

Zinnov Zones 2018

IoT Technology & Services

October 2018

The Zinnov logo consists of the word "zinnov" in a white, lowercase, sans-serif font, followed by a blue square containing a white, stylized wave or 'Z' shape.

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IoT Technology Services Market Overview



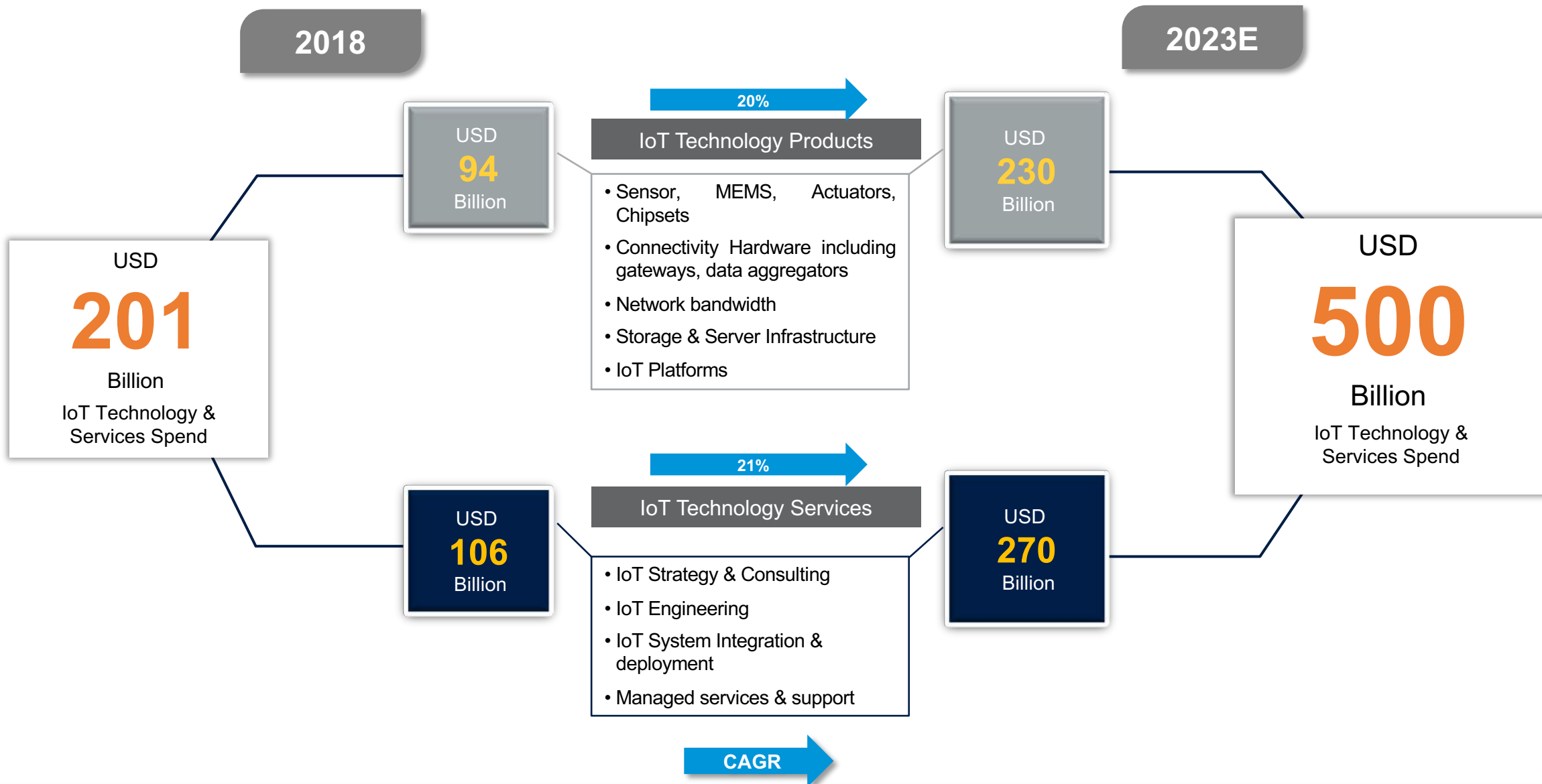
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Use-case Adoption by Enterprises

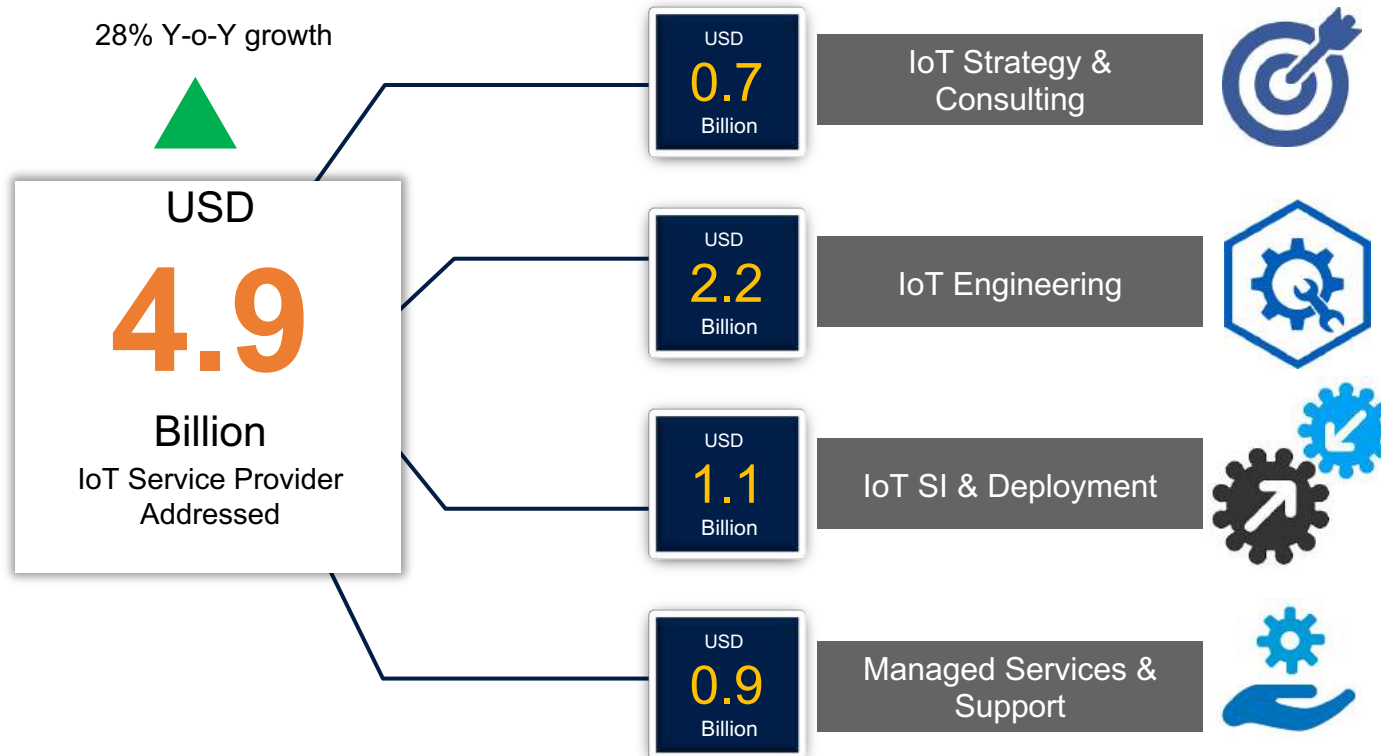
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Zinnov Zones IoT Ratings 2018

- Overall IoT Technology Services Market
 - Technology products and services market and growth
- IoT Technology Services market addressed by service providers
 - IoT strategy and consulting
 - IoT engineering
 - IoT SI and deployment
 - Managed services and support



2018



- Service providers help manage the enterprise IoT conundrum of managing disparate vendor types for end-to-end IoT solutions
- Large transformatory IoT deals entail advisory services at the top and managed services at the tail
- IoT engineering services account for ~45% of the addressed market
- Managed services & support is expected to witness strong growth as a result of increasing demand for infrastructure enablement and data science capabilities

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IoT Technology Services Market Overview



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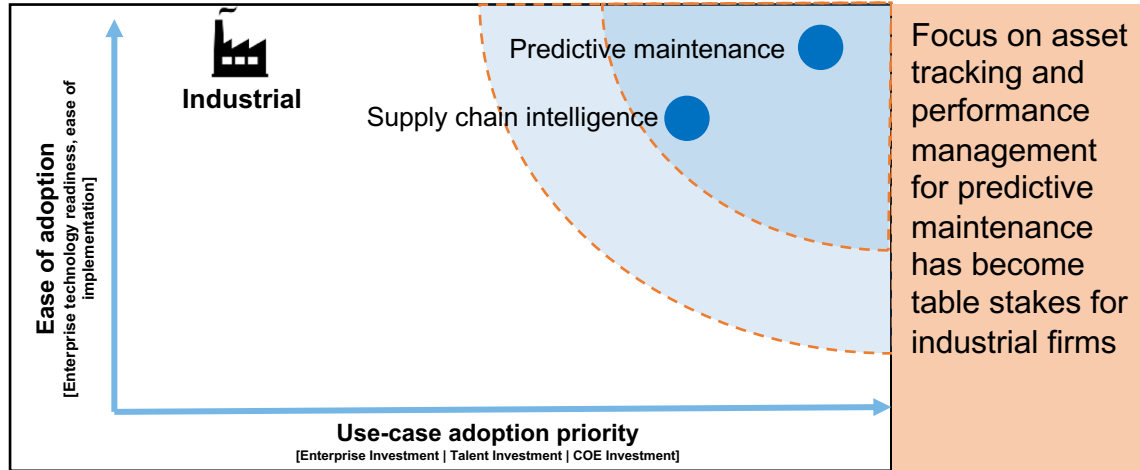
Use-case Adoption by Enterprises

- IoT use-case adoption priorities
 - Industrial
 - Automotive
 - Healthcare
 - Retail

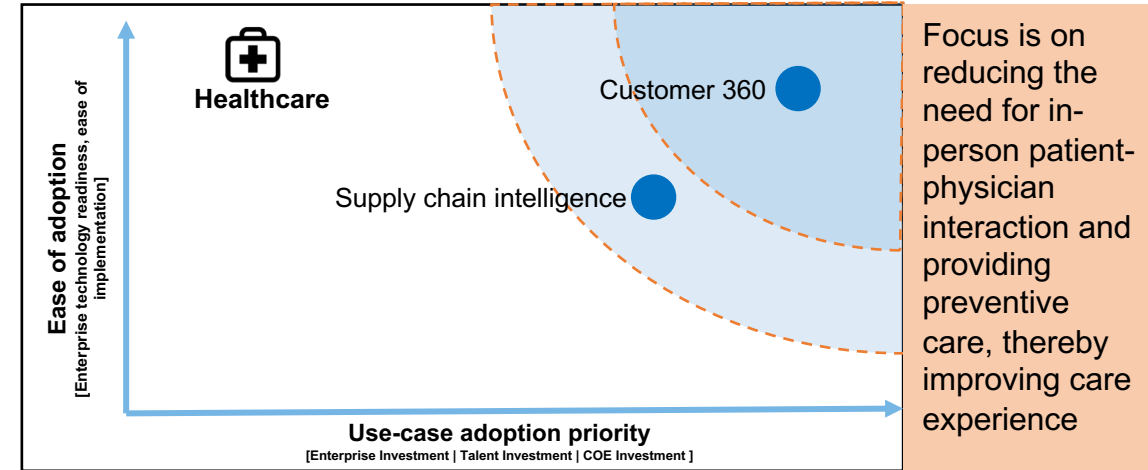
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Zinnov Zones IoT Ratings 2018

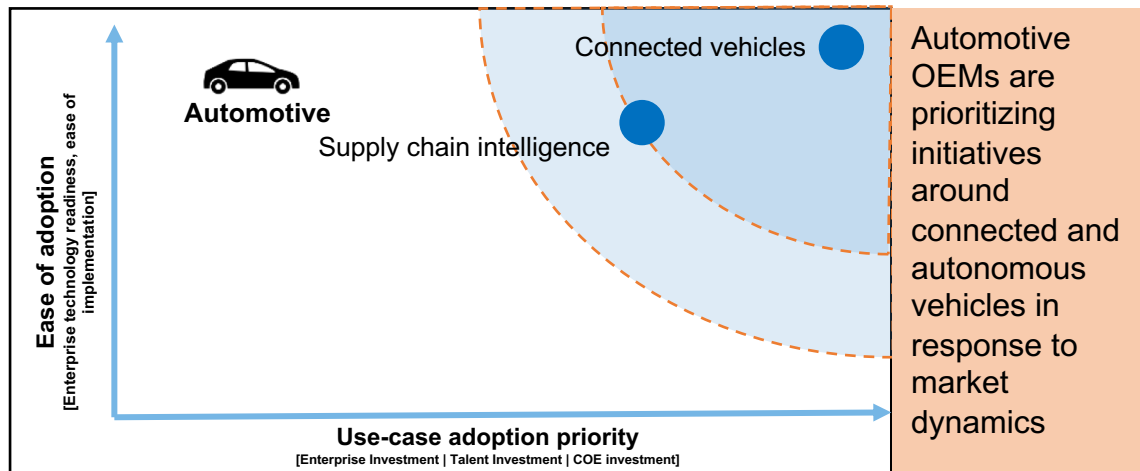
Industrial



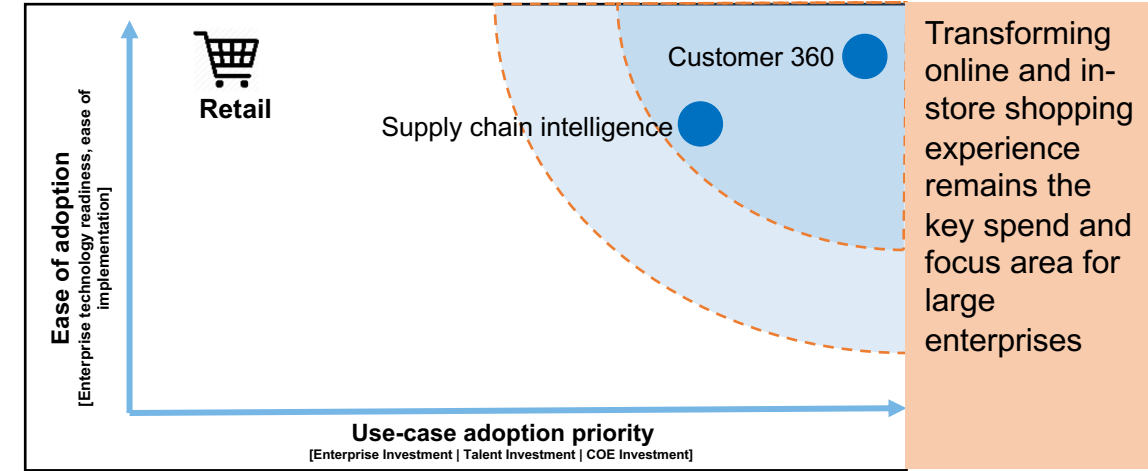
Healthcare



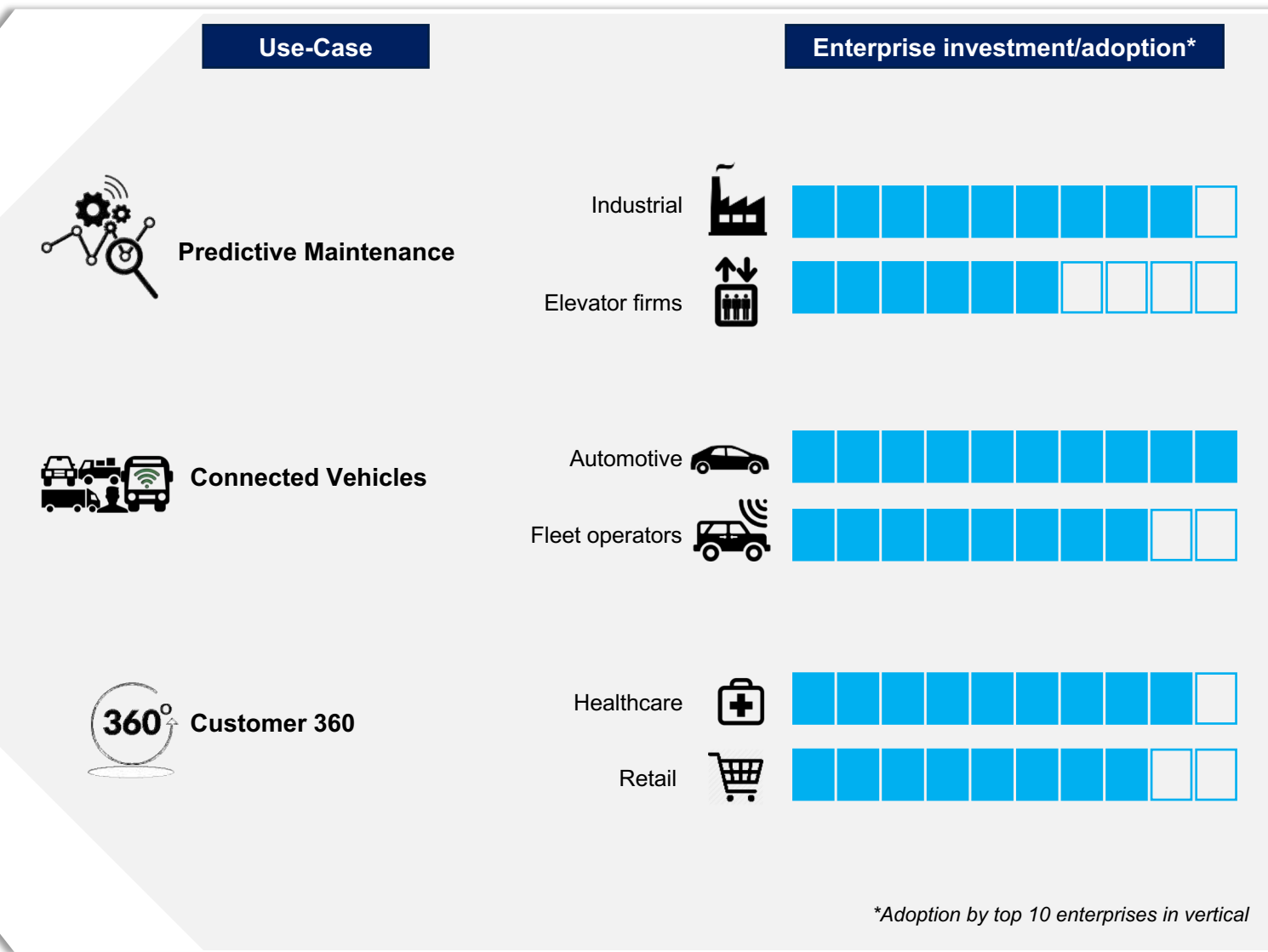
Automotive



Retail



Global Enterprises



*Adoption by top 10 enterprises in vertical

- Predictive maintenance adoption in the Industrial sector has become table stakes
- Asset performance management is becoming critical to predict anomalies and reduce downtime

- Increasing focus on safety, predicting driver behaviour, and tracking vehicles to enhance fuel & cost efficiency are driving investments towards connected vehicles

- Remote patient monitoring and increasing penetration of smart wearable technologies is pushing customer 360 adoption in the Healthcare sector
- Large retailers are deploying personalized retail marketing and customer behaviour analytics solutions for better CX

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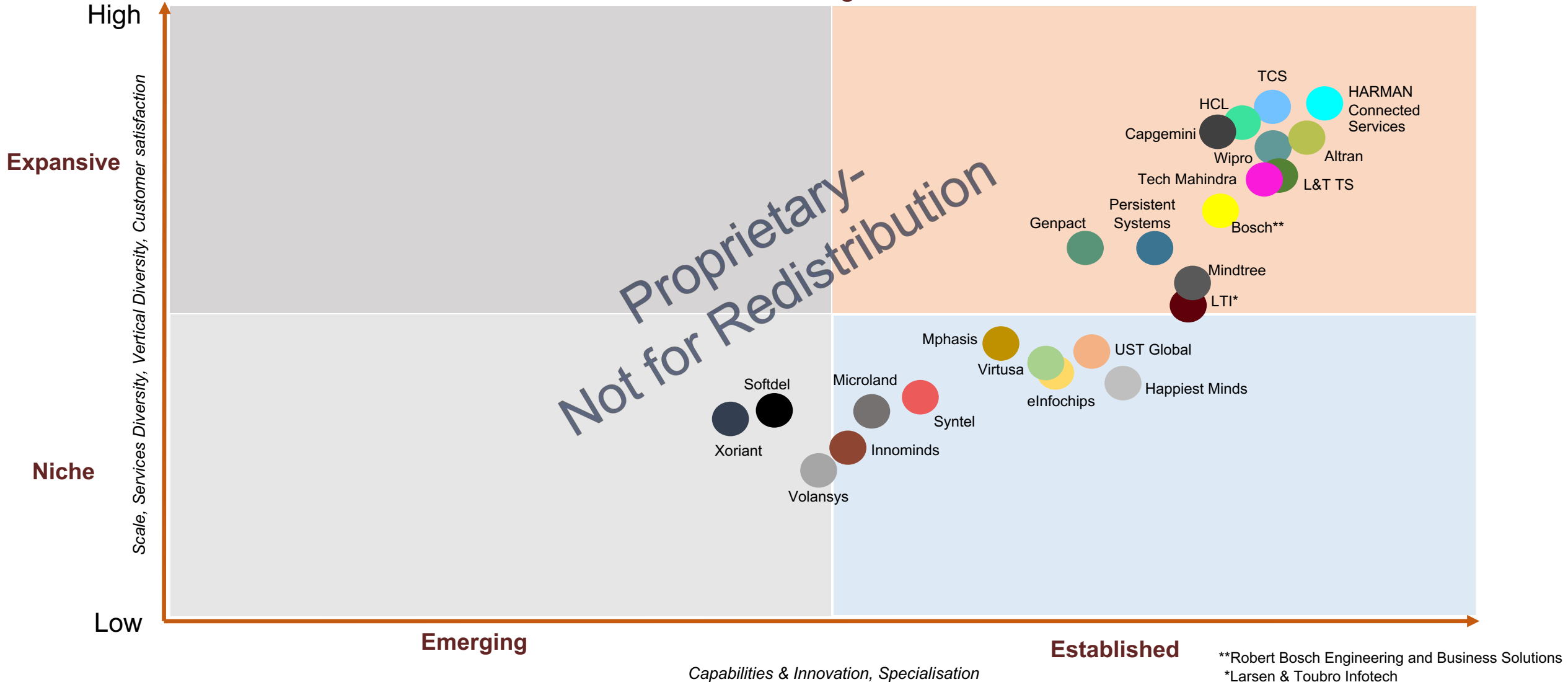
Use-case Adoption by Enterprises

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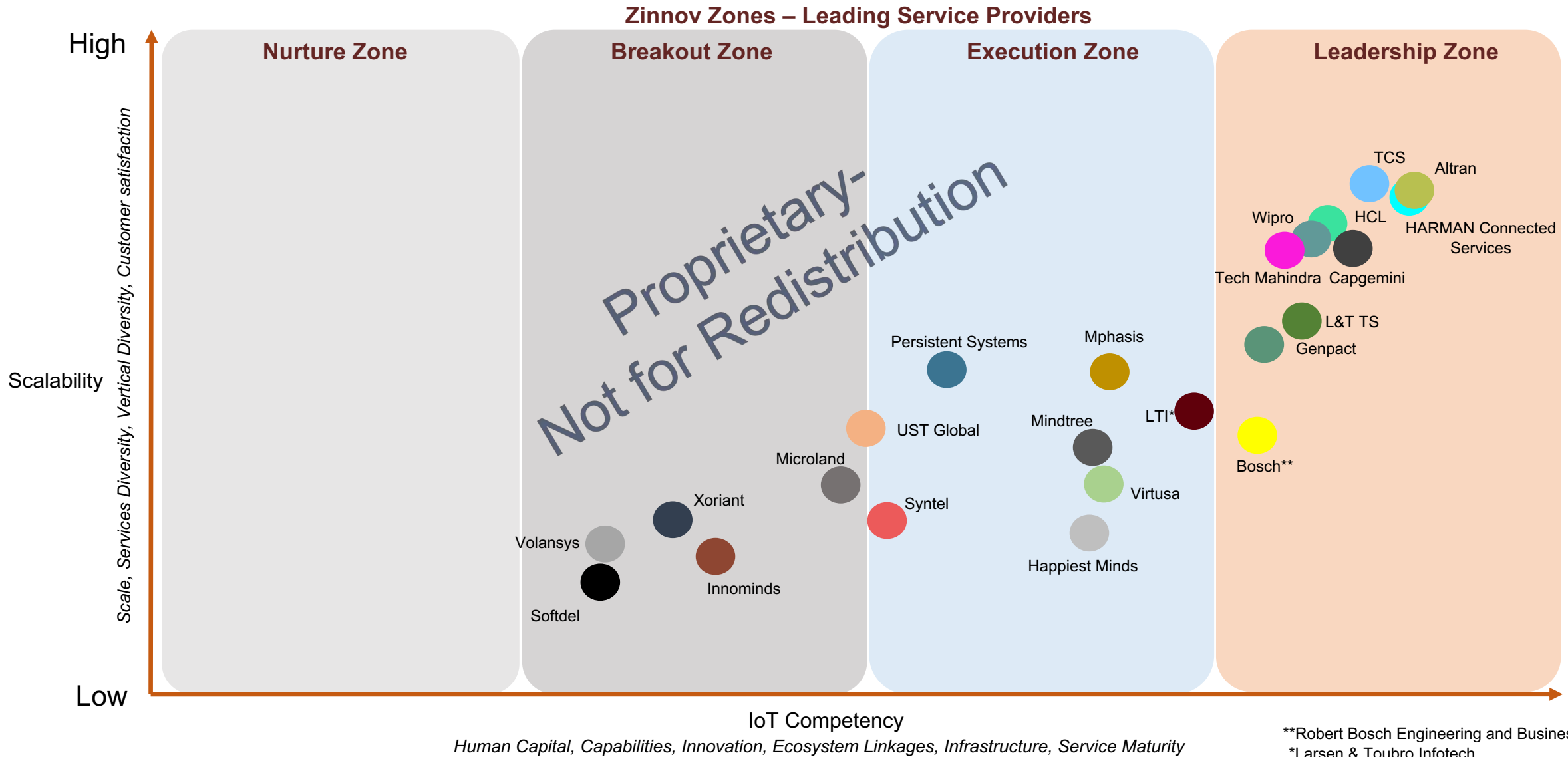
Zinnov Zones IoT Ratings 2018

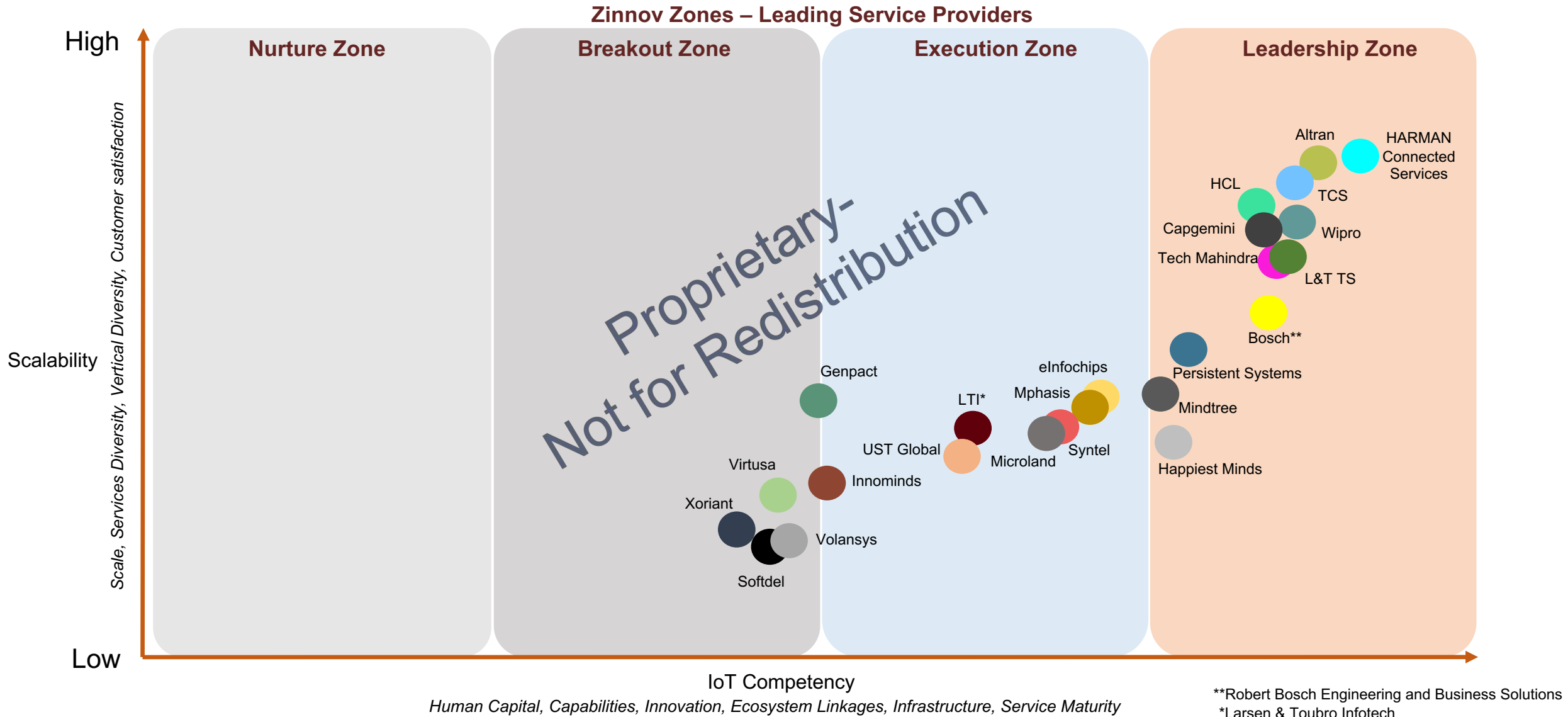
- Overall IoT Ratings
- IoT Technology service ratings by sub-service area
 - Strategy and consulting
 - IoT Engineering
 - SI and deployment
 - Managed services and support
- Use-case based ratings
 - Predictive maintenance
 - Connected vehicles
 - Supply chain intelligence
 - Public infrastructure
 - Customer 360
- IoT competencies based ratings
 - Sensors & devices
 - Platforms & applications
 - Communications
 - Big data and analytics

Zinnov Zones – Leading Service Providers

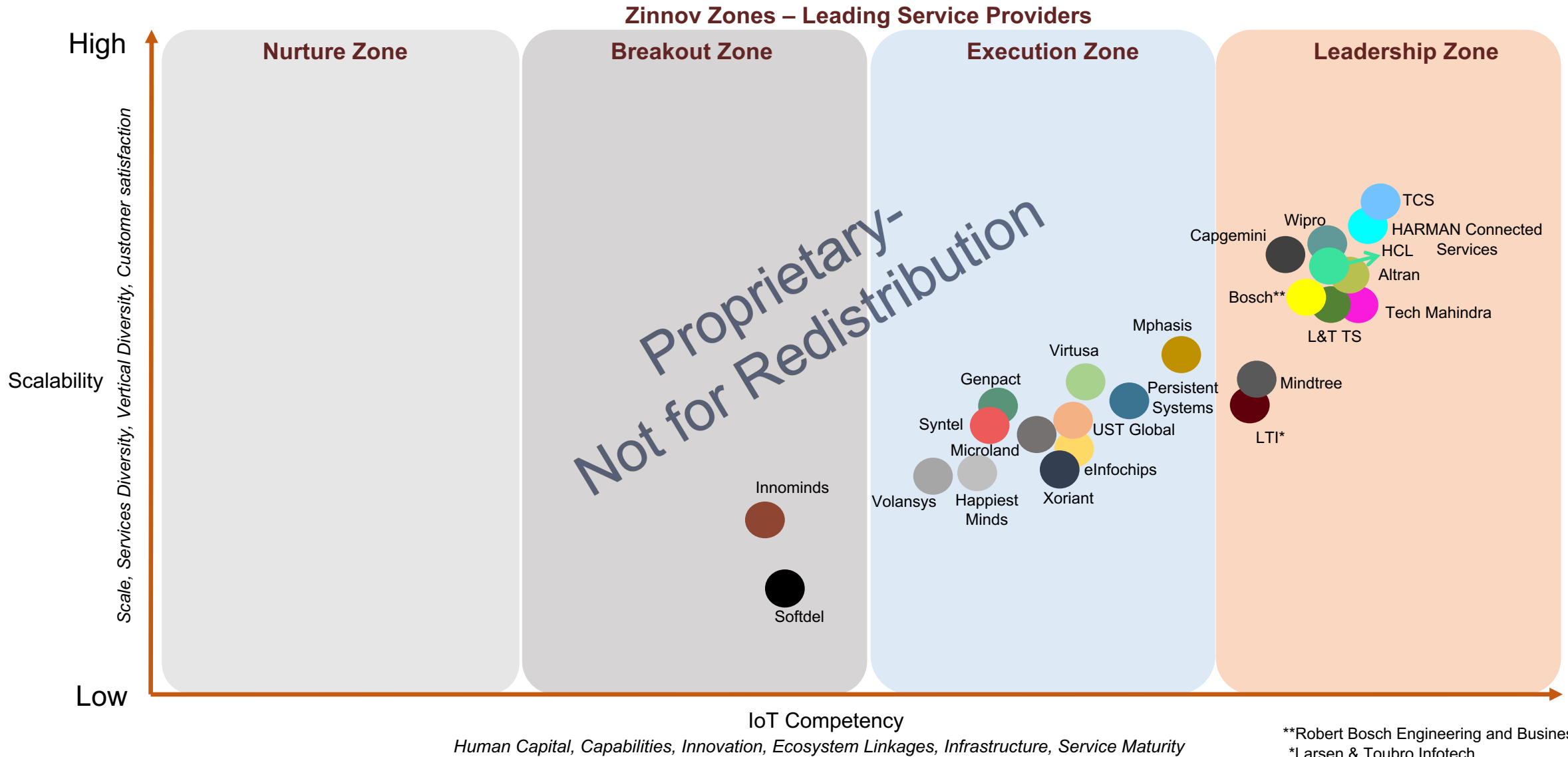


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*Larsen & Toubro Infotech

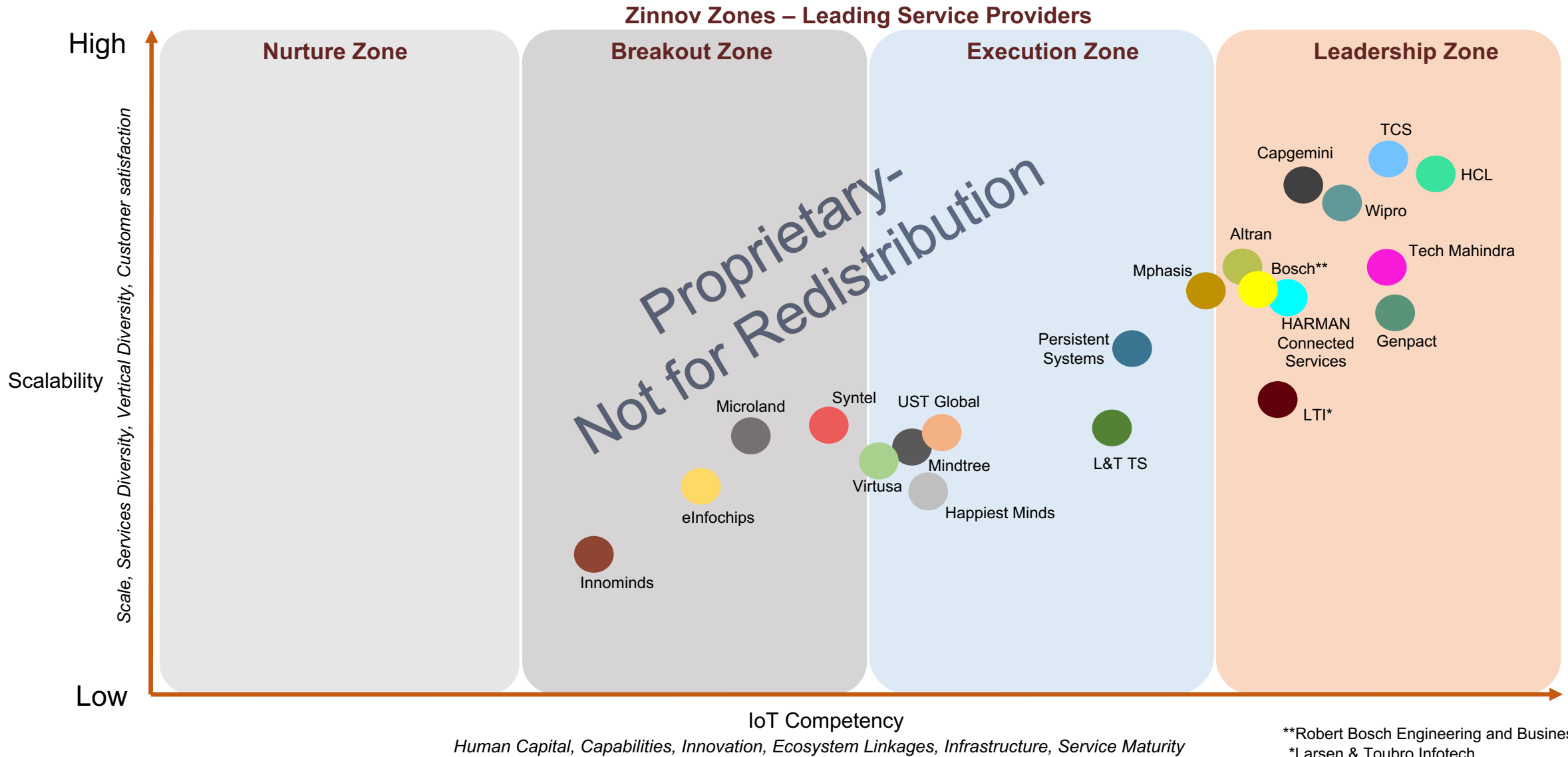




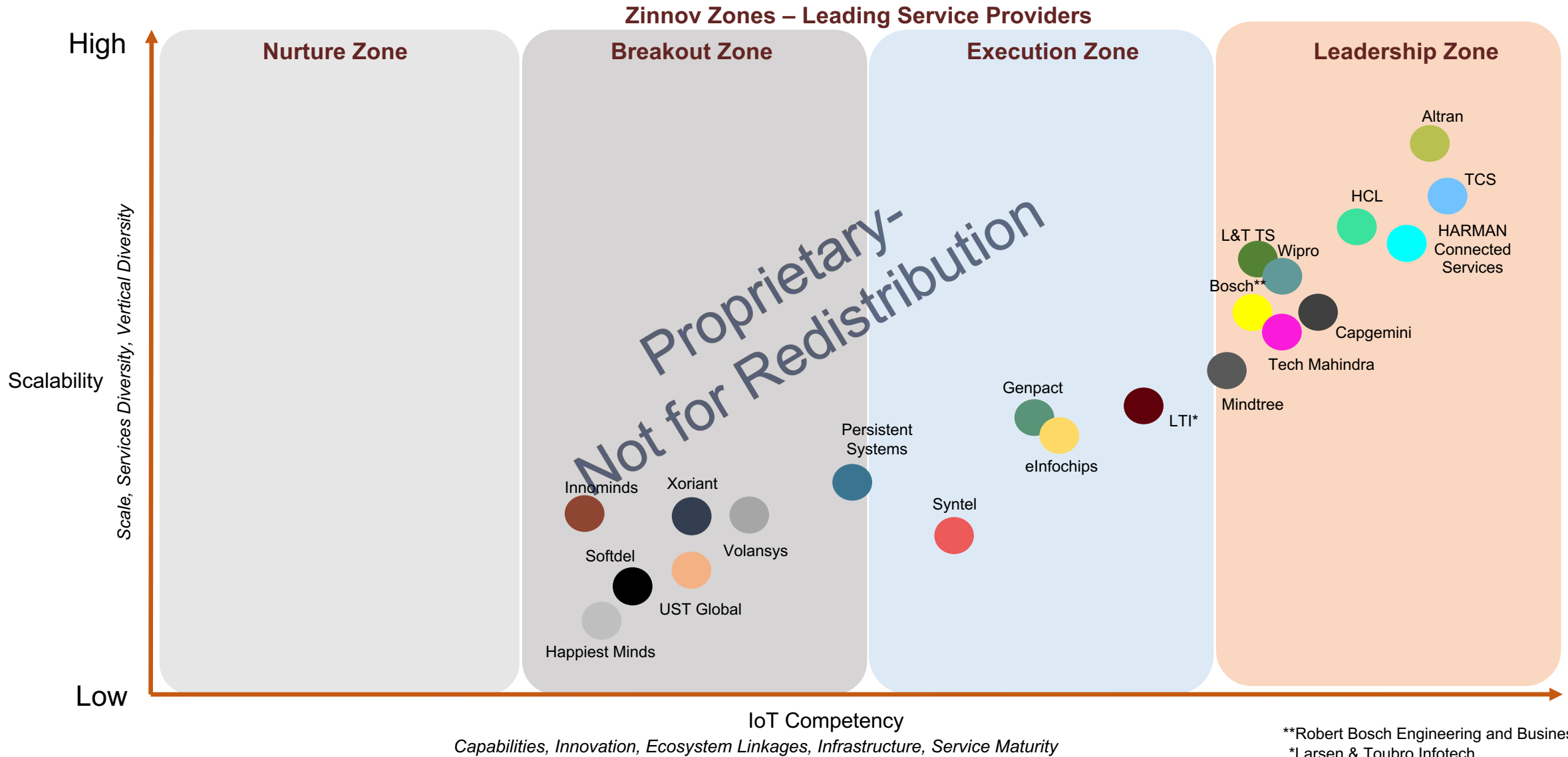
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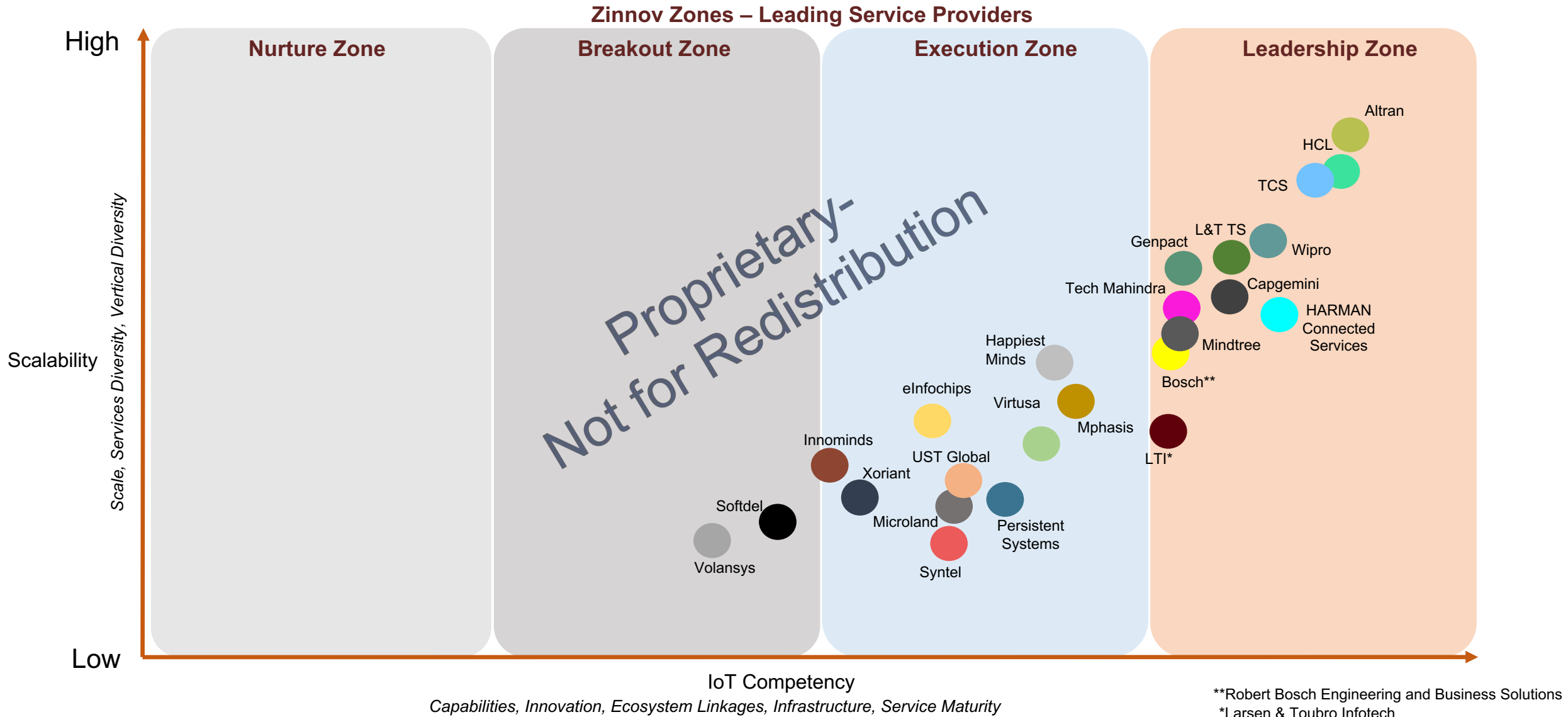
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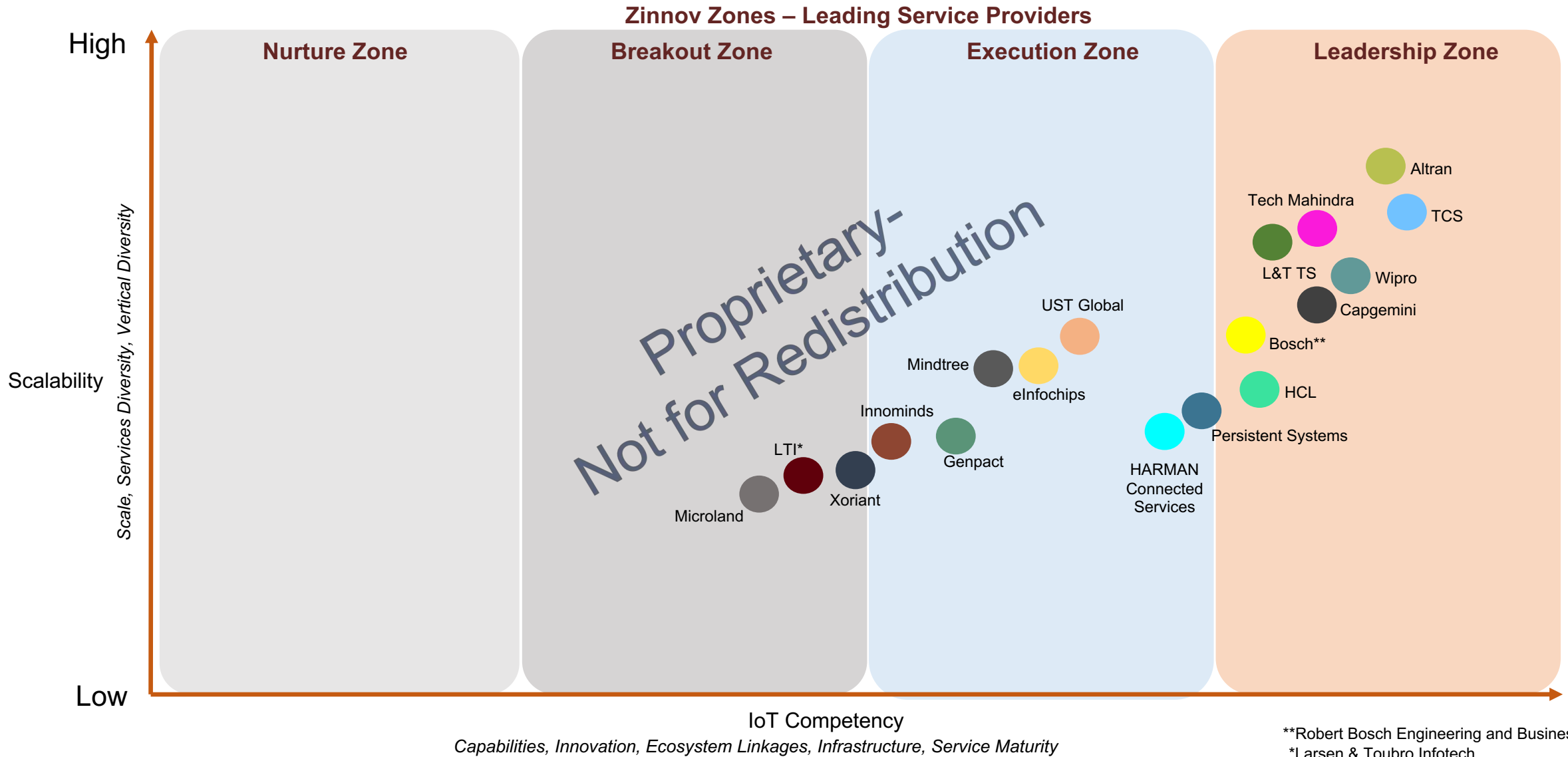


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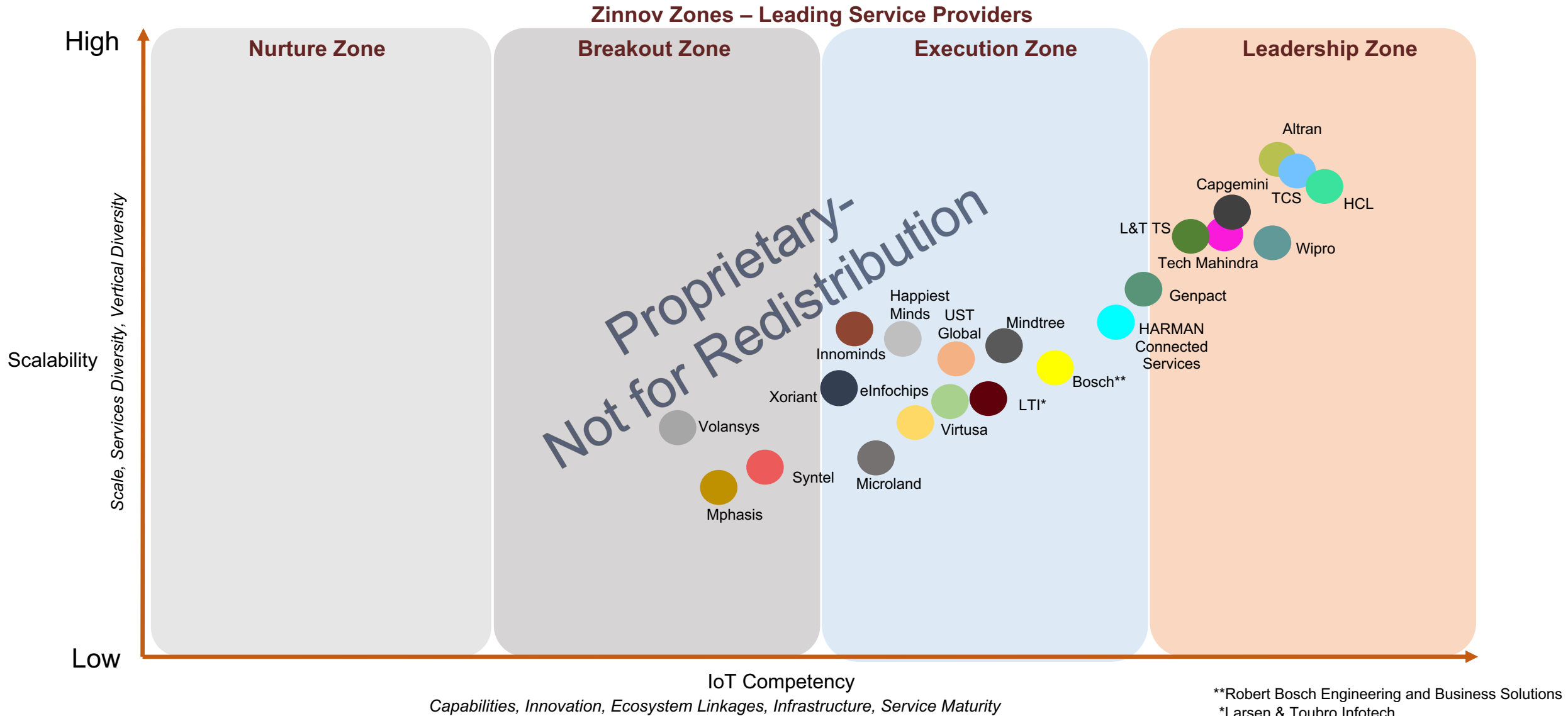


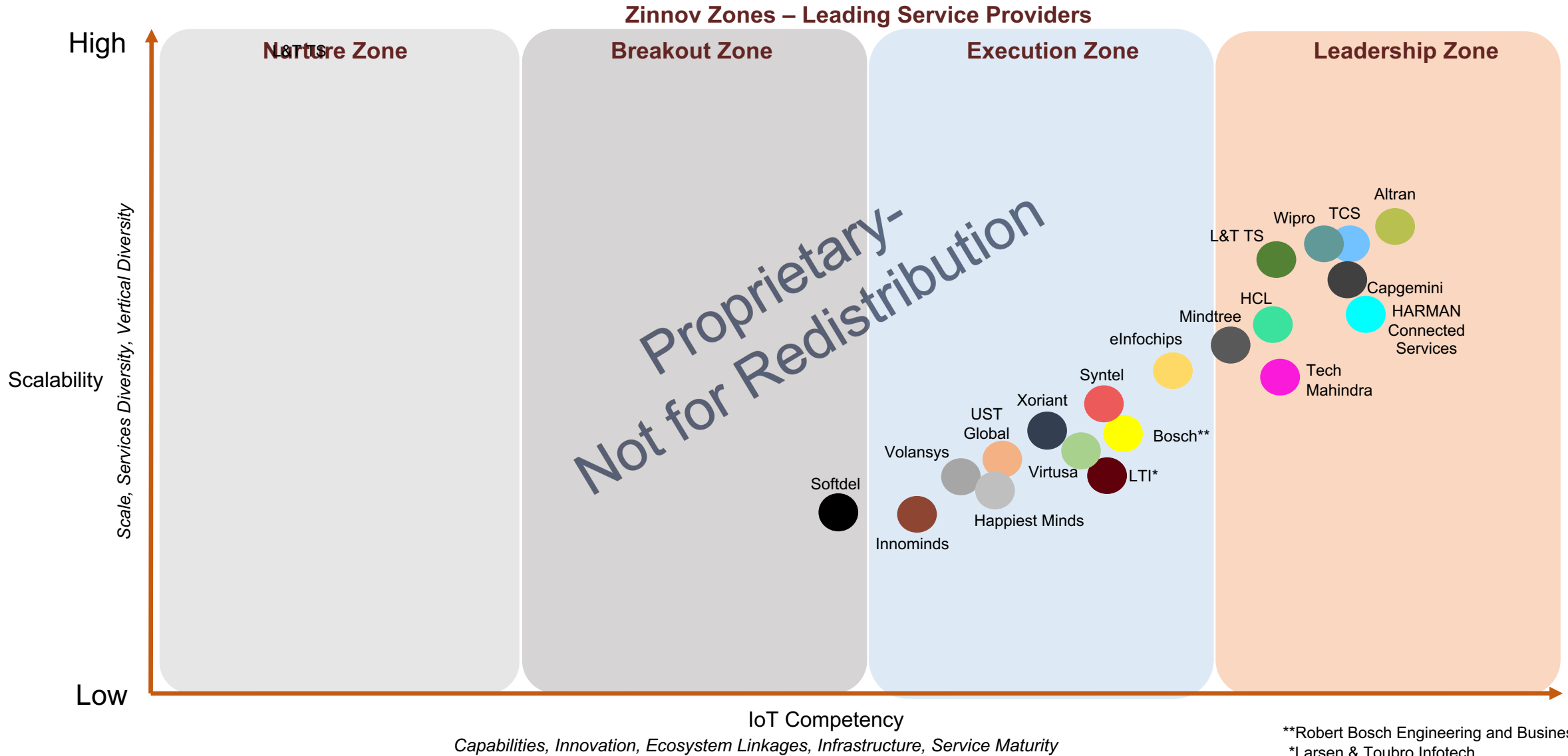
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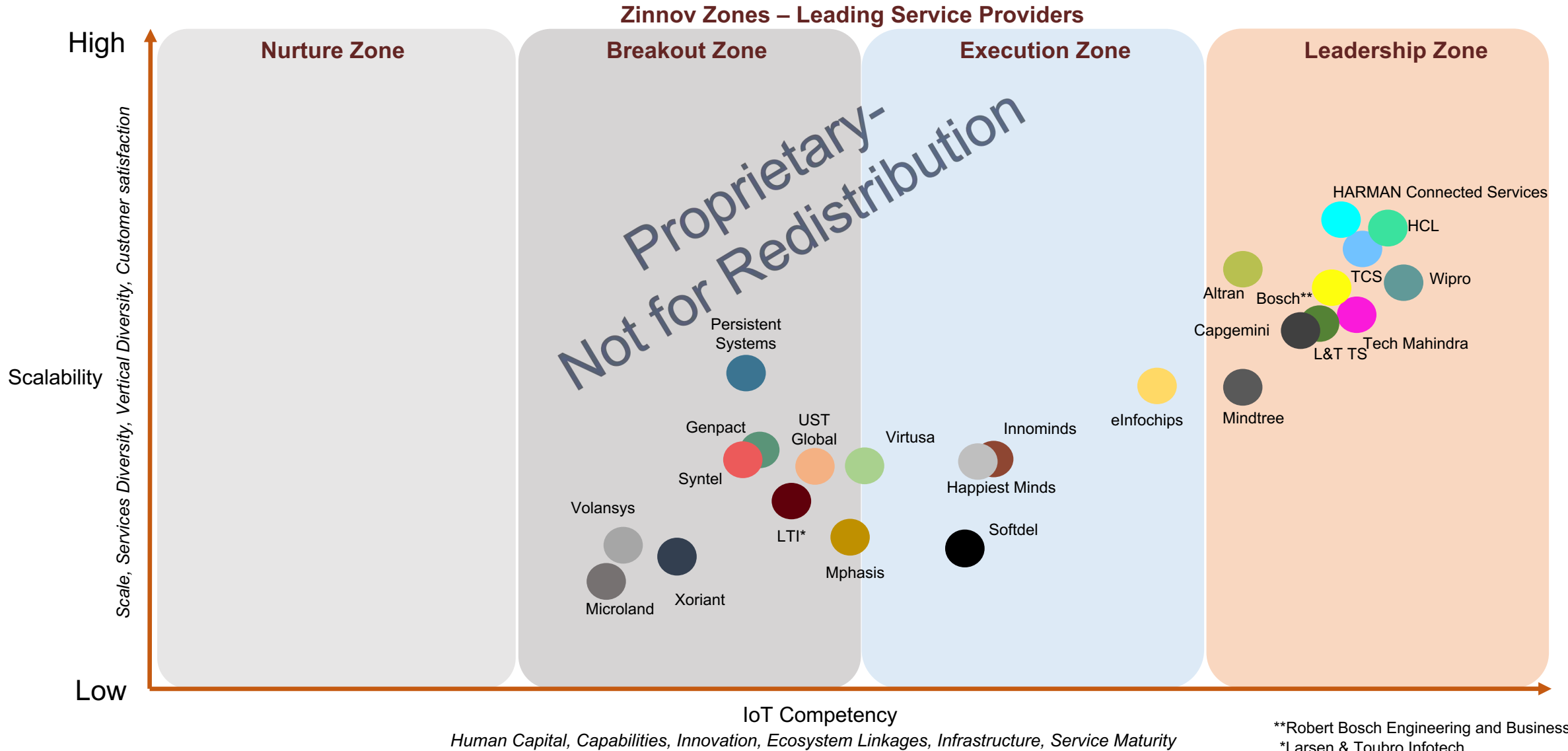


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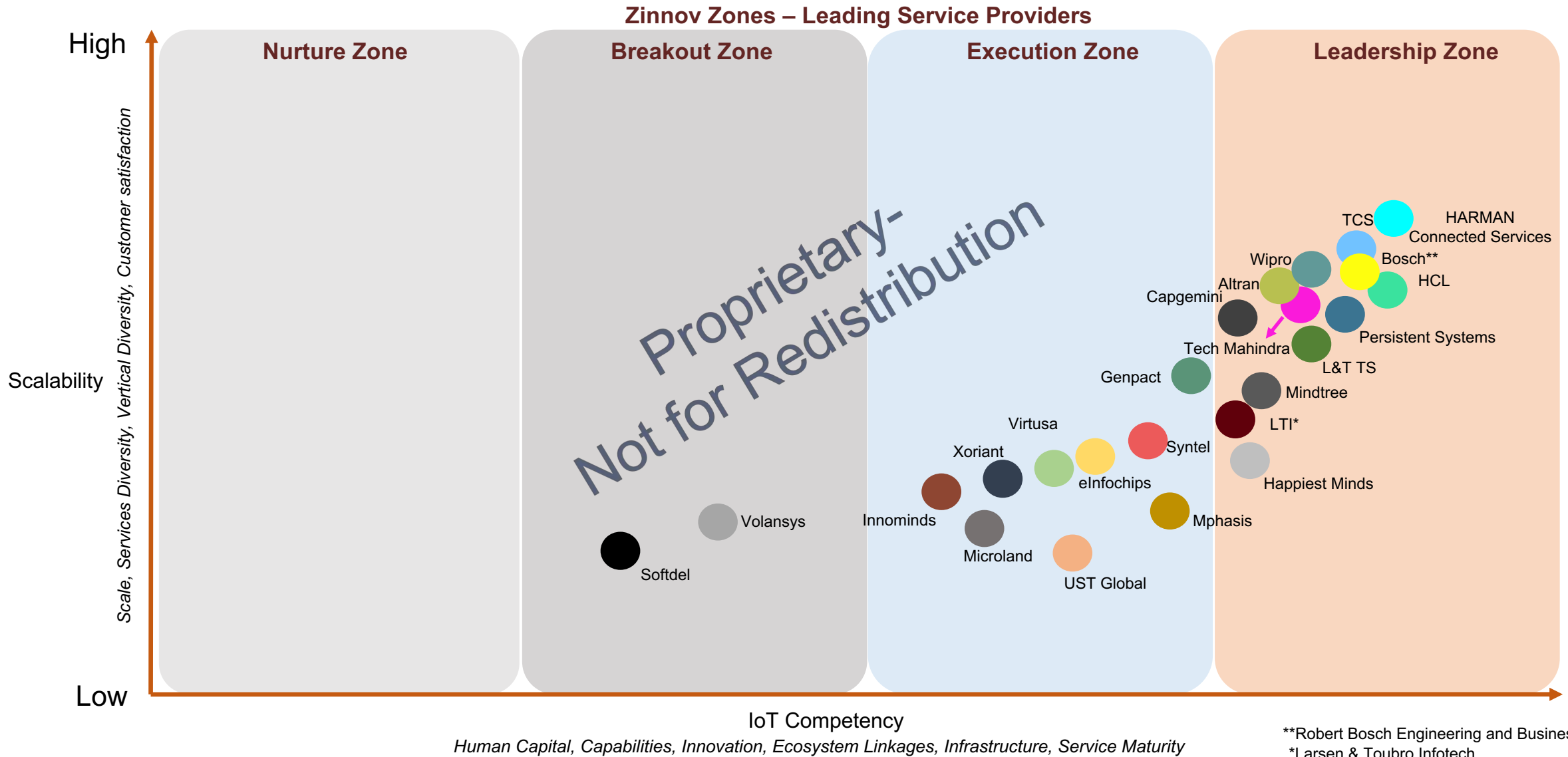




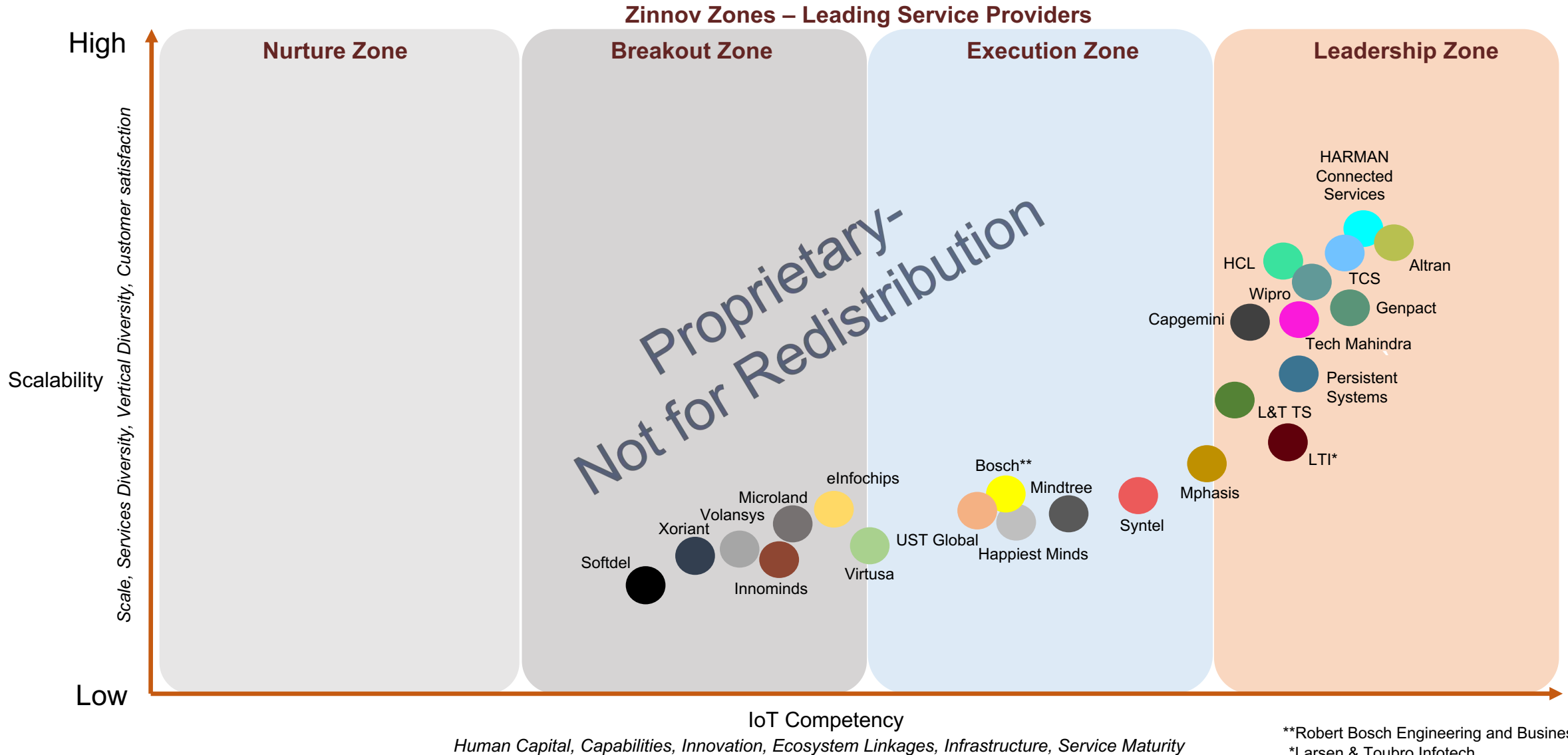
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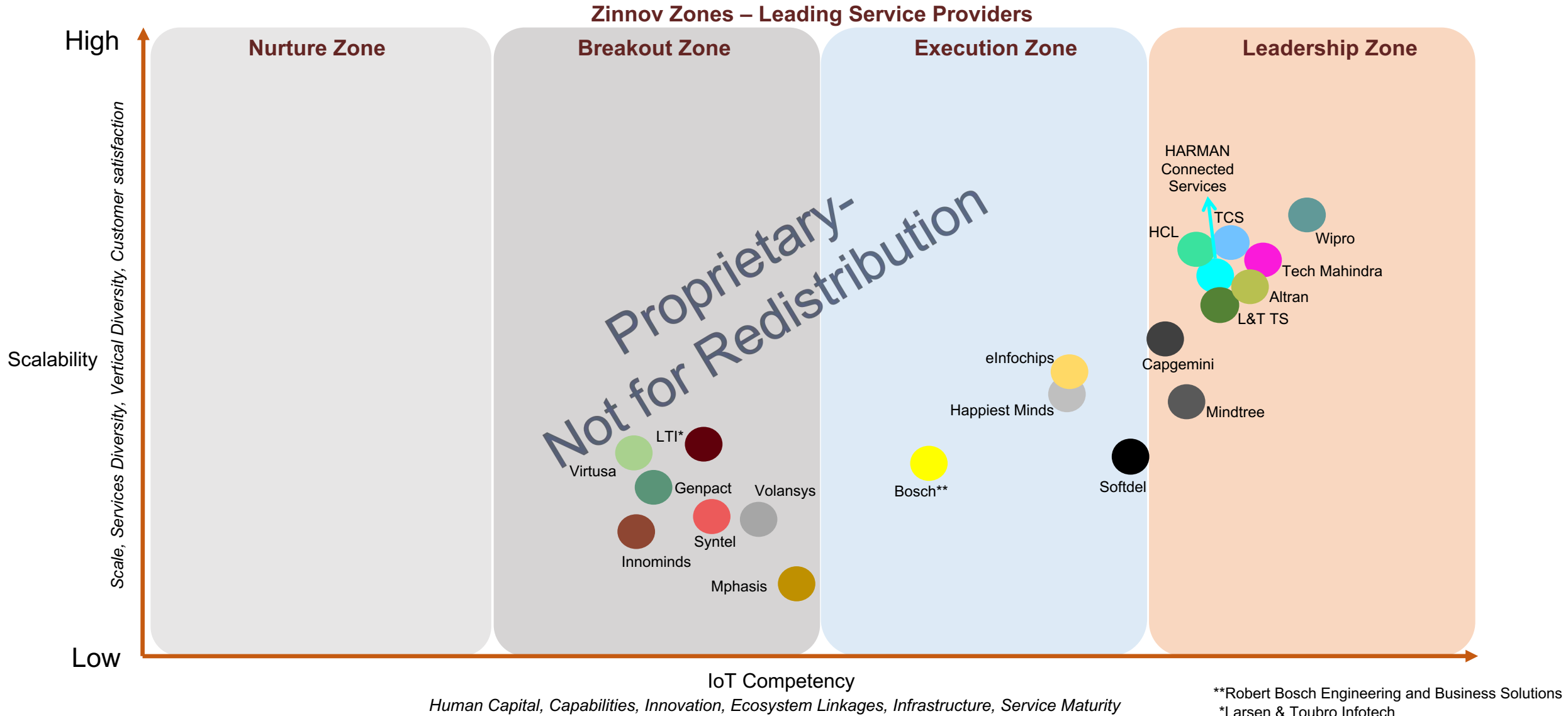
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