

Zinnov Zones 2019

IoT Technology & Services

October 2019

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

This document is solely for the use of Zinnov Client and Zinnov Personnel only. No part of it may be quoted, circulated or reproduced for distribution outside the client organization without prior written approval from Zinnov.



01

IoT Technology Services Market Overview

02

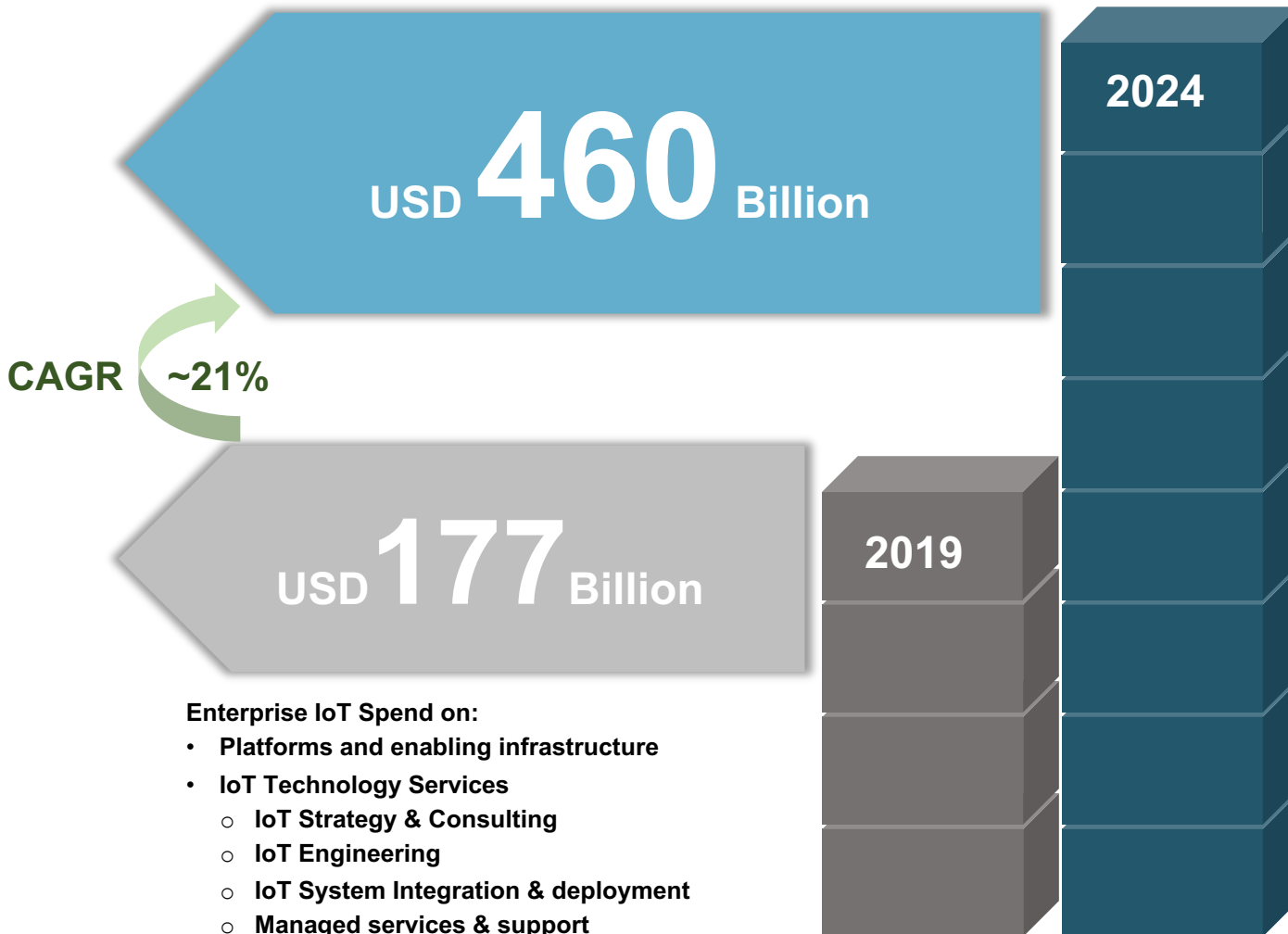
Use-case Adoption by Enterprises

03

Zinnov Zones IoT Ratings 2019

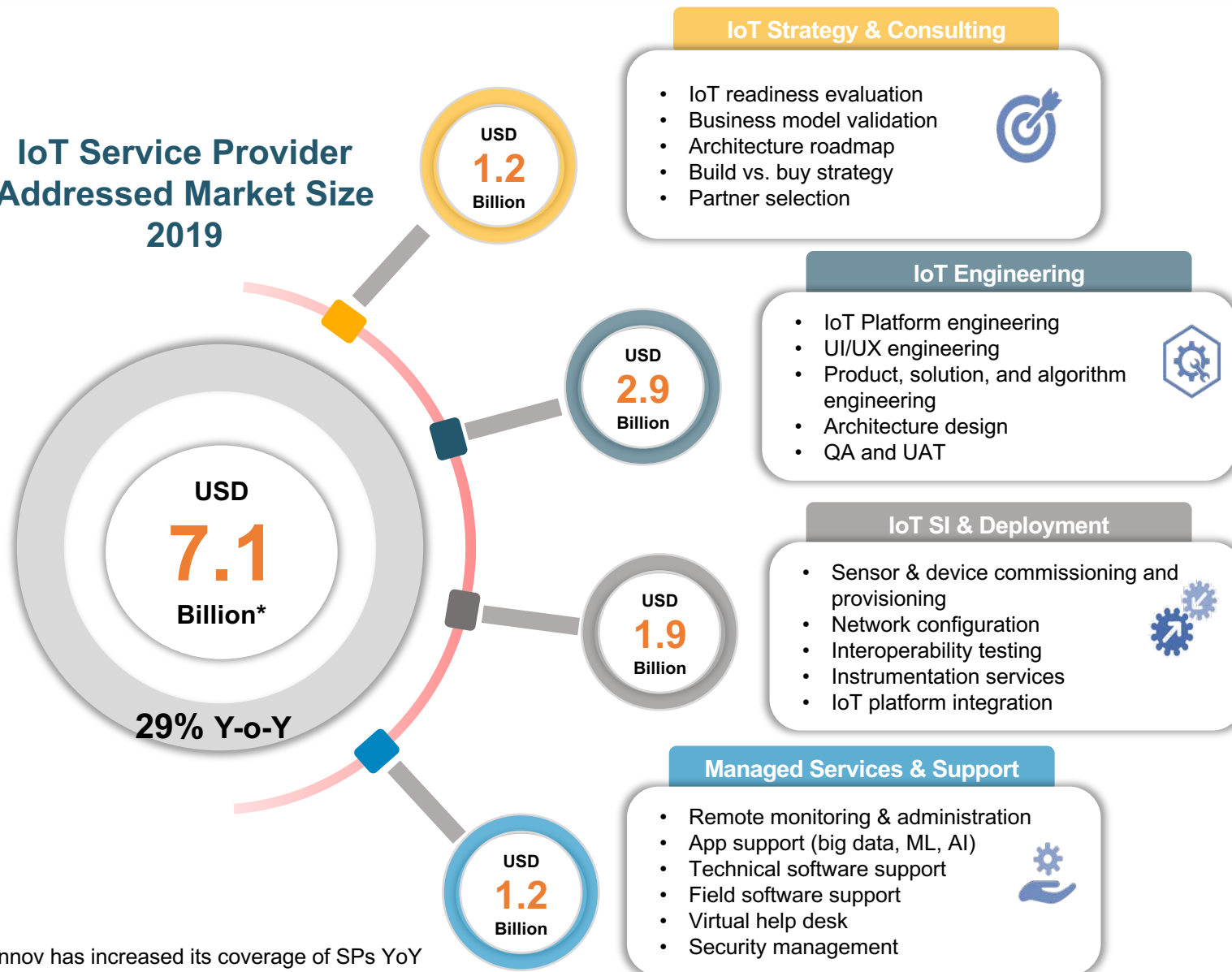
- Overall IoT Technology Services Market
 - Technology products and services market and growth
 - Market addressed by service providers

IoT Technology & Services Market Size - 2019



- Growth in IoT is facilitated by increasing adoption of enabling foundational infrastructure. There is an increase in IoT adoption as enabling technologies have evolved to reduce compute, storage, and network costs while enabling enterprises to access real-time insights for decision making
 - Edge & Fog computing: The number of IoT devices connected to an edge solution has grown at a CAGR of 50+% over the last 5 years
 - LPWA connections: It is estimated that ~11% of IoT connections will use LPWA connections such as Sigfox, LoRa, and LTE-NB1 by 2025
 - AI & Machine learning: AI and Machine learning adoption and use-cases has increased in enterprises as they look to analyse data for real-time intelligence and decision making
- There has been an increasing adoption of IoT for various use-cases across enterprises. As enterprises unlock more RoI from IoT investments, they are crossing the chasm when it comes to enterprise wide roll-outs

IoT Service Provider Addressed Market Size 2019



Key Takeaways

- Large transformatory IoT deals entail advisory services at the top and managed services at the tail
- IoT engineering services account for the highest share of the addressed market accounted for more than 40% of overall addressed market size
- Managed services & support is expected to witness strong growth as a result of increasing demand for infrastructure enablement and data science capabilities

*Zinnov has increased its coverage of SPs YoY



01

IoT Technology Services Market Overview

02

Use-case Adoption by Enterprises

03

Zinnov Zones IoT Ratings 2019

- IoT use-case adoption priorities
 - Industry 4.0
 - Connected Worker
 - Connected Assets
 - Connected Logistics
 - Connected Products

IoT use case adoption – Enterprise IoT deals by use case, N=163*

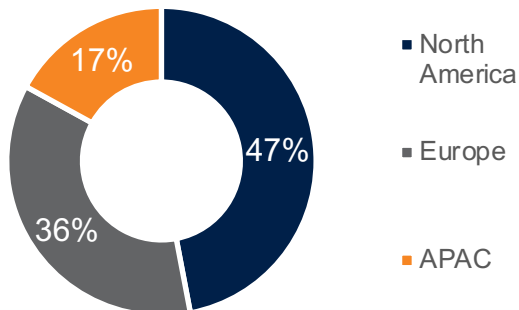


■ Industry 4.0 ■ Connected Assets ■ Connected Products ■ Connected Logistics ■ Connected Worker

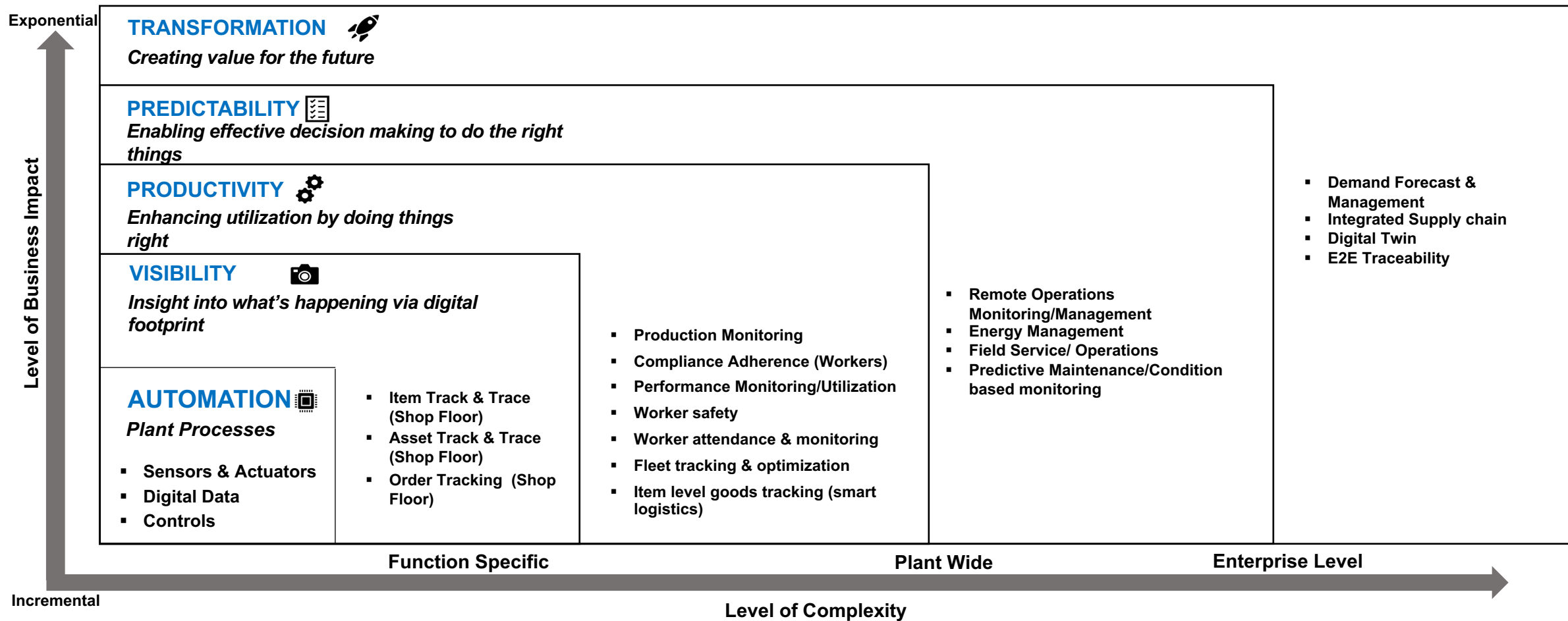
IoT use case adoption – Enterprise IoT deals by vertical, N=163*

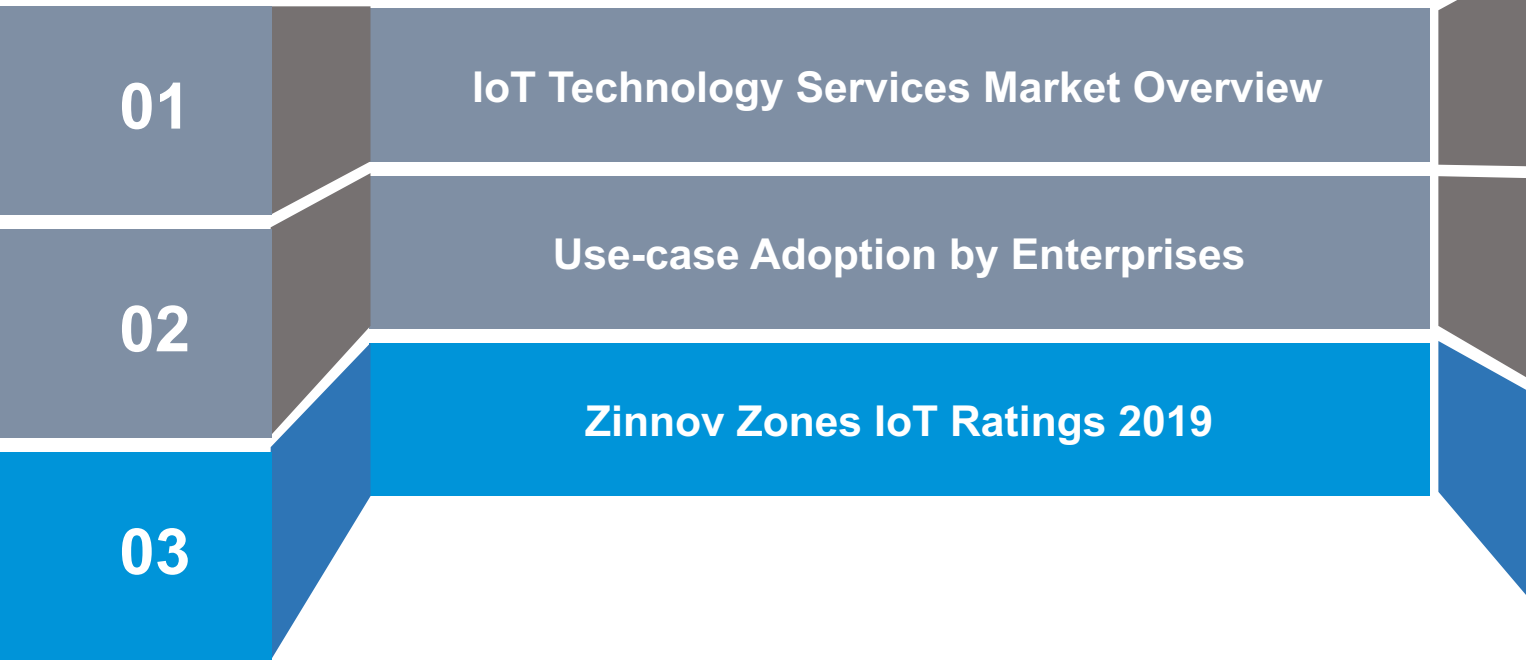


Enterprise IoT deals by geography, N=156*



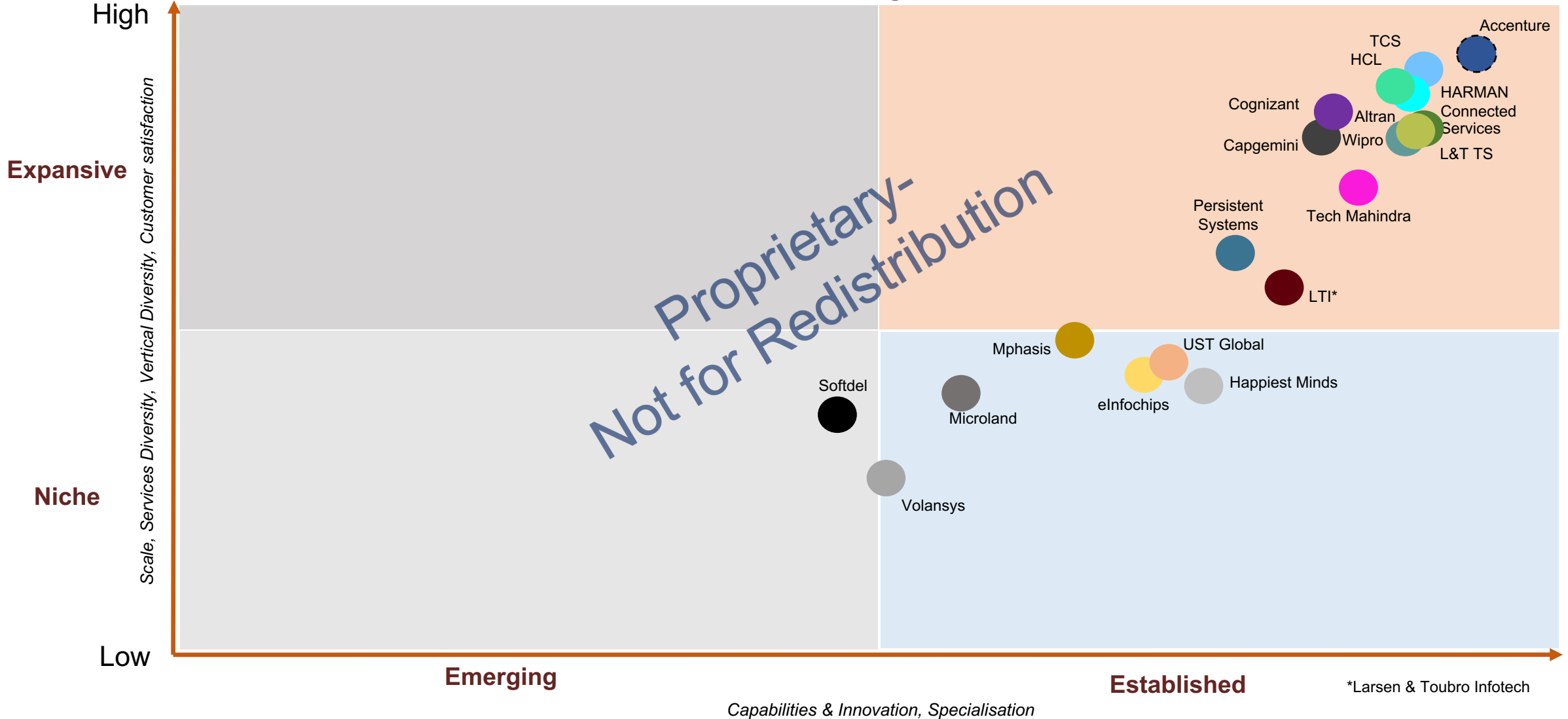
- Manufacturers are investing in Industry 4.0 initiatives to create an autonomous and cognitive ecosystem. Advancement in enabling technologies such as machine learning, deep learning, and robotics is further propelling their journey
- Industry 4.0 use-cases demonstrate strong alignment with outcomes. Key outcomes sought are automation, visibility, productivity, predictability, and overall digital transformation through IoT
- While adoption and leverage of service providers have been high for industry 4.0 initiatives, enterprises are marred with implementation challenges:
 - Scattered leadership that increases the complexity of cross-unit coordination and decision making
 - Integration challenges as shop floors use multiple software systems
 - Data ownership and security concerns

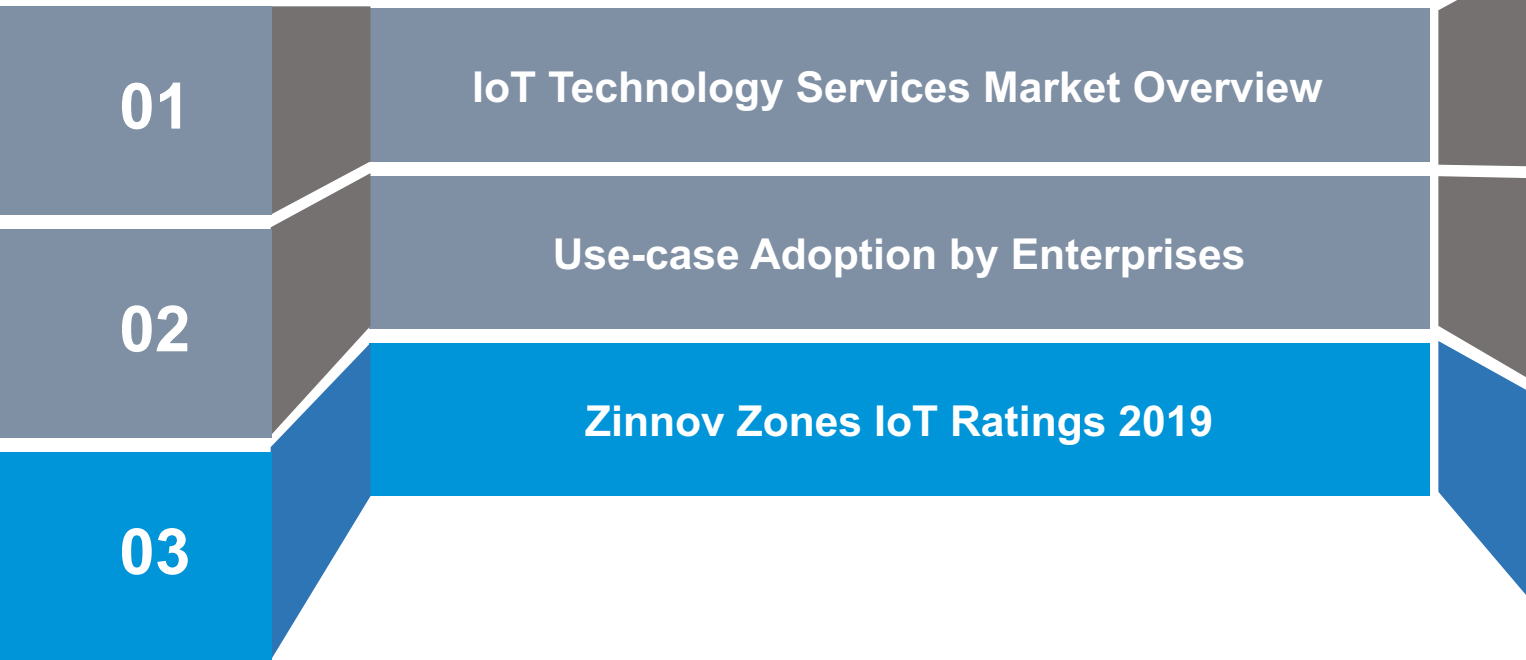




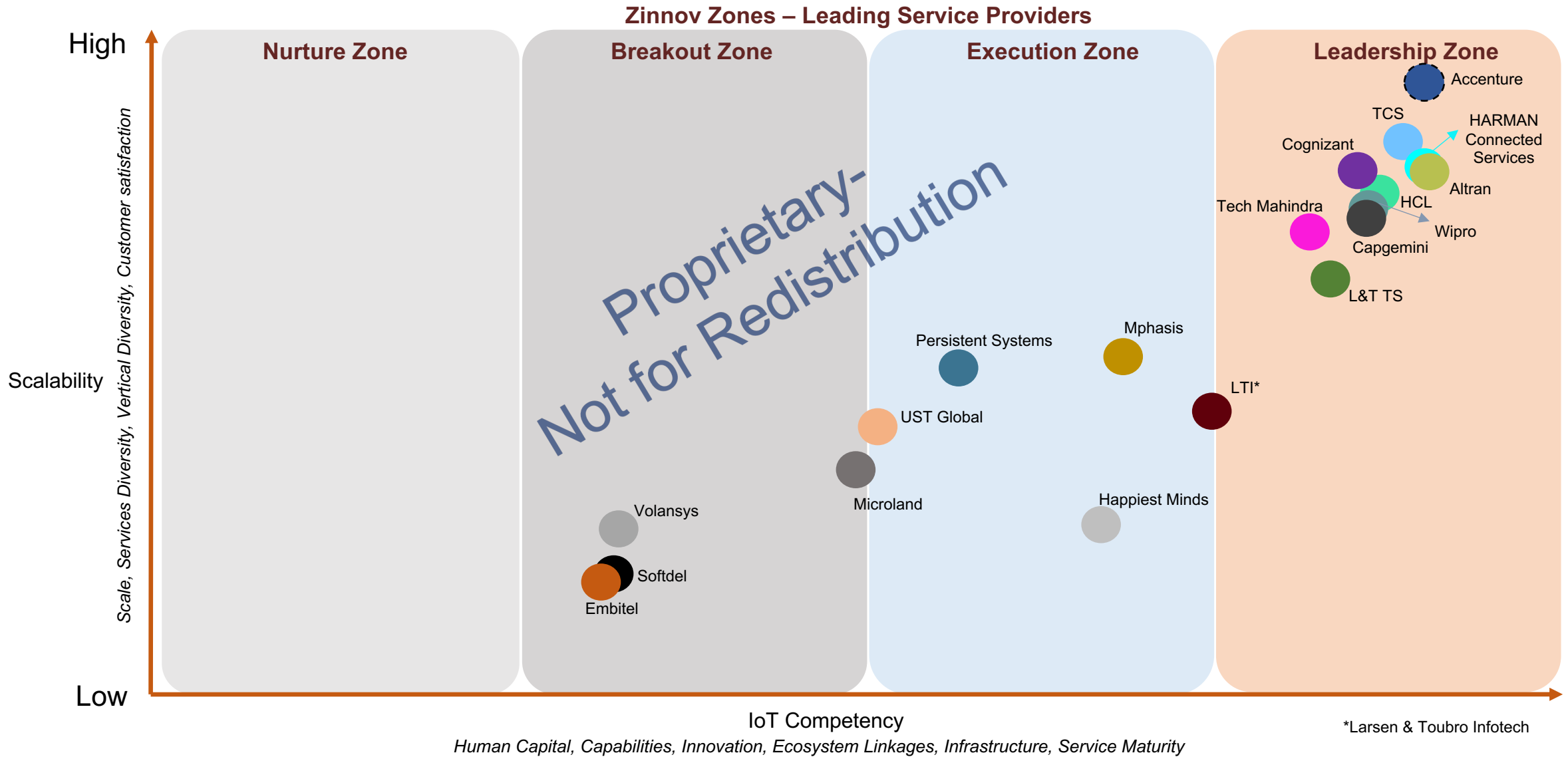
- Overall IoT Ratings
- IoT Technology service ratings by sub-service area
 - Strategy and consulting
 - IoT Engineering
 - SI and deployment
 - Managed services and support
- Use-case based ratings
 - Industry 4.0
 - Connected Worker
 - Connected Logistics
 - Connected Assets
 - Connected Products
- Vertical specific ratings
 - Public Infrastructure
 - Energy & Utilities
 - Retail
 - Telecom

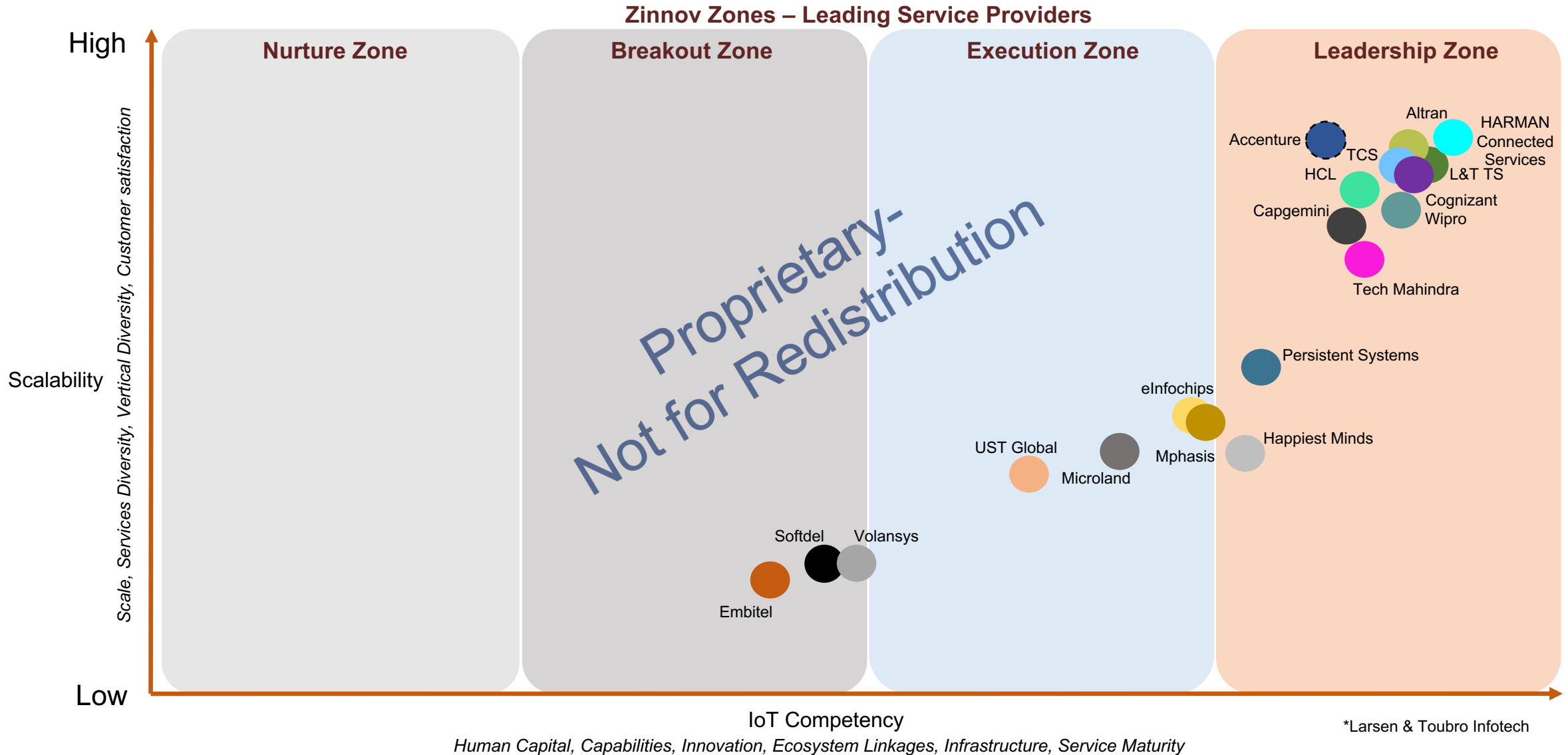
Zinnov Zones – Leading Service Providers

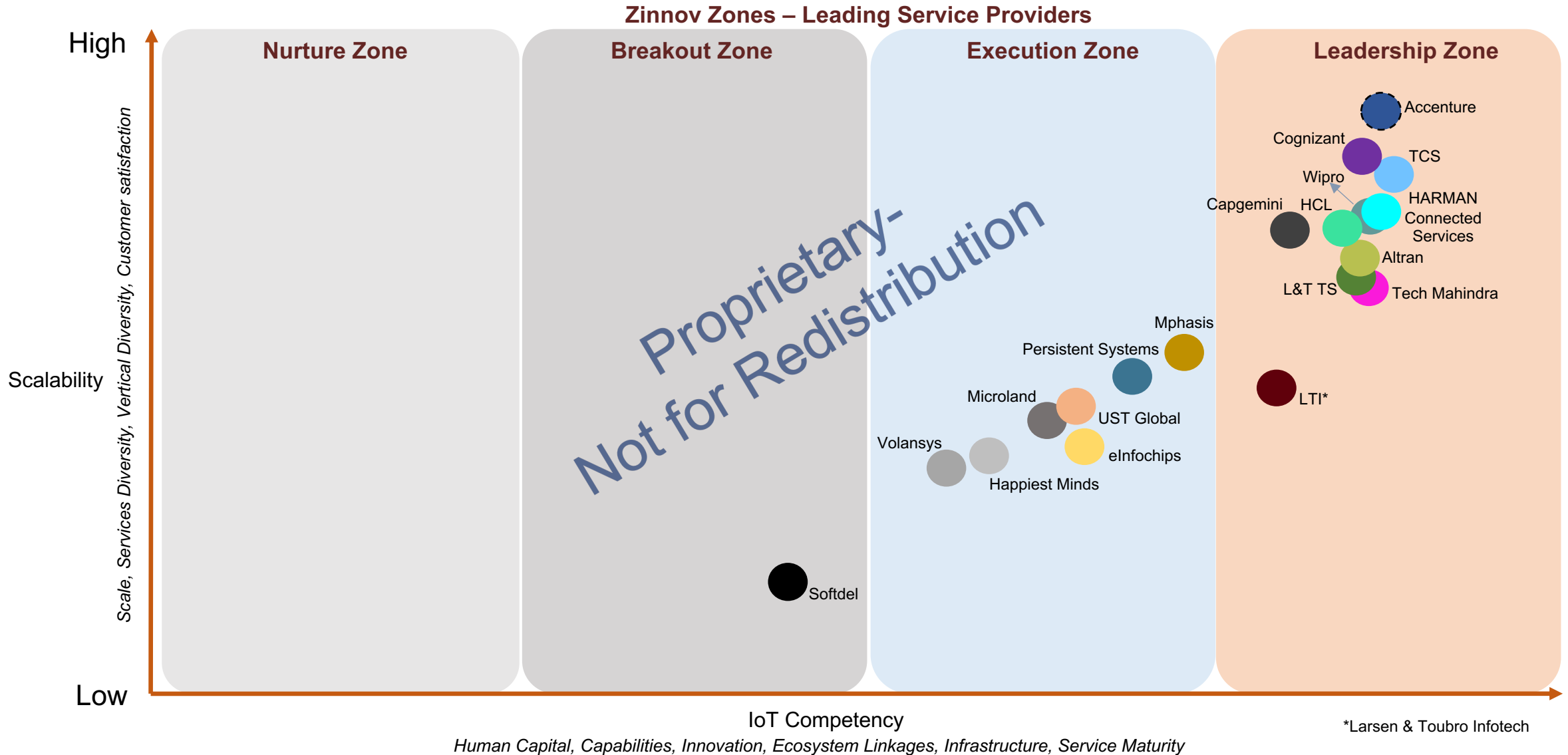


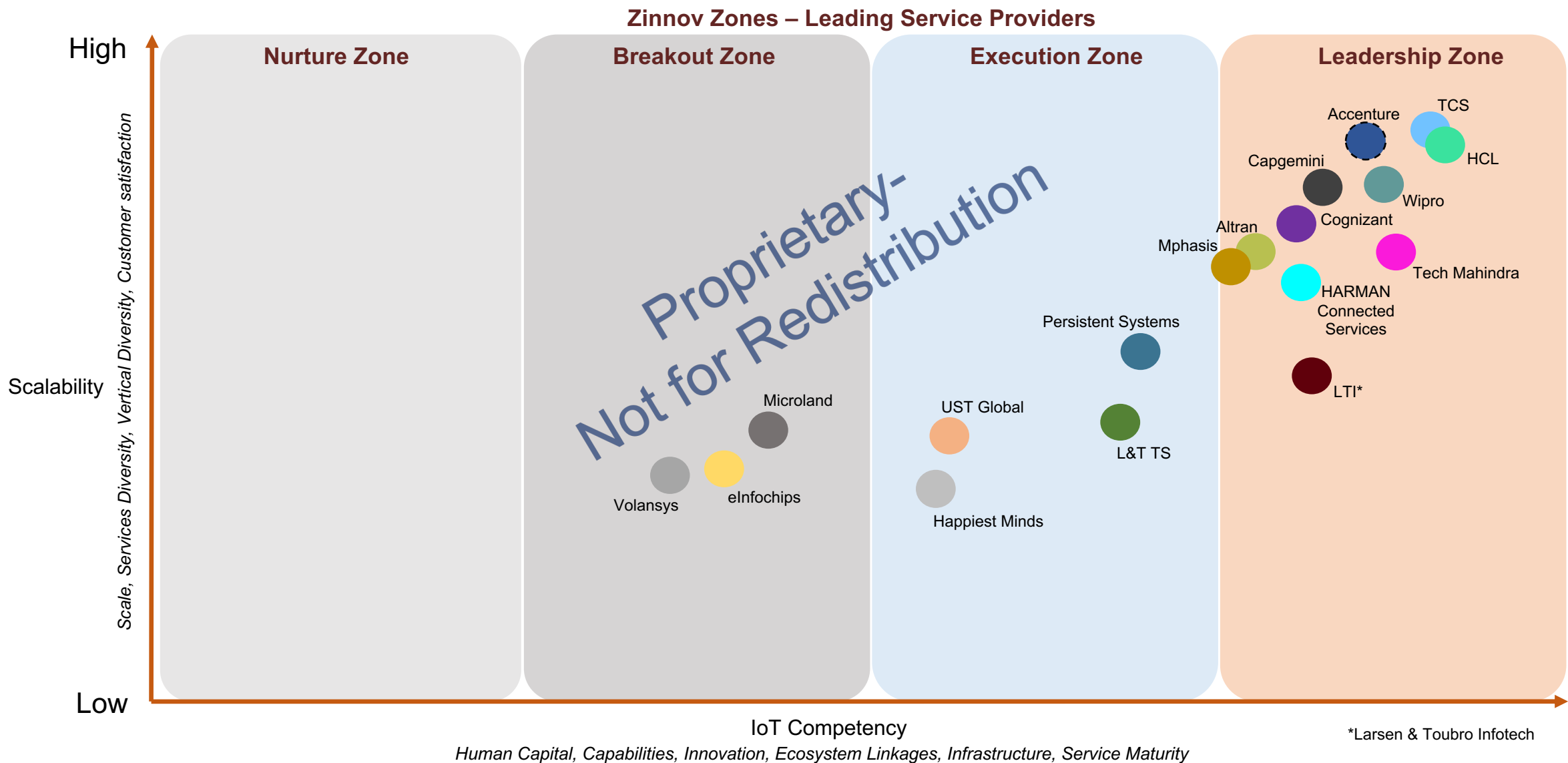


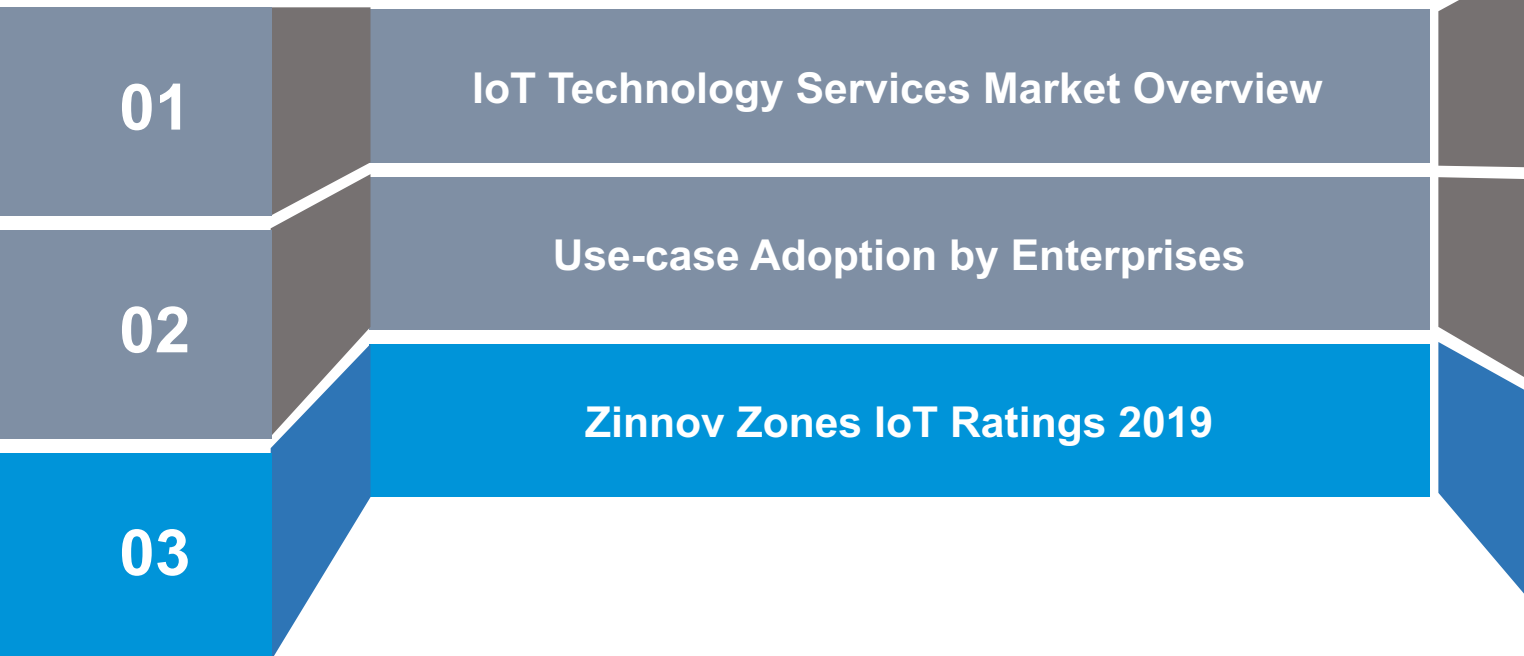
- Overall IoT Ratings
- IoT Technology service ratings by sub-service area
 - Strategy and consulting
 - IoT Engineering
 - SI and deployment
 - Managed services and support
- Use-case based ratings
 - Industry 4.0
 - Connected Worker
 - Connected Logistics
 - Connected Assets
 - Connected Products
- Vertical specific ratings
 - Public Infrastructure
 - Energy & Utilities
 - Retail
 - Telecom



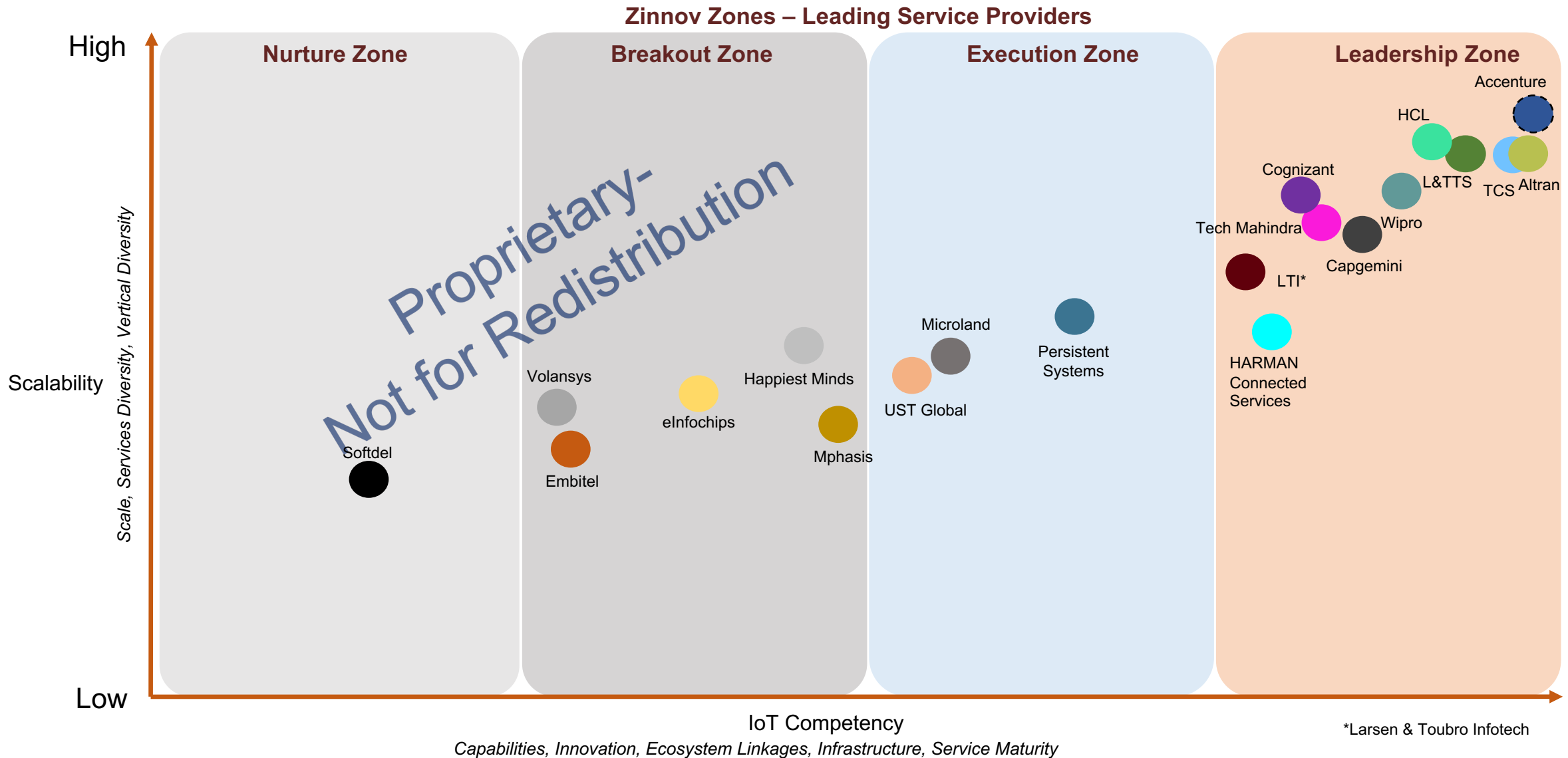


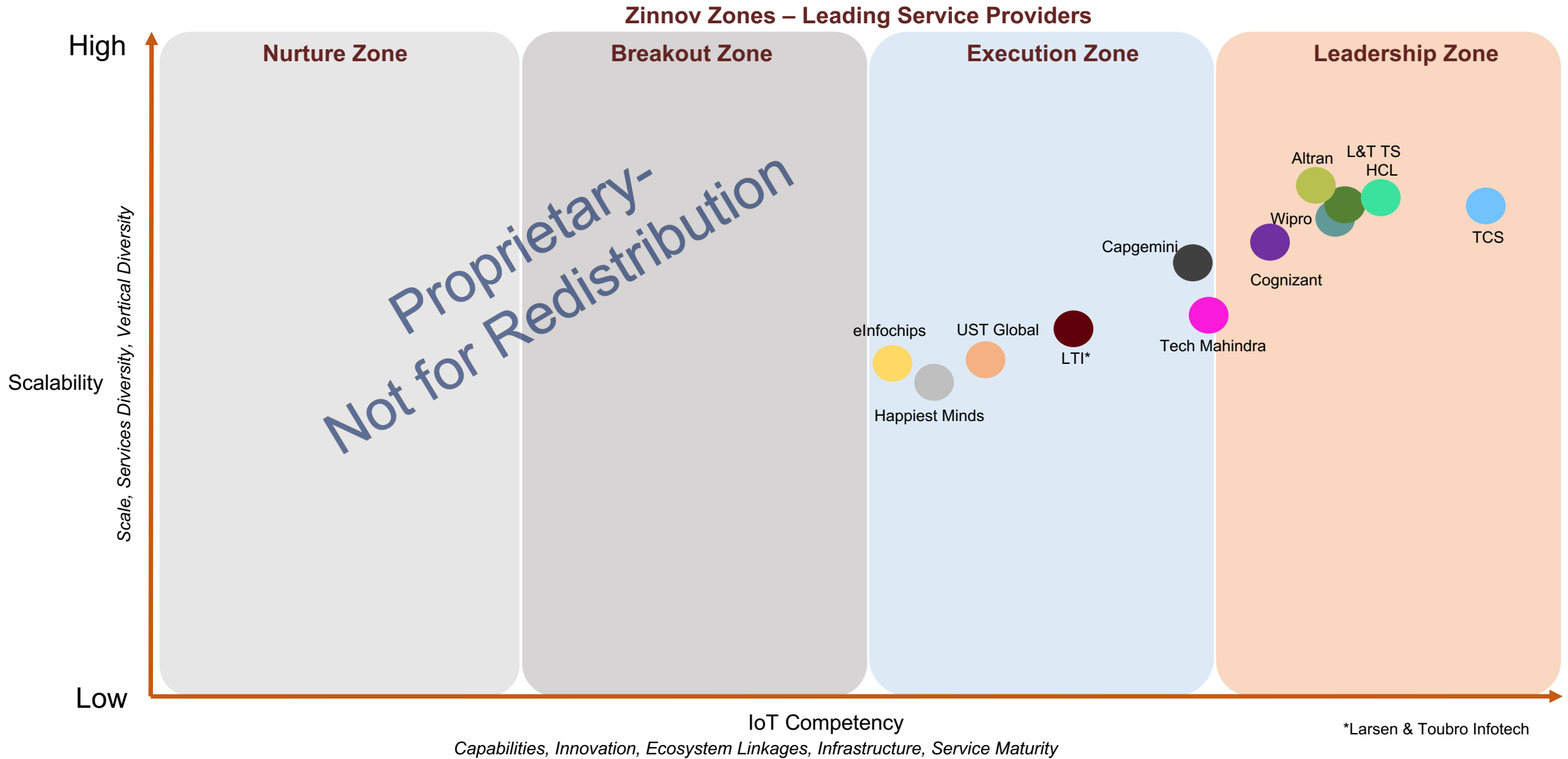


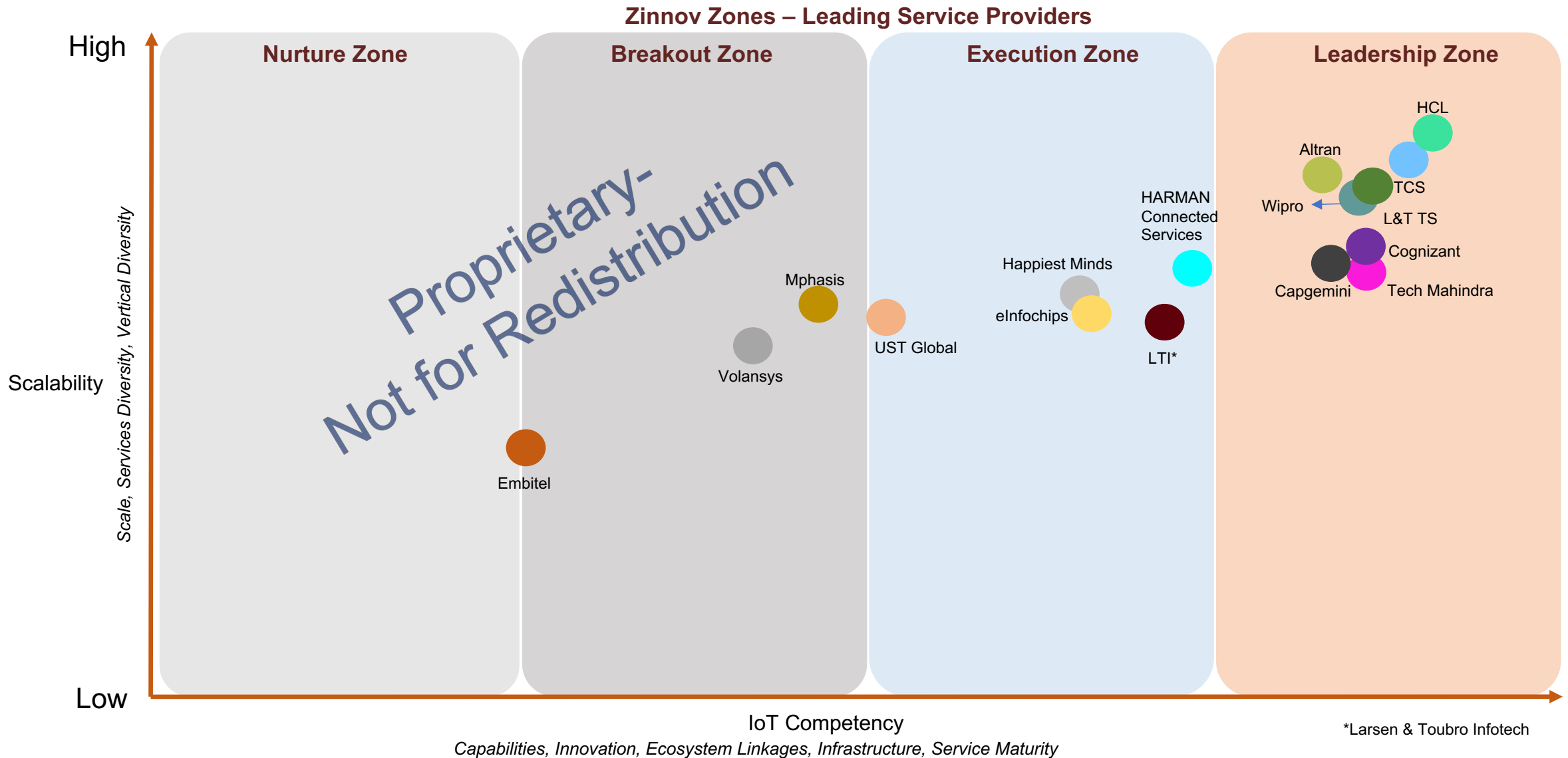


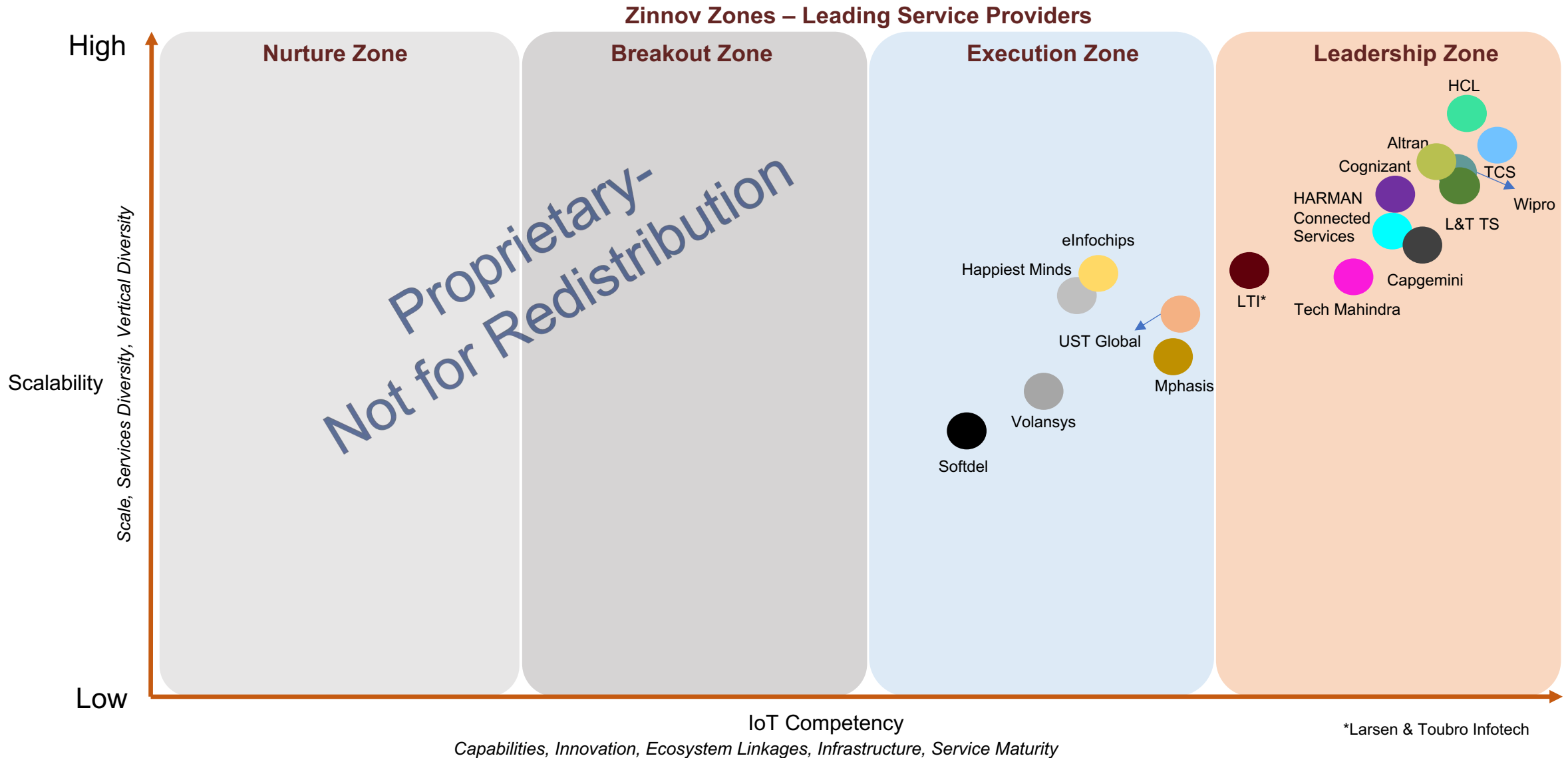


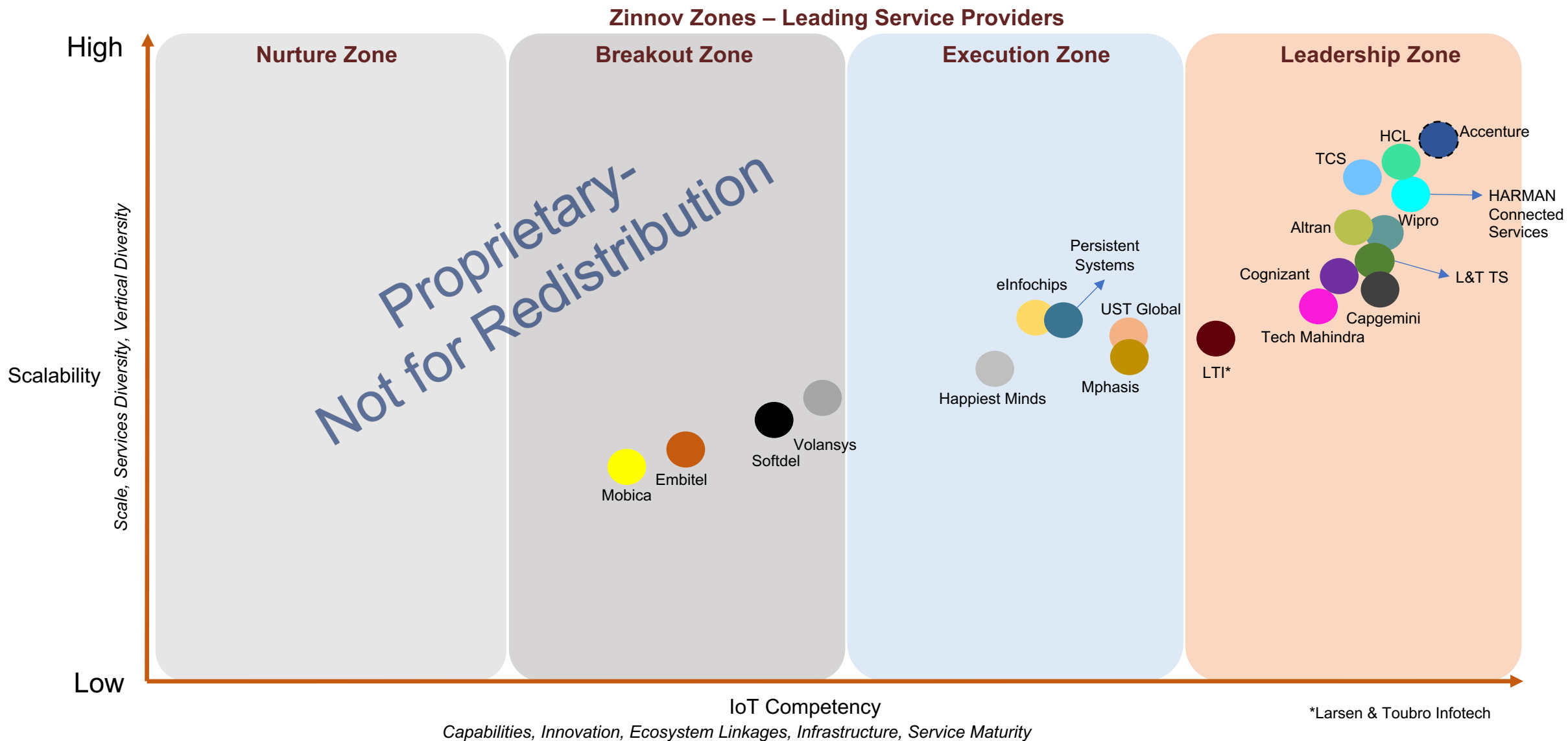
- Overall IoT Ratings
- IoT Technology service ratings by sub-service area
 - Strategy and consulting
 - IoT Engineering
 - SI and deployment
 - Managed services and support
- Use-case based ratings
 - Industry 4.0
 - Connected Worker
 - Connected Logistics
 - Connected Assets
 - Connected Products
- Vertical specific ratings
 - Public Infrastructure
 - Energy & Utilities
 - Retail
 - Telecom

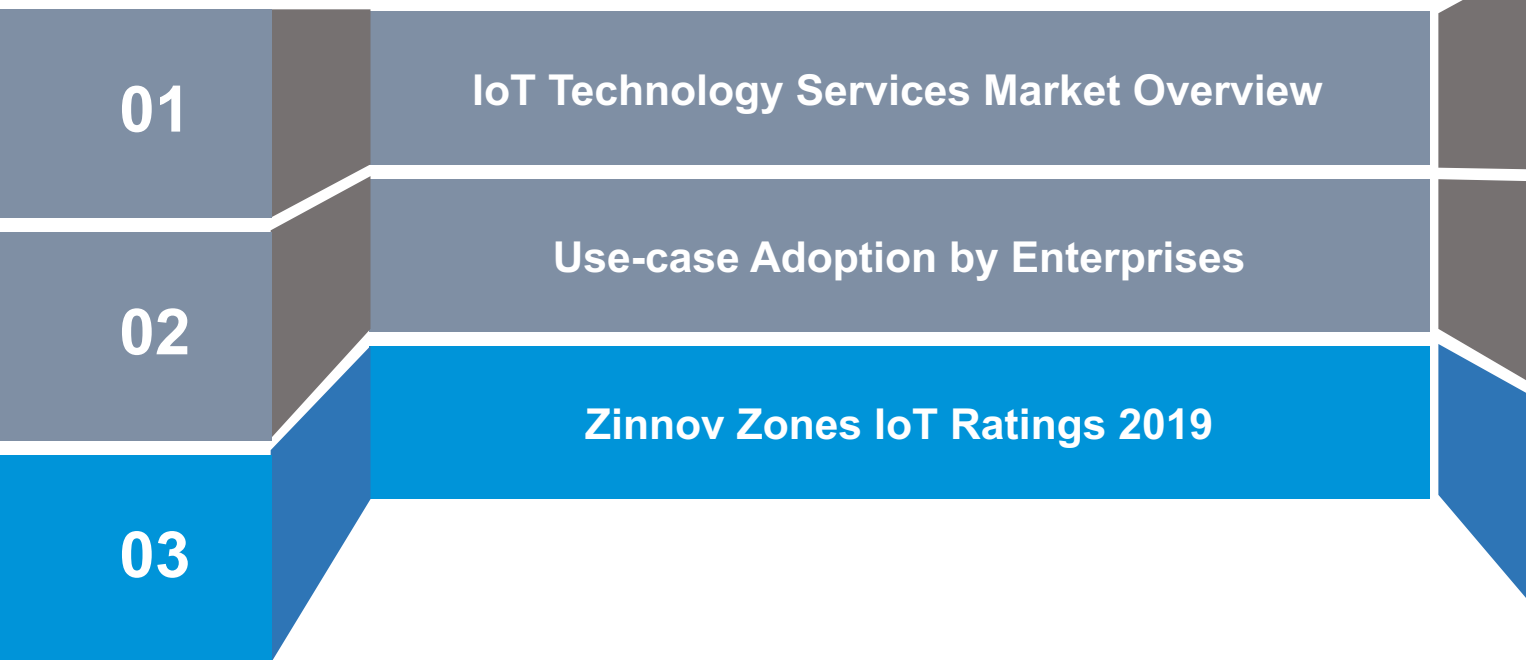




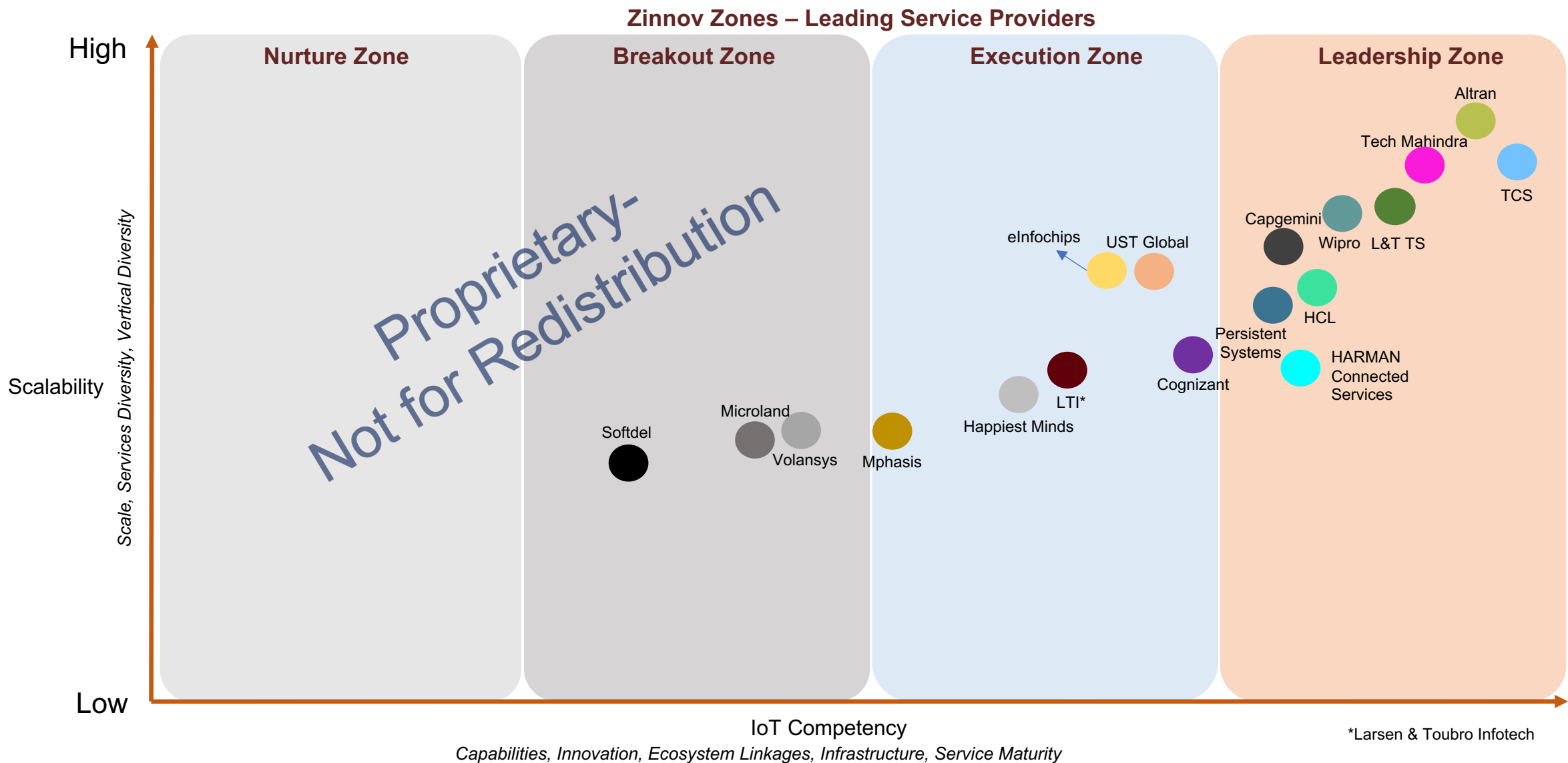


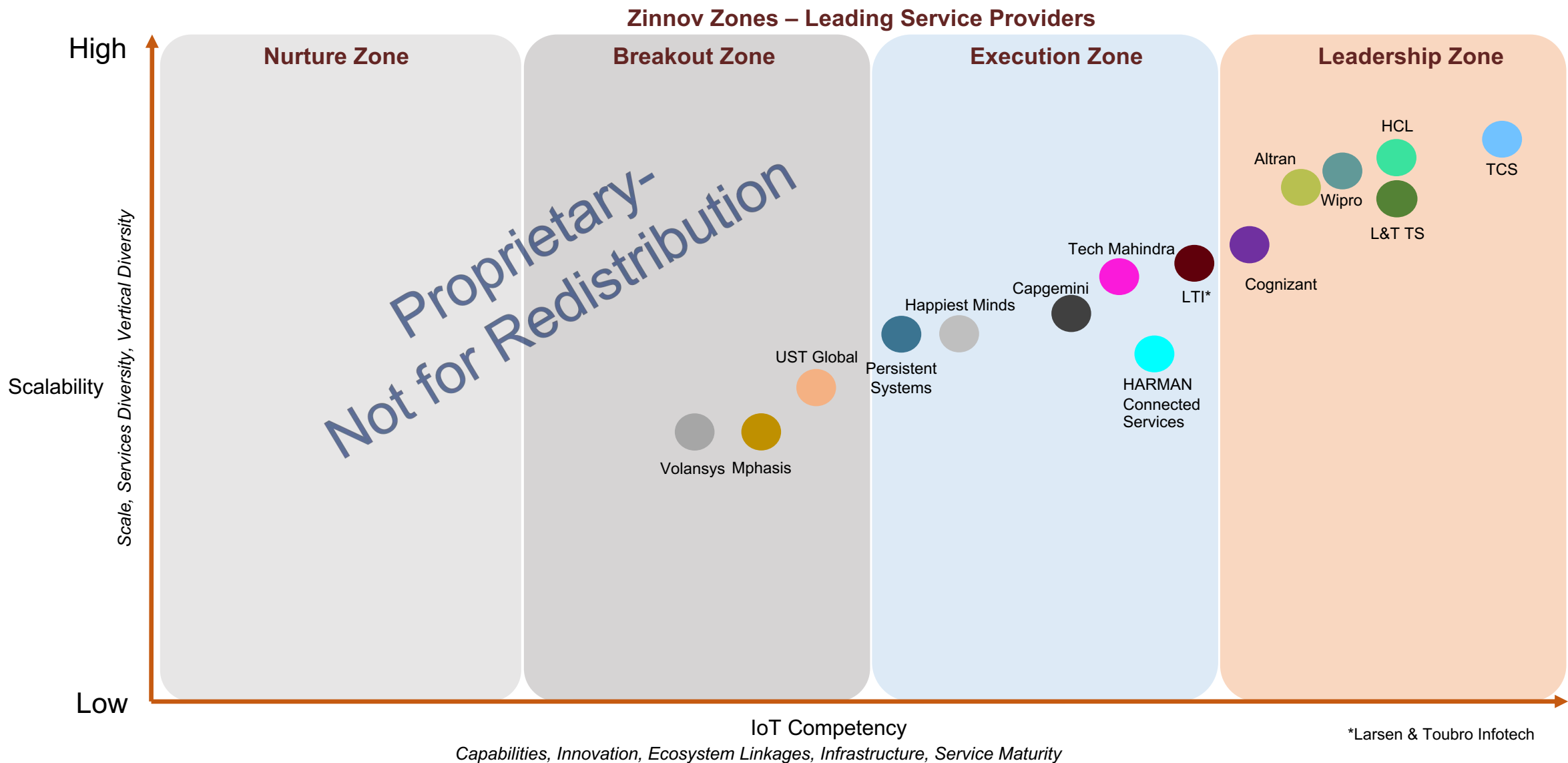


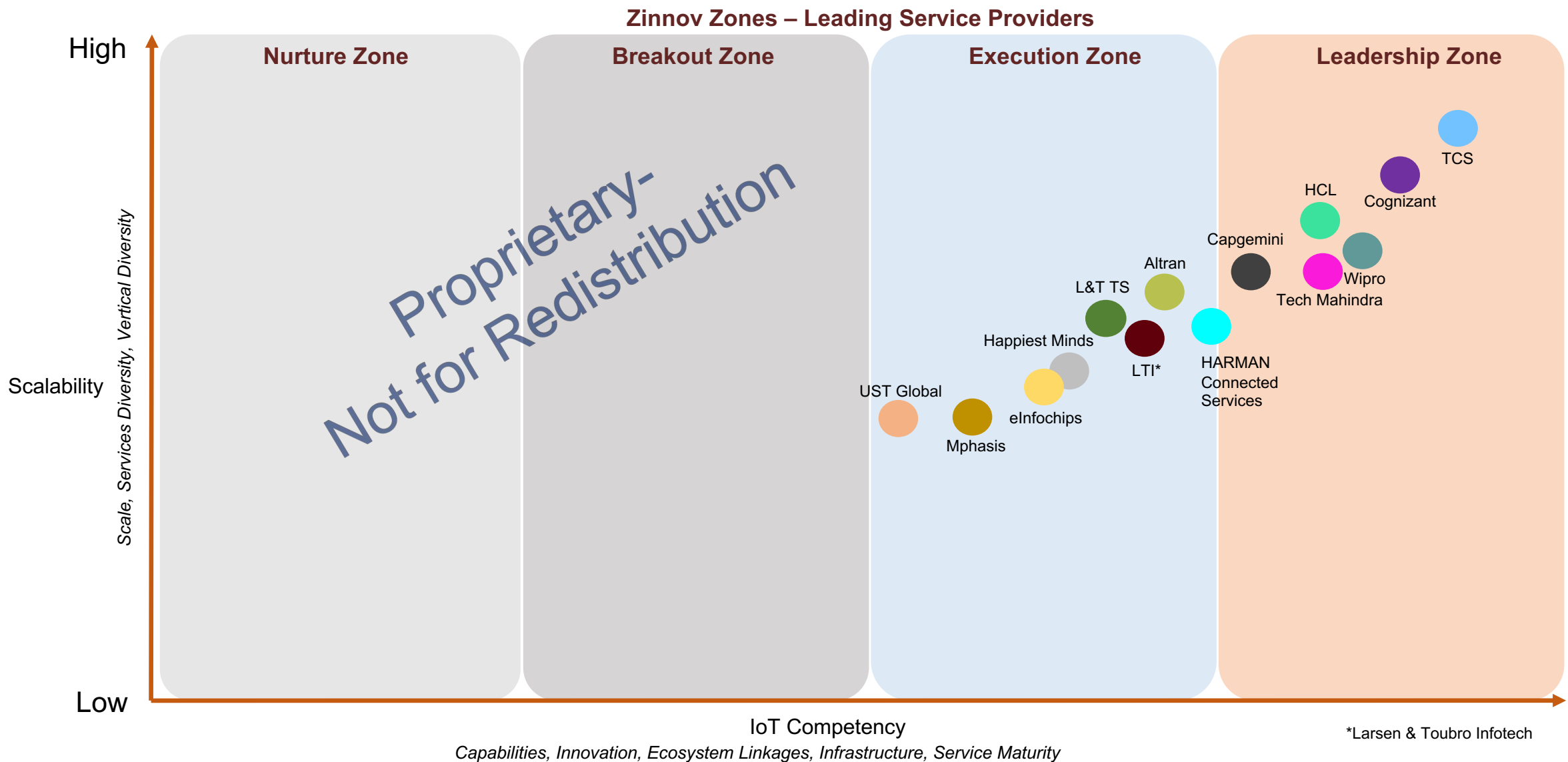


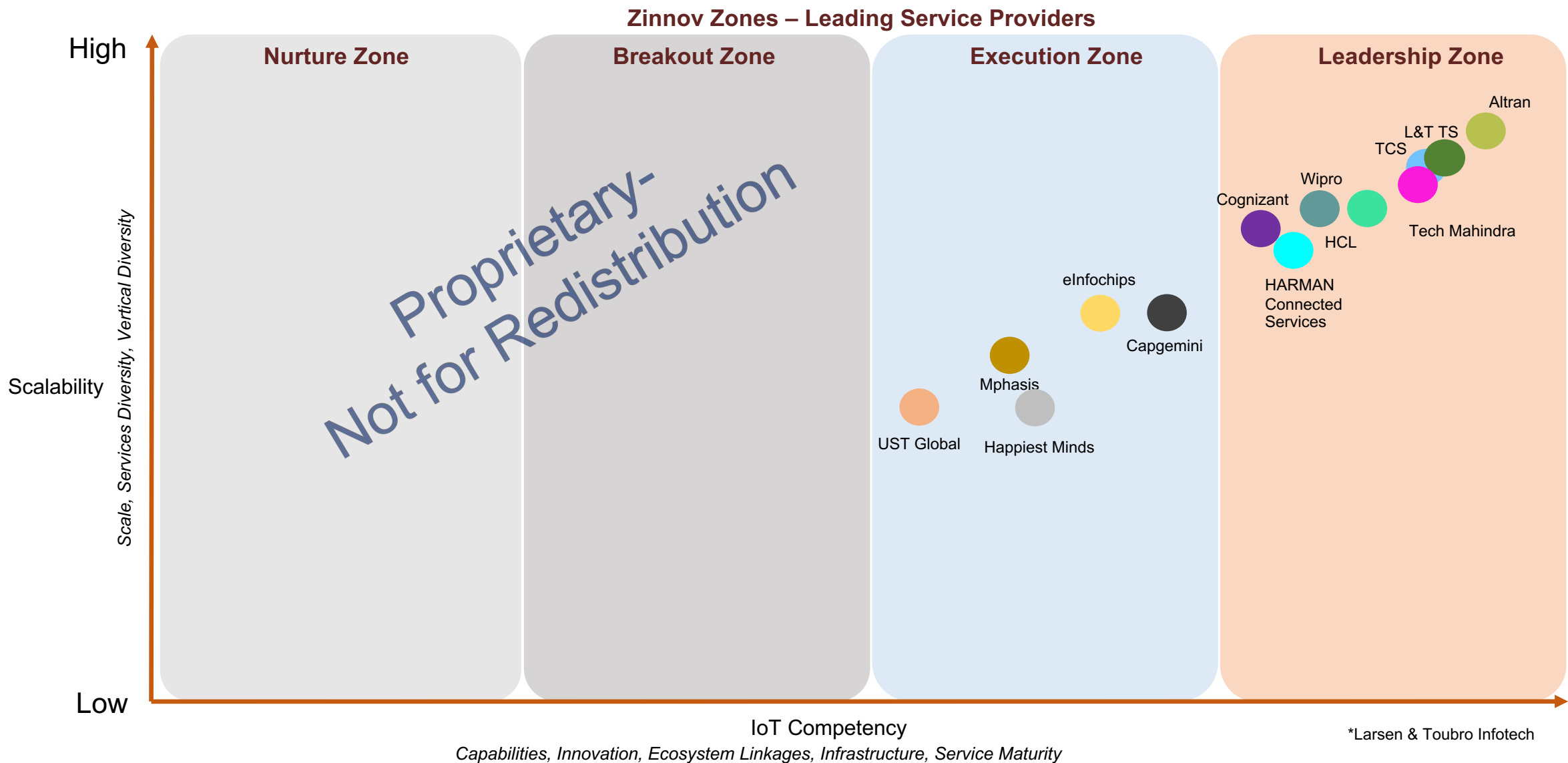


- Overall IoT Ratings
- IoT Technology service ratings by sub-service area
 - Strategy and consulting
 - IoT Engineering
 - SI and deployment
 - Managed services and support
- Use-case based ratings
 - Industry 4.0
 - Connected Worker
 - Connected Logistics
 - Connected Assets
 - Connected Products
- Vertical specific ratings
 - Public Infrastructure
 - Energy & Utilities
 - Retail
 - Telecom











www.zinnov.com



info@zinnov.com

SANTA CLARA | HOUSTON | BANGALORE | GURGAON

©2002-19 Zinnov. All rights Reserved