







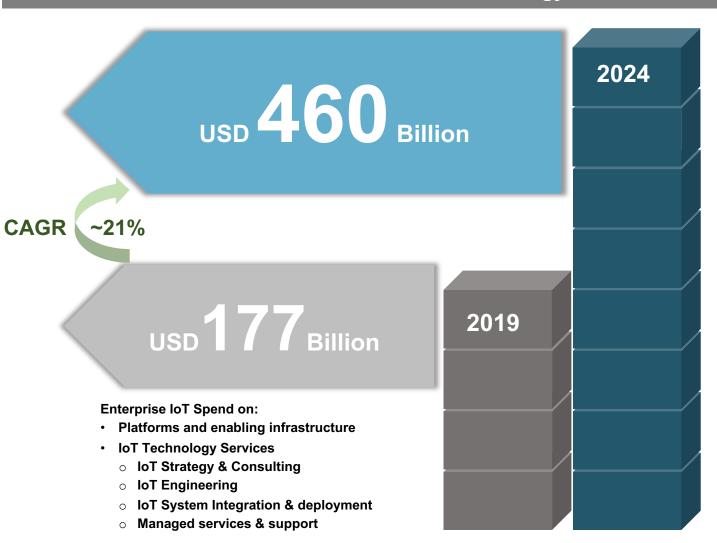
- Overall IoT Technology Services Market
 - Technology products and services market and growth
 - Market addressed by service providers



The adoption of IoT technologies continues to accelerate as enterprises unlock potential from myriad use-cases



IoT Technology & Services Market Size - 2019

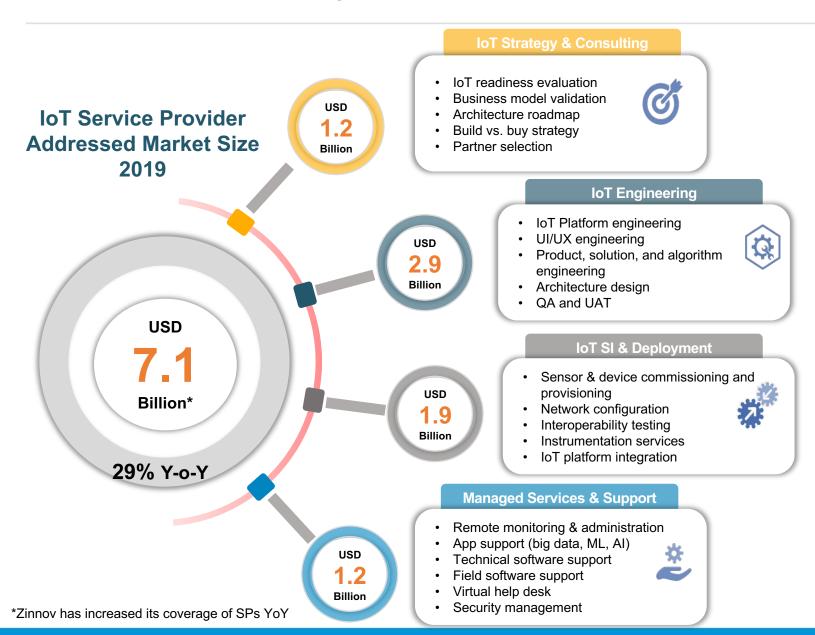


- Growth in IoT is facilitated by increasing adoption of enabling foundational infrastructure. There is an increase in IoT adoption as enabling technologies have evolved to reduce compute, storage, and network costs while enabling enterprises to access real-time insights for decision making
 - Edge & 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 Rol from IoT investments, they are crossing the chasm when it comes to enterprise wide roll-outs



The addressed market by service providers has grown at close to 30% Y-o-Y as enterprises need handholding from SPs across services for IoT initiatives



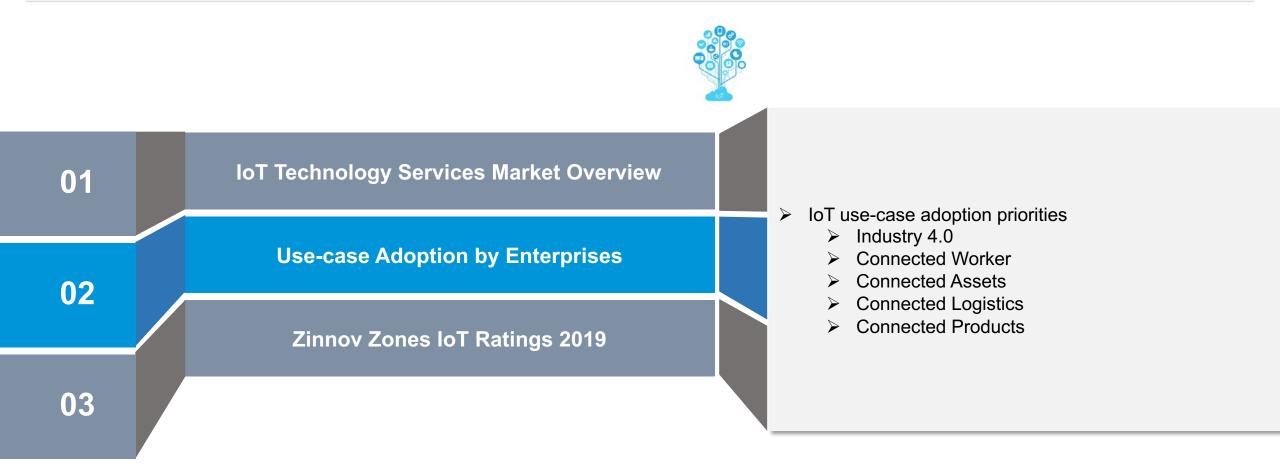


Key Takeaways

- 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







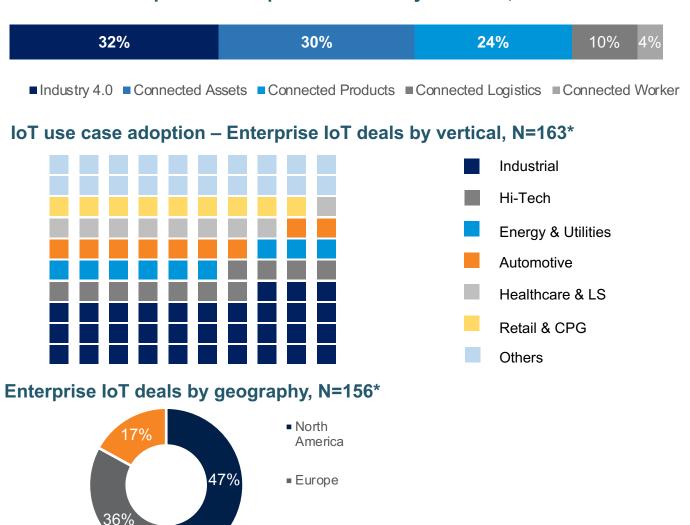


Source: Zinnov IoT Deals database





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



APAC

- 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



...Industry 4.0 use cases demonstrate strong alignment with outcomes



Exponential

Level of Business Impact

TRANSFORMATION 🧬



Creating value for the future

PREDICTABILITY [5]

Enabling effective decision making to do the right things

PRODUCTIVITY *

Enhancing utilization by doing things right

VISIBILITY



Insight into what's happening via digital footprint

AUTOMATION

Plant Processes

- Sensors & Actuators
- **Digital Data**
- Controls

- Item Track & Trace (Shop Floor)
- Asset Track & Trace (Shop Floor)
- Order Tracking (Shop Floor)

- **Production Monitoring**
- Compliance Adherence (Workers)
- **Performance Monitoring/Utilization**
- Worker safety
- Worker attendance & monitoring
- Fleet tracking & optimization
- Item level goods tracking (smart logistics)

- **Remote Operations** Monitoring/Management
- **Energy Management**
- Field Service/ Operations
- **Predictive Maintenance/Condition** based monitoring

- Demand Forecast & Management
- Integrated Supply chain
- **Digital Twin**
- E2E Traceability

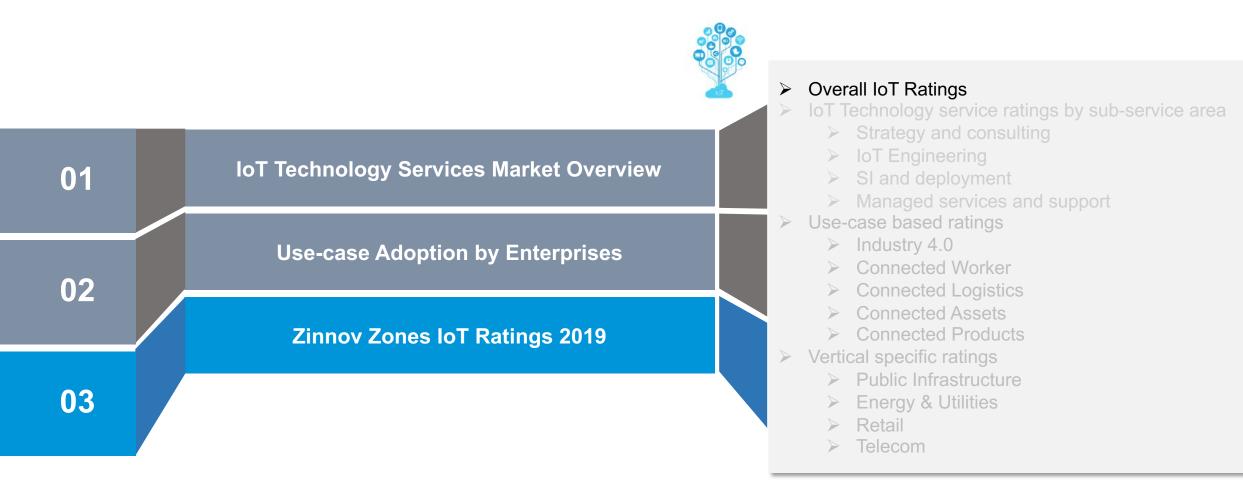
Enterprise Level Function Specific Plant Wide

Incremental

Level of Complexity

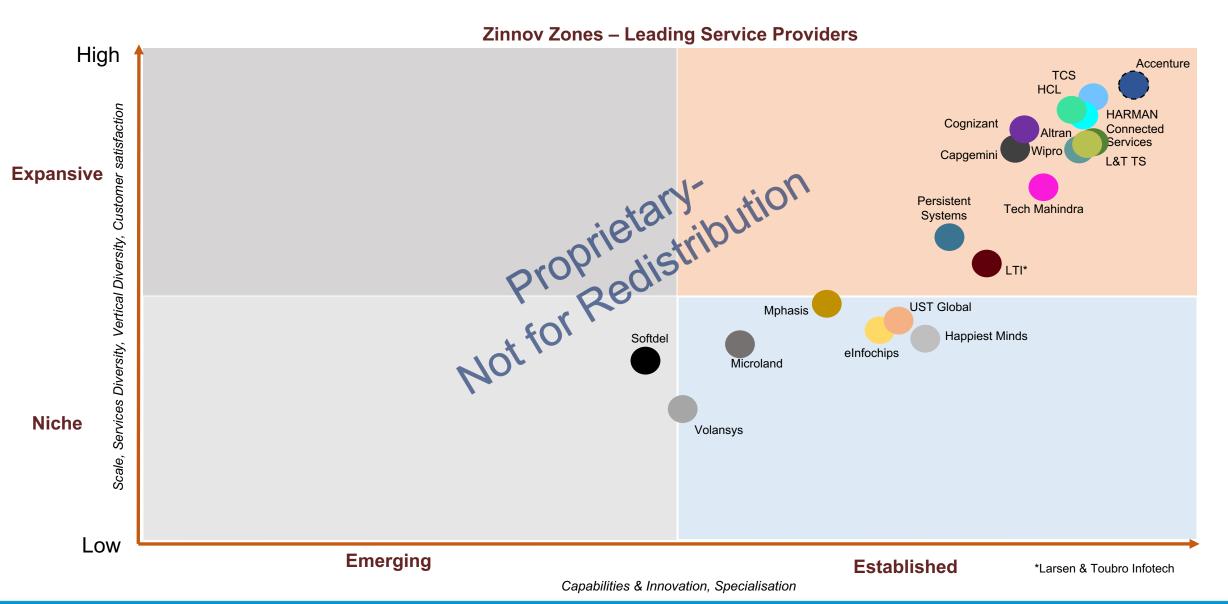






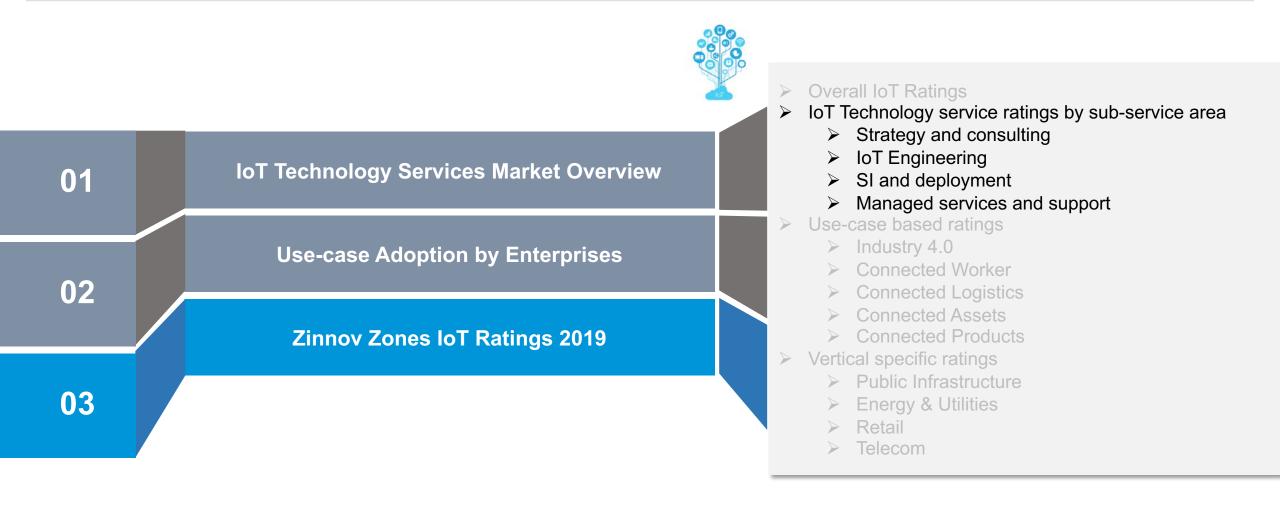






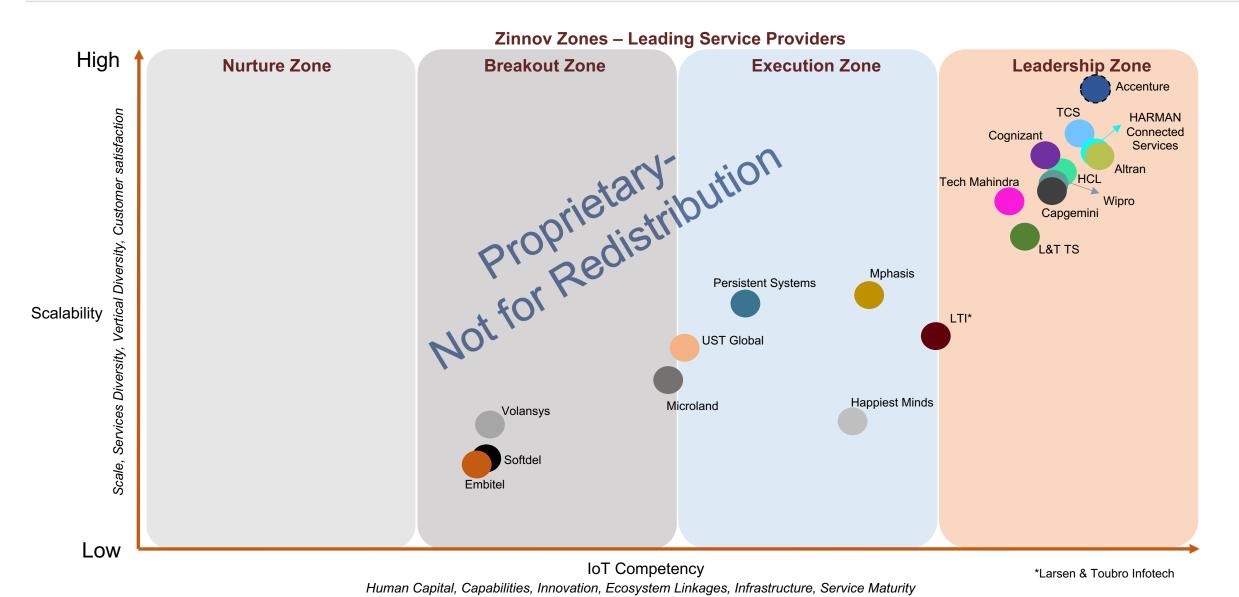






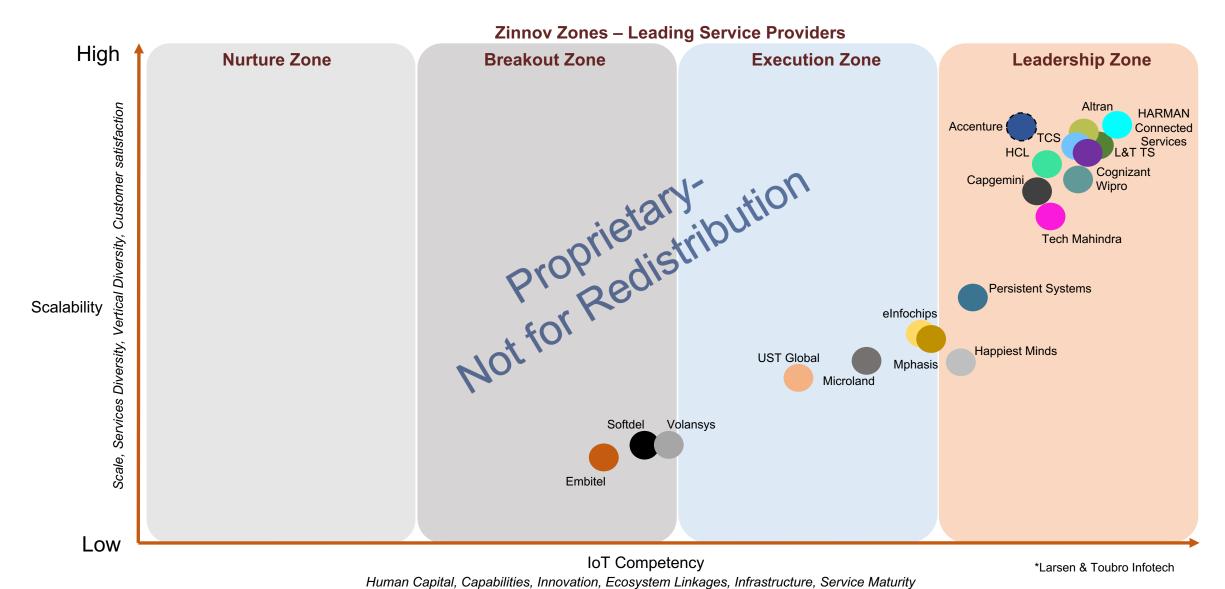






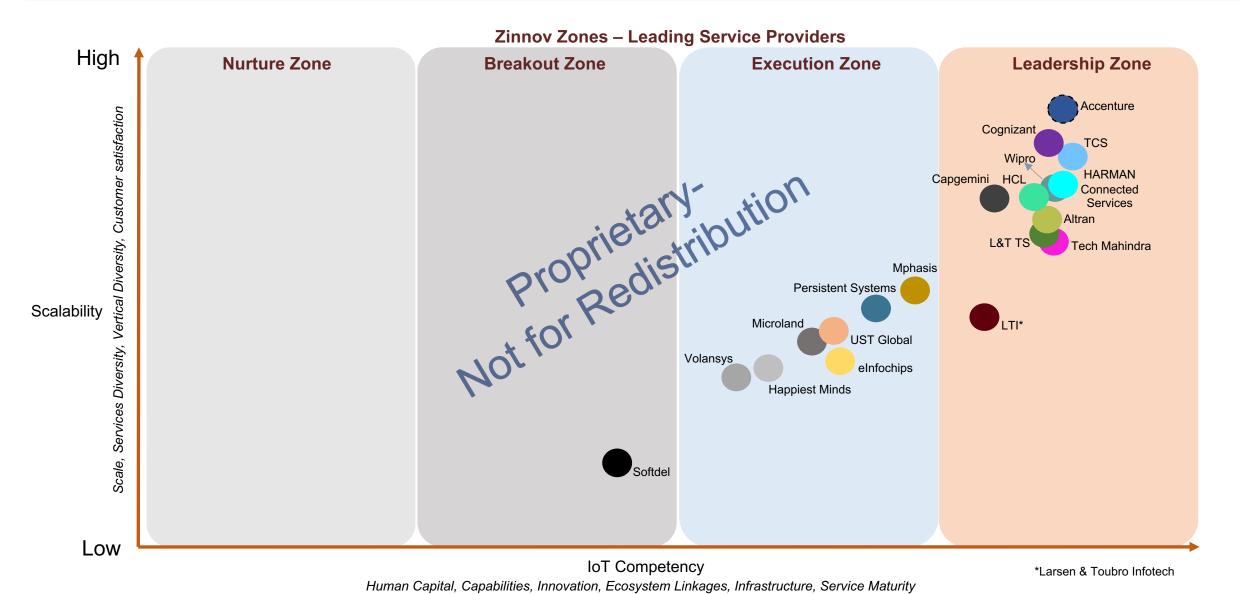






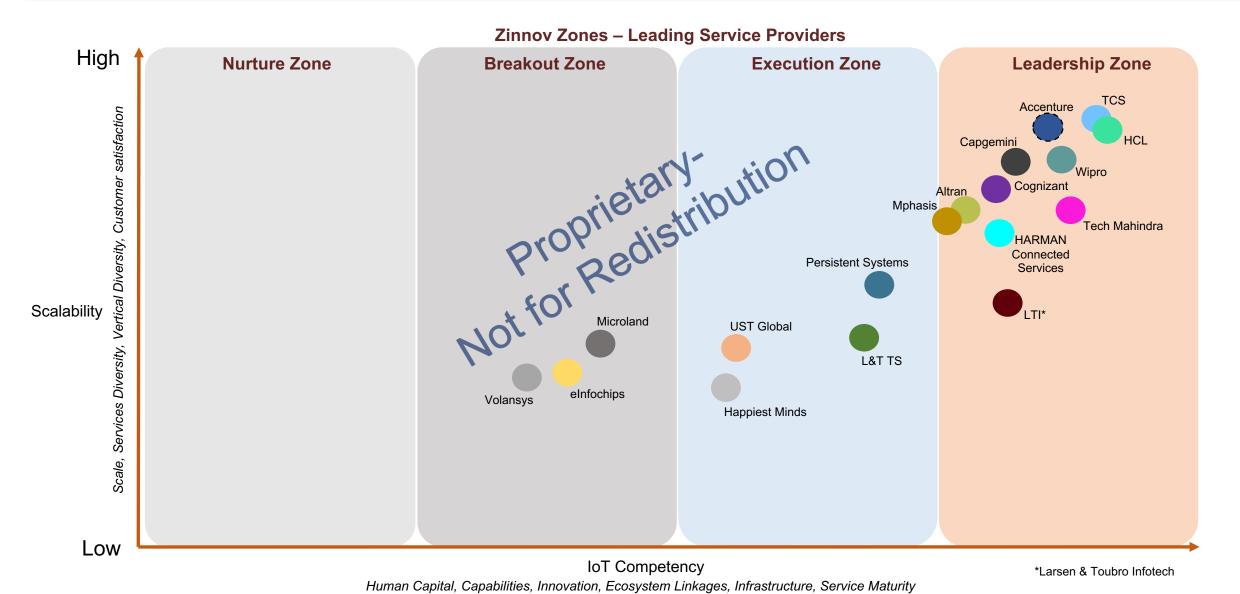






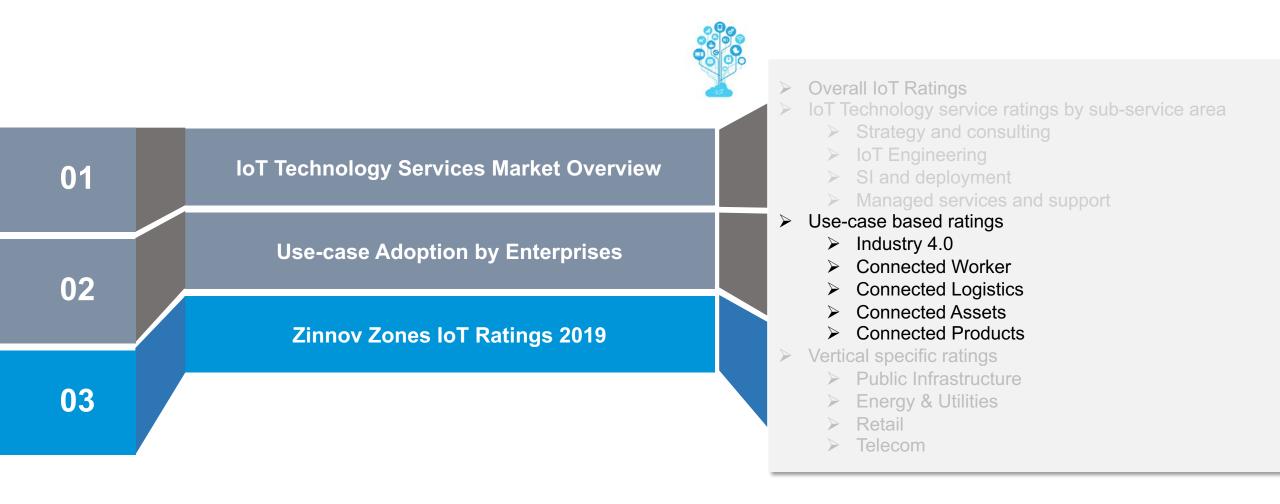














Industry 4.0 Ratings 2019



Industry 4.0 refers to connected factories, Industrial IoT, or smart factories where machines are augmented with sensors to enable automated decision making and enhance productivity and drive velocity in product manufacturing

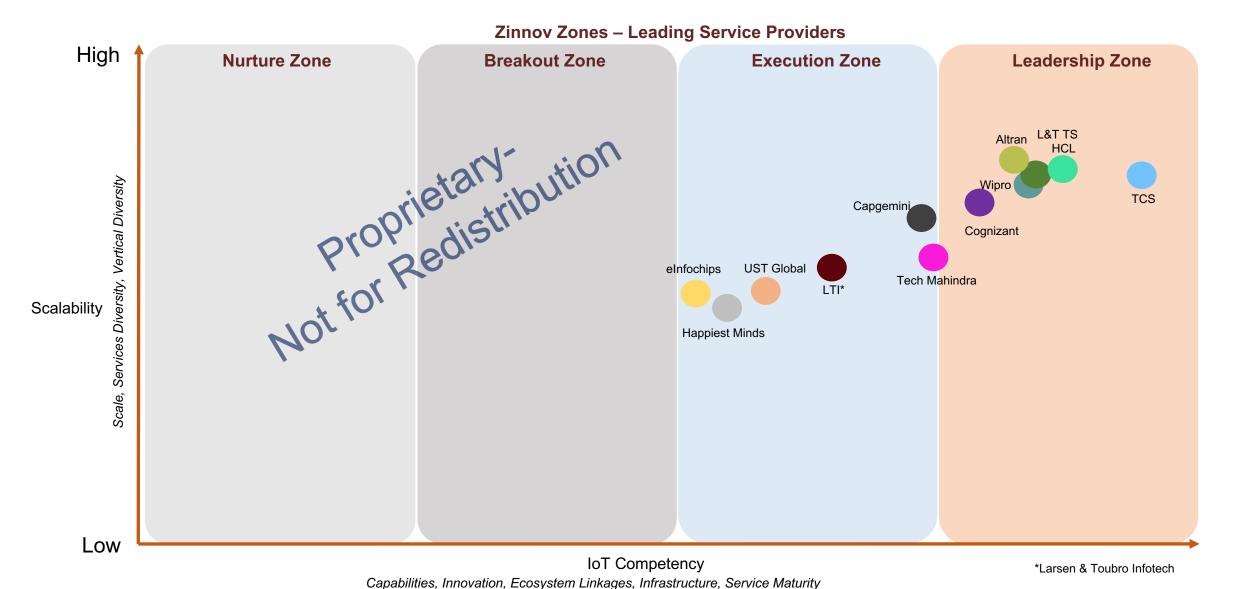




Connected Worker Ratings 2019



Connected Worker refers to field workers connected through digital technologies allowing for use cases such as worker safety, compliance, and productivity enhancement

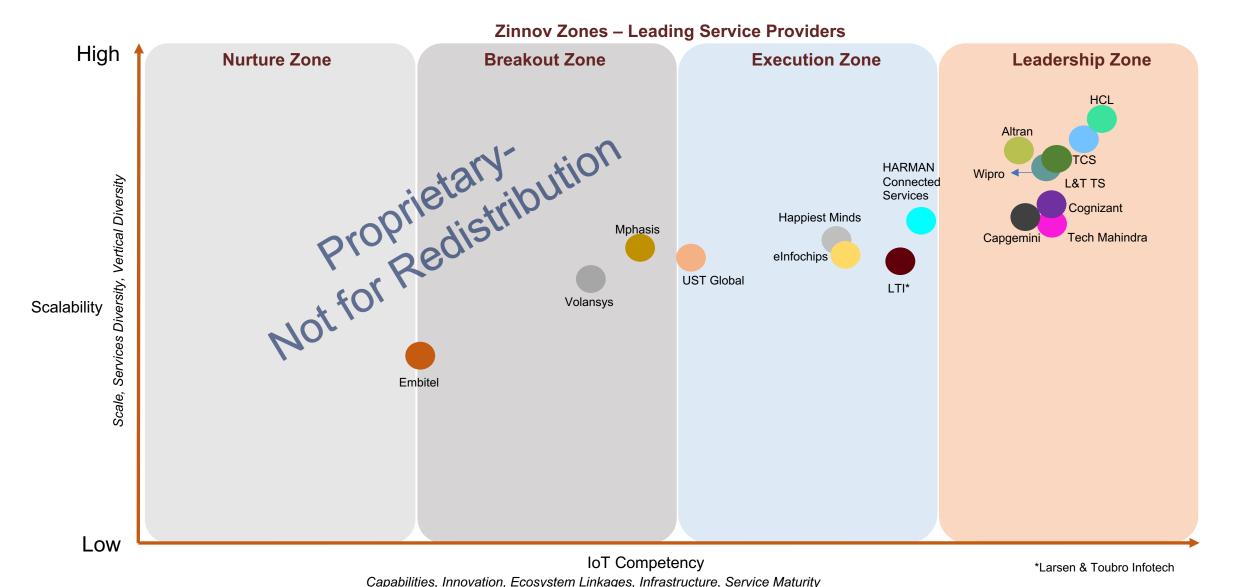




Connected Logistics Ratings 2019



Connected Logistics refer to digitalization of the supply chain that includes connected fleet, automated warehouses, etc. and supports use cases such as fleet monitoring, supplier intelligence, and warehouse optimization

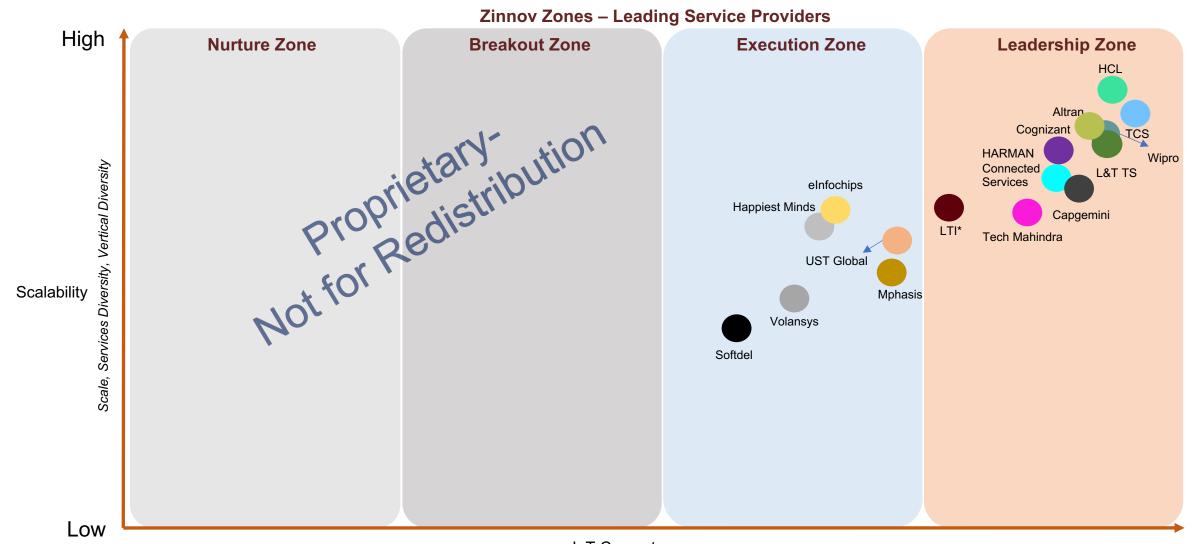




Connected Assets Ratings 2019



Connected Assets refer to IoT-enabled assets such as machinery, tools and other equipment that support use cases such as predictive maintenance, location monitoring and asset management



IoT Competency
Capabilities, Innovation, Ecosystem Linkages, Infrastructure, Service Maturity

*Larsen & Toubro Infotech

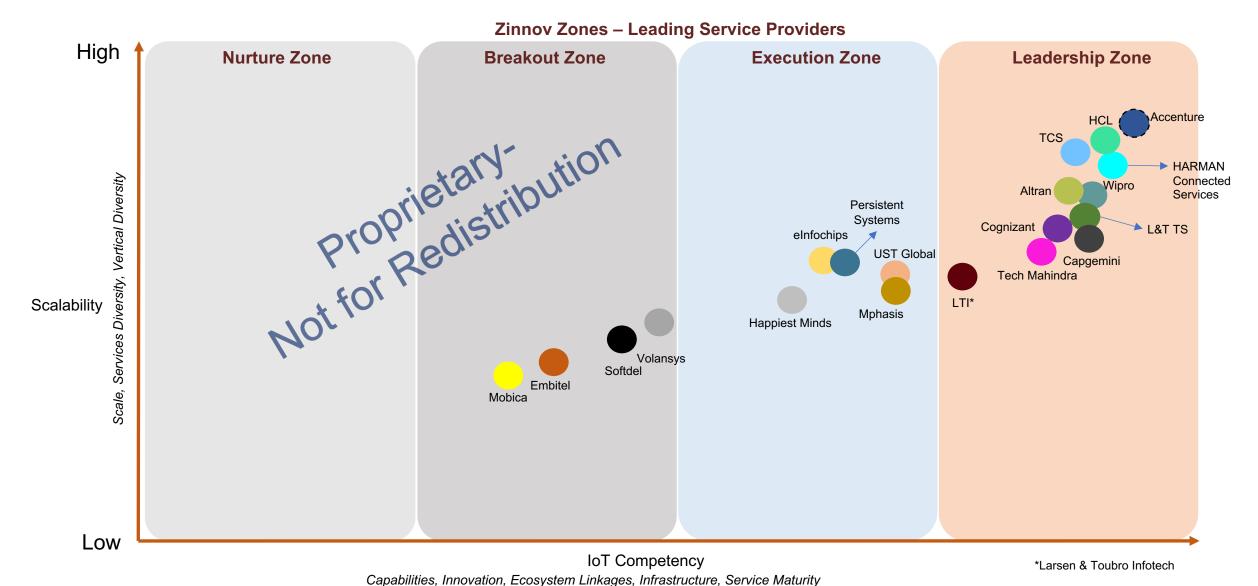


Connected Products Ratings 2019



Connected Products refer to intelligent, connected products that enable use cases such as performance visibility, usage insights and precision marketing





Accenture did not participate in the assessment process; Ratings

are based on Zinnov's market understanding





