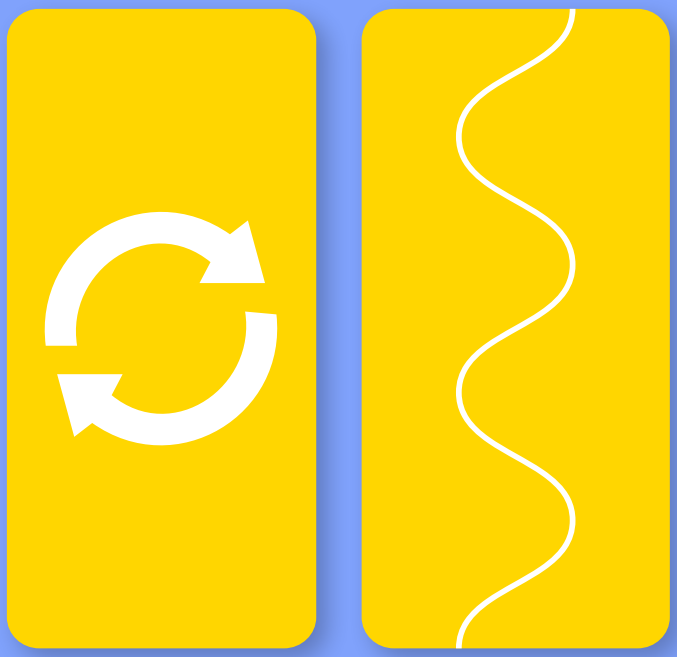
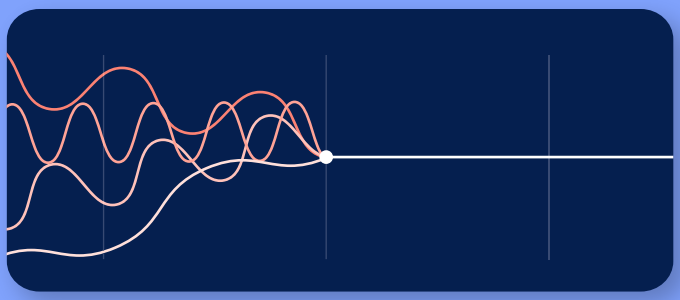
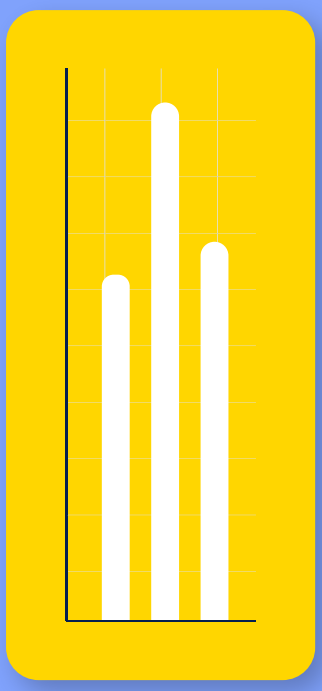
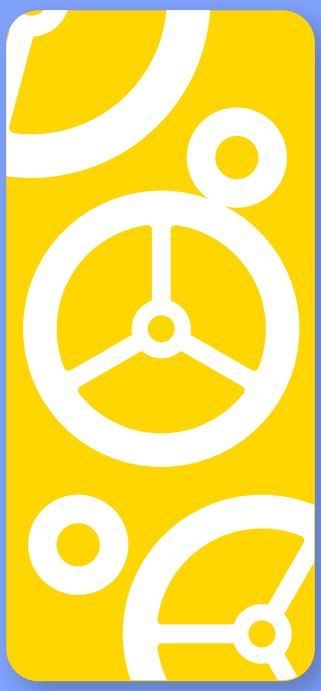
Uptime Index

Moving in sync: how seamless coordination drives uptime









Uptime Index

The Rubix Uptime Index is a health indicator for the European Manufacturing sector, generated from a survey of Rubix customers across Europe.

74

The Uptime Index as of June 2025 stands at 74 (out of 100), suggesting that confidence is quite high for Rubix customers.

Businesses demonstrate a strong understanding of their own maintenance needs and are confident in their ability to access the right spare parts when they need them, at a fair price. From a maintenance perspective, they have a strong understanding of what needs to be done and when, and feel confident that they have visibility on inventory and support from suppliers.

We see consistent results, on average, across all of the Uptime Index factors. However, the strength to which customers agree varies. We see more agreement that businesses have both a strong understanding of maintenance needs and expect to have access to the necessary spare parts when needed. The latter seems to reflect a reduction in supply chain pressures.

Despite there being confidence overall, versus other factors we see significantly lower agreement for the ability to successfully predict maintenance activity, likely due to more reactive ways of working. Similarly, there is less confidence in predictive maintenance.

The current economic climate also appears to be reflected as we see significantly lower agreement that management are willing to make long-term investments in maintenance solutions, as well as the ability to find suitable staff.

Small businesses struggle more with economic instability, with less confidence in management investing in long-term solutions. They also experience greater challenges in accessing skilled staff, impacting their ability to maintain operations smoothly.

Large businesses are not exempt from challenges – they have difficulties managing inventory effectively, likely due to long supplier tails and duplications of SKUs. Small businesses also struggle with this, but evidently due to lack of investment in suitable solutions. Medium-sized businesses sit in a sweet-spot, where inventory challenges are less of an issue.

Businesses operating across multiple markets (EU Key Accounts) demonstrate similarly low confidence, potentially tied to broader market uncertainties.

Foreword

Whether you are involved in pharmaceuticals, aerospace, food & beverages (F&B), fast-moving consumer goods (FMCG), or any other area of manufacturing, business leaders all understand one thing: machine downtime is the enemy of high performance.

Every manufacturing business can tell you the Euro, Sterling or Dollar cost for each minute of downtime. When production grinds to a halt, reputations become tarnished as reliability is threatened. If it happens too often, customers who are let down seek out alternatives.

Businesses must strive to keep machines running as long and efficiently as possible, scheduling repairs and maintenance tactically to minimise downtime. And if downtime is the enemy of performance, its opposite – uptime – is a manufacturer's lifeblood.

Today, we're launching our monitor: *The Rubix Uptime Index*. It's a health indicator for the sector, and with it, we're introducing a series of white papers that go deeper on what uptime is, why it matters, where it can go wrong, and how to get it right.

The first paper in the series highlights how greater alignment of decisions taken by central teams and actions carried out at the site level can improve a business's health. We offer a perspective on why this happens and what it takes to bring balance and consistency to operations.

Uptime serves as the meeting point for the seemingly conflicting interests of different business functions. It's a binding agent for finance teams focused on working capital; procurement professionals with an eye on cost; and maintenance, repair and overhaul (MRO) teams charged with productivity and efficiency – a particularly important role given the ageing install base common across Europe.

All these parties want to protect and enhance uptime. In the same way, no one wants to threaten it, but each function has its own motivations. The stakes are high. Finding the balance is tough, but getting it right is essential. The health of the sector depends on it.

David Cullern, Group VP Key Accounts

Uptime Index

About our research

We wanted to understand more about the benefits of manufacturing business coordination and how companies are faring in their journey to better alignment. We worked with market research agency We Live Context to undertake primary research, surveying over 4000 businesses involved in manufacturing industries, to get a deeper understanding of the following areas:

- Why is synchronisation so important for manufacturing companies today?
- How well are businesses performing in their drive towards achieving better synchronisation and improving uptime?
- What are the challenges and barriers to better alignment today?
- What are the enablers of effective coordination across manufacturing businesses?

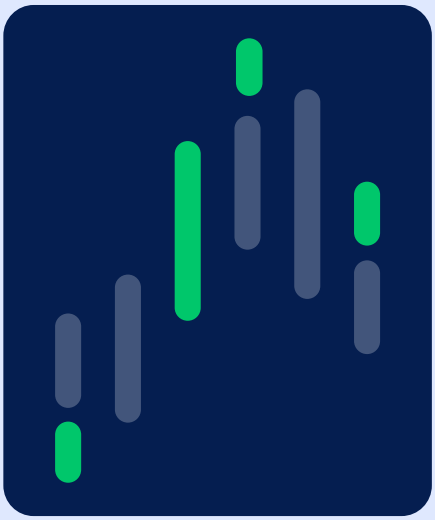
The results of our research are telling, with over two-thirds of those responding citing a need for closer alignment within their organisation.

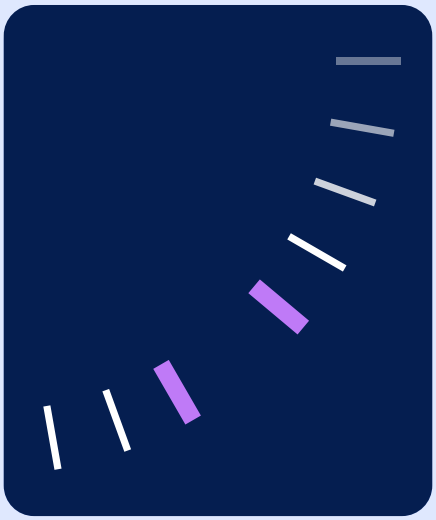
From a shifting business context driven by Merger & Acquisitions (M&A) activity to new technologies and a rapidly changing market, we discuss the drivers of great business coordination in Section 2.

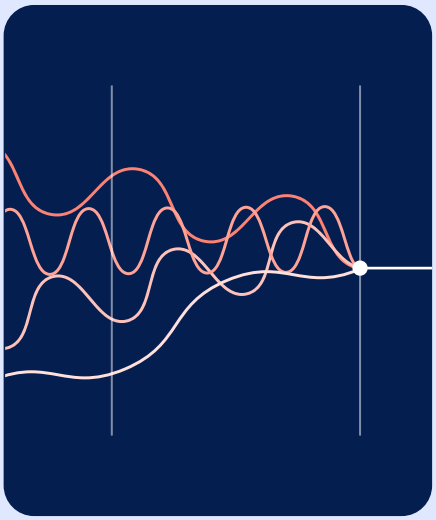
Understanding the barriers to successful coordination – such as misaligned site cultures and incentives, poor use of digital tools and rigid hierarchies – is key to overcoming them. These barriers are outlined in Section 2 of this paper.

And in Section 3, we have defined the *4 key enablers* of successful integration that businesses must follow to position themselves for prosperity.

We hope you find this research as interesting and illuminating as we have. And of course, if you would like to discuss any of its findings, then please get in touch.







1

The case for coordination

The case for coordination

As manufacturing businesses strive for better efficiency, cost control and improved profitability, achieving uptime is key. It is not just a case of keeping machines running smoothly. Effective synchronisation between business units is essential. How well teams coordinate between central functions and different sites, or between procurement, inventory management, operations, sales and maintenance, is a vital consideration in how they will perform relative to their peers.

The macro picture

Macro-level challenges are forcing manufacturers to prioritise agility and efficiency and rethink how they organise. Competition is fierce and change happens lightning fast. Businesses operate against a backdrop of volatility, where disruption springs from all sides. From supply chain dislocation to tariffs, inflation, geopolitical uncertainty, sustainability, and shifting customer demand – challenges have come thick and fast in recent years.

The shifting business context

Sector and business-specific issues also play their part. Achieving efficient coordination is simple when headcount is low and people work together in a close-knit team on a single site. As businesses grow, make acquisitions, develop new technological capabilities or expand into new territories, their needs inevitably change, costs rise and communication becomes more difficult. It is forcing manufacturers to get a grip on better alignment.

Turning a tidy profit

The benefits of coordination are clear: efficient businesses cost less to run. Total Cost of Ownership (TCO) in highly coordinated businesses is lower. There is less waste. Streamlined operations embed a sharper ability to adapt to changes in customer demand or issues in the supply chain. Teams can gain quick access to critical spares when things go wrong – enabling faster recovery and, in turn, more uptime. And it means that all teams are pulling in the same direction towards the defined goals of their organisation.

Effective coordination isn't just a one-time move. Businesses must continually rethink, refine and adapt to the shifting circumstances within their organisation and throughout the wider world. Manufacturers must operate with seamless coordination and efficiency to maximise the uptime of their operations and remain competitive.

The coordination conundrum

Joining the M&A dots

With an 11% increase in M&A within European Manufacturing from 2023 to 2024 (BDO Global, 2025), more businesses are feeling coordination challenges. Aligning working practices and systems, consolidating preferred suppliers and asking incumbent teams to adhere to the new modus operandi from head office can all be difficult. Businesses must consolidate supplier bases, streamline processes, and strip complexity to reap the benefits of M&A.

> "With mergers and acquisitions, you've had a massive capital A on the acquisition and a small little, tiny M for the merger... it's just layers on top of another and then you've just got this spider's web of complicated systems."
>
> Head of Indirect Procurement, Aerospace, UK

Tuning the engine

Bigger businesses inevitably bring more costs as operations grow and inefficiency creeps in. Inflation, price pressure from competitors and poor control of spending all drive the need to reduce the total cost of ownership and improve profitability. Businesses cannot afford duplication, siloed working or fragmented supplier relationships, compelling them to continually refine operations and exercise greater levels of central control.

A digital double-edged sword

Cutting-edge software can unlock faster, leaner and smarter ways of working, but when it is not considered from a holistic, coordinated perspective, it can also add complexity. Uneven adoption of tech, poor inventory visibility, slow data and a reliance on outdated systems all create friction, impeding progress rather than coordinating teams to spur growth.

> "One of the big priorities is delivering efficiencies... cost pressures are always there – we must find smarter, leaner ways to work."
>
> Head of Indirect Procurement, Aerospace, UK

2

The great coordination gap

The great coordination gap

While every organisation faces its own unique set of circumstances, there are 3 common coordination barriers that businesses must overcome.

69% of European manufacturers agree they need to improve their systems to better integrate divisions such as procurement, inventory and maintenance.

Challenge one: misalignment across key functions

When companies are working across multiple sites or different countries, or when they acquire a new business, there is always a challenge in aligning cultures and connecting different parts of the business working with different priorities between local and central teams.

Central strategy

Aims to reduce cost, standardise operations and gain control through consistent, enterprise-wide processes

- Reducing TCO: Focus on lifetime value over lowest unit price to unlock long-term savings
- Consolidation of suppliers: Streamline the supplier base to improve pricing, compliance and consistency
- Standardisation and harmonisation: Align parts, equipment and processes to reduce complexity
- Visibility of inventory: Improve data access to make smarter, more proactive procurement decisions

Local strategy

Focuses on meeting day-to day operational demands by prioritising speed, flexibility and practical decision-making on the ground

- Autonomy and independence: Enable sites to make decisions that best suit local operational realities
- Proactive maintenance activities: Shift from reactive fixes to planned, insight-led interventions
- Quick access to spares: Ensure fast, reliable availability of critical spares to minimise downtime
- Local supply chain: Maintain trusted partnerships that support responsiveness and service quality

If procurement functions become overly complex with purchasing responsibilities on local, regional and global levels, it creates friction. Duplication of work, waste, bloated inventories, differing capabilities of teams across the world, and a lack of understanding about where responsibilities lie all risk paralysing a business's agility and unnecessarily tying up working capital. Local labour and safety regulations or working across language barriers and cultural practices can also complicate coordination efforts even further.

> "Local teams are focused on keeping the lines running... if we can't convince them the change improves responsiveness, it's dead in the water."
>
> Global Strategic Sourcing Director, Pharmaceuticals, France

Keeping the wheels turning

When parts don't arrive when they're needed, misalignment and hostility between central HQ and local teams grows. This can result in downtime rising as production grinds to a halt, with local teams going off script as they source outside of existing agreements for their own needs, sending costs soaring, or vital projects being put on hold indefinitely.

> "We are centrally steered by the US – but agility is limited. We are ready to move, but the global rollout is delayed for two years."
>
> European MRO Category Manager, Building Materials, France

Central tools and reporting systems are often deprioritised unless they deliver a clear benefit for people on the ground or solve urgent plant needs. Even when tools like SAP or e-procurement systems are available, local teams lack the time, resources or incentive to implement them effectively.

And when local engineers and management feel that programmes are dictated centrally, it can feel threatening, demoralising and detached from operational realities.

Changing working patterns and aligning behaviours takes time, care and effort. To achieve the buy-in and support of different plants and regional teams, businesses must work to align incentives and ensure that any central directives are seen by local teams to be working in their best interests, and with operational realities in mind. Central and local teams must work in sync to optimise production uptime, and those businesses that can integrate most seamlessly and efficiently therefore develop a competitive advantage over their peers.

Challenge two: underused or ineffective digital tools

Digital technologies offer one way to help businesses connect better and improve visibility. As capabilities grow, areas like automation of production lines, efficient procurement, improved stock management, monitoring of plant and machinery maintenance and repair schedules, and better coordination across teams should all seemingly become much easier tasks.

> Even with the same ERP system, we still find duplicate references because of small differences – it's a daily manual effort to clean and standardise.
>
> Procurement Operations Manager, Packaging, France

Digital dilemmas

The digital reality that many businesses face, however, is far from ideal. Enterprise Resource Planning (ERP) programmes are often deployed piece-by-piece and added at various stages in the company's life. When a company acquires another, new digital layers of complexity are added, rather than stripped away through a process of alignment and simplification. Keeping up with the pace of change is a challenge too, with systems quickly becoming obsolete, leaving teams unsure whether to stick with existing tech or take the plunge and invest.

Many businesses work with multiple ERPs that don't talk to each other, or with different sites seeing different levels of adoption and digital sophistication. Technology can be poorly implemented or not used to its full potential. The result is more complexity, rather than cohesion, and poor coordination between teams, resulting in inefficiency and ultimately risking unnecessary downtime.

Maintenance missteps

The problem manufacturing faces with digital tools is particularly striking across maintenance, repair and overhaul (MRO) functions. When not fully integrated into ERP systems or when those systems are unable to provide sufficient levels of detail and visibility, MRO teams resort to workarounds like Microsoft Excel or Power BI for even basic data, causing significant challenges in protecting and improving uptime.

Working with multiple systems drives up costs, adds manual workload as people duplicate data entry, and opens the door to human error. When you consider that some manufacturers are working with thousands of new part codes every day, the potential for costly mistakes can be huge. Poor quality data, a lack of visibility on repair schedules and parts availability, or inconsistency on how digital tools are used all create inefficiency and waste time, harming valuable uptime of machinery and ultimately increasing a manufacturer's total cost of ownership.

Problematic procurement

Issues seen with digital tools are also acutely felt within procurement. Platforms, like Coupa, that are not fit for integration pervade procurement departments, allowing uncontrolled free-text purchasing, leading to poor data quality and an inability to achieve standardisation across spare parts and services.

Failing to support true integration between different sites, suppliers and inventory data compounds fragmentation. And with a lack of data and visibility on inventory, coordination suffers, bottlenecks occur, and the right parts aren't available when they are needed, meaning more machine downtime.

Challenge three: long supplier tails and maverick spending

When coordination is poor and parts or materials are unavailable, local teams facing tight deadlines will often revert to local suppliers. Convenience and the confidence of having the right materials trump strategic aims. While this enables teams to keep working in the short term, in the long run, it creates complexity and damages coordination and efficiency, with some local sites maintaining hundreds or even thousands of local supplier relationships.

> "Local teams maintain their preferred suppliers – changing this is a huge internal negotiation."
>
> Global Strategic Sourcing Director, Pharmaceuticals, France

Time to cut the supplier tail

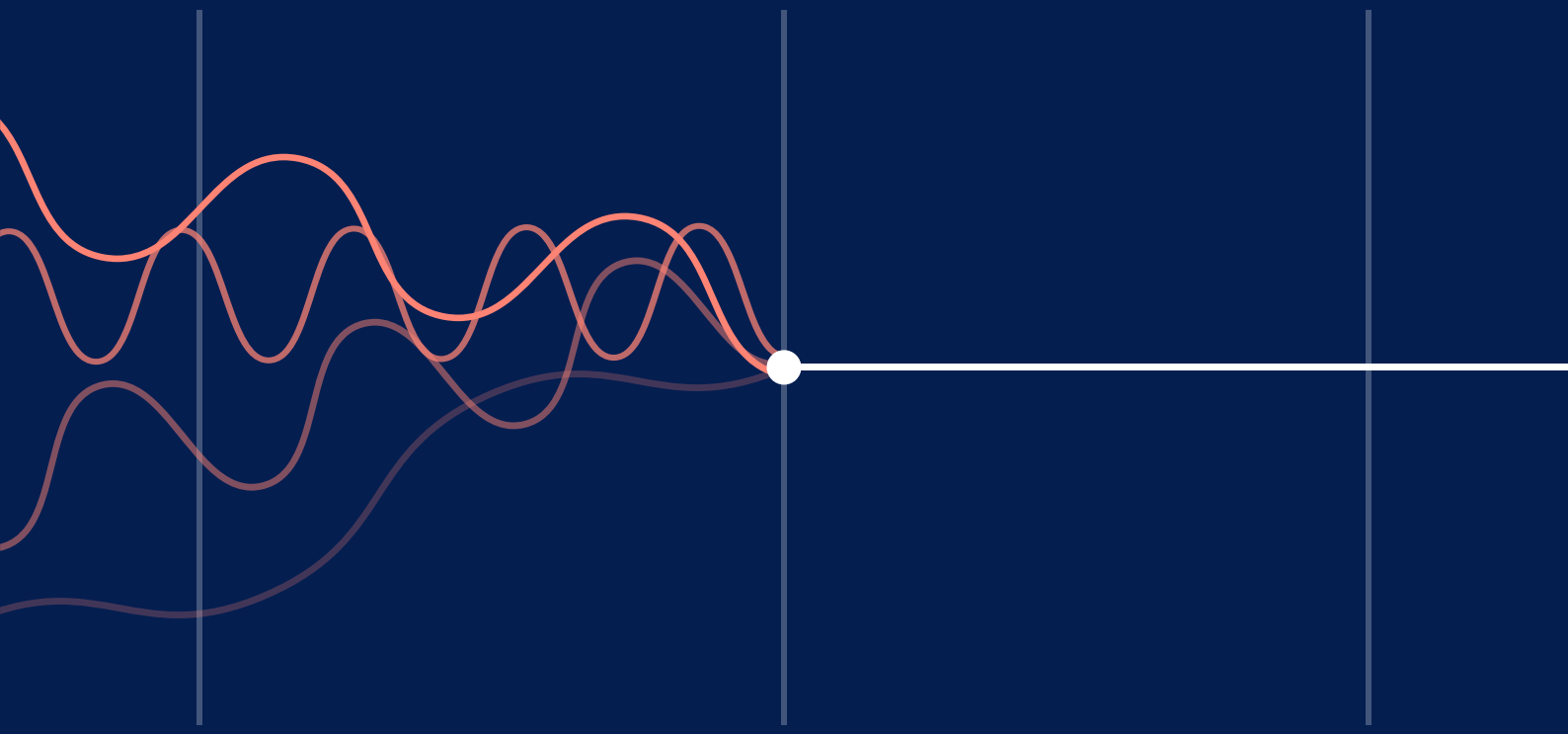
Centrally agreed framework contracts and preferred supplier lists are available in most businesses, but it is hard to enforce them without alienating local teams when the pressure is on to meet tight delivery schedules. This results in long supplier tails. 80% of spend can often sit with fewer than 100 suppliers, but many businesses will carry a supplier base of 2,500–3,500, creating huge inefficiency.

When standardisation and quality control are key factors in achieving high performance and maintaining uptime, this added complexity can put a spanner in the works. Businesses must be ruthless in taming sprawling supplier lists, driving coordination, standardisation and calibration across the business to optimise efficiency and minimise downtime.

> "Each plant still uses their own local suppliers, we still have around 2,500 active suppliers across 60 factories."
>
> Head of Strategic Procurement, F&B, Switzerland

3

The four steps to successful coordination



The four steps to successful coordination

It may seem that a lack of coordination is the result of local teams "going rogue" and failing to stick to well-laid plans from head office. But that misses the bigger picture. Local teams often understand their markets, machinery and local culture better than execs sitting in ivory towers. True coordination doesn't mean rigid control from the centre, it is about empowering coordinated autonomy where sites have freedom to operate locally within planned frameworks that ensure harmony, transparency and efficiency. Flexible control and consistency, rather than top-down authority.

The businesses that thrive are those that treat integration as an enabler, not a constraint. We've identified four areas that manufacturers should prioritise to improve coordination across their businesses, drive efficiency and maximise uptime.

> "You also need an engineering function aligned to the contract to drive the ownership of the MRO supplier. Procurement should be involved, but day-to-day should be firmly set within local engineering teams."
>
> Procurement Director, F&B, UK

Step one: local leadership

When local teams are given measured levels of autonomy, involvement in key decision making, and ownership of supplier relationships, they thrive. While complete independence would breed inconsistency and an inability to coordinate efforts towards the common good, achieving an ideal level of self-determination brings invaluable local expertise into play.

Building pockets of high performance

'Cluster-based decision-making' blends the benefits of local autonomy with the vision and rigour of central oversight. A centralised Head of Engineering who is responsible for leadership, direction and coordination, works in close collaboration with regional and local engineering managers at a site level.

Regional teams help navigate cross-site needs, mediate trade-offs and ensure feedback loops between plants and HQ are continuous and constructive. This allows local teams to keep production running and maintain uptime based on the day-to-day realities on the ground, while working towards a central vision and improving integration and efficiency for the long term.

The freedom of constraint

With the right guardrails in place, local teams are given a clear understanding of how to balance short-term needs with the wider aims of the business. Local engineers have the freedom to execute plans on a tactical level, such as defining their local MRO approach or replenishment frequency, but are guided to work within the defined parameters and tools prescribed by HQ.

By providing a 'menu' of solutions for local teams to choose from, central management can advance desired objectives while providing enough flexibility for local teams to succeed within their unique operational and cultural context.

> "Cluster leads bridge the gap between strategic procurement and plants – otherwise it's impossible to manage across 60 sites."
>
> Head of Strategic Procurement, F&B, Switzerland

Procurement check-ins

Clear communication is key to effective coordination between central and local functions. Regular check-ins between procurement teams, different sites and suppliers helps improve alignment and builds trust. This also ensures key delivery criteria can be met, while highlights opportunities to refine performance at a local level while adhering to the central framework.

These types of regular check-ins allow management to steer proceedings, monitor and control areas like cost, and keep teams on track in areas of importance, all while keeping teams on the ground happy and able to lead operations at a local level.

> "Sites retain decision-making power, but within clear strategic parameters. We create menus of solutions rather than mandates."
>
> Global Strategic Sourcing Director, Pharmaceuticals, France

Step two: strategic supplier consolidation

Sprawling supplier bases that are managed locally and use different suppliers from site to site create a highly inefficient way to work. It's hard to maintain effective quality control, costs can vary drastically, and change and innovation can be hard to implement when dealing with multiple suppliers, each with different capabilities. Equally, having no local involvement in procurement can hamper on-site teams' performance as they lack visibility and control of stock and ownership of their operations.

> "Success for me is one provider, one standard product across all sites, working in partnership to improve total cost of ownership."
>
> Head of Indirect Procurement, Aerospace, UK

The best of both worlds

The best approach is to blend a local presence – with on-site supplier personnel managing day-to-day activities to improve responsiveness and engagement-with a centrally-defined strategy. Central teams select suppliers and drive standardisation and cost management, while teams on the ground manage the relationship and ensure their operational needs are being met in a timely and effective way. This approach helps build consistency and efficiency across the business while advancing site-level autonomy.

Gaining leverage

With fewer suppliers and closer working relationships, companies can leverage those connections to improve internal coordination and drive more value from their partners. Developing a strategic relationship with suppliers, rather than a purely transactional one, enables improvement in areas like how data is consolidated and exploited across sites, or by driving economies of scale by consolidating a higher volume of purchases from fewer companies.

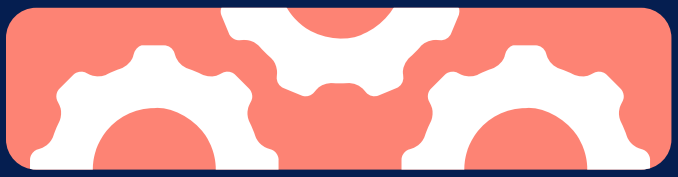
A case in point

Supplier consolidation means better data

We spoke to a UK-based F&B manufacturer who had faced a highly fragmented supplier base, causing significant challenges in gaining accurate, reliable data that they could use to improve coordination and maximise uptime.

The problem

With each site across the business maintaining independent relationships with local suppliers, there was an inconsistent approach to data collection and reporting practices, making comparison and accurate analysis across sites an impossible task.
This led to frequent discrepancies in inventory management and made it difficult for central procurement to monitor performance, forecast demand accurately, or negotiate contracts.



The solution

By building strategic supplier partnerships, the company was able to centralise data collection and improve visibility across the business. Implementing standardised data reporting practices across all sites meant that data became a more useful tool to monitor and optimise performance, improve coordination and standardisation across different sites and take steps to improve uptime through their learnings.

With real-time data accessed through integrated dashboards, central teams can monitor inventory levels, lead times, and consumption patterns, helping to manage costs and steer the desired direction of the business, while giving on-site operational teams the supplies they need on time.

Step three: steering better implementation

Big projects that run across multiple teams and different business areas require central oversight. From onboarding new suppliers to standardisation of systems and processes, centralised steering committees are best placed to improve cross-functional alignment, achieve consensus, and motivate different teams to make changes that drive company-wide progress.

> Our role from the central team is to manage internal negotiations and support local teams, not just impose solutions.
>
> European MRO Category Manager, Building Materials, France

A united front

Central aims are more easily achieved when you bring the team on the journey with you. Creating alignment forums and working groups with board-level oversight that include areas like engineering, finance and operations from the start, means new initiatives and change management projects can reflect both efficiency and company-wide goals, while meeting the operational realities on the shop floor.

> When onboarding new providers, you need to take everyone on the journey internally.
>
> Procurement Director, F&B, UK

A case in point

Overcoming resistance to central control

A large industrial manufacturer in France was operating across multiple plants, each running their own production practices and local supplier bases. This fragmented approach made integration difficult and central visibility and control hard to achieve.

The problem

When a company has been operating in a certain way for a long time, or new sites have been brought in through acquisition, unwinding old ways of working can be difficult. Local teams at this French manufacturer were resistant to change and wary of direction coming from central functions that didn't understand the realities of teams on the ground, citing concerns about the production risks of changing suppliers and the general upheaval that the project posed. Buy-in was hard to secure. Mistrust of centrally driven decisions and a fear of downtime posed a threat to implementation.

The solution

A central steering team was set up to manage the project and allay the fears felt by teams across the business. The central team engaged early and deeply with site stakeholders – from plant buyers to engineering managers – to build support. Each plant was individually briefed on the strategy and upcoming supplier changes, with site visits and audits carried out to review spare parts inventories, helping teams feel heard and involved. This collaborative approach reduced resistance and improved adoption of the new supplier framework.

Step four: setting a new standard in visibility

Working with standardised tools and systems across the business is a crucial goal for manufacturers. It helps improve visibility, simplify operations, control costs, and drive coordination and efficiency, maximising uptime.

Standardisation of procurement tools and catalogues creates a consistent digital backbone for the business – one that both central and local teams can understand, navigate and harness data from with ease. This approach reduces complexity and supports consolidated spending with seamless visibility across sites and clusters.

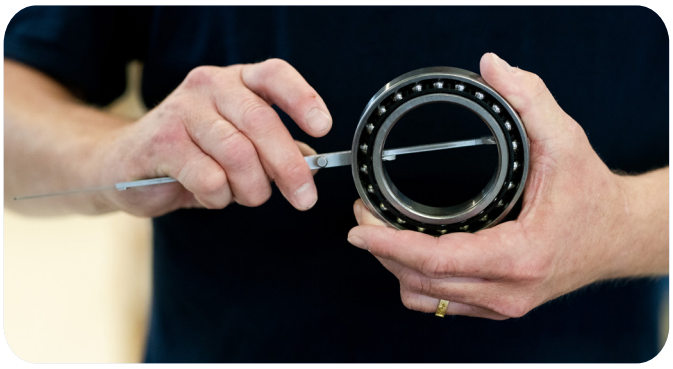
By providing consolidated, real-time data on stock levels across every site, central teams have full visibility and can manage inventories dynamically, optimising how much stock they hold, addressing problems before they hit, achieving economies of scale when purchasing and alleviating any bottlenecks with agility.

Capabilities at the cutting edge

While many systems and processes served manufacturers well in the past, to remain competitive, they need to harness the right tools today. Moving from free-text, uncontrolled procurement in Coupa to catalogue-based ordering in SAP helps improve compliance, control and visibility, particularly for spare parts and MRO. With better visibility across the business, central teams can improve coordination, spot problems early, and in turn, keep machines running longer, enhancing uptime.

When manufacturers develop strategic partnerships with their suppliers, they can leverage these relationships to improve how their business runs. By encouraging suppliers to integrate with digital ERP systems, they can unlock new levels of visibility and performance.

With catalogue uploads, e-procurement capabilities, and automated order processing, orders are filled quicker, supply chains run smoother, teams get the parts and materials they need, when they need them, and central teams have visibility of requirements and overall spend across their business.



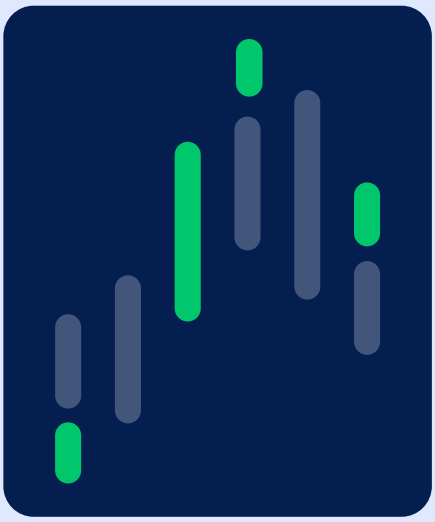
Conclusion: towards seamless efficiency

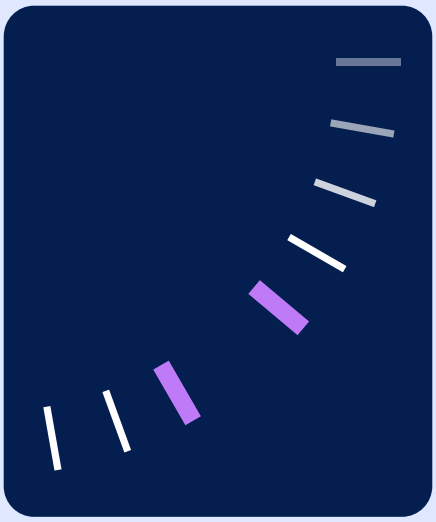
Manufacturing businesses operate in an ultra-competitive environment. Technology is both transforming possibilities and upending long-established norms. Disruptions ranging from inflation to geopolitical unrest and supply chain dislocation all threaten performance and are forcing manufacturers to achieve more with less. It all points to a growing need for more efficiency and more uptime of plant and machinery.

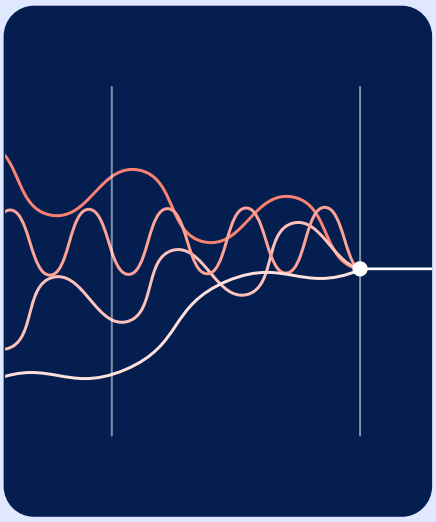
Businesses simply can't afford costly periods of downtime if they want to survive and thrive in today's world. A critical element of maximising uptime is improving how your business connects different functions. In an ideal world, that means giving local teams the tools, materials and autonomy to run their side of the business in a way that keeps day-to-day operations ticking over without difficulty or disruption. But that needs to be balanced with vision and control from central management.

By connecting different systems, aligning incentives, standardising operations and keeping sprawling supplier lists in check, central teams can drive best practice, accelerate efficiency and simplify life for local operational teams so they can get on with doing what they do best.

From enabling local leadership to consolidating suppliers, enacting steering committees to implement core projects better, and standardising tools and technologies to improve organisational visibility, we identified four key areas that businesses must strive toward to succeed in today's cutthroat manufacturing world. Businesses that can achieve success across these four areas will be those that thrive in the future, becoming leaner, better-connected, more agile businesses, able to keep operations running with seamless efficiency. Because when manufacturers achieve better coordination, uptime and high performance follow.







The index explainer

Sample overview

The Uptime Index is based on an annual survey of Rubix customers in the European manufacturing sector. It covers key European markets of Benelux, CEE, DACH, France, Italy, Spain, Nordics, UK, Ireland, Iceland. The sample includes a diverse mix of customer types and job roles from key accounts and regional accounts to more transactional accounts.
Note: The sample is not weighted to reflect market sizes, etc. It reflects the views of Rubix customers who have completed the survey.

Frequency of study

It is conducted once per year as part of a wider customer survey.

How the index score works

The index score is designed to provide a clear, normalised indicator of confidence in the European Manufacturing Sector on a scale from 0 to 100.

- It is calculated by taking the mean responses to agreement-scale questions on a seven-point scale and converting them into a 0–100 index

The score provides a standardised way to interpret attitudes across various aspects of manufacturing strategy and readiness.

What the index measures

The index is derived from responses to statements that evaluate perceptions of thought leadership within European manufacturing, including:

- Understanding of maintenance needs
- Willingness to make long-term investments
- Access to spare parts
- Availability of skilled staff
- Effective predictive maintenance

Together, these dimensions form a holistic view of how prepared and forward-looking the sector is in both strategic and operational terms.