A Connected Industrial Workforce promises to transform manufacturing. But are manufacturers ready to embrace it?

Accenture research¹ shows that few global companies feel ready to make the Connected Industrial Workforce—human-machine-centric, rather than just human-centric—a reality. Based on the self-perceptions of the manufacturing executives surveyed in 2015, below are the key findings.

**A Connected Industrial Workforce drives significant new value**

- 52% of companies expect improved productivity
- 47% of companies expect improved operational efficiency
- 31% expect enhanced safety and risk management

**A Connected Industrial Workforce transforms manufacturing processes**

- 39% of companies already assign injection molding to collaborative robots
- 72% of companies will assign gluing and welding to collaborative robots in the next 5 years
- 69% of companies will assign assembling to collaborative robots in the next 5 years

**Most manufacturers recognize the benefits of a Connected Industrial Workforce**

- 85% expect it to be commonplace in their plants by 2020
- >50% want to lead in setting its agenda

**Most companies lack the confidence to implement it successfully**

- 85% say they are still digital followers or laggards, rather than leaders
- 22% have implemented measures designed to realize its potential

**Technical concerns hold them back**

- 70% worry about a shortage of skilled human workers
- 76% worry about data vulnerability
- 72% worry about system vulnerability

**Digital leaders spend almost twice as much as laggards on implementing the Connected Industrial Workforce—**

<table>
<thead>
<tr>
<th>Connected Industrial Workforce budget as % of annual R&amp;D spend</th>
<th>Laggards</th>
<th>Followers</th>
<th>Leaders</th>
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</thead>
<tbody>
<tr>
<td>Today</td>
<td>14%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Next 5 years</td>
<td>29%</td>
<td>25%</td>
<td>23%</td>
</tr>
</tbody>
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**Automotive players**

- 25% of companies will increase investments in a Connected Industrial Workforce from 19% of their annual R&D budget today to 27% over the next 5 years

**Industrial Equipment makers**

- 21% of companies will increase investments in a Connected Industrial Workforce from 17% of their annual R&D budget today to 22% over the next 5 years

**Construction Equipment companies**

- 24% of companies will increase investments in a Connected Industrial Workforce from 18% of their annual R&D budget today to 24% over the next 5 years

**By envisioning the full promise of the Connected Industrial Workforce, as well as the benefits they expect it to deliver, more global manufacturers could identify what’s holding them back, and begin to define their journey and who owns it. The findings suggest that the time to start raising their game—identifying new job profiles, and dedicating higher proportions of their R&D budget to the Connected Industrial Workforce—is now.**

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1 Accenture surveyed more than 500 senior executives and managers in the world’s leading automotive, industrial and construction markets in December 2015.