PRESS RELEASE

New PAC RADAR evaluates platforms in newly emerging market segments in the context of IoT, augmented reality, and data monetization in Europe

Munich, July 25, 2019 – Today market research and strategic consulting firm teknowlogy | PAC has published the PAC RADAR Platforms for IoT & AR in Europe 2019. It is the broadest analysis of the vendor landscape around newly emerging topics in the context of IoT platforms. teknowlogy | PAC screened more than 70 platforms, evaluated 38 of them in five different segments, and through this approach identified the best-in-class providers in different areas. Across all five segments, only 13 players achieved a "Best in Class" rating: AWS, Bosch Software Innovations, Caruso, Deutsche Telekom/T-Systems, Eurotech, FORCAM, Microsoft, OSIsoft, PTC, RE'FLEKT, SAP, Siemens, and Ubimax.

Besides the ongoing convergence of established market segments, there are new segments emerging that have the potential to further enlarge the overall market scope of IoT platforms to new levels. Two of them are emerging around IoT applications, two are related to technology, and one market segment provides additional services around IoT data:
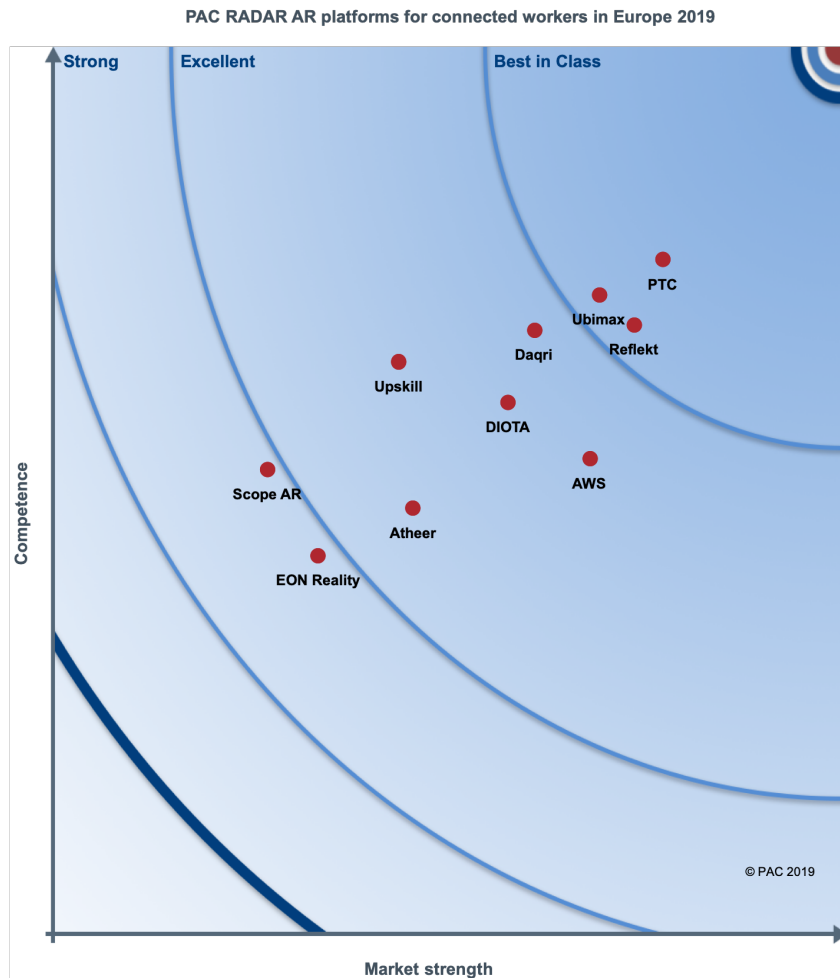
- Emerging market segments where providers move beyond IoT platforms with the intention to offer an open IoT application marketplace on top of their platform:
    - **IoT platforms with application marketplaces ("Best in Class" ratings: AWS, Microsoft, SAP)**
    - **IoT platforms for industrial applications ("Best in Class" ratings: FORCAM, OSIsoft, SAP, Siemens)**

- Emerging market segments around technology that are currently significantly gaining in relevance and user attention in the context of IoT:
    - **IoT platforms based on open source ("Best in Class" ratings: Bosch Software Innovations, Eurotech)**
    - **Augmented reality (AR) platforms for connected workers ("Best in Class" ratings: PTC, RE'FLEKT, Ubimax) - RADAR shown in the graphic**

- A newly emerging market segment that provides add-on services around IoT data:
    - **IoT data exchange & monetization platforms ("Best in Class" ratings: Caruso, Deutsche Telekom/T-Systems)**

Not all of these solutions are tightly integrated or linked with IoT platforms today; however, teknowlogy | PAC expects that the further evolution of the market will lead to these emerging segments increasing in relevance. Plus, if they represent a separate market today (like AR), they will increasingly converge with the IoT platform market. *"We observe two main trends –*

consolidation in the core market of IoT platforms and vendors increasingly turning their attention towards newly emerging market segments related to IoT platforms, including AR and data monetization", says Arnold Vogt, IoT Analyst at teknowlgy Group. From an analyst view, these are the reasons for this development:

In the context of IoT platforms in combination with IoT applications, teknowlgy | PAC discussed the emergence of more vertically-oriented IoT platforms that provide industry-specific applications to their clients for dedicated use cases already last year. However, the evolution of vendors towards this new model has been slow over the past 12 months. Analysts currently observe two trends: first, as an interim solution, some vendors provide a horizontal IoT application marketplace that addresses more generic use cases such as device tracking and monitoring across different industries. Second, from a vertical perspective, they see the most traction to adopt this new concept in the industrial space.

In the context of open source, the answer is straightforward. Across the IT market, open source software is highly relevant and attractive to many users. Linux, one of the dominant operating systems for servers, is just one example in this context. Therefore, the analysts at teknowlgy | PAC see no reason why this should not be the case for IoT platforms, too. They notice an increasing interest from user companies in taking open source into account in their vendor selection process for IoT platforms.

PAC RADAR AR platforms for connected workers in Europe 2019

PAC RADAR Platforms for IoT & AR in Europe 2019 - AR platforms for connected workers

In the context of AR, teknowlogy | PAC observes several things happening simultaneously. On the provider side, AR application development platforms are becoming simpler and also increasingly usable for non-developers. Also, the necessary hardware, smart glasses, is constantly improving in quality, and prices are falling. On the user side, there is growing adoption of AR in the manufacturing space to provide support in many areas, such as field services, assembly, quality control, logistics, and training. The increasing integration of IoT data into AR applications is a logical next step. Therefore, we see the potential of IoT platforms, as the source of IoT data, and AR platforms, as a new means to visualize this IoT data, converging in the future.

The increasing capturing and storage of IoT data in IoT platforms enables a new kind of service – the exchange of IoT data plus its potential monetization. New platforms are emerging that are designed to orchestrate the **data exchange and monetization** between different providers and consumers. Today, this kind of service is mainly separate from IoT platforms, and different vendor landscapes can be observed. However, as both kinds of platform focus on the best possible utilization of captured data, the growing convergence of them is a potential scenario. teknowlogy | PAC expects to see some vendors offer both services in the future.

For more information on the PAC RADAR Platforms for IoT & AR in Europe 2019, visit: http://bit.ly/2XWtWyR

About teknowlogy Group
teknowlogy Group is the leading independent European research and consulting firm in the fields of digital transformation, software, and IT services. It brings together the expertise of three research and advisory firms, each with a strong history and local presence in the fragmented markets of Europe: Ardour Consulting Group, CXP and PAC (Pierre Audoin Consultants). We are a content-based company with strong consulting DNA. We are the preferred partner for European user companies to define IT strategy, govern teams and projects, and de-risk technology choices that drive successful business transformation. We have a second-to-none understanding of market trends and IT users' expectations. We help software vendors and IT services companies better shape, execute and promote their own strategy in coherence with market needs and in anticipation of tomorrow's expectations. Capitalizing on more than 40 years of experience and six branches in Europe, we are active worldwide with a network of 150 experts. For more information, please visit www.teknowlogy.com and follow us on Twitter or LinkedIn.

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