

M&H: servitizar en la era de la esmartización y la Industrie 4.0

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Datos de fondo

- Base instalada M&H = 1:20
 - Sobre cada maquina nueva que se instala, hay veinte a las que se puede ofrecer servicios
- Los margenes sobre servicios son -pro medio- 4 à 5 veces mas altos que los que se capta sobre venta de maquinas
 - No entrar en servicios puede mermar *profit-loss account*
- Sector M&H vasco obtiene el 5% de su facturacion de ingresos por servicios
 - Selectivos europeos del sector logran porcentajes mas altos

Call for servitization

- “La tendencia entre las empresas industriales de ir basando sus negocios mas en los servicios para así ganar en competitividad en el mercado”
- Nuevas formas de concebir las relaciones entre usuarios y proveedores de activos
- Nuevas formas de concebir los modelos de pago y cobro (cfr. *pay-per-use*)

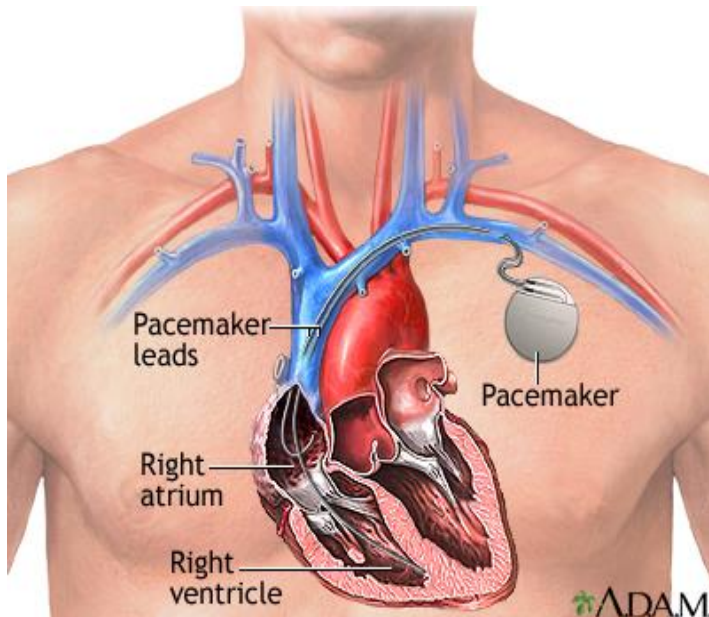
Call for smartization

- Particularmente si se entiende la servitización como:
 - Nuevas formas de concebir las relaciones entre usuarios y proveedores de activos
 - Nuevas formas de concebir los modelos de pago y cobro (cfr. *pay-per-use*)
- ... La smartization y conceptos de la Industrie 4.0 cobran relevancia

Relaciones / transacciones servitizadas requieren conectividad & interoperabilidad

- Vincularse a los clientes
- Vincularse a los activos instalados en sus sedes
- Vincularse a los procesos y operaciones que manejan

➤ Requiere tomar y mantener el pulso



- sensors
- transmitters
- actuators

Antología de experiencias con servicios avanzados en el sector M&H vasco

Papel-Co:

First mover wrt remote diagnostics programme
«FMD»: educating the market in vain
Providing on-line support on ad hoc basis caught on, but ongoing monitoring of client operations did not (clients obstruct /deactivate data access)
Limited internal data analysis capacity

Fresado-Co:

Dilligent trend follower
Observes gap between technological possibilities on its own behalf and propensity of clients to make use of advanced services
Clients keep devices in off-line modus disabling the firm's options to serve smartly
Mainstreaming smart service offering to push/enhance its uptake ("freemium")
New "app" to intervene/correct machining operations remotely
Stake in start-up wrt big data analysis

Descarga-Co:

Slow trend follower
Have launched smart machine monitoring applications, but not in a commercial spirit more as a (free) gadget for clients' internal use and to showcase Discharge-Co's capacities and readiness in this realm
Limited internal data analysis capacity

Perforacion-Co:

Dilligent trend follower
Have invested heavily in internal capacities for big data analysis and in own data logging devices
Encounters stronger market interest in cyber-security and big data analysis than in advanced services as such
Decided to use the former as a way-paver for advanced production service business

Expectaciones en cuanto al impacto de servicios avanzados sobre el negocio de la empresa

	Existing market	New market
New offering	<p>Uptake of advanced services among captive clients</p> <p>Fresado-Co</p> <p>Descarga-Co</p> <p>Perforacion-Co</p>	<p>Attending new clients in new market areas; both in the form of geographic expansion and sectoral diversification</p> <p>Descarga-Co (geo - PSS)</p> <p>Perforacion-Co (sector - S)</p>
Existing offering	<p>Trickle down effects of advanced services consumption on demand after base and intermediate services on behalf of captive clients</p> <p>Fresado-Co</p>	<p>In the slipstream of obtaining new clients in new places (geographical expansion), but from the traditional sector(s) a company addressed, such clients can also exert a demand after base and intermediate services</p> <p>Descarga-Co</p>

Plus: inverting the product-service sales order (Descarga-Co & Perforacion-Co)

Implications wrt M&H firms' potential to grow their business through advanced services

- Uptake of advanced services is progressing
 - Albeit being a bumpy ride
 - In some cases resembling the Solow paradox
- Contingencies on the user side are, a.o.:
 - Maintenance, bookkeeping, PSS/SDL culture
 - Receptiveness for payment model innovation
 - Level playing & trust between supplier and buyer
 - Imposition of overarching Big Data systems à la HANA, Predix o home brewed solutions
- On the supplier side:
 - Specificity and IP value of underlying equipment
 - Market position of the proposing firm
 - Counting with a cash cow
 - Uniformity of installed base
 - Uniformity in geographical, sectoral and operational sense

Eskerrik asko!

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