring
Partner
McKinsey & Company