Internet of Things

2020 Research Agenda

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> IoT has now moved beyond the hype stage. But there is still plenty of room for growth: only 29% of organizations so far have deployed IoT solutions. For enterprises, IoT is delivering efficiency and productivity benefits, cost savings, and improved product quality and customer experience. But challenges remain around data protection and usage, cybersecurity, and how and when to scale up. Technology providers must think in terms of delivering end-to-end IoT solutions in a variety of vertical "wraps," to address key business problems.

Internet of Things

The Market Challenge

The IoT market is moving into a new phase. The hype is beginning to die down, but the growth opportunity is still significant. While some IoT technologies are becoming fully commercialized, others are still early-stage, including connectivity solutions such as LPWAN, 5G, and CV2X, and adjacent technologies that leverage or support IoT use cases, including edge compute, blockchain, and AI.

IoT use cases in many industry verticals have been proven to deliver value. Growth figures for IoT connections and devices continue to accelerate. The range of enabling technologies is growing, and some clear winners are emerging. However, important questions remain around ensuring effective security and data usage in IoT deployments, the best strategies for IoT monetization, the role of investments and partnerships for communications service providers (CSPs) and other market players, and the most effective way to engage with enterprises and to drive scalability.

How Ovum helps you

Identify where service providers and technology vendors can play most effectively in the IoT value chain.

Develop effective strategies for helping enterprises make the decision to adopt IoT, successfully deploy new use cases to deliver business and social benefit, and scale up deployments.

Discover how new IoT-enabled business models are developing, and how enterprises and the public sector are using IoT to drive innovation.

Compare and learn from the IoT strategies of leading IoT service and technology providers.

Identify the capabilities and partners required to deliver transformational IoT solutions.

Choose the most important verticals and use cases to prioritize for IoT product and marketing initiatives.

Derive maximum impact from emerging technologies that will take IoT to the next level including LPWA, 5G, blockchain, and AI.

What's new for 2020?

New IoT Enterprise Survey – understand major adoption, buying, and other trends among enterprises deploying IoT in 15 key country markets and eight vertical industries.

Enhanced focus on automotive, industrial IoT, and smart cities verticals – including competitive analysis of best practice strategies for CSPs and major technology vendors, outlook for CV2X and autonomous driving, cybersecurity and platform strategies in key industries.

New reports on 5G IoT use cases, IoT business models, and adjacent/enabling technologies – including how blockchain, edge, and AI are impacting IoT opportunities and driving data value.

Updates of five-year IoT connections, devices, and service revenue forecasts – split by technology, country and regional markets, and industry verticals.

Key Deliverables

IoT Strategy Profiles and Comparative Strategy reports – for major IoT service providers and infrastructure vendors, with analysis of strategies in key verticals.

IoT Technology Impact reports – forward-looking analysis of technologies impacting IoT opportunities, including LPWAN, 5G use cases, blockchain, AI, and IoT security.

IoT Vertical Market Landscape and Market Radar reports – drivers, challenges, main IoT use cases, and evolution paths for major vertical industries.

Forecasts for IoT connections, devices and service revenues – five-year forecasts, 20 countries and eight regions, split by technology and industry vertical; detailed use-case segmentation for four deep-dive verticals (automotive, smart cities, energy and utilities, and consumer + Industrial IoT deep-dive)

IoT Smart Cities Project, LPWAN Deployment, Service Provider Contract, and Investment Deal Trackers – key IoT service provider contracts, platform deals, LPWA deployments, investments, and smart cities projects.

IoT Enterprise Survey – covering investment plans, technology and supplier choices, challenges and drivers, and use cases for enterprises in 15 country markets

Service modules

IoT Markets and Technologies
To succeed, CSPs and technology providers need to have a clear, dynamic view of the overall IoT market direction. Understanding the pace of technology adoption and ecosystem development is critical to identifying the right opportunities. The market is still early-stage in most industries – providers must find ways to help customers to scale up IoT beyond the initial proof of concept stage, and to look for replicable solutions.

IoT Competitive Strategies
Looking at competitor strategies and IoT best practices for providers and enterprise customers is key to developing a successful IoT strategy. Service providers and technology vendors must identify the best partners to focus on, and prioritize industry verticals and use cases. The evolving technology and commercial landscape for IoT includes LPWA, 5G, blockchain, edge computing, and AI. Intersections between these areas and IoT are driving new use cases and opportunities, but they are also raising questions about where to place bets, how to time investments, and how to ensure effective data governance and network security as IoT's reach grows.

IoT Verticals
For all the interest in horizontal technology solutions, at the point of sale, IoT is very much an enterprise proposition and needs to fit the needs of specific industries. We compare the evolution of the nine major verticals where IoT is having the greatest impact. We assess vertical use cases, what's working, what's scalable and what's necessary for success, and undertake deep dives on smart cities, industrial IoT, and automotive.

> *The IoT market is moving to the active commercialization phase, with LPWAN, 5G, and industrial IoT emerging as leading trends.*

IoT connected devices and service revenue, 2018-2023
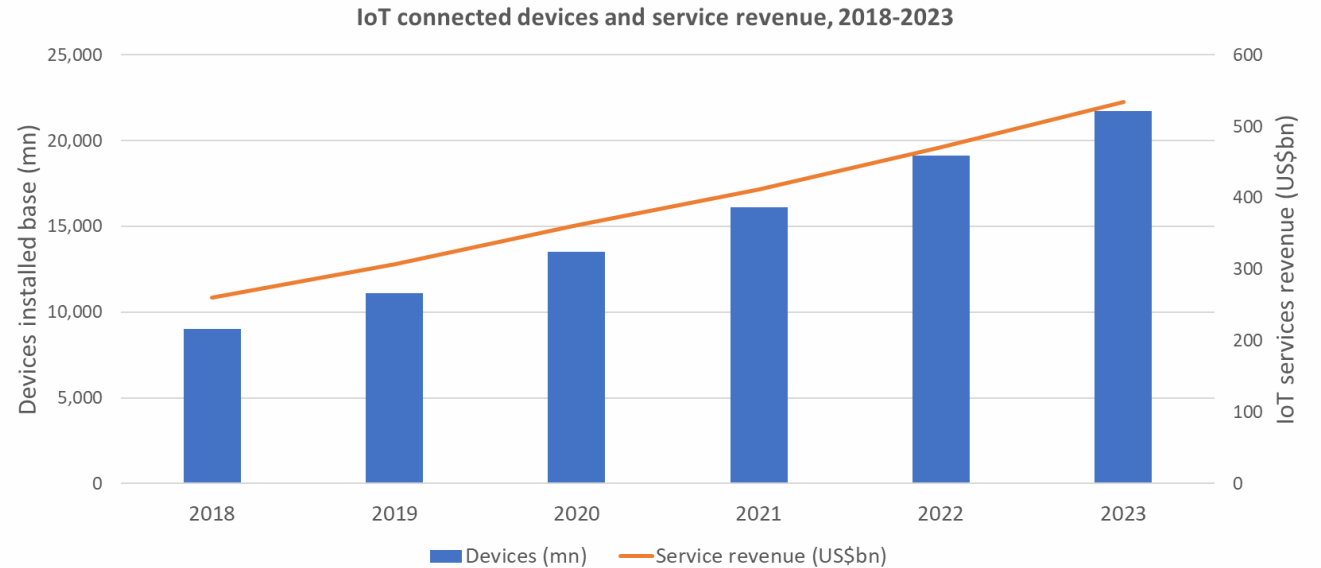
Source: Ovum

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