ISG Provider Lens™

2019

Transformational IoT Services – Technology, Solutions, Platforms and Industries Study 2019

imagine your future®

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Definition

Internet of Things (IoT) services are defined as the conglomeration of functions such as consulting and implementation (planning, cost analysis and business case development), technology integration and execution (device, platform, analytics, application and security) and overall IoT ecosystem management (managed services). The interaction and exchange of huge amounts of data through a network connectivity, the analysis of such data derives meaningful insights which instigates decision-making. The use of sensors to collect the data and then applications, software and platforms to build on the same in a secure way help make useful business cases. Implementations across industries like manufacturing, healthcare, smart building, connected cars and others have been able to drive huge cost savings, better business decisions, operational efficiencies, better process management. A connected ecosystem is capable of running a business in a planned and continuous demeanor and extracting returns on effective investments.

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency of strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus towards different markets including Global, USA, Brazil, Germany, UK and ANZ

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG Advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

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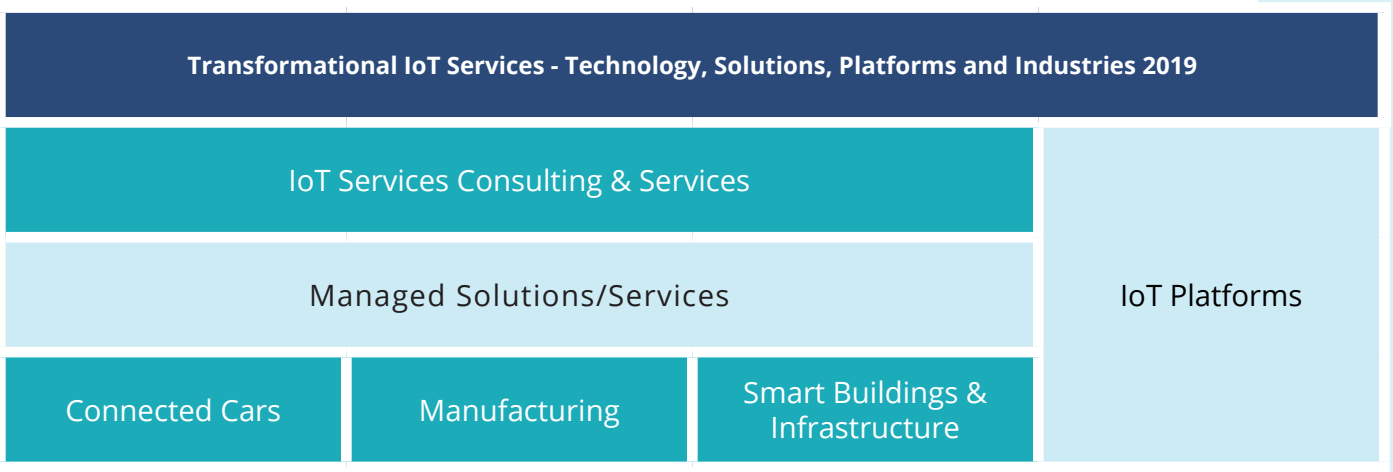
Quadrant Research

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following 6 quadrants on Transformational IoT Services – Technology, Solutions, Platforms and Industries.



Transformational IoT – Consulting and Services

It is a conglomeration of functions like consulting and implementation (Planning, cost analysis and development of business case), technology integration and execution (device, platform, analytics, application and security). Based on the requirements of the connected framework or ecosystem of the clients, providers are enabling the right mix of technology and partners to achieve the business outcomes. It also includes edge computing consulting & implementation support on distributed end devices as computing power shifts to outside the central data center. Intelligence and analysis close to the edge has become important. There is also increasing focus on IoT security to protect the connected devices and networks. The system outages and loss of control caused by malware (such as ransomware) and DDoS attacks result in significant data loss, and endpoint security and network security solutions can prevent such attacks.

Transformational IoT – Managed Solutions and Services

Management of overall IoT ecosystem by service providers and they should be able to offer scalable IoT solutions and managed connectivity solutions for ongoing IoT enabled business operations. The solutions include security management, network management, device/equipment management, data management, platform and application management, and IoT analytics. The IoT analytics offerings would comprise of data management and intelligence to drive business values, predictive analytics, data visualization and IoT analytics platform maintenance. Enterprises that have already implemented IoT systems and solutions need extensive support in managing these systems and upgrading them.

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IoT Services – Manufacturing

Manufacturing vertical has been one of the frontrunners in adoption of technology to improve operations and supply chain. The shop floors increasingly use networked sensors and intelligent devices which collect data, store it wirelessly, and use analytics and machine learning to reduce downtime of machines. The services range from asset tracking, preventive maintenance, monitoring of manufacturing process, diagnostics and real-time demand fulfilment to advanced analytics for predictive maintenance.

IoT Services – Smart Building & Infrastructure

The interaction of sensors with the physical assets to plan, design, manage and maintain the infrastructure. Analyzing the huge data coming in from the connected ecosystem and managing the assets and operations forms the core of the infrastructure management. Smart building being an important component of the infrastructure is about retrofitting and automating buildings for a connected and digitized building management systems.

IoT Services – Connected Cars

Connected car is defined by the connectivity of the car with its own ecosystem and/or the outside world like infrastructure, network and other devices. The connected car best features into categories like safety, navigation, fleet management, infotainment and payments, etc. with respect to voice recognition features and autonomous driving capabilities.

IoT Platforms

IoT platform is the software layer that connects all other layers in the IoT technology stack like hardware, network, data and cloud Platform, application platform and software application. An IoT platform enables the deployment of applications that monitor, manage, and control connected devices. Key capabilities include remote data collection from connected devices, secure connectivity between devices, sensor management and integration with 3rd party systems. IoT platforms are the key interface for device communications (measure, control, regulate) and handle data management tasks (save, integrate, analyze, visualize device data), device management (security and functional SW updates on devices) as well as process management. Platforms are an integral part of the entire IoT deployment and we consider those players who are using their own platform technology.

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Quadrants by Region

Quadrants	Global	US	Brazil	ANZ	UK	Germany	Europe	Latin America	Nordics
IoT Services Consulting and Services	√	√	√	√	√	√	CPQ	√	CPQ
Transformational IoT – Managed Solutions and Services	√	√	√	√	√	√	CPQ	√	CPQ
IoT Services – Manufacturing	√	√	√	√	√	CPQ	CPQ	√	CPQ
IoT Services – Smart Building & Infrastructure	√	√	√	√	√	√	CPQ	√	CPQ
IoT Services – Connected Cars	√	√	√	√	√	CPQ	CPQ	√	CPQ
IoT Platforms	√								

Note: There are some regions which are highlighted as not having a quadrant report. The data for these regions is being collected for the Candidate Provider Qualification program.

Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients.

This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens reports.

These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

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Schedule

The research phase is between **January - May 2019** during which survey, evaluation, analysis and validation will take place. Selected results will be presented to the media in **July 2019.**

We will roll out the survey on an online platform called Qualtrics. The invites will be sent with links to fill in the responses and submit.

Milestones	Beginning	End
Survey Phase	January 16, 2019	February 06, 2019
Sneak previews	May 15, 2019	
Content provisioning	June 26, 2019	
Press release	July 03, 2019	

Refer to the link below to view/download the Provider Lens 2019 Research Agenda :
https://isg-one.com/docs/default-source/default-document-library/isg-provider-lens-annual-plan-2019.pdf?sfvrsn=c323cc31_0

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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

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List of companies being invited for IoT study

Please check the participant list. In case you don't find yourself here but believe that your company should participate, please respond to this email to be included in the study.

Accenture
Alcatel-Lucent
Altizon
Arm Limited
AT&T
Atos (Incl Syntel)
AWS
Axians IT Solution
AXOOM
Ayla Networks
Bosch Software
Bosch Software Innovation
BT
CANCOM
Capgemini
CGI
Cisco
Cognizant
Datacom
Dell Technologies
Device Insight
Diebold Nixdorf
DMI
DXC
eInfochips
Empired
EPAM
Ericsson
Eseye
Eurotech
Flutura
Forcam
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Happiest Minds
HARMAN
HCL
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HPE
Huawei
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Kaa Projects
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