

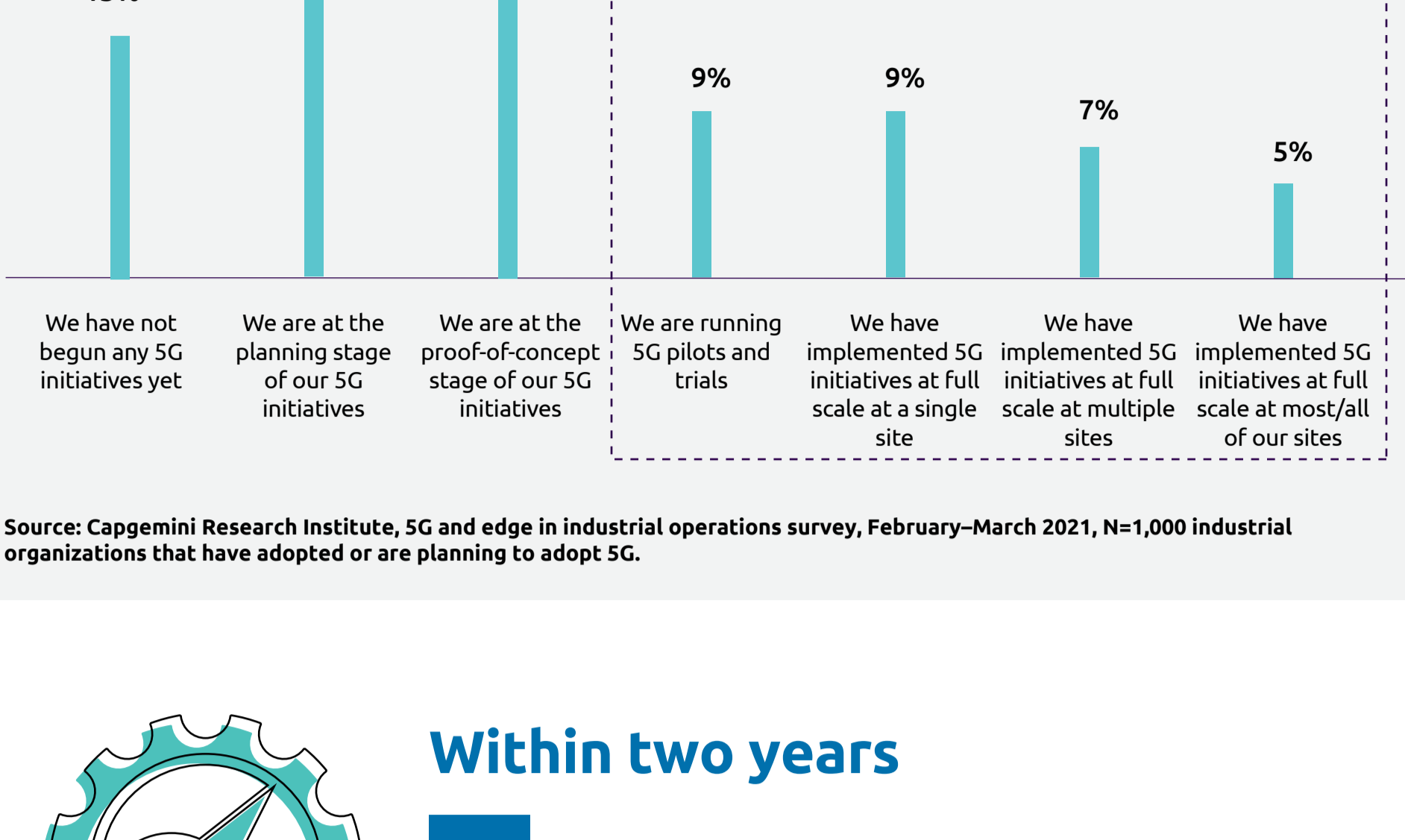
Accelerating the 5G Industrial Revolution

State of 5G and edge in industrial operations

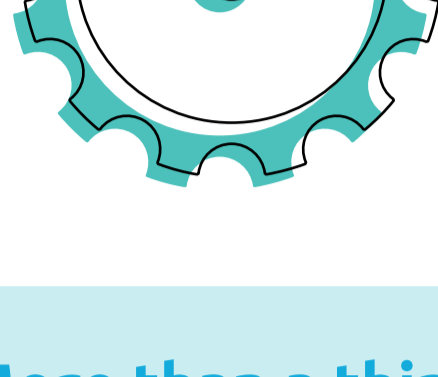
These are early days for industrial 5G adoption

Most industrial organizations that intend to adopt 5G are at the planning and ideation stages

What is the current status of 5G implementations in your organization?



Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=1,000 industrial organizations that have adopted or are planning to adopt 5G.

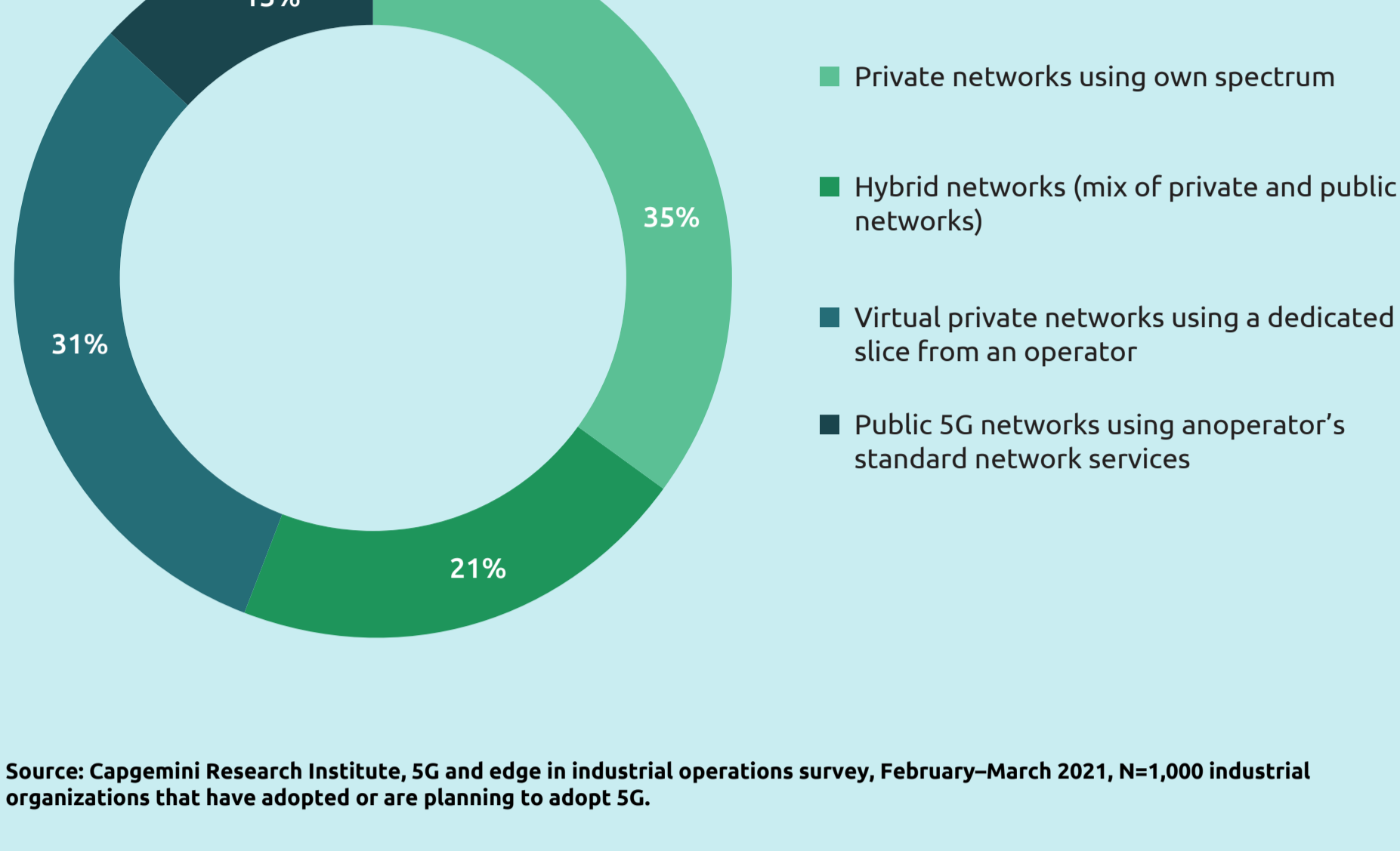


Within two years

40% of industrial organizations plan to implement 5G at scale at a single site

More than a third of industrial organizations prefer to deploy private 5G networks

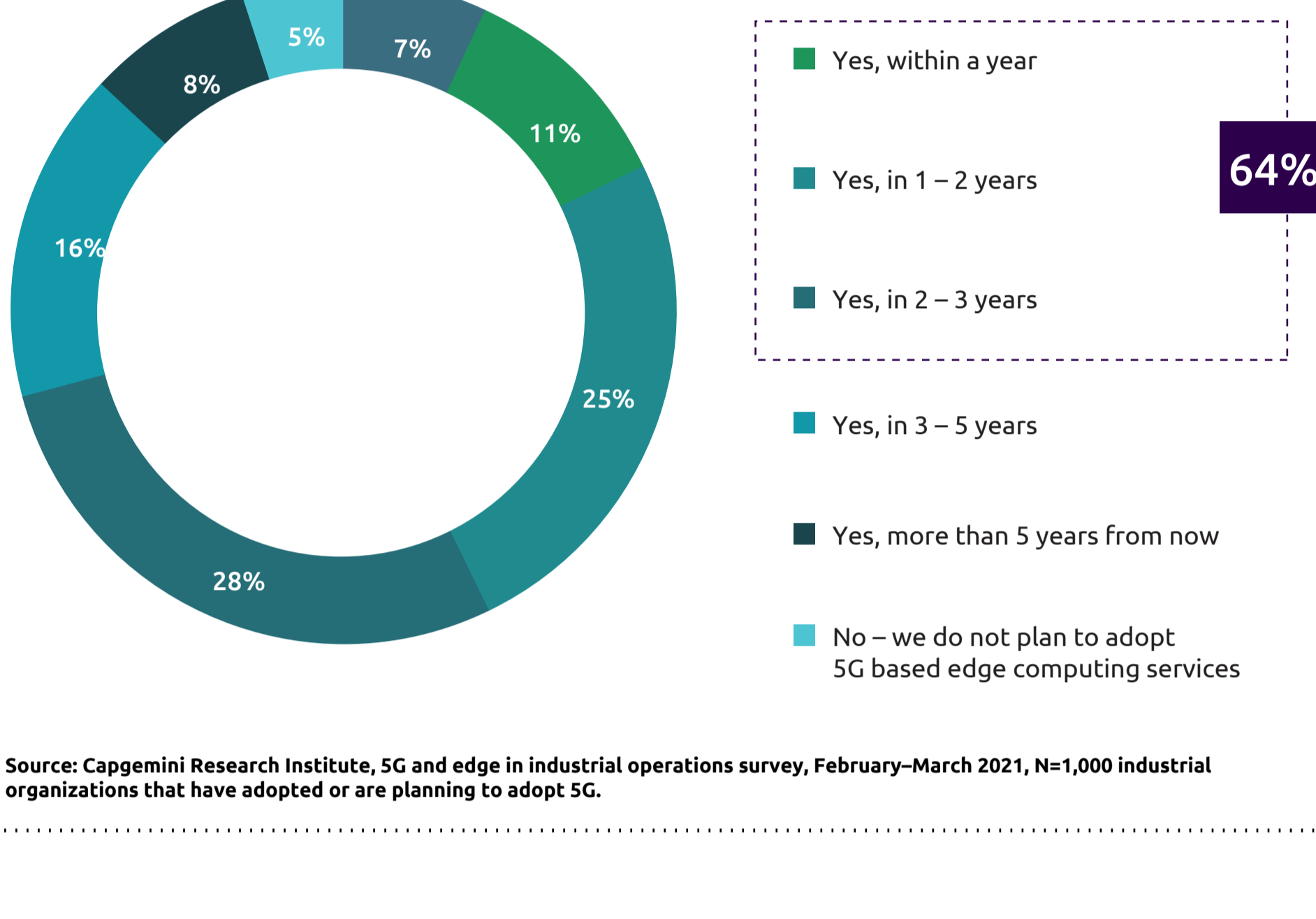
Which of the following is your organization's preferred model for 5G implementation?



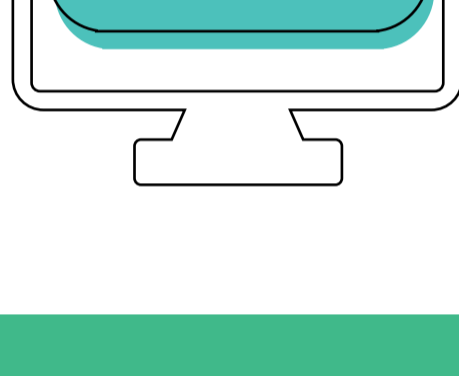
Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=1,000 industrial organizations that have adopted or are planning to adopt 5G.

Industrial organizations view edge computing as key to realizing the full potential of 5G

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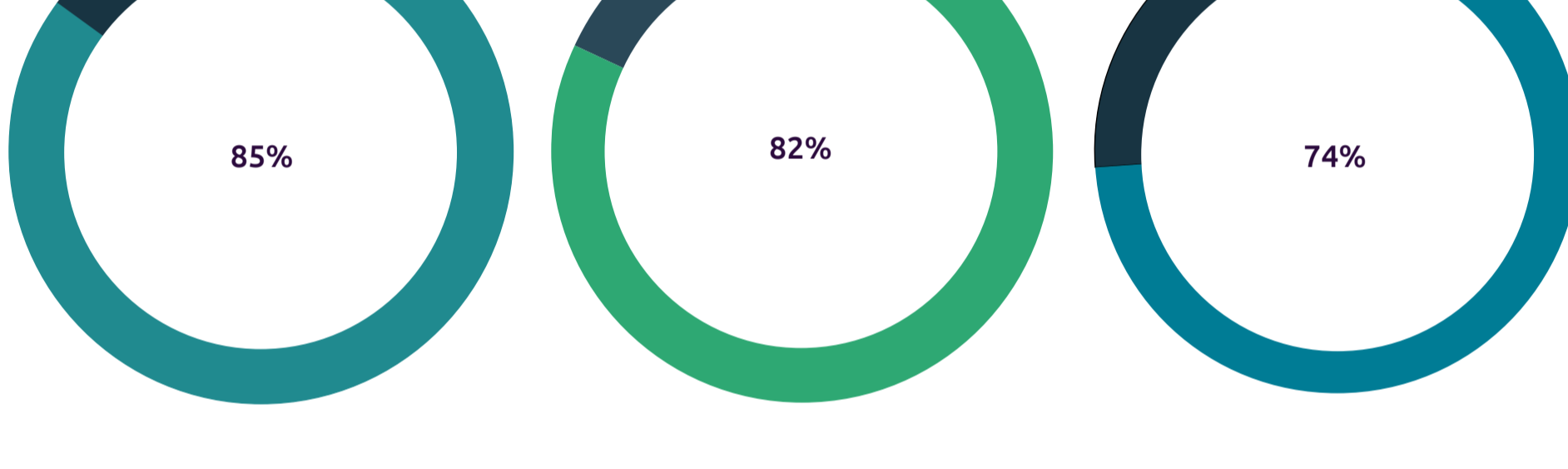


Top 2 drivers behind adopting 5G-based edge computing services

- Increased performance and reliability
- Increased data security and privacy

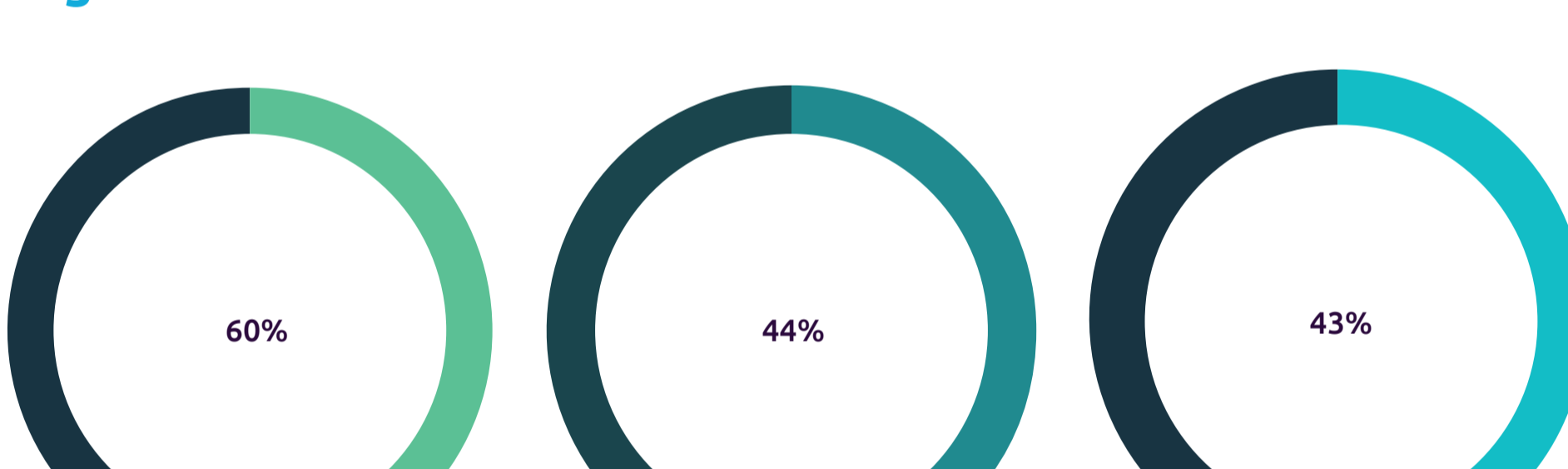
Early implementations are turning 5G hype into on-the-ground reality

5G features have matched or exceeded expectations for the majority of early adopters



Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=89 for network slicing with Quality of Service (QoS) control, N=76 for edge computing, N=105 for ultra-reliability and low latency.

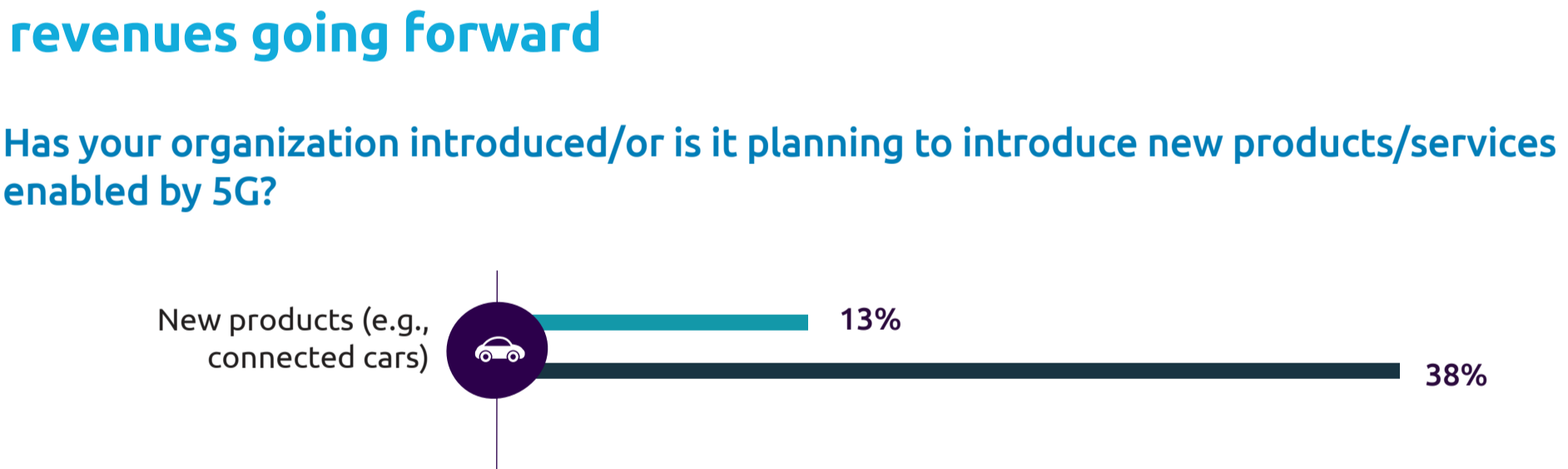
5G is already delivering business benefits for industrial organizations



Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=302 industrial organizations that have run pilots/trials or full-scale implementations of 5G.

Industrial organizations are optimistic that 5G will drive revenues going forward

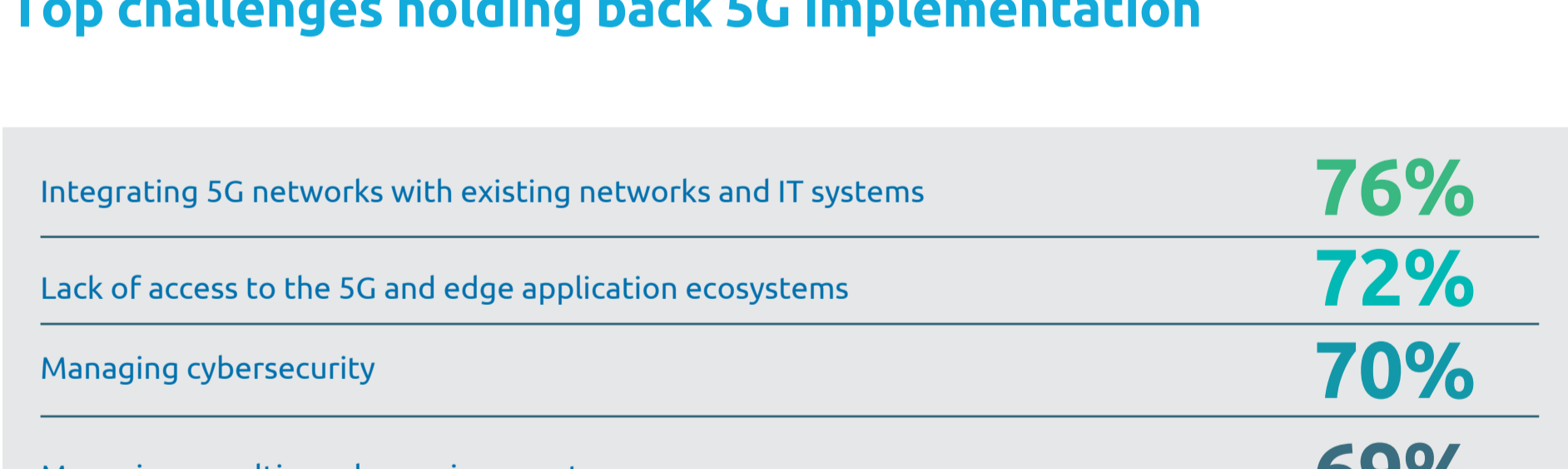
Has your organization introduced/or is it planning to introduce new products/services enabled by 5G?



Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=1,000 industrial organizations that have adopted or are planning to adopt 5G.

What is holding back more widespread implementation of 5G?

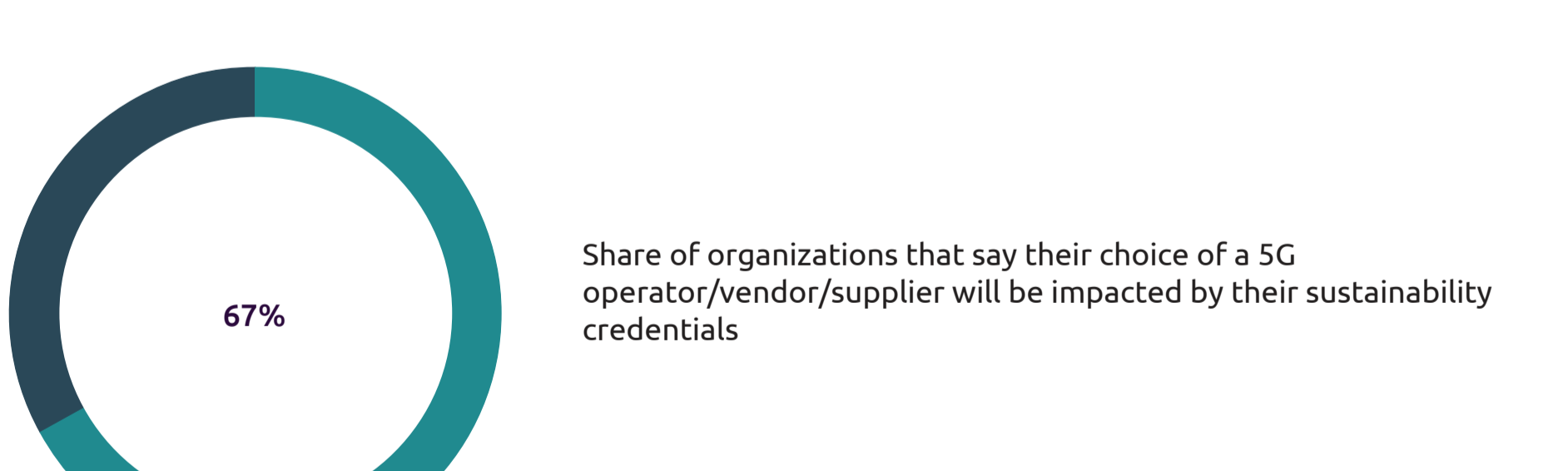
Top challenges holding back 5G implementation



Source: Capgemini Research Institute, 5G and edge in industrial operations survey, February–March 2021, N=1,000 industrial organizations that have adopted or are planning to adopt 5G.

Industrial organizations are conscious of the environmental impact of 5G adoption

51% of industrial organizations say they are concerned about the potential negative environmental impact of 5G



How can industrial organizations accelerate 5G adoption?

- Start with a clear understanding of the capabilities of 5G and edge computing and how they can address challenges and drive innovation
- Identify the network deployment models that will best fit business needs and evaluate the trade-offs involved
- Engage with the ecosystem to jointly test and validate the benefits of 5G
- Build the business case for 5G adoption supported by a multi-year implementation roadmap
- Start gradually and test results before progressing with 5G adoption – fine-tune approach as the ecosystem evolves
- Ensure that security is built in by design from the earliest stages of 5G implementation

Sources: Capgemini Research Institute analysis.

How can telcos aid their industrial clients' 5G journey?

- Simplify the path to 5G adoption...
- Demonstrate the impact of 5G in the context of a client's unique industrial environment
 - Create a portfolio of enterprise offers to accommodate multiple network deployment scenarios and provide guidance on building an adoption roadmap
 - Help clients select the right use cases and invest in expanding the availability of vertical-specific 5G solutions
 - Provide seamless access to vertical-specific solutions and an end-to-end service offering with a strong partner ecosystem

- Cybersecurity**: Help industrial organizations understand the security implications of various network deployment scenarios and build adequate counter-measures
 - Sustainability**: Make environmental protection a priority as part of 5G implementations
- ...while building a strong foundation

Sources: Capgemini Research Institute analysis.

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