IoT Platforms and Software is the third strategy report from Berg Insight analysing the latest developments on the IoT connectivity management, device management and application enablement platform markets.

This strategic research report from Berg Insight provides you with 170 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

**Highlights from this report:**

- **360-degree** overview of the IoT ecosystem.
- **Insights** from 30 executive interviews with market leading companies.
- **Summary** of the latest industry trends and developments.
- **Updated** in-depth profiles of key players in the IoT platform market.
- **Reviews** of the market strategies of leading platform vendors.
- **Perspectives** on the evolution from vertical M2M solutions to the broader scale and scope of the IoT.
- **Extensive** global market forecasts lasting until 2022.

**Berg Insight’s M2M Research Series**

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight’s M2M Research Series is a unique series of 35 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or car telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets respectively.

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The IoT platform market to reach US$ 7.1 billion in 2022

IoT platforms provide developers with tools to connect and manage devices and integrate collected data into various applications and services. These platforms are intended to reduce the cost and development time for IoT solutions by providing standardised components that enterprises can build upon. The relatively new product category facilitates the growing trend away from time-consuming in-house developed and bespoke IoT solutions. Broadly speaking, most IoT platforms fall into one of the following three categories: connectivity management platforms, device management platforms and application enablement platforms.

The connectivity management platform (CMP) market is characterised by a limited number of providers, although several new players have emerged in recent time following developments in the domains of LPWA and software-defined networks. Cisco Jasper is the dominant commercial CMP for mobile network operators worldwide and had about 75 million connections at the end of 2017. Other major vendors include Ericsson, Huawei, Amdocs, Comarch, as well as Nokia that launched its Nokia WING service in Q1-2017. Start-ups such as EMnify, Flo Live and Soracom have introduced cloud-based core networks dedicated for IoT that are offered as a service. A number of major mobile operators continue to invest in the development of their proprietary platforms to differentiate from the competition. Vodafone’s Managed IoT Connectivity Platform stands out as the leading proprietary connectivity management platform with about 67 million connections at the end of 2017. CMPs are also a key component in the value proposition from IoT managed service providers. Aeris and KORE have consolidated their positions as leading players in this segment, with 10 million and 9 million connections respectively at the end of 2017.

The market for device management (DMP) and application enablement platforms (AEP) is notably crowded and has in recent time experienced a new wave of investments from major cloud infrastructure providers and enterprise software vendors. Berg Insight estimates that the total market value for commercial DMPs and AEPs was US$ 1.1 billion in 2017. Growing at a compound annual growth rate (CAGR) of 36.2 percent, the market value is expected to reach US$ 4.9 billion in 2022.

In 2017–2018, the major cloud infrastructure providers Amazon, Microsoft and Google continued to invest heavily in their IoT offerings to drive growth in their cloud businesses. Berg Insight expects that the higher level of involvement of the cloud infrastructure providers over time is likely to lead to further specialisation among the IoT platform vendors and more partnerships between vendors with complementing capabilities. Merger and acquisition activity has risen sharply in recent time and the market has now entered a consolidation phase. A level of fragmentation in the market is however expected to remain due to lack of standards, but also due to specific requirements in industries characterised by mission critical applications such as automotive, healthcare and manufacturing, as well as in the critical infrastructure industries.

This report answers the following questions:

- Which trends and developments are shaping the IoT platform market?
- What are the benefits of using third party IoT platforms?
- Who are the leading providers of IoT connectivity, device management and application enablement platforms?
- What are the main drivers behind the adoption of IoT platforms?
- Which are the leading IoT platform vendors in the major market verticals?
- What are the key features of the application enablement platforms available today?
- Which mobile operators have deployed IoT connectivity management platforms?
- What is the potential market size for third party IoT platforms?
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