

# The Internet of Things

Devices Connectivity Platforms Applications Security Analytics Services

The Internet of Things (IoT) has the potential to be as transformative as the Industrial Revolution

<b>1 Overview.....</b>	<b>4</b>
Definition .....	4
Top Technologies in next 10 years (McKinsey).....	4
IoT at top in Gartner's Hypercycle 2014.....	4
The IoT Ecosystem.....	4
Highlights .....	5
Investments on IoT 2015-20 .....	6
Return on IoT Investments.....	6
<b>2 Market Drivers &amp; Industry Dynamics .....</b>	<b>7</b>
<b>IoT – The Promise.....</b>	<b>7</b>
The Reach of IoT .....	7
The IoT value proposition.....	7
Cost Reduction .....	7
Increased Revenues .....	7
New Business Model.....	7
<b>Enablers of IoT.....</b>	<b>8</b>
The rise of Industrial IoT .....	8
IoT is gaining huge momentum 2010-2015 .....	9
<b>IoT Market Challenges .....</b>	<b>9</b>
Top Issues making IoT more vulnerable:.....	10
Existing Big Data Analytics Products don't fulfill IoT Requirements.....	11
Diversity of Devices & Applications .....	11
Not All "things" are created Equal.....	12
Market Drivers and Inhibitors .....	12
<b>3 Market Segments &amp; Product Requirements.....</b>	<b>13</b>
<b>Segments by End User Groups.....</b>	<b>13</b>
Top Market Segments Adopting IoT.....	13
<b>Segments by Vertical Industries .....</b>	<b>13</b>
Verticals benefitting from adoption of IoT.....	14
<b>Segments By Value-Added Ecosystem.....</b>	<b>15</b>
WW IoT Revenues 2020 by Market Segments.....	15
<b>Product Requirements by Value-Add Market Segments.....</b>	<b>15</b>
IoT Barriers to Overcome.....	15
IoT Requirements – Deriving Business Value from Connected Things & Processes .....	16
True value of IoT lies in converting from telematics and resulting insights to actions.....	16
<b>Devices .....</b>	<b>17</b>
Requirements - Remote Devices pose unique challenges .....	17
<b>Connectivity.....</b>	<b>17</b>
Connectivity – Requirements vary by Application .....	17
<b>Platform.....</b>	<b>18</b>
IoT Requirements - Big Data & Cloud .....	18
<b>Applications.....</b>	<b>18</b>
Same application but very different service level requirements.....	18
<b>Analytics.....</b>	<b>19</b>
Different Applications necessitate optimal Infrastructure required for Analytics.....	19
IoT Requirements – Distributed Big Data Cloud.....	20

<b>Security</b> .....	<b>20</b>
<b>Verticals</b> .....	<b>20</b>
Carriers need advanced analytics to predict new IoT Traffic and Service Demands .....	20
IoT Requirements .....	21
IoT Technology Roadmap.....	21
IoT Requirements vs Reality.....	23
Need for a new architecture .....	23
<b>4 Market Forecast &amp; Shares</b> .....	<b>25</b>
Market Size – Devices Installed 2015-2020.....	25
<b>Market Forecast – WW IoT Revenues &amp; Units 2015-2020</b> .....	<b>25</b>
WW IoT Revenues 2015-2020 .....	25
WW IoT Units 2015-2020 .....	25
Rise of Embedded Internet .....	26
WW IoT Revenues 2020 by Market Segments.....	27
WW IoT Revenues Forecast by Vertical Industries \$B 2015-2020 .....	28
WW IoT Revenue 2020 by Region .....	29
<b>5 Enabling Technologies &amp; Standards</b> .....	<b>30</b>
<b>Intelligent Devices</b> .....	<b>30</b>
Device Identification System for IoT .....	30
Edge Analytics .....	31
<b>Emerging Standards</b> .....	<b>31</b>
Race for Standardization – Fragmentation & Conflicts .....	31
<b>Communications Protocols</b> .....	<b>32</b>
<b>6 Ecosystem &amp; Competitive Positioning of Suppliers</b> .....	<b>32</b>
<b>Value Add Ecosystem –Devices to Professional Services</b> .....	<b>33</b>
WW IoT Revenues 2020 by Market Segments.....	33
Potential of IoT Ecosystem 2020 by Market Segment .....	33
<b>Seven Layer Value Add Ecosystem Reference Model</b> .....	<b>33</b>
<b>Sensors Devices/Intelligent Systems</b> .....	<b>34</b>
<b>Connectivity</b> .....	<b>36</b>
<b>Platforms</b> .....	<b>36</b>
<b>Applications</b> .....	<b>36</b>
<b>Analytics</b> .....	<b>36</b>
<b>Security</b> .....	<b>37</b>
<b>Professional Services</b> .....	<b>37</b>
<b>Use Cases (Typical)</b> .....	<b>38</b>
Use Cases – Health Real-time Disease Prediction .....	38
Use Case - Food Tracking & Compliance Application .....	39
Use Cases – Home Automation .....	40
<b>IoT Reference Model</b> .....	<b>41</b>
IoT Stack: Sensors>Connectivity>Cloud>Analytics>Prof.Services .....	41
<b>7 Suppliers</b> .....	<b>45</b>
<b>Top 150 IoT Suppliers Profiles by Market Segment</b> .....	<b>45</b>
Most Active IoT Investors .....	46
Top Suppliers Profiles & Strategies HW Devices, Connectivity Platforms.....	47
Top Suppliers Profiles & Strategies Analytics, Applications, Security .....	49
Top Suppliers Profiles & Strategies in Vertical Solutions & Services .....	51
<b>8 Routes-to-Market/GTM Implementation</b> .....	<b>53</b>
<b>9 Recommendations for Suppliers/Integrators/EUs/Investors</b> ...	<b>55</b>
<b>Suppliers</b> .....	<b>55</b>
<b>System Integrators/VARs</b> .....	<b>55</b>
<b>Vertical Industry End Users</b> .....	<b>55</b>
<b>VCs/Investment Bankers</b> .....	<b>55</b>

<b>10 Appendices.....</b>	<b>56</b>
<b>Research Methodology.....</b>	<b>56</b>
<b>References/Sources/Citations.....</b>	<b>58</b>
Technologies.....	58
Ecosystem Stack.....	58
Target Markets.....	58
Suppliers.....	58
Investors.....	58