

IOT ONE INSIGHTS

IoT ONE 500 Industrial IoT Companies

2019



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The Importance of Influence

The Industrial Internet of Things (IIoT) has the potential to fundamentally shift the way businesses create value, whether internally for their operations or externally for their customers. However, as the Industrial IoT is still in the early stages of development, it is important to recognize the companies that are bravely leading technology development and educating the market.

On the supply side, development of Industrial IoT solutions depends heavily on collaborative ecosystems. There are few Industrial IoT solutions that are ideated, built, and brought to market by one company alone. Likewise, on the demand side of the equation, few end users have the depth of understanding to confidently evaluate and invest in solutions without support. The companies we recognize as influencers are important in both cases. They are the centres of gravity that draw together partners for collaborative solution development. And they educate the market about “What is possible?” and “How to start?”.

Market influence creates centers of gravity that enable collaboration.

To recognize and showcase the most influential companies in the global IoT ONE Ecosystem, IoT ONE has assessed over 2,000 IIoT solution providers to create the IoT ONE 500 index and the IoT ONE Top 10 technology domain indices. Our ranking criteria takes into consideration the visibility and rate of growth of companies in the IoT ONE ecosystem. The rankings are moderated by external factors such as innovation capabilities, commercialization, client success cases, and media presence.

These rankings are not definitive surveys or rankings of all Industrial IoT companies. Through other projects, IoT ONE has assessed more than 4,000 companies globally with Industrial IoT solutions. There are undoubtedly many companies and alternative assessment methods that we remain unaware of.

The IoT ONE Top 10 features 10 notable companies in 10 technology categories that we believe are key to driving value creation in industrial IoT systems. Our objective is to recognize the companies that are making the most progress in these key categories – Connected Machines, Cybersecurity, Connectivity Platforms, Analytics Platforms, Embedded Computing, Connectivity Hardware, Connectivity Services, Integrators, Robotics, and Wearables ([see breakdown on page 6](#)).

The background of the cover is a complex network of light blue lines connecting various nodes, overlaid on a series of semi-transparent, overlapping geometric shapes in shades of light blue and grey. The overall aesthetic is clean, modern, and tech-oriented.

IoT ONE 500

Top 25
Top 100

IoT ONE 500 (2019) – Top 25



Source: IoTONE.com (2019)

- Accelerators: High visibility with rapid influence growth
- Challengers: Modest visibility with rapid influence growth
- Influencers: High visibility with limited influence growth
- Followers: Modest visibility with limited influence growth

“ A large part of the innovation in the smartphone industry was – and still is – created in a joint effort. Adoption exceeded everyone’s expectations as user needs were not only addressed by one single company, but instead by an entire ecosystem that was capable of handling this ever-growing demand.

- PTC -

”

IoT ONE 500 (2019) – Top 100

01	02	03	04	05	06	07	08	09	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100

Full list of all 500 companies in the IoT ONE 500: www.iotone.com/iotone500

IoT ONE 10

Connected Machines

Cybersecurity

Analytics Platforms

Embedded Computing

Connectivity Platforms

Connectivity Hardware

Connectivity Services

Integrators

Robotics

Wearables

IoT ONE 10 (2019) – Connected Machines

Connected machines are solutions that enables rapid and repeatable machine connectivity to provide operational business improvements.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Cybersecurity

Cybersecurity solutions secure IoT systems to prevent unauthorized use of electronic data

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Analytics Platforms

Analytics platforms help perform the operations on data analytics and provides contextual analyzed data out of stored information.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Embedded Computing

Embedded computers are specialized computer systems that are implemented as part of a larger device, intelligent system, or installation.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Connectivity Platforms

Connectivity platforms are platforms that connects devices to the internet for bidirectional communication between solution backends and IoT devices.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Connectivity Hardware

Connectivity hardware are electronic devices which are required for communication and interaction between devices on a computer network. Specifically, they mediate data transmission in a computer network

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Connectivity Services

Connectivity services are services that provide devices with access to networks.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Integrators

Integrators are specialized in bringing together component subsystems into a whole system and ensuring that the subsystems function well together.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Robotics

Robotics is an interdisciplinary brand of engineering and science that deals with the design, construction, operation, and application of robots.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

IoT ONE 10 (2019) – Wearables

Wearables are smart electronic devices that can be incorporated into clothing or worn on the body as implants or accessories.

01 	02 	03 	04 	05
06 	07 	08 	09 	10

Methodology

The IoT ONE 500 and IoT ONE 10 are ranked based on a combination of the following 5 factors. The factors are based quantitative data from the IoT ONE database and analysis by IoT ONE researchers.

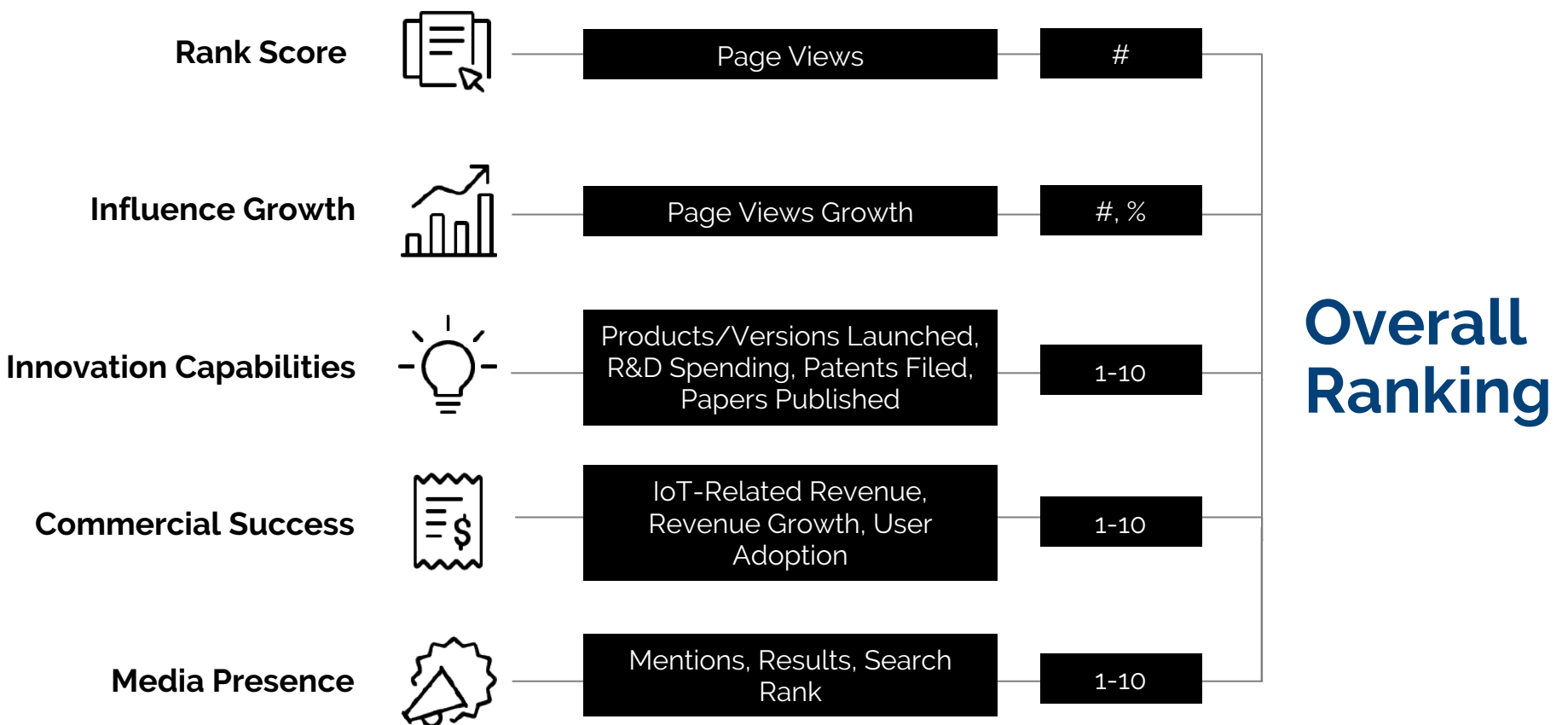
Rank Score is the following of a company's profile and all its associated pages on IoTONE.com.

Influence Growth is the growth of the Rank Score between Jan to Dec 2018 and Jan to Dec 2018.

Innovation Capabilities are a measure of a company's effectiveness in developing new technologies or business models to serve customer needs.

Commercial Success is a measure of the effectiveness of a company's to go-to-market capabilities and the market's acceptance of a product or solution.

Media Presence is the broadcasting of a company's brand, solutions, and capabilities via both internal and external channels.



About IoT ONE

IoT ONE provides research and advisory services to help companies manage the threats and opportunities brought by the Industrial Internet of Things. We conduct research and support the planning and execution of innovation strategies in Asia. Our methodology combines IoT domain expertise with innovation strategy and organizational development experience. And our engagement with technology and startup ecosystems gives us access to specialized expertise and entrepreneurial perspective.

IoT ONE published this report to further our mission of accelerating the Industrial Internet of Things. The first Internet wave disrupted retail, media and finance. Traditional companies declined and new leaders emerged. The second Internet wave is disrupting how products and operations create value. It will impact every company that builds or operates physical infrastructure, assets and devices. The core question companies must consider is “Will you disrupt or be disrupted by the Industrial Internet of Things?” Our “micro-to-macro” research covers the four central knowledge domains that guide strategy development for both IoT technology development and adoption.

Use cases define the range of possible solutions that exist today or will exist in the future. Use cases differ in market readiness. The predictive maintenance use case is easily envisioned but technically challenging. In contrast, asset-as-a-service use cases can be technically simple but may disrupt value chains.

The IoT technology stack enables use cases. Bottleneck technologies can delay or prevent use case adoption. For example, battery constraints limit the deployment of sensors for environmental monitoring.

Business model or process innovation is often required in order to obtain value from a connected product or an internal system. The most significant challenges may be organizational rather than technical.

Partner ecosystems are as critical as intellectual property for success in Industrial IoT markets. Few companies possess all of the competencies internally that are needed to bring solutions to market.

For more information about our knowledge center:

IoTONE.com

For more information about our services:

IoTONE.com/services

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Get in touch –
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IOT ONE INSIGHTS

IoT ONE 500 & IoT ONE 10 Top Industrial IoT Companies



RESEARCH | ENABLE | GROW
the Industrial Internet of Things

IoT ONE's mission is to increase the competitiveness of our clients by helping them to realize the opportunities and manage the threats that are created by digitalization.

We are known for:

- An intent focus on the interface of digital technology and strategy.
- Deep engagement with domain experts and startup ecosystems.
- Our focus on delivering practical results at China speed.

We are always looking for opportunities to better serve our customers and users. To learn more about us or to begin a discussion, email team@iotone.com.

Kind regards,

Erik Walenza-Slabe
CEO, IoT ONE