



# 2015 IoT Application Enablement ScoreCard

*Executive Summary*

December 29, 2015

## Executive Summary

The IoT application enablement space has blossomed into one of the hottest technology areas of the Internet of Things (IoT). According to MachNation research on mergers and acquisitions activities in IoT<sup>1</sup>, application enablement companies trade at significantly higher multiples – in some cases up to 6 times higher – than IoT services companies and IoT/M2M MVNOs. Venture capital, private equity and strategic vendor investors recognize the value of horizontal application enablement technology that is capable of providing rich IoT insights.

MachNation's IoT Application Enablement ScoreCard helps public and private sector organizations understand the IoT application enablement vendor space. This year's ScoreCard is proof of the incredibly high interest in this technology sector. MachNation has included nearly double the number of vendors in the 2015 versus the 2014 ScoreCard. Vendors have been willing to submit more technology details, product roadmap insights and information about their strategic directions than last year. In addition, vendors provided MachNation information about their businesses under nondisclosure terms. While MachNation will not be sharing any the information shared under nondisclosure terms, MachNation did use this information in the ScoreCard ratings.

Of note: MachNation has noticed a bifurcation of the IoT application enablement space over the last 6-12 months. The ecosystem is dividing into two types of vendors – application enablement platforms (AEPs) and Platform-Enabled Solutions (PES). MachNation has written an [accompanying piece of research](#) on this important market split. In that piece of research, MachNation presents a definition of the two types of application enablement approaches, establish criteria for identifying each type of technology and illustrate the high-level value provided by each vendor to its customers. MachNation summarizes the distinction below.

**Application Enablement Platforms (AEPs)** are technology-centric middleware platforms focused on connecting any device to any application with limited or no regard to the target segment (or industry sector) addressed by the technology. Using a flexible deployment model, an AEP relies heavily on exposure of its APIs, a vibrant developer community, a relatively broad set of technologies and a robust, specialized set of system integrators to fully realize the value of the platform for customers.

**Platform-Enabled Solutions (PESs)** are solution-centric offerings that are built to provide target customers a fully-enabled, referenceable IoT solution quickly. Using a flexible product-plus-services development model, a PES relies on its own application development; exposure of

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<sup>1</sup> See MachNation research including, "ARM purchases security vendor Sansa Security for USD75 million," "Autodesk snaps up application enablement platform vendor SeeControl," and "Financial valuations: recent IoT MVNO acquisitions of Sierra Wireless."

specific APIs; a relevant developer community; a direct sales model; and a core set of SIs to create validated, rapid and secure industry- or application-centric IoT solutions for customers.

Because of this industry bifurcation between IoT AEPs and IoT PESs, it is becoming more difficult to evaluate vendors in this ecosystem. MachNation is reviewing its future research plans and will likely conduct separate ScoreCards for these two technology categories – AEP and PES – in 2016. MachNation will provide more information about this process to relevant vendors shortly.

MachNation’s 2015 IoT Application Enablement ScoreCard rates IoT application enablement vendors’ technology on 5 categories

- Flexibility of deployment model
- Focus on developer
- Sophistication of platform and device management
- Comprehensiveness of overall platform
- Depth and breadth of strategic partnership networks

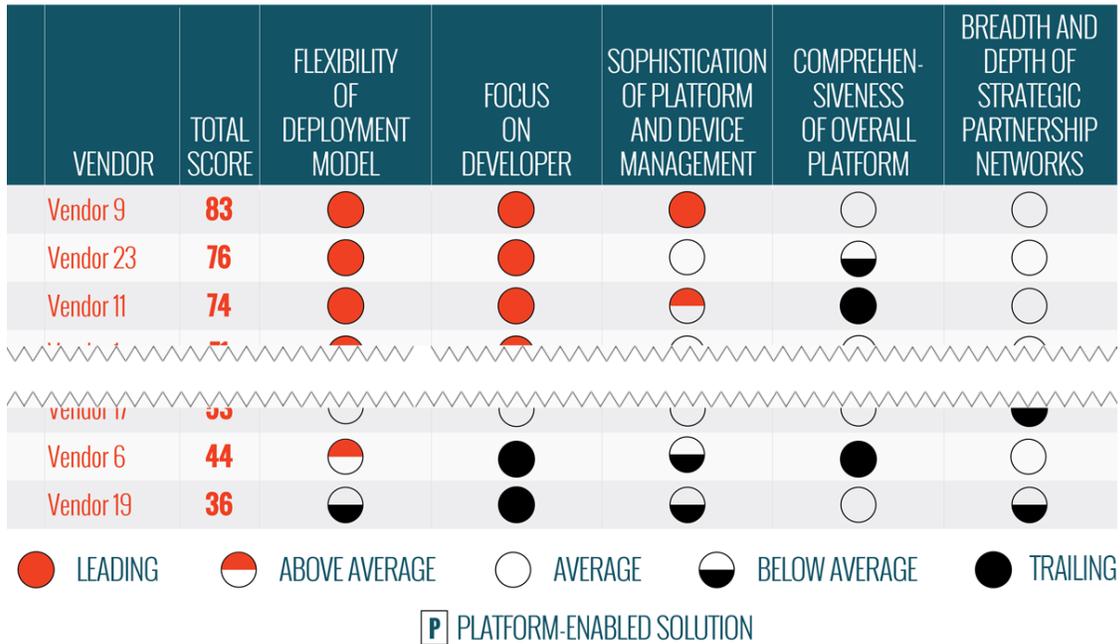
MachNation’s 2015 IoT Application Enablement ScoreCard includes the following vendors (listed alphabetically): Aeris Communications, Amazon, ARM, Autodesk, Ayla Networks, Bug Labs, Carriots, Cumulocity, Davra Networks, Electric Imp, EVERYTHING, Exosite, IBM, MachineShop, PLAT.ONE, PTC, SAP, Sierra Wireless, Telit, Waylay, Xively, Yaler and Zebra Technologies. See [Figure 1](#).

**FIGURE 1: VENDOR LIST** [MACHNATION, 2015]

VENDORS	VENDORS	VENDORS
Aeris Communications	Davra Networks	SAP
Amazon	Electric Imp	Sierra Wireless
ARM	EVERYTHING	Telit
Autodesk	Exosite	Waylay
Ayla Networks	IBM	Xively
Bug Labs	MachineShop	Yaler
Carriots	PLAT.ONE	Zebra Technologies
Cumulocity	PTC	

The complete ScoreCard contains ratings, write-ups, strengths and points-of-note about 23 application enablement vendors. A summary of these ratings is shown on [Figure 2](#) below.

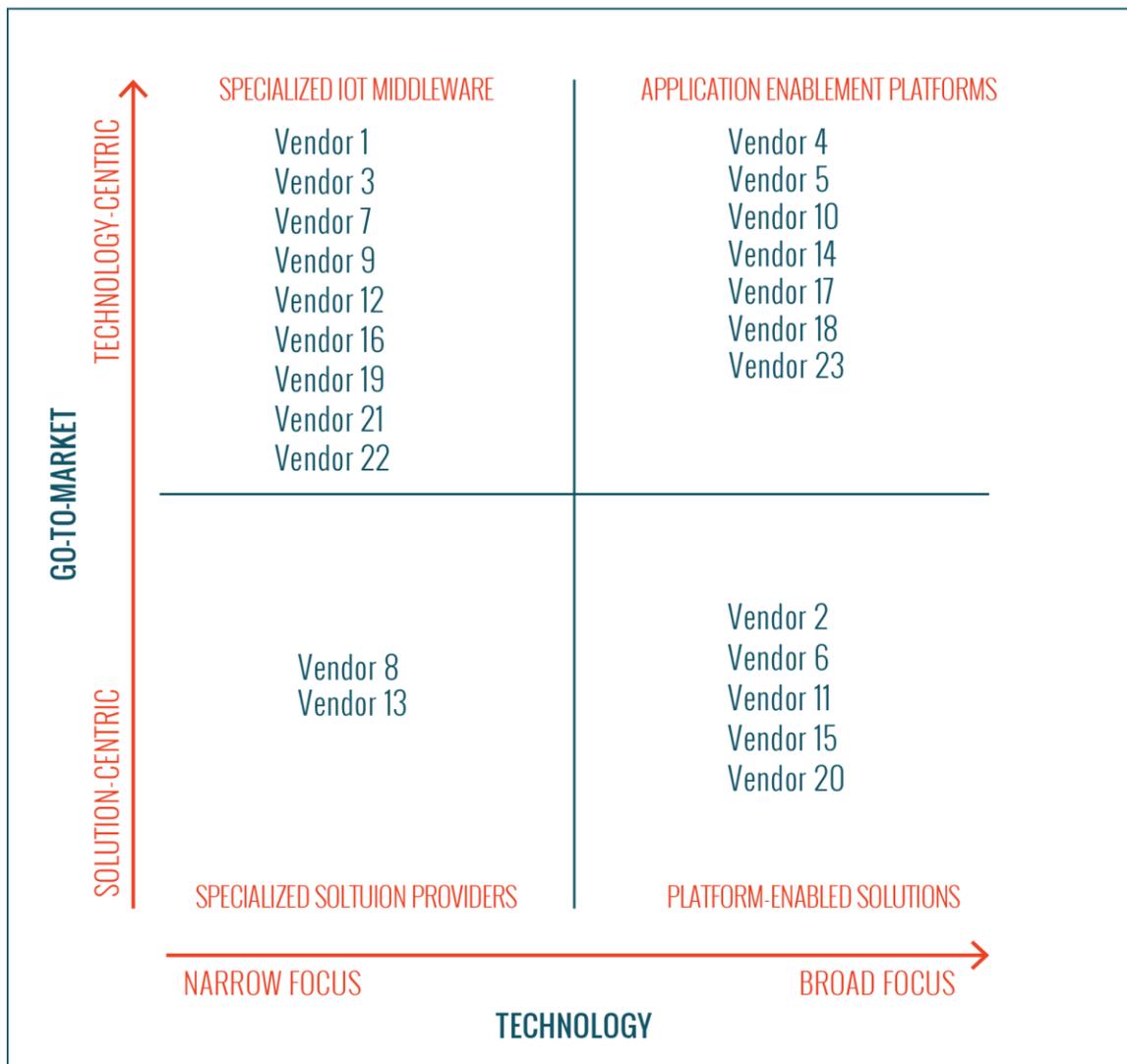
**FIGURE 2: IOT APPLICATION ENABLEMENT SCORE** [MACHNATION, 2015]



In addition, MachNation cites two vendors in the ScoreCard that epitomize the unique, new PES approach described above. MachNation recognizes that the value offered by IoT PES vendors deserves heightened focus in the IoT ecosystem. Therefore, partners of MachNation will be receiving additional information about this new technology category in 2016.

Finally, MachNation believes it helpful to classify vendors by the broadness of their technology and their go-to-market approaches. Using a traditional 2x2 matrix, MachNation classifies the types of IoT application enablement solutions into four buckets: application enablement platforms, platform-enabled solutions, specialized IoT middleware and specialized solutions providers. This classification is shown on [Figure 3](#) on the next page.

**FIGURE 3: IOT APPLICATION ENABLEMENT SCORECARD** [SOURCE: MACHNATION, 2015]



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MachNation is the only dedicated insight services and application development firm covering the future of the Internet of things (IoT), Internet of everything (IoE), connected device and machine-to-machine (M2M) ecosystems. MachNation specializes in understanding and predicting these technology sectors including developments in hardware, platforms, communication services and applications. MachNation specialists have provided guidance, consulting services and support to the majority of the world's leading IT and communications firms. MachNation serves on Cisco's prestigious IoT World Forum Steering Committee and co-chairs the Service Provider working group within the Steering Committee.