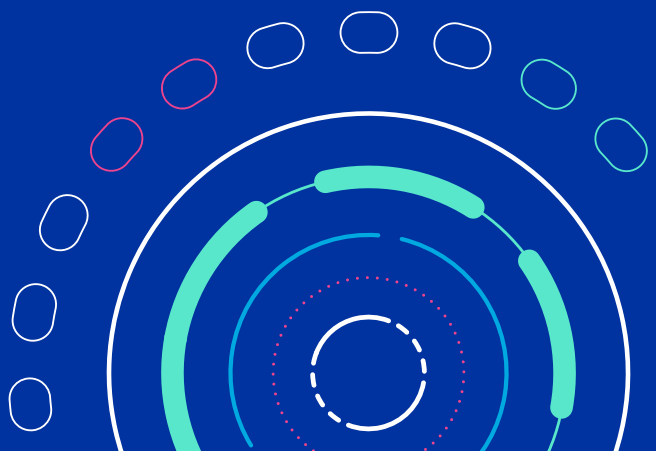
Manufacturing Leadership Council

SURVEY REPORT

THE FUTURE OF DIGITAL LEADERSHIP

FUTURE OF MANUFACTURING PROJECT



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INTRODUCTION

Since its founding, the Manufacturing Leadership Council—the digital transformation division of the National Association of Manufacturers—has believed that digital transformation in manufacturing entails three dimensions of change: technology, organization and leadership.

On the technology front, manufacturers need to adopt, implement and optimize advanced digital technologies, with a central focus on the smart use of data to drive greater efficiency, productivity and better decision-making.

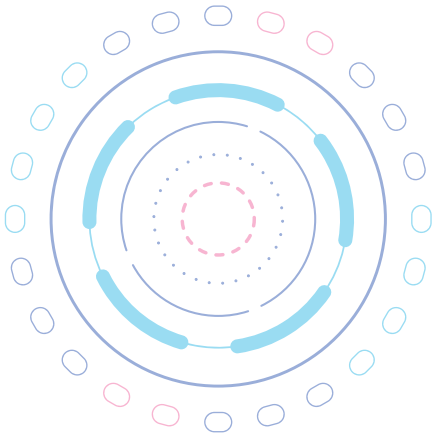
With respect to organization, the use of advanced technologies has a profound effect on how manufacturers organize their processes, conduct work and manage people. Understanding the organizational implications of advanced technologies is fundamental to successful digital transformation.

The third dimension, leadership, is the linchpin to both the successful use of advanced technologies and adapting the organization to their use. Leadership is the key to successful digital transformation. Without what the MLC calls "enlightened leadership" for the digital age—understanding the potential of new technologies to advance the business, orchestrating change cross-functionally and determining how information-empowered people should be managed in collaborative working environments—digital transformation will surely either not succeed or perform sub-optimally.

This is why the MLC, under the auspices of its Future of Manufacturing Project, devoted a year-long effort to better understand the future of digital leadership, particularly as artificial intelligence gains momentum in the industry. This effort started in December 2025 with an in-person event in Orlando, Florida, and is continuing through 2026.

Our goal is to help manufacturers understand the mindset, behaviors, skills and strategies they will need to manage increasingly digital businesses in the years ahead. This research report probes key aspects of these requirements, including organizational preparation for digital transformation, change management, and leadership skills and competencies that will be necessary in the future.

The MLC wishes to thank its Future of Manufacturing Project partners—EY; Infor; Invisible AI; Kalypso, a Rockwell Automation business; NTT DATA and RSM—for their continued support, invaluable feedback on the survey report and their commitment to imagine a better future for manufacturing. And a special note of thanks to all manufacturers who participated in the survey.



EXECUTIVE SUMMARY

The future of manufacturing leadership will be defined by how effectively leaders translate digital potential into organizational action. The Future of Manufacturing Project survey reveals a growing gap between ambition and readiness—only 17% of respondents believe their operational leadership teams are fully prepared to lead digital transformation over the next five years. While digital transformation is widely recognized as a strategic priority, many organizations are still working to align leadership, define ownership and build the capabilities necessary to execute at scale. As digital technologies and AI continue to reshape operations, the urgency is shifting from experimentation to leadership readiness.

Meanwhile, leaders want to prioritize digital transformation's most valuable uses—yet are still working to identify if not prove which deliver the greatest benefit. More than half of respondents identify use cases (53%) and business cases/ ROI (52%) as the most important focus areas, underscoring the need to justify digital investments and demonstrate measurable impact. However, this emphasis on the "why" and "what" often comes before fully addressing the "how". Fewer than half of organizations have a formal change management program in place, and nearly two-thirds have yet to define the relationship between humans and machines in their operations. While the digital transformation vision is clear, the organizational foundation required to sustain it is still being built.

Responsibility for digital leadership itself is evolving with no single model emerging as the standard. While 29% of organizations report a shared leadership approach to digital transformation, nearly one in five (19%) say no one is directly in charge. This lack of consistent ownership responsibility reflects a broader reality that companies are still determining how best to structure leadership for a digital, data-driven environment. At the same time, expectations for leaders are rising quickly, with 93% of respondents agreeing that digitally driven operations will require a fundamentally different set of skills, behaviors and mindsets compared to traditional manufacturing leadership.

Looking ahead, the capabilities that will define successful digital leaders extend beyond technical learning and understanding. Leaders must combine digital acumen with the ability to embed data-driven cultures and empower decision-making across the organization. They also must prepare for a future where the workforce shifts from "technicians" to "technologists," as AI and other technologies change the workforce roles needed in manufacturing and the required skills. While efficiency and competitiveness remain top priorities, organizations also must strengthen collaboration, talent development and alignment to fully realize their digital investments' value.

The findings point to a clear imperative: closing the gap between digital ambition and leadership readiness will be critical for manufacturers' future success.

SECTION 1

PREPARING ORGANIZATIONS FOR CHANGE

As manufacturing's digital era has made change more ubiquitous, more rapid and more urgent, preparation and strategic planning have become essential for a high-performing organization. However, as the pace of technology evolution has accelerated, many leaders have struggled to understand the roles and skills needed for the future, the organizational structures and systems that can best take advantage of data and digital, and the technologies that can have the most impact and ROI.

Today's manufacturing leaders face an important to-do list to prepare for the future: Educate themselves on digital technology and its operational applications. Lay the groundwork for an industrial data foundation. Upskill the workforce with digital training. Strengthen OT–IT integration and develop a scalable architecture and technology roadmap.

For digital transformation to succeed, operational leaders need to consider all levels of the organization. To keep the C-suite willing to invest in new technology, it means aligning digital strategy to operational value in a way that shows results. To keep frontline teams engaged with new tools, it means creating strategies for change management. To keep their operational peers and other functional leaders willing to support new initiatives, it means creating cross-collaborative teams and establishing clear governance and ownership for decision-making.

Navigating all these challenges while continuing to manage the day-to-day business is a daunting task, but manufacturers appear to be making progress. When asked to assess how prepared their operational leadership teams are for digital transformation, 67% indicated that their teams are either fully or moderately prepared to lead, with 17% saying "fully" prepared. But more than a quarter of respondents said that leadership is only minimally prepared (28%) [Chart 1].

MOST VIEW LEADERSHIP AS MODERATELY PREPARED TO LEAD DIGITAL TRANSFORMATION EFFORTS

How prepared do you think your company's operational leadership team is to lead and manage digital transformation over the next five years?
(Select one)

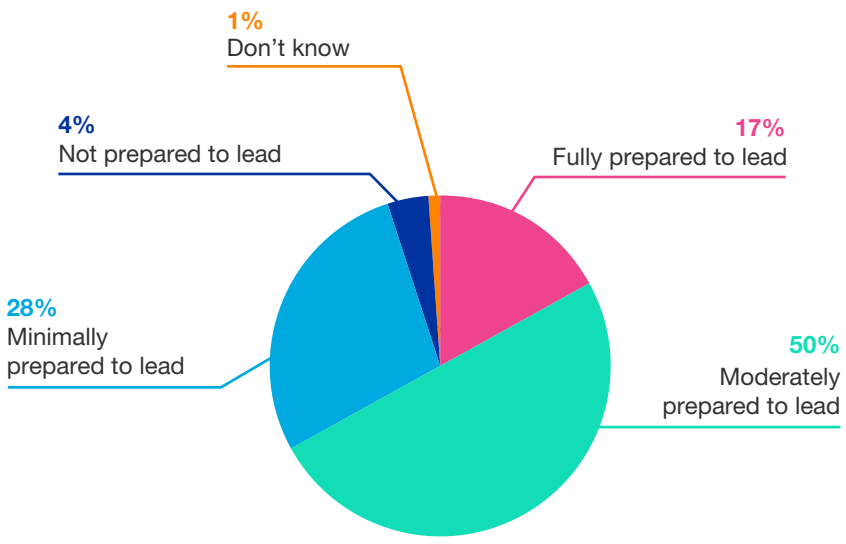


Chart 1

There is also the challenge of understanding the roles and skills needed for the future. Roles that were once confined to corporate IT are now found on the factory floor, such as a data analyst, data scientist or cybersecurity specialist. There could be a need for a specialist with expertise in industrial AI, machine learning or automation engineering.

As technology continues to find its place within manufacturing operations, leaders are tasked with understanding these new responsibilities and devising a plan for future team structures. But most respondents (63%) said that their operational leaders had more work to do to go beyond a basic understanding of new digital roles [Chart 2].

MAJORITY OF OPERATIONAL LEADERS STRUGGLE TO UNDERSTAND NEW DIGITAL ROLES AND SKILLS

How well prepared do you think your operational leaders are in understanding the new digital roles, responsibilities and skills that workers will need in the next five years? (Select one)

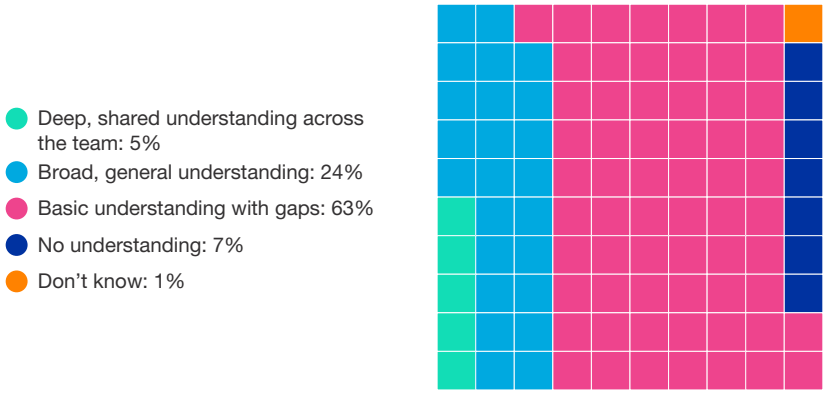


Chart 2

Digital transformation requires continuous care and feeding and cannot be treated as a one-time activity. While a respectable 45% said their organization does have a change management program in place to support digital strategy, slightly more said that no such program existed [Chart 3].

FEWER THAN HALF HAVE A DEFINED CHANGE MANAGEMENT PROGRAM

Has your leadership team created an organizational change management program to help support its digital strategy? (Select one)

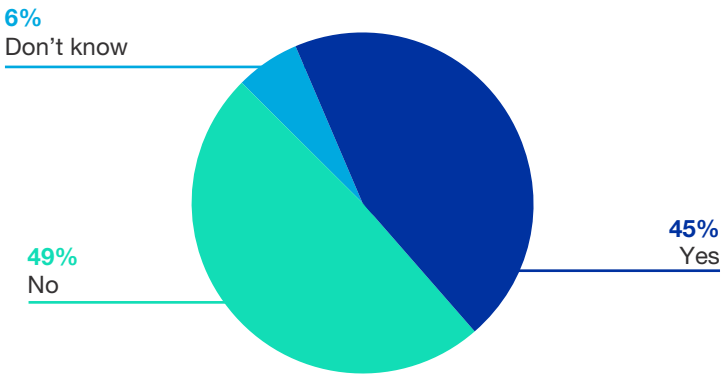


Chart 3

For the organizations that do have a formalized change management program, the focus of these initiatives has most often included creating leadership alignment and articulating how a digital strategy supports business goals (55%) [Chart 4]. Many programs also include the formation of a dedicated change management team responsible for communicating about change to different plants, shifts and functions (48%).

CHANGE MANAGEMENT PROGRAMS FOCUS ON LEADERSHIP ALIGNMENT, GOVERNANCE AND COMMUNICATION

As part of your company's organizational change management program to support digital transformation, which practices has your company emphasized so far? (Select up to three)

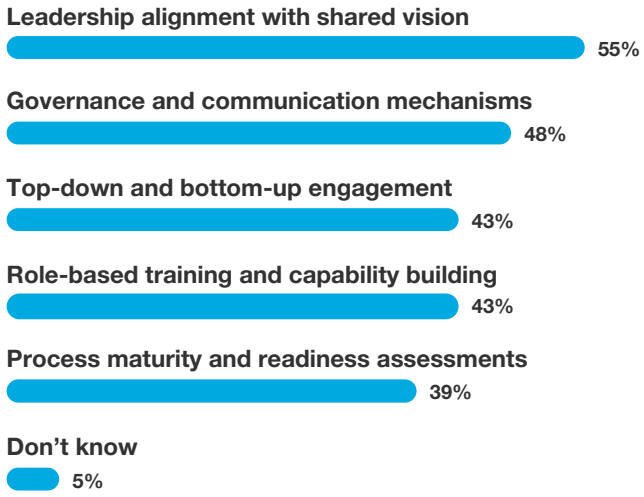


Chart 4

It is mission critical to focus on the digital future. Doing so provides benefits to operational efficiency and productivity, greater resilience to supply chain disruptions, and benefits to attract and retain talent. And companies need to take action. Slightly more than half of respondents (51% total) rated their company's future success as highly or moderately vulnerable due to their organization's current level of preparedness [Chart 5].

MORE THAN HALF FORESEE FUTURE SUCCESS NEGATIVELY IMPACTED BY LACK OF DIGITAL PREPARATION

How vulnerable do you think your company's future success will be as a direct result of your company's current level of preparedness for digital transformation? (Select one)

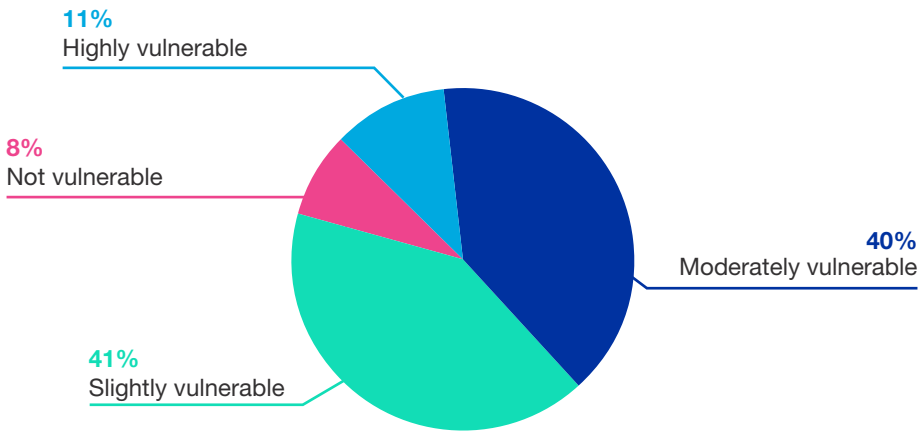


Chart 5

SECTION 2

PREPARING LEADERSHIP FOR THE DIGITAL FUTURE

Digital transformation is amplifying the interdependence between humans and machines. Technology and organizational change demand leadership alignment that can define and model success while establishing ownership, collaboration and priorities.

On the ownership front, there isn't a one-size-fits-all approach to digital leadership—and in many cases, there isn't a clearly defined owner at all. While shared leadership is the most common model in place today (29%), nearly one in five organizations (19%) report that no one is directly in charge of digital transformation.

Even when ownership is clear and defined, it is distributed across roles, with Chief Information Officer (13%), Vice President/Head of Digital Transformation (12%) and Chief Executive Officer (10%) most likely to lead these efforts. No single role stands out as the clear standard bearer.

The data suggests that companies are experimenting with how best to structure digital leadership, which may reflect differing priorities, operating models and levels of digital maturity [Chart 6].

THE DIGITAL TRANSFORMATION LEADER VARIES BY COMPANY

Who is leading the charge around your digital transformation efforts in your organization? (Select one)

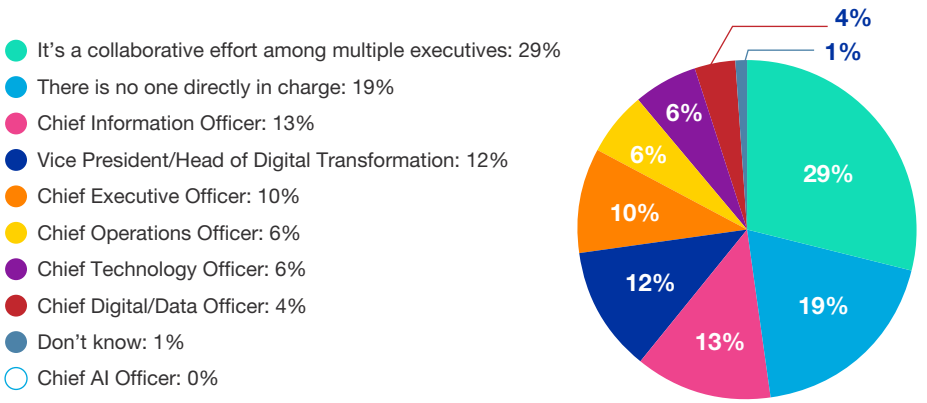


Chart 6

Given this fragmented ownership, it's not surprising that the AI age is as much a leadership challenge as it is a technology one. Most organizations have not yet acted to define the human-machine relationship in their organization despite how fundamental this will become in factories. This relationship will affect work design, trust, skills, decision hierarchy and change management.

Nearly 40% of respondents told us they have not translated AI discussions into a concrete workforce model, while another 27% say this is planned but not implemented. Taken together, nearly two-thirds of respondents have not acted to define the human-machine relationship. The low "yes" response rate (29%) indicates that many companies are still treating AI as a technical initiative rather than a broader, integrated leadership and organizational priority [Chart 7].

Even as they plan to spend more on AI and broaden its use within manufacturing operations, manufacturers are working to define the boundaries between what they want AI-powered machines to do and what they want humans to do. Proactively defining the human-machine relationship will be essential to achieving the right balance in how decisions are made on a host of operational issues.

MOST ORGANIZATIONS STILL DEFINING THE HUMAN-MACHINE RELATIONSHIP

As the AI age unfolds, has your operational leadership team taken proactive steps to define the relationship between humans and machines in your workplace? (Select one)

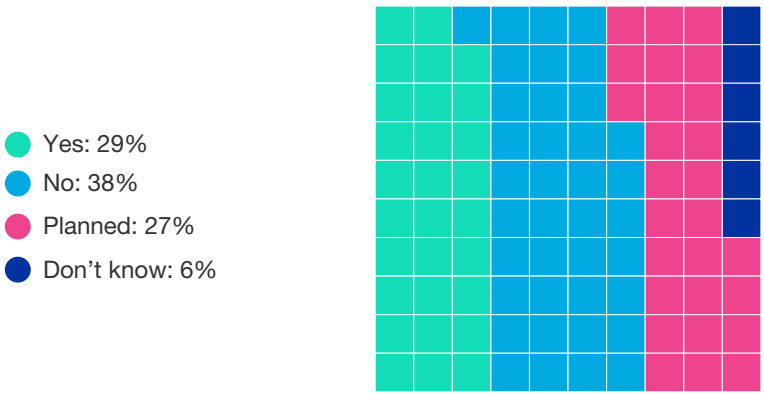


Chart 7

Leadership teams also appear to be prioritizing the "why" and "what" of digital transformation before grappling with the people, structural and strategic implications. This may be a natural progression; they must understand where and how to apply the technology before they can grapple with the ramifications of how the use of the technology may reshape their operating models including how work is performed. For example, 53% of respondents shared that their company's operational leadership team is seeking use cases that will drive the most value, while 52% shared that leaders want to know about business cases and ROI.

Meanwhile, leaders are also focused on what it will take to implement digital transformation in practical terms. Rounding out the three most important topics, 48% reported that technology requirements and roadmaps make their list.

However, there is a noticeable drop-off when considering organizational and workforce topics. Here, organizational impact (28%), skills and competency requirements (23%) and impact to strategy (22%) trail far behind the top three topics.

The significant gap in response rates suggests that while leaders are focused on justifying and implanting digital investments, they may be underestimating the organizational and workforce changes required to fully realize value [Chart 8].

MOST ORGANIZATIONS STILL DETERMINING VALUE OF DIGITAL TRANSFORMATION

What are the most important things your company's operational leadership team wants to know about digital transformation? (Select up to three)

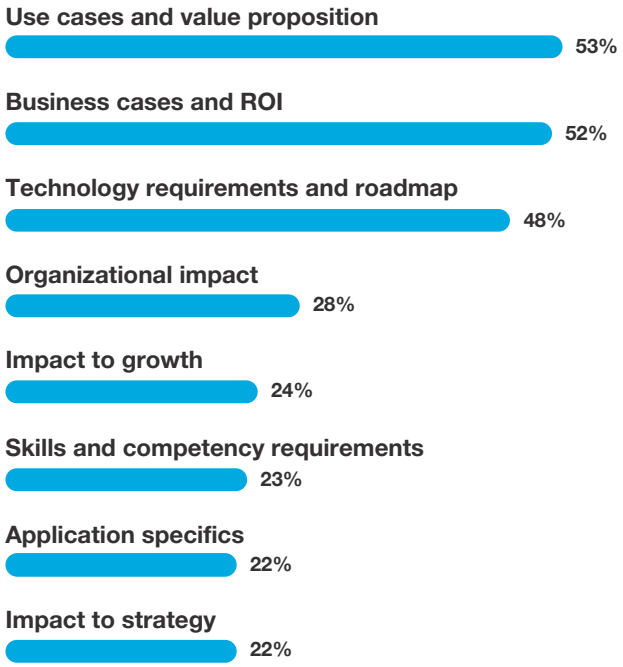


Chart 8

As organizations prepare their leaders for the digital future, most (58%) saw moderate collaboration across functional areas. Only 18% considered their leadership team to be highly collaborative and fully integrated and consistent across the organization. Taken together, more than three-quarters of respondents reported at least some level of cross-functional leadership collaboration related to the development and assessment of digital strategy.

Still, silos remain. Nearly one-quarter of respondents described collaboration as either limited (21%) or nonexistent (3%). If not addressed, these structural leadership barriers could undermine digital strategy development and execution [Chart 9].

MORE THAN 75% REPORT AT LEAST MODERATE CROSS-FUNCTIONAL DIGITAL STRATEGY COLLABORATION

How collaborative is your leadership team across multiple areas of the organization in the development and assessment of its digital strategy? (Select one)

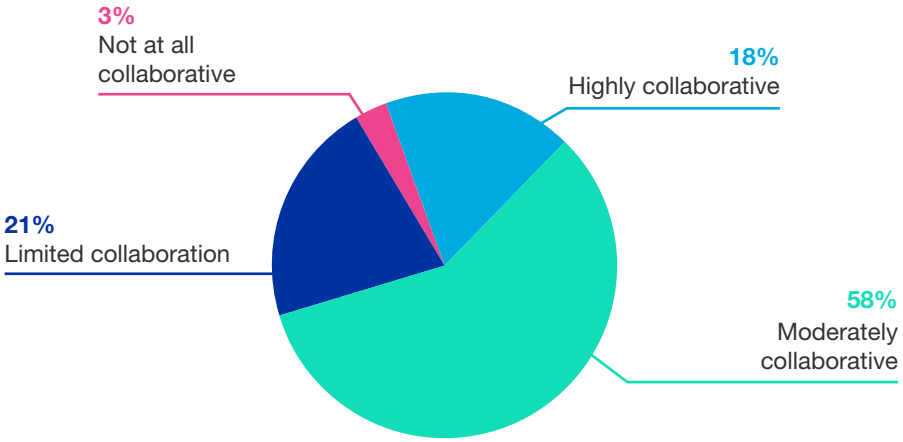


Chart 9

These findings suggest that digital transformation is recognized as a leadership priority, but there is work to be done to align ownership, define the human-machine relationship and build cross-functional environments that are required to execute digital transformation effectively.

SECTION 3

A NEW ERA FOR MANUFACTURING: ENLIGHTENED LEADERSHIP

For manufacturing leaders, a traditional style of leadership often meant relying on personal experience along with limited data provided by historical reports and periodic production reviews. The focus was on optimizing individual machines, lines or departments while operating under a siloed hierarchy that kept boundaries between operations, engineering and IT. A primary objective was maintaining a stable and predictable production environment.

Today's leaders are expected to possess an entirely new style of leadership. Decision-making through personal experience has been superseded by operational data, dashboards and analytics for better-informed decisions. Leaders need to understand how connected systems interact throughout the entire value chain and consider the digital architecture that supports manufacturing operations. Cross-functional collaboration is de rigueur for organizations that succeed at digital initiatives. In addition, leaders must learn to respond quickly to supply chain disruptions, shifting demand and the emergence of new technologies.

And yet, there remains a time and place for traditional operational expertise in the environment of today's industry. Manufacturing leaders still need to possess a deep understanding of their production processes, including process flows, cycle times, bottlenecks and equipment limitations. The essentials of lean management and continuous improvement are central to operational excellence. There is a need to understand root-cause analysis, risk management and structured production planning.

However, traditional knowledge will find its application in novel scenarios. The leaders of tomorrow should expect to work alongside both humans and machines, as manufacturers may look increasingly to technology to mitigate the long-standing and chronic issue of unfilled jobs. This could be especially true in rural or low-population areas where labor and production needs outpace what the local workforce is able to fully support.

Leaders of the digital era can be certain of one thing: Expectations will change, frequently and rapidly. While only about a third (28%) believed that digital leadership today means routinely integrating AI into decision-making, more than double that (58%) said that's how digital leadership will be described in five years [Chart 10]. There will also be a greater emphasis on creating digital change efforts that engage people in an intentional manner, in addition to utilizing digital platforms to improve team alignment, connection and accountability.

DIGITAL LEADERS WILL SOON FACE GREATER EXPECTATIONS TO UTILIZE AI-DRIVEN DECISIONS

Which statements best describe what digital leadership means today and in the next five years? (Select up to three)

Chart 10

Survival of the fittest doesn't mean survival for the strongest or the smartest; it means survival for those who accurately perceive their environment and best adapt to it. Digital leaders would be well advised to remember this teaching, as 93% of respondents said that the digital era will require a substantially different mindset, skillset and set of behaviors compared to traditional manufacturing leadership [Chart 11]. Those who adapt most effectively will reap the greatest rewards.

LEADERSHIP SKILLS AND BEHAVIORS WILL FACE SUBSTANTIAL CHANGE IN THE DIGITAL ERA

Do you agree or disagree with this statement: "The emergence of digitally driven operations and business models will require a substantially different approach and set of skills on the part of manufacturing company leadership." (Select one)

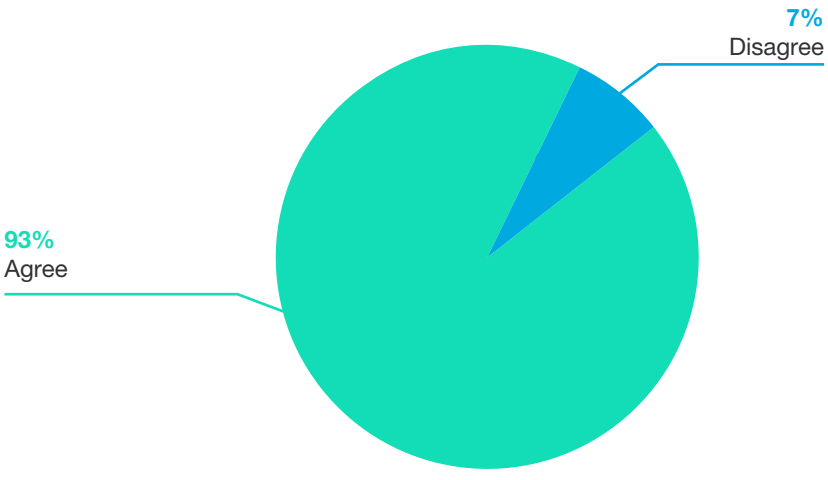


Chart 11

SECTION 4

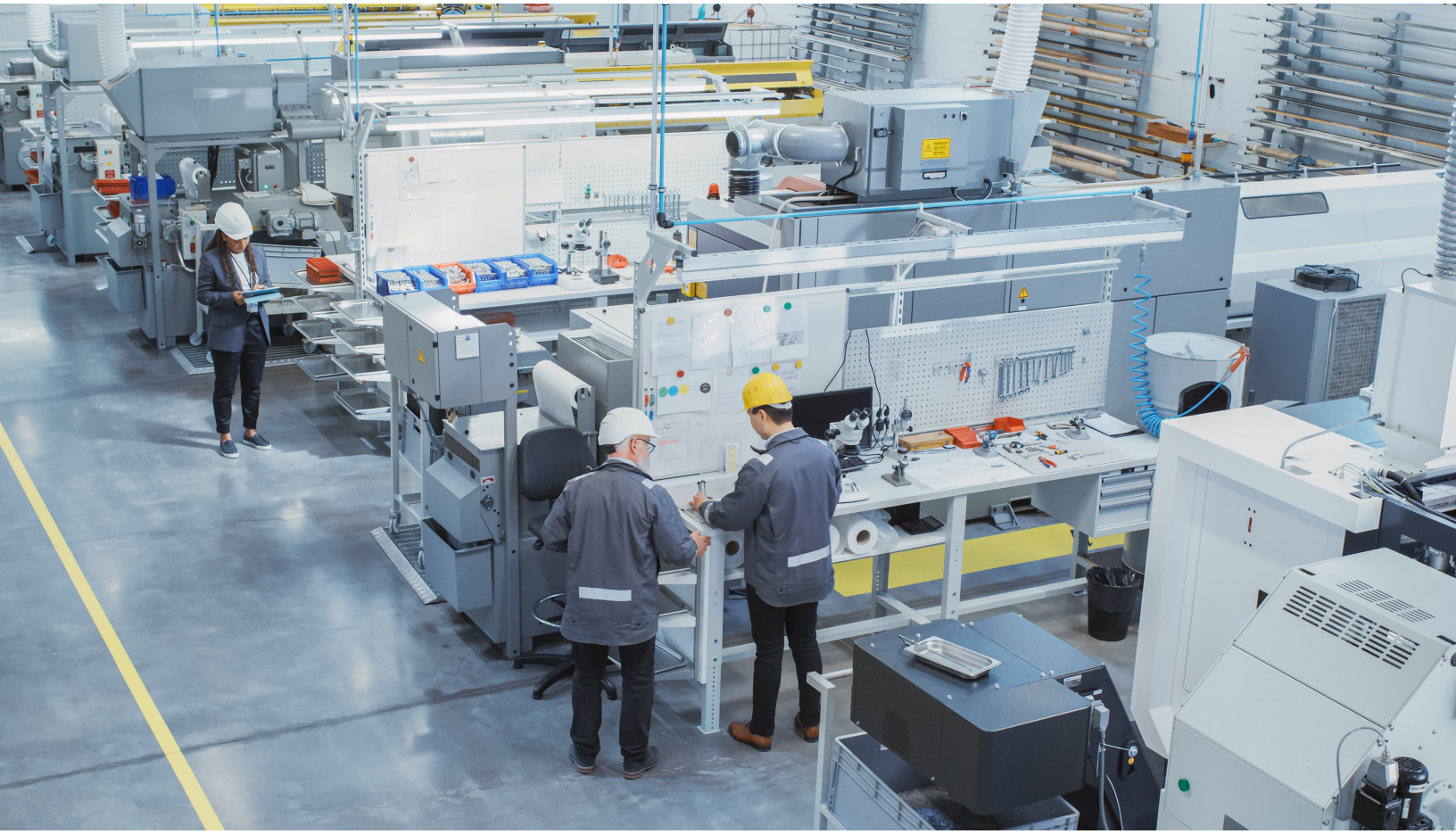
WHAT LEADERS NEED FOR A DIGITAL FUTURE

As manufacturers look ahead, the requirements for effective digital leadership are expanding beyond technological understanding. Leaders increasingly understand the importance of shaping cultures and embracing data-driven decision-making, empowering employees and integrating digital thinking throughout the organization.

At the same time, leadership priorities reveal a strong focus on performance, adaptability and gaining competitive advantage. There is an emphasis on using digital to drive efficiency, rethinking business models and adapting quickly to disruption. Yet even with this mindset, manufacturers continue to grapple with foundational challenges like proving ROI, defining strategy and aligning teams. While the vision for digital leadership is evolving, execution at scale remains a work in progress.

Leaders must bridge the gap between technical possibilities and business execution. More than half of those surveyed (51%) identified digital acumen as the most important skill for digital leadership in the next five years. This includes both understanding new technologies and how to apply them.

Embedding data-driven culture (49%) and empowering employees with data (45%) round out the top three most important future skills. Leaders recognize that digital success depends on data and decision democratization—how decisions are made and by whom.



While sharing data across the enterprise without silos (35%) and reducing hierarchical structures (27%) are recognized by respondents, they trail behind skills tied to understanding and activating tools and culture. Still, addressing structural barriers will be necessary to enable successful digital transformation [Chart 12].

MORE THAN HALF IDENTIFY DIGITAL ACUMEN AS THE MOST IMPORTANT DIGITAL LEADERSHIP SKILL

Which digital leadership skills do you feel will be most important over the next five years? (Select up to three)

Chart 12

As digital leaders continue to develop, efficiency and transformation-oriented capabilities dominate the agenda. Leaders are focused on optimizing today's operations and reshaping future business models. In fact, using digital technologies to reduce costs and improve efficiency (74%), learning to rethink business strategies and embrace a digital model (70%) and responding effectively to disruptions (68%) are the most important digital leadership skills.

It is important to note that there are marketplace outcomes also on the radar for respondents. Sixty-four percent identified the ability to leverage digital innovation to create and maintain a competitive advantage as highly important.

Computer-based analytics lag behind these strategic and adaptive capabilities. While 62% rated using computer-based analytics to make data-driven decisions as highly important, this indicates that data is viewed as a tool within the broader leadership toolkit.

Meanwhile, respondents indicated that leadership development may not be fully aligned with the workforce and the structural realities of digital factories and enterprises. Ranking lower on the importance scale are collaborative skills to manage flatter organizations and expand partnerships (34%), succession planning (31%) and managing an open, virtual working culture across multiple locations (15%) [Chart 13].

EFFICIENCY AND TRANSFORMATION-ORIENTED CAPABILITIES DOMINATE

Looking ahead, what degree of importance would you assign to the following digital leadership skills and abilities? (Rate each on a scale of low/medium/high to designate the level of importance)

- Low Importance
- Medium Importance
- High Importance

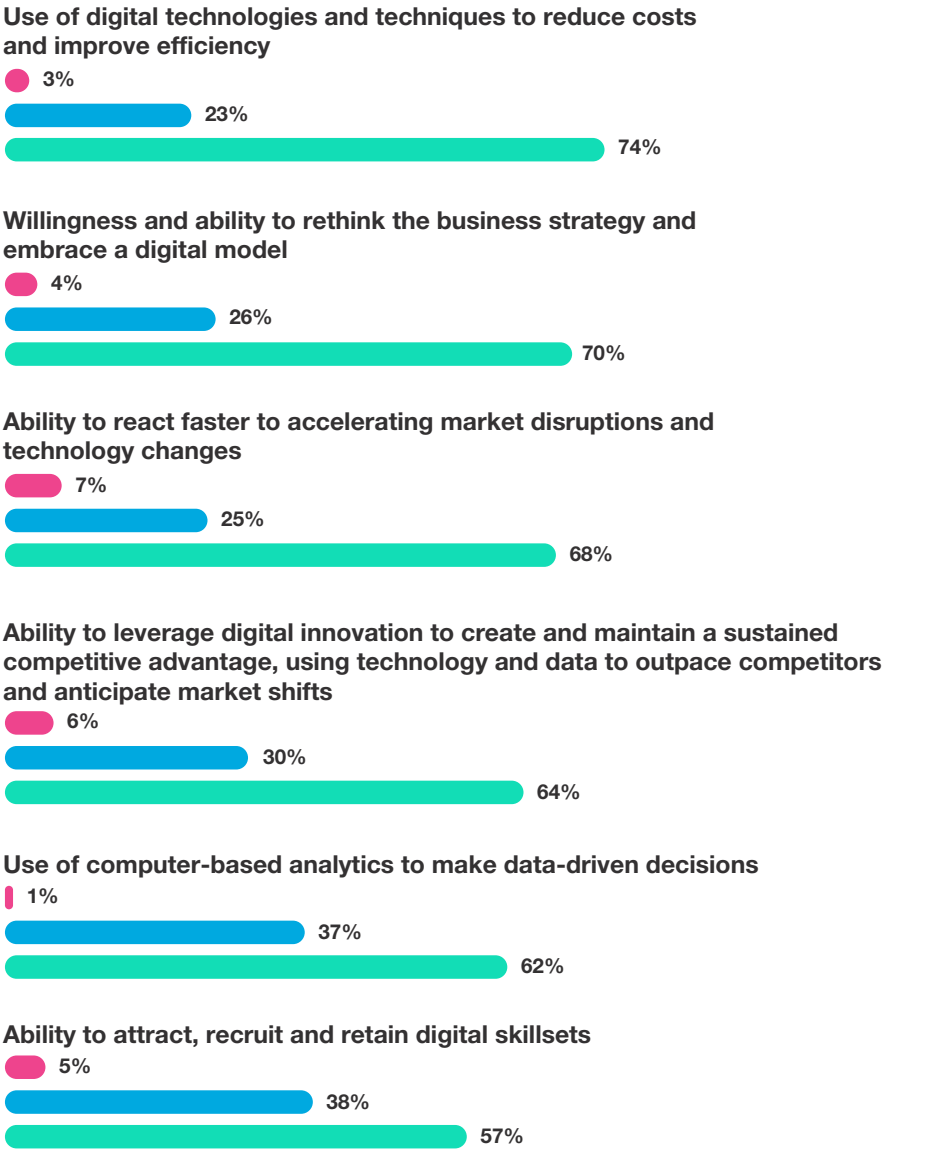


Chart 13, part 1

EFFICIENCY AND TRANSFORMATION-ORIENTED CAPABILITIES DOMINATE

Looking ahead, what degree of importance would you assign to the following digital leadership skills and abilities? (Rate each on a scale of low/medium/high to designate the level of importance)

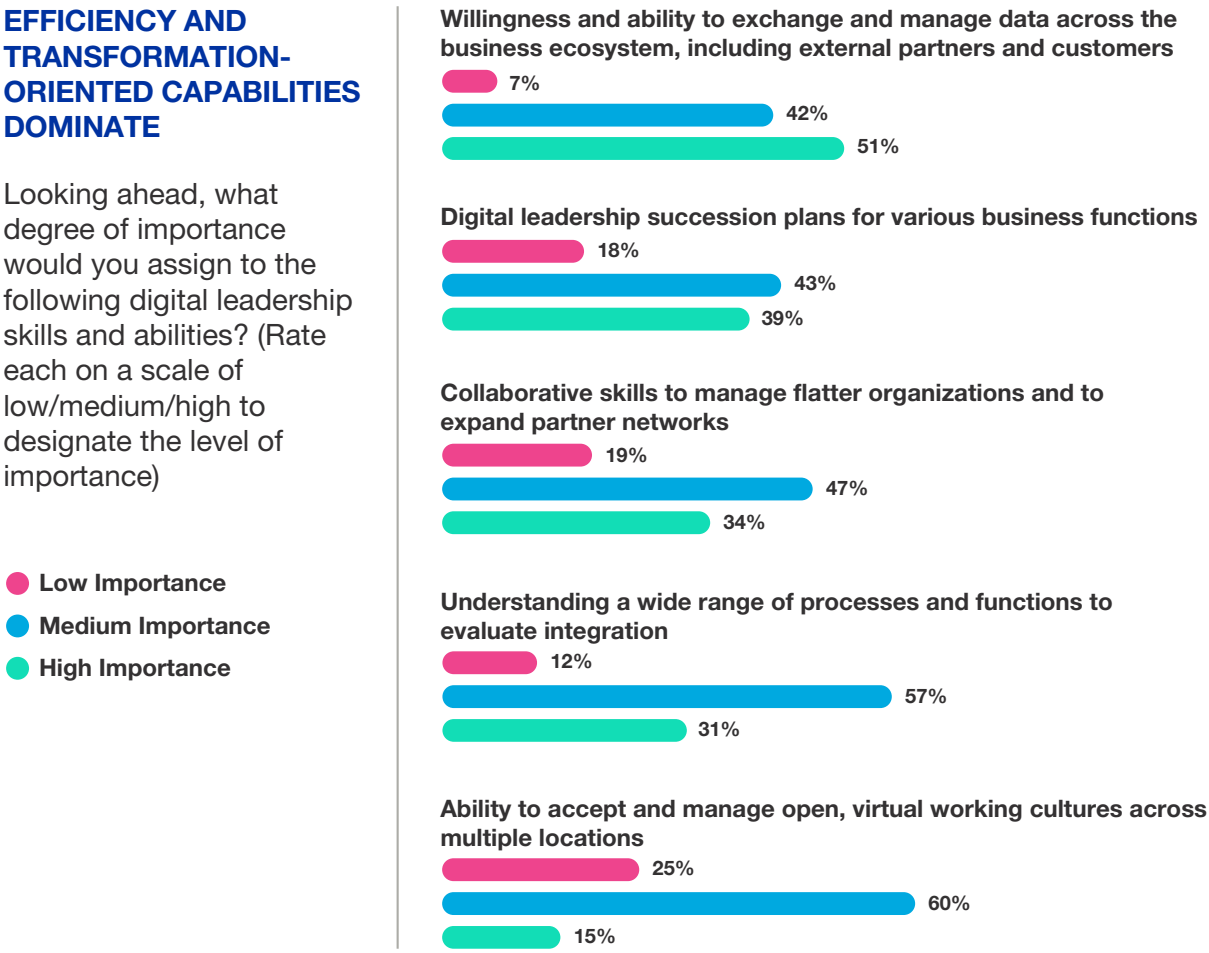


Chart 13, part 2

As seen throughout this survey report, adding value is a primary driver of digital transformation and aim of digital leaders. So it is no surprise that the most important challenge for the next five years is anticipated to be understanding business cases to create and articulate a strong ROI (55%). This finding underscores that many manufacturers are still working to justify digital investments.

Leadership teams are also still trying to figure out how best to align with their organization's direction and how to operationalize transformation efforts. Forty-three percent reported the most important challenge will be defining the digital strategy to enhance alignment and drive objectives, while another 42% identified understanding technical requirements and creating a digital roadmap as an important challenge.

Like with any change or evolution, change management and organizational alignment will prove to be difficult. For 35% of respondents, understanding organizational impact and defining/hiring the right resources is expected to be a challenge in the coming years. Another 30% pointed to engaging teams through digital change management as an important challenge.

Meanwhile, defining and understanding digital application specifics (14%) and ensuring the ethical use of digital tools and mitigating cyberthreats (9%) rank low for respondents. Similar to Section 2, Chart 8, this is likely due to sequencing priorities and leaders focusing first on the "why" before homing in on the "how" [Chart 14].

OPERATIONAL LEADERS MUST CREATE AND ARTICULATE STRONG ROI

In thinking about the requirements and implications of digital transformation over the next five years, what do you think are the most important challenges for operational leadership? (Select up to three)

Chart 14

CONCLUSION

MLC research has consistently shown that success with digital transformation requires organizing effectively around the opportunity that digital offers. Selecting and implementing the right technologies is one important dimension of the challenge. But a far more important set of requirements governs the outcome of digital transformation. This set of challenges spans factors such as establishing a digital mindset throughout the company, understanding how digital will change culture, orchestrating cross-functional alignment and achieving results that will strengthen competitiveness.

That's a daunting set of challenges for any company to undertake, particularly when they are trying to get products out the door every day. But this is where enlightened leadership in the digital age comes in. It is the key to all the dimensions of change that are part of digital transformation.

While this new leadership survey confirms what prior MLC leadership surveys have revealed—that the biggest issue in digital transformation continues to be organizing around the opportunity—this year's report provides important new insights into how this dynamic may get more pronounced in the future.

Perhaps the most significant of these insights is that within five years, 58% of manufacturers believe that digital leadership will mean "routinely integrating AI into decision-making." Couple this with the finding that two-thirds have not yet defined the human-machine relationship in their companies, organizing around the digital transformation opportunity may become a much more significant challenge.

Leaders in the digital age will have to decide what types of decisions they will allow to be automated by AI and those not yet ready or appropriate to do so. This will happen, of course, within the context of a moving target; the technology will continue to develop and mature, making possible in the years ahead what may not be possible or desirable today.

What sort of framework should digital leaders use to help navigate the road ahead? Perhaps ironically, the tools manufacturers need to guide them on their increasingly AI-fueled digital journey have existed for many years and are well known. What will guide us has always guided us—a logical path that encompasses a well-thought-out vision; a detailed strategy that includes clear goals and objectives; the right tactics that enable goals and objectives to be met; and the stamina to execute over time.

Most importantly, we must ask where the digital transformation road is headed. What is the end game? Autonomous operations powered by AI? If so, digital leaders will have to decide how far to go down this road, and how to keep the human being at the center of what their companies do. A human-centered approach to AI is essential for the successful acceptance and use of the technology.

Today's signposts suggest that the next decade in manufacturing is going to be an exciting time, replete with both great opportunities and great challenges. The key to success in the future will continue to be whether manufacturing leaders rise to the moment, rally their people and organize themselves effectively to realize the possibilities of that future.

FUTURE OF MANUFACTURING PROJECT PARTNERS

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KALYPSO

As market pressures and operational complexity continue to evolve, Rockwell Automation and Kalypso are helping companies accelerate digital maturity and create the future of industrial operations—securely and at scale.

Rockwell Automation, Inc. (NYSE: ROK), the world's largest company dedicated to industrial automation and digital transformation, combines advanced hardware, software and services to drive productivity, resilience and sustainability across industries.

Kalypso, Rockwell's digital services business, helps companies build resilient, secure, data-driven operations—turning operational data across IT and OT into insight that informs decisions and enables more autonomous, continuously improving ways of operating.

Together, Rockwell and Kalypso combine industry-leading automation and digital expertise to help manufacturers empower their workforce, adapt faster and achieve measurable results.

RSM

RSM is a leading global provider of assurance, tax and consulting services, focused on serving the middle market. With professionals across the United States, Canada and a global network spanning more than 120 countries, RSM helps manufacturers navigate complexity, manage risk and turn investment into measurable enterprise value.

RSM works with manufacturers across the full value chain, from discrete and process manufacturing to energy, industrials and infrastructure-driven enterprises. Our teams advise organizations as they modernize operations, strengthen supply chains and adopt digital and data-driven strategies that support scalable growth and operational resilience.

Through a combination of industry insight, functional expertise and technology enablement, RSM connects strategy to execution across finance, operations and technology. Our approach helps manufacturers improve visibility across the enterprise, optimize capital investment decisions and build organizations that are more agile, resilient and prepared for change.

RSM is committed to helping manufacturers thrive in an evolving business environment by delivering practical, outcome-oriented solutions grounded in real-world industry experience. Visit RSM to learn more.

Manufacturing Leadership Council

Founded in 2008 and now a division of the National Association of Manufacturers, the Manufacturing Leadership Council's mission is to help manufacturing companies transition to the digital model of manufacturing by focusing on the technological, organizational and leadership dimensions of change. With senior-level members from many of the world's leading manufacturing companies, the MLC focuses on the intersection of advanced digital technologies and the business, identifying growth and improvement opportunities in the operation, organization and leadership of manufacturing enterprises as they pursue their journeys to Manufacturing 4.0. For more information, please visit www.manufacturingleadershipcouncil.com.

NATIONAL ASSOCIATION OF Manufacturers

The National Association of Manufacturers is the largest manufacturing association in the United States, representing small and large manufacturers in every industrial sector and in all 50 states. Manufacturing employs nearly 13 million men and women, contributes $2.95 trillion to the U.S. economy annually and accounts for 53% of private-sector research and development. The NAM is the powerful voice of the manufacturing community and the leading advocate for a policy agenda that helps manufacturers compete in the global economy and create jobs across the United States. For more information about the NAM, please visit www.nam.org.

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Methodology

The survey was fielded in early February of this year and was concluded in March. Respondents included MLC operational executive members and qualified manufacturers.

Published May 2026

FUTURE OF MANUFACTURING PROJECT

Manufacturing Leadership Council

NATIONAL ASSOCIATION OF Manufacturers

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