



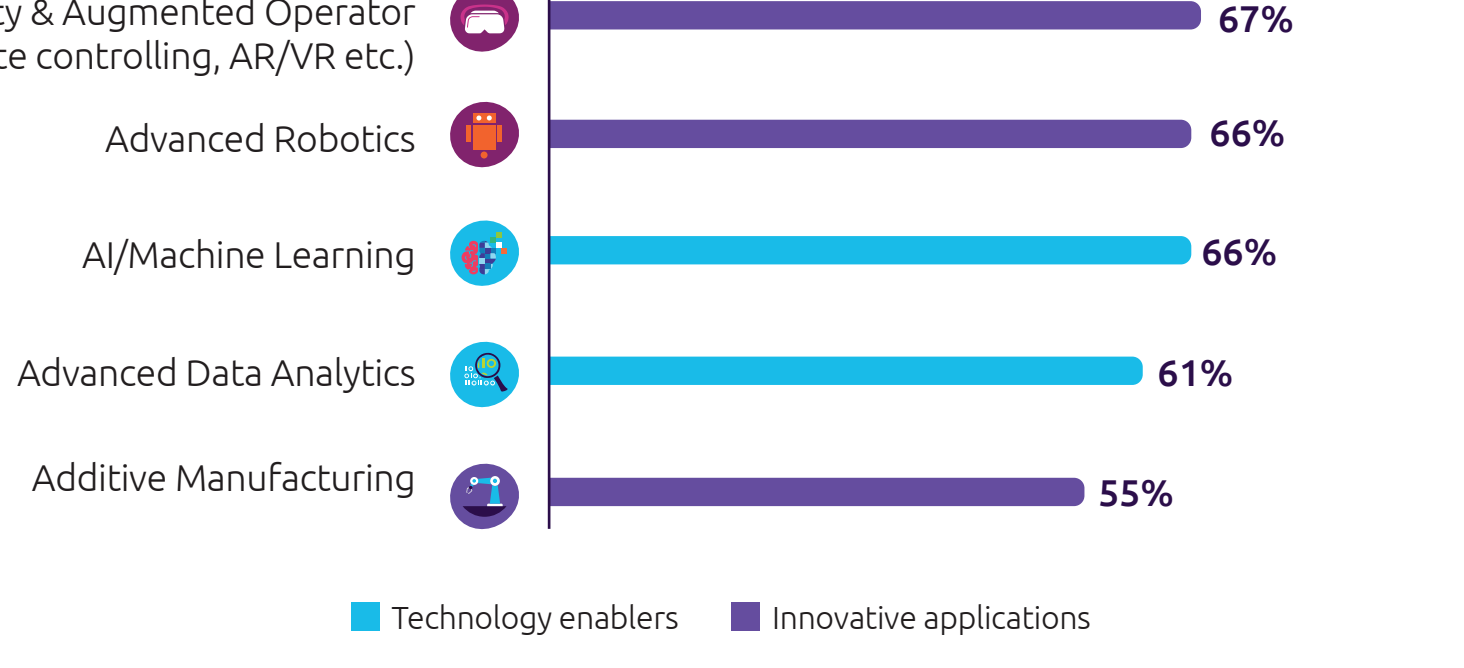
5G in industrial operations

How telcos and industrial companies stand to benefit

Companies across the world are ready to embrace 5G, but 5G's disruptive features will take some time to materialize

Industrial companies* consider 5G an attractive proposition and there is appetite to launch quickly

5G ranks higher than most other enablers for digital transformation

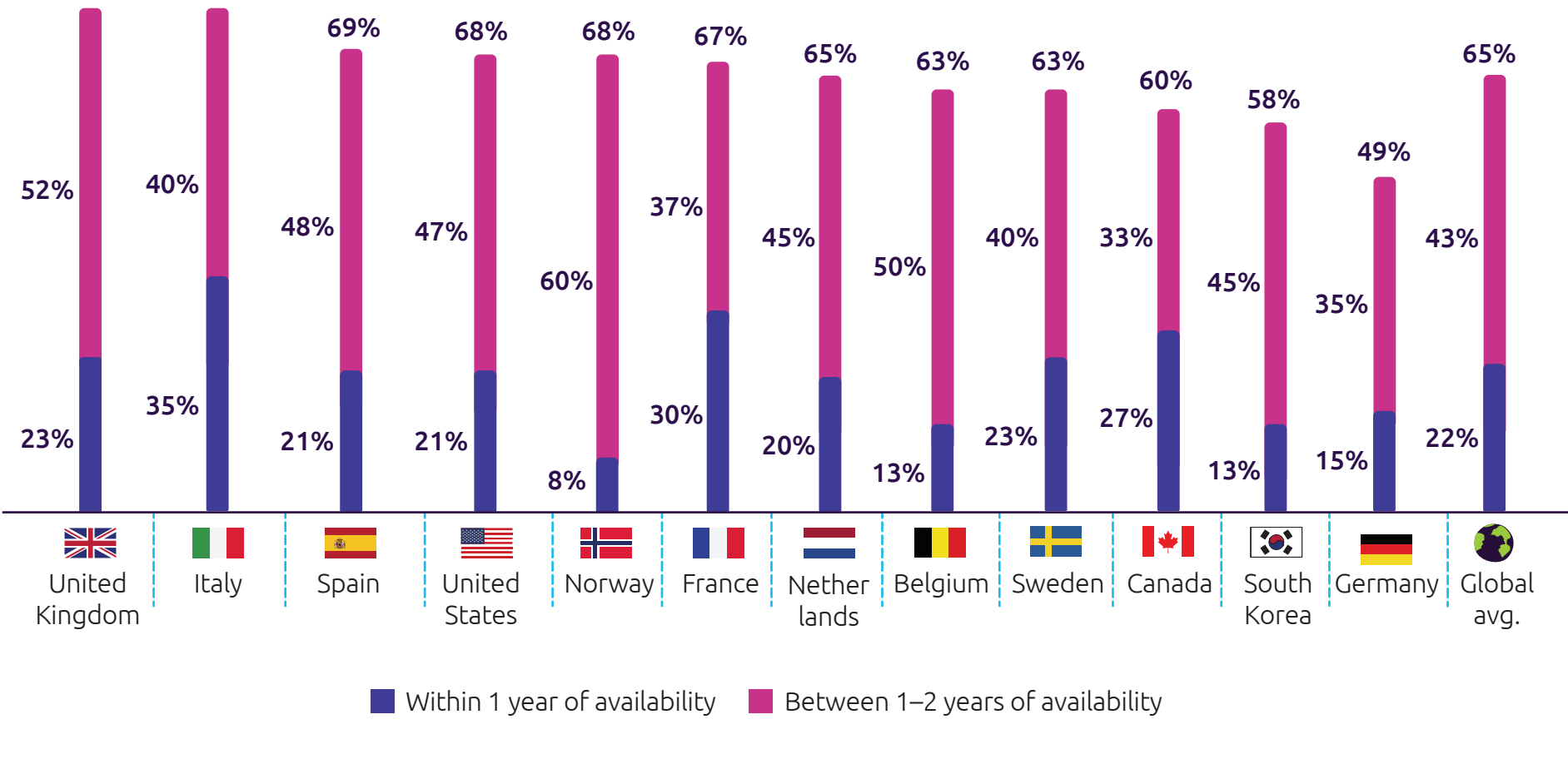


*Our research included 806 companies from industry verticals such as manufacturing, transport hubs (harbors, airports, train stations), logistics, energy & utilities which we are referring to as industrial companies throughout.

Source: Capgemini Research Institute, Industrial companies' survey on 5G, March–April 2019, N=806 industrial companies.

The majority are willing to implement 5G for operations within two years of availability

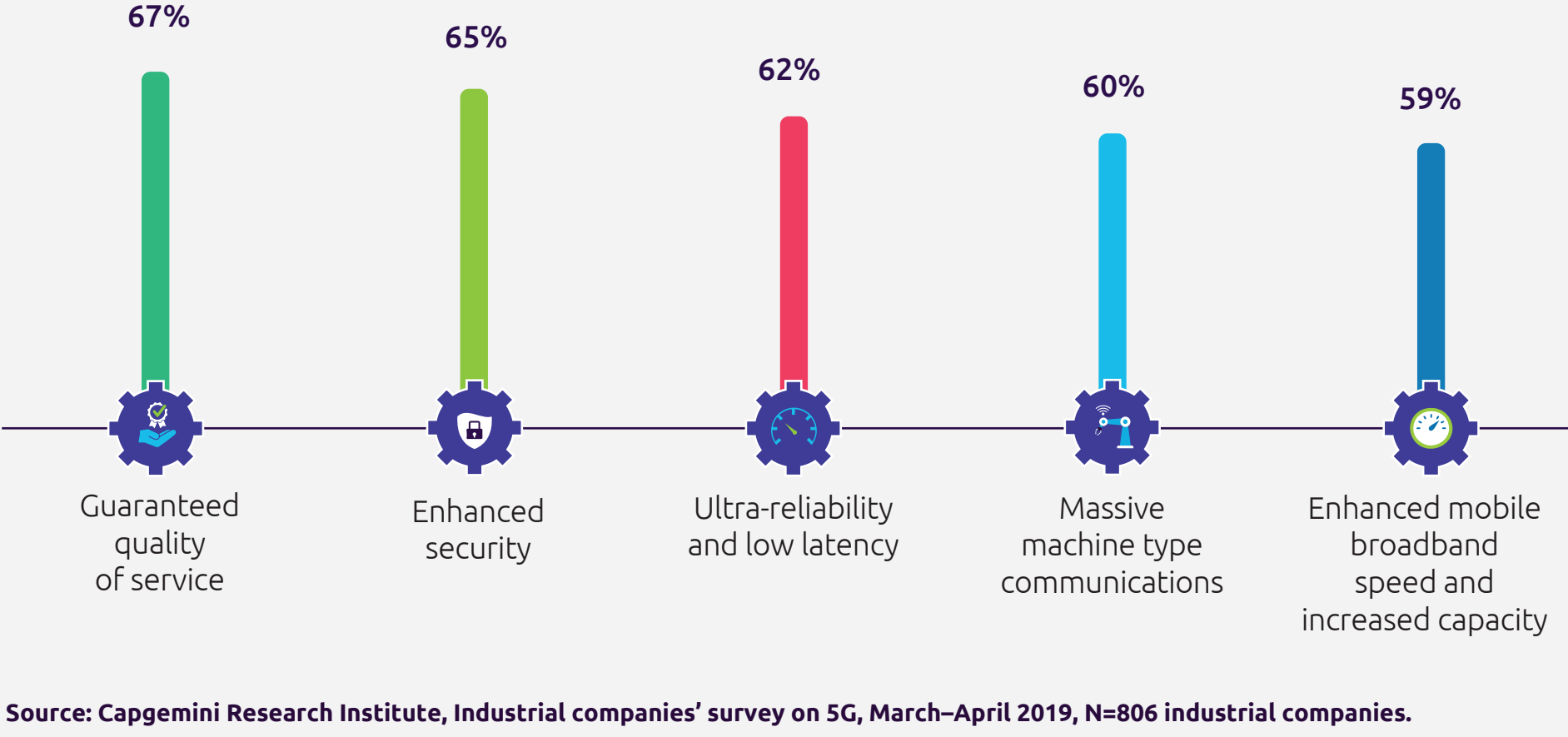
Willingness to implement 5G - by country



Source: Capgemini Research Institute, Industrial companies' survey on 5G, March–April 2019, N=806 industrial companies.

Executives believe a range of 5G features are critical for digital transformation

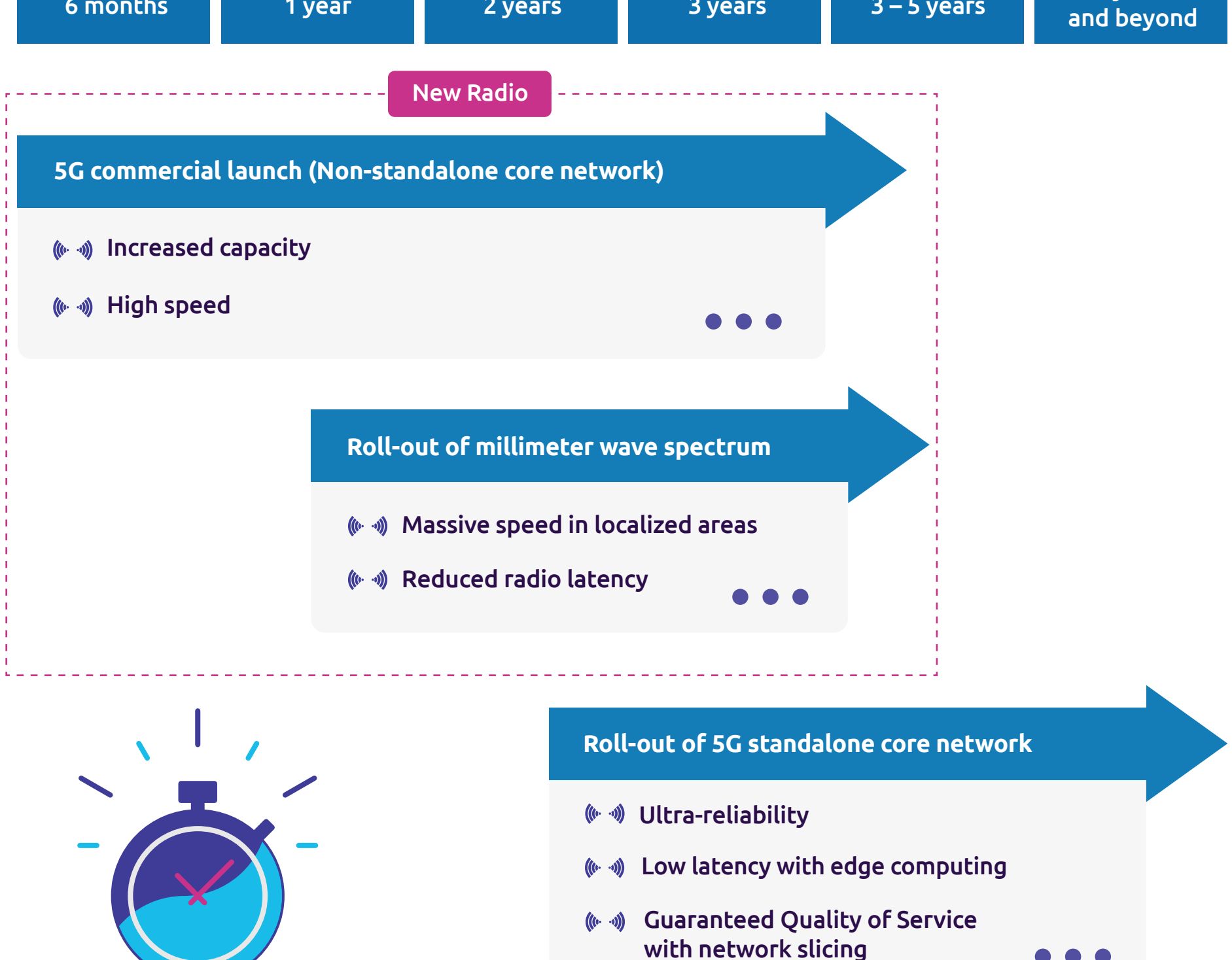
Importance of various features of 5G for digital transformation



Source: Capgemini Research Institute, Industrial companies' survey on 5G, March–April 2019, N=806 industrial companies.

However, telco players will need at least three years to provide all the anticipated benefits

Estimated timelines for 5G feature availability

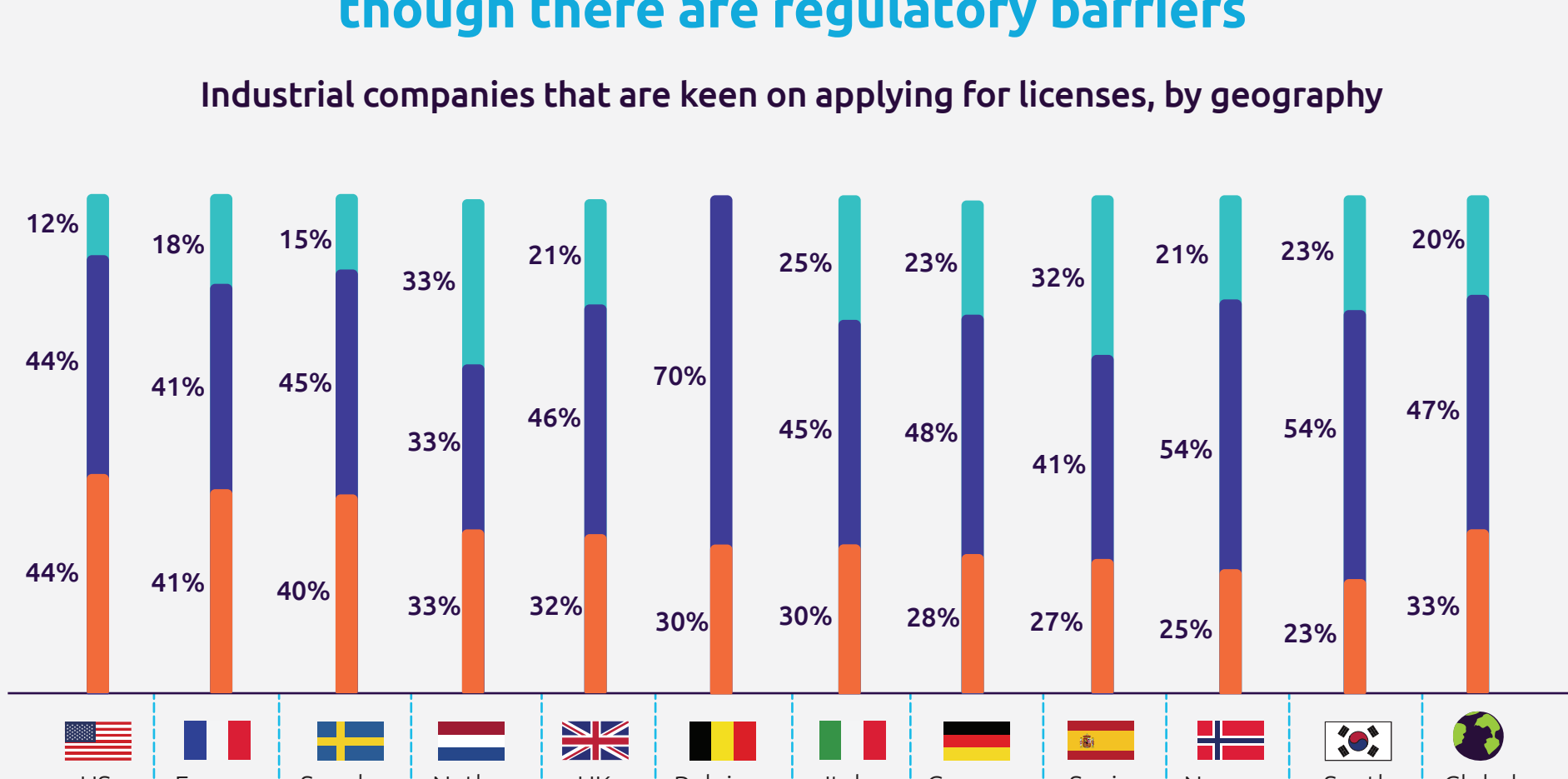


Source: Capgemini Research Institute, Telecom operators' survey on 5G, March–April 2019, N=68 telecom organizations, 150 respondents.

To overcome delays, some industrial companies are considering applying for local 5G licenses

One-third are interested in local licenses, though there are regulatory barriers

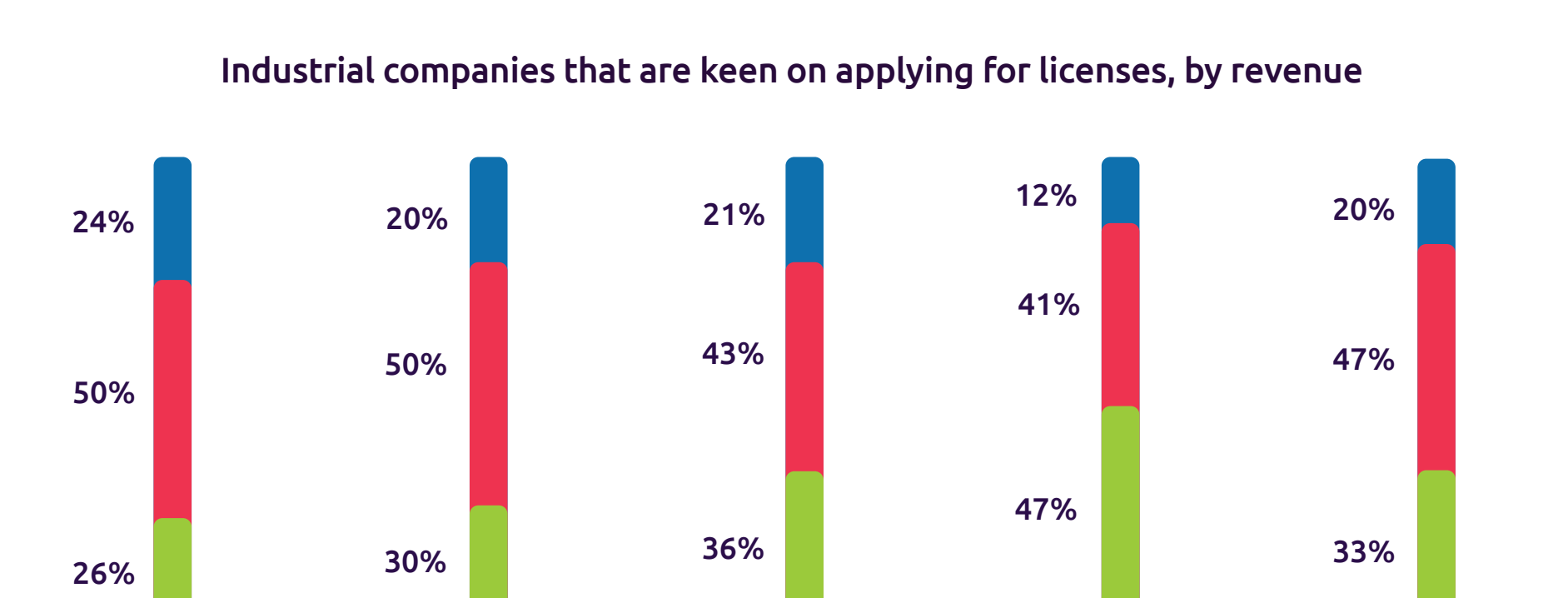
Industrial companies that are keen on applying for licenses, by geography



Source: Capgemini Research Institute, Industrial companies' survey on 5G, March–April 2019, N=313 industrial companies, percentages represent the share of respondents who have 5G in their connectivity roadmap and chose to answer this question.

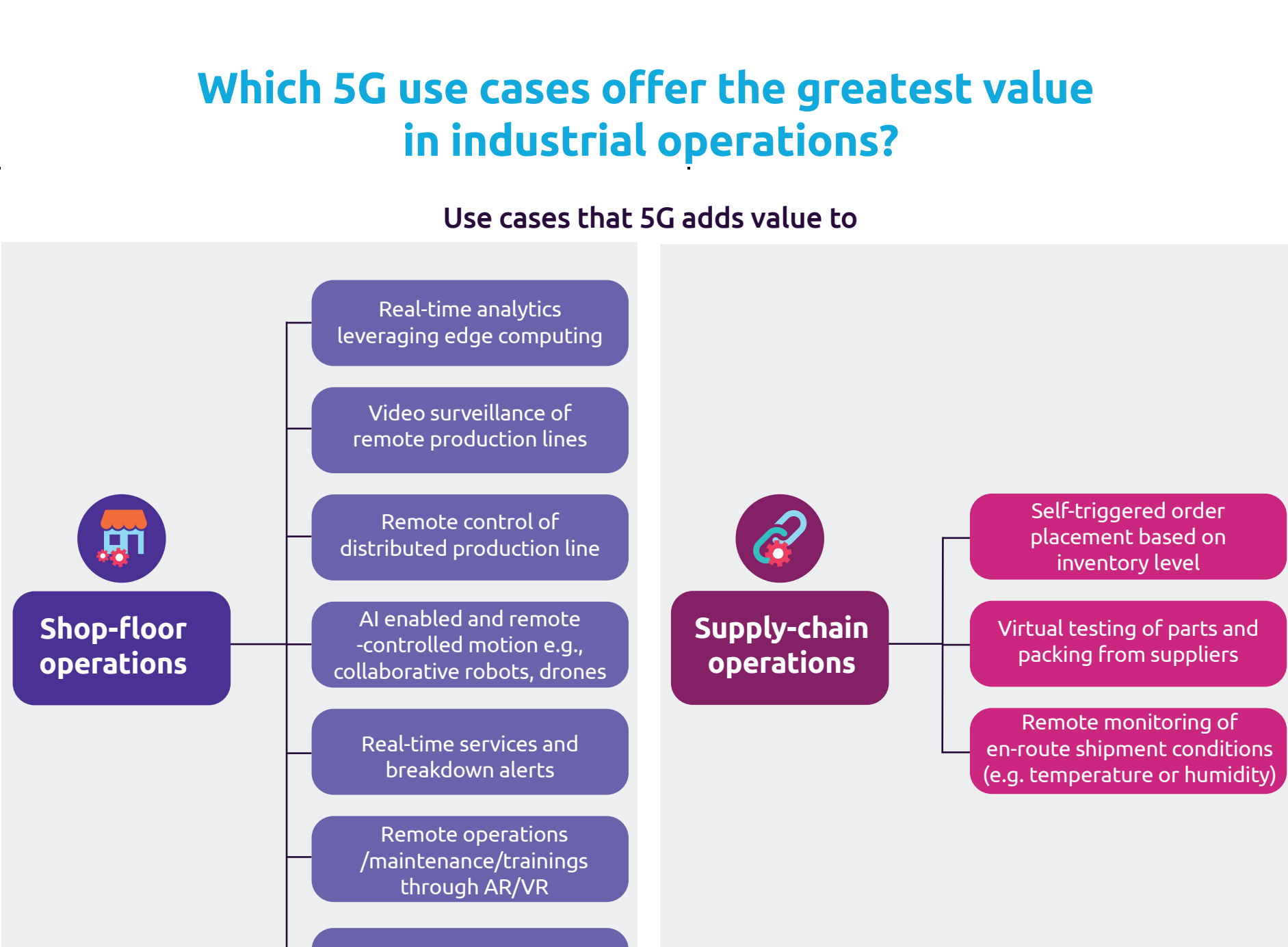
This interest in local licenses is more prominent among large organizations

Industrial companies that are keen on applying for licenses, by revenue



Which 5G use cases offer the greatest value in industrial operations?

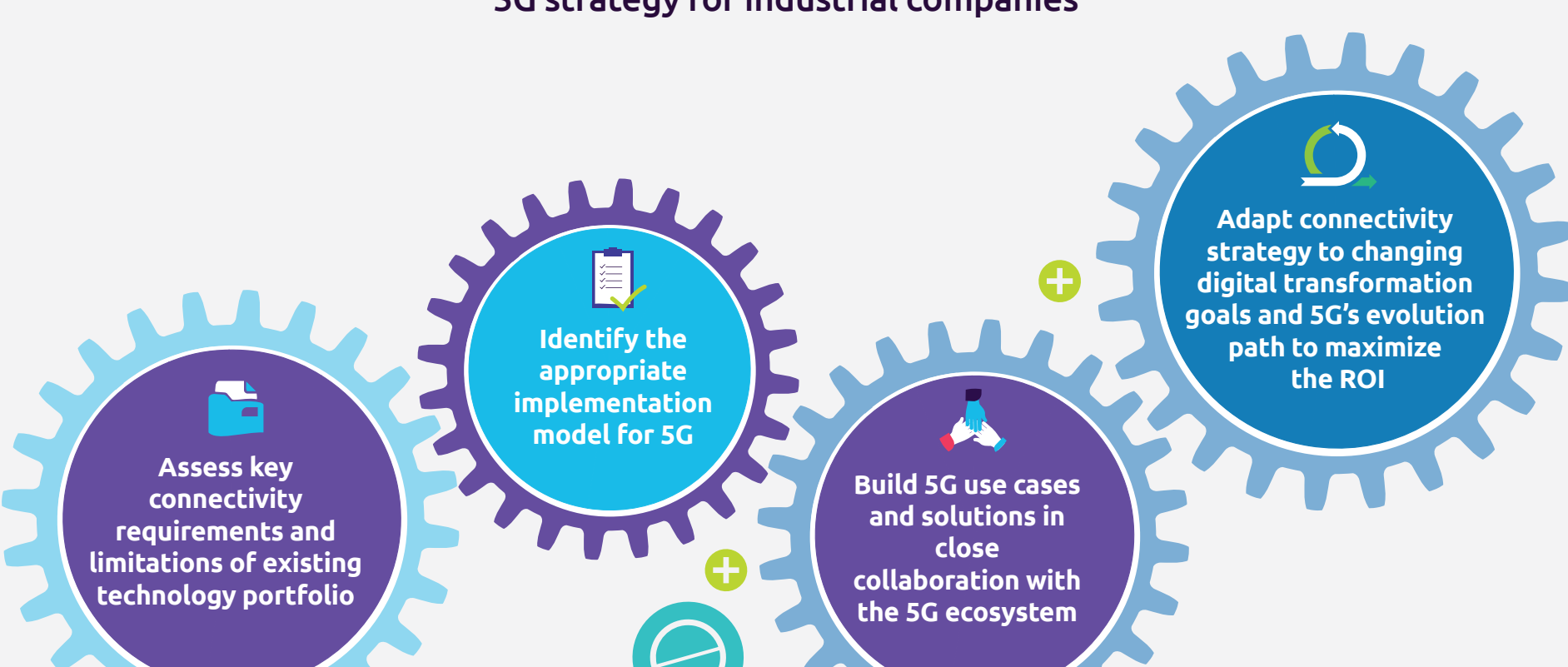
Use cases that 5G adds value to



Source: Capgemini Research Institute, Industrial companies' survey on 5G, March–April 2019, N=806 industrial companies.

How to get strategic value from 5G?

5G strategy for industrial companies



Source: Capgemini Invent, Capgemini Research Institute analysis.

5G strategy for telecom operators



Source: Capgemini Invent, Capgemini Research Institute analysis.

Download Report