



FIWARE Use by Product and Service

Joint Fiware Networking Session

Richard Stevens, IDC

Lisbon, ICT 2015, 20 October 2015



IDC Offers Unmatched Global and Local Expertise

IDC has more than

1,100
analysts

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countries worldwide

Significant primary
demand-side research
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300,000

end users surveyed
annually

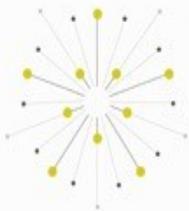


49%

of IDC analysts are in
emerging markets

Providing global,
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trends in over

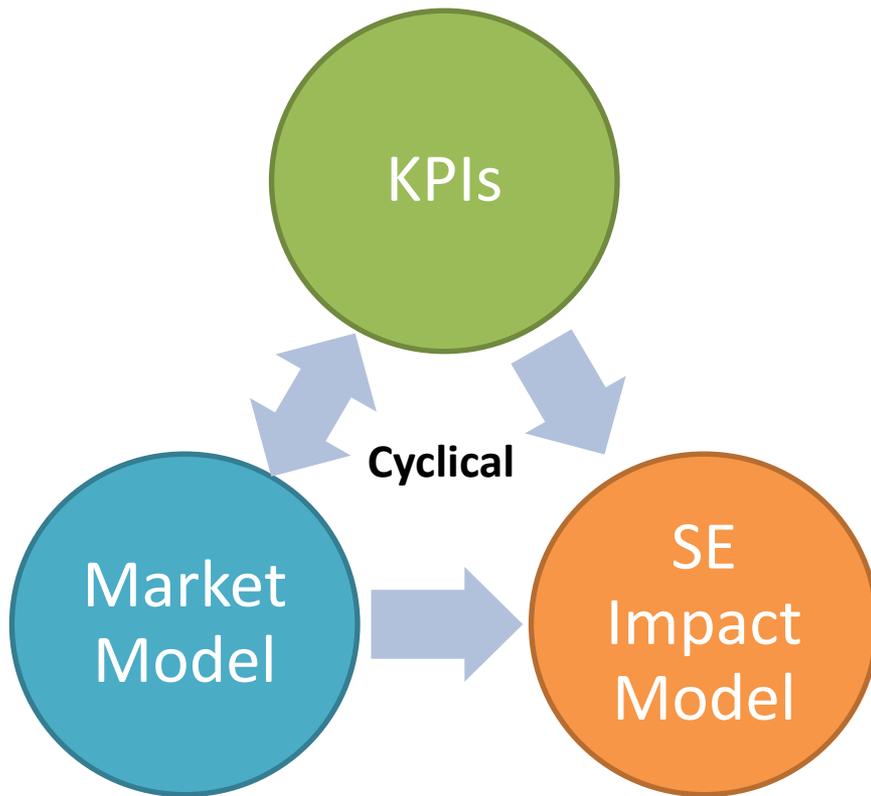
110 countries



FUTURE
INTERNET
PPP



Three interdependent components of the Methodology Framework:



- 1** To estimate the Phase 3 projects' potential **take-up**, target **markets**, **demand drivers**, potential **revenues**
- 2** To assess the potential direct, indirect and induced **impacts** of the Phase III projects: **macro-economic**, **social** and **scientific** impacts, and users' **benefits**
- 3** To measure the **readiness** of the Phase III projects to achieve their objectives and potential impacts with reference to objective **benchmarks**

Look at Everything Focus on Impact



Original Submitted Proposals

Total Proposals to all calls	6571
Total Proposals collected	3369
Total Proposals Funded	725
Accelerators Analyzed	15

August 31st, 2015

Accelerator	Selected
SOUL-FI	119
SpeedUp Europe	90
FICHe	80
CREAtiFi	59
FABulous	53
SmartAgri Food2	50
FINODEX	49
FRACTALS	43
IMpaCT	42
CEED Tech	34
Finish	32
INCENSE	26
FI-Adopt	25
European Pioneers	12
FI-C3	11

Survey focused on Impact



Sub-Grantee Survey

August 31st, 2015

Selected Initiatives	725
Eliminated Initiatives	119
Potential Surveys	606
Unfinished Survey	140
Completed Surveys	466
Completion Rate	77%

FIWARE Tried and Tested Across Europe

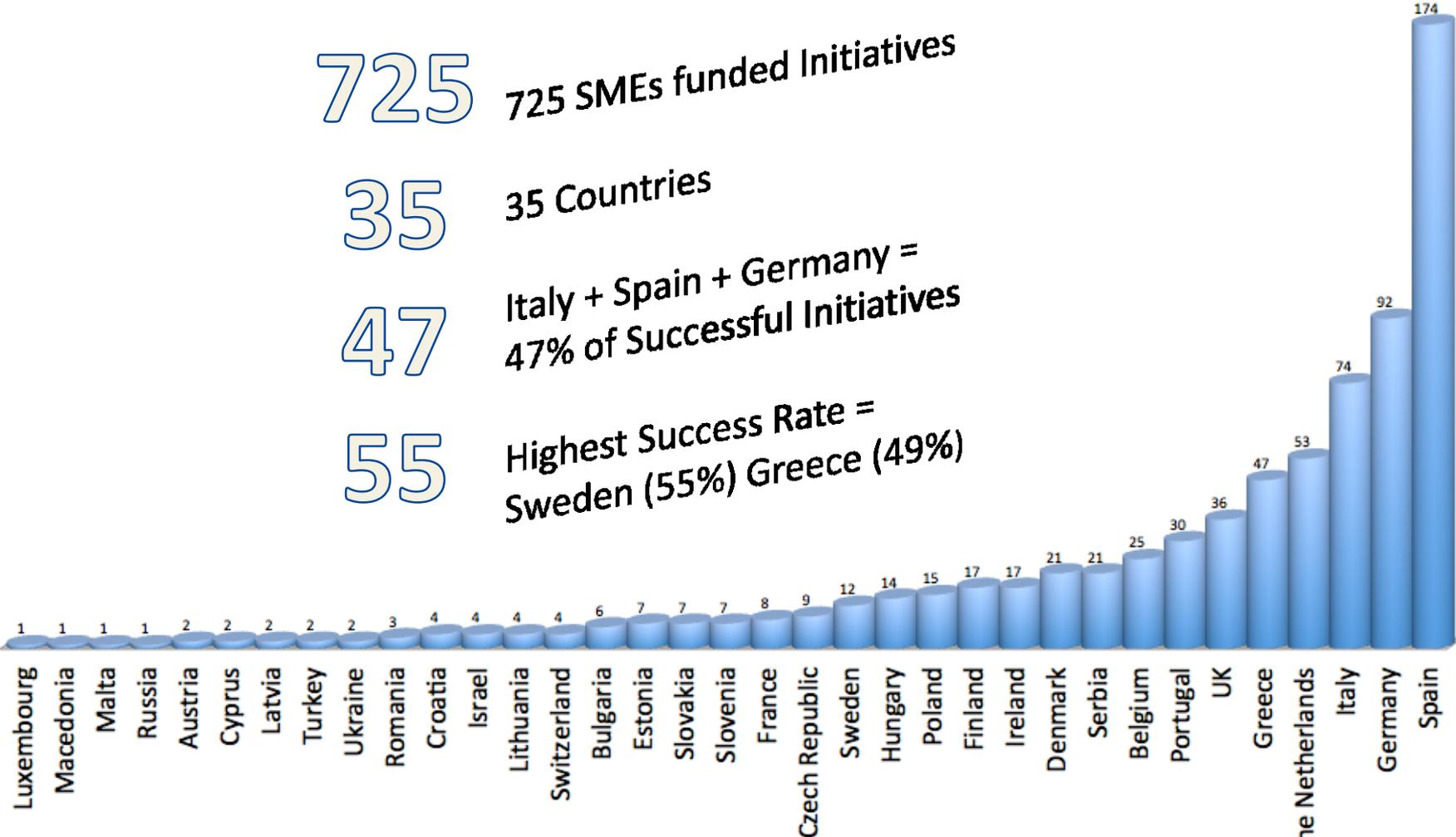


725 725 SMEs funded Initiatives

35 35 Countries

47 Italy + Spain + Germany = 47% of Successful Initiatives

55 Highest Success Rate = Sweden (55%) Greece (49%)

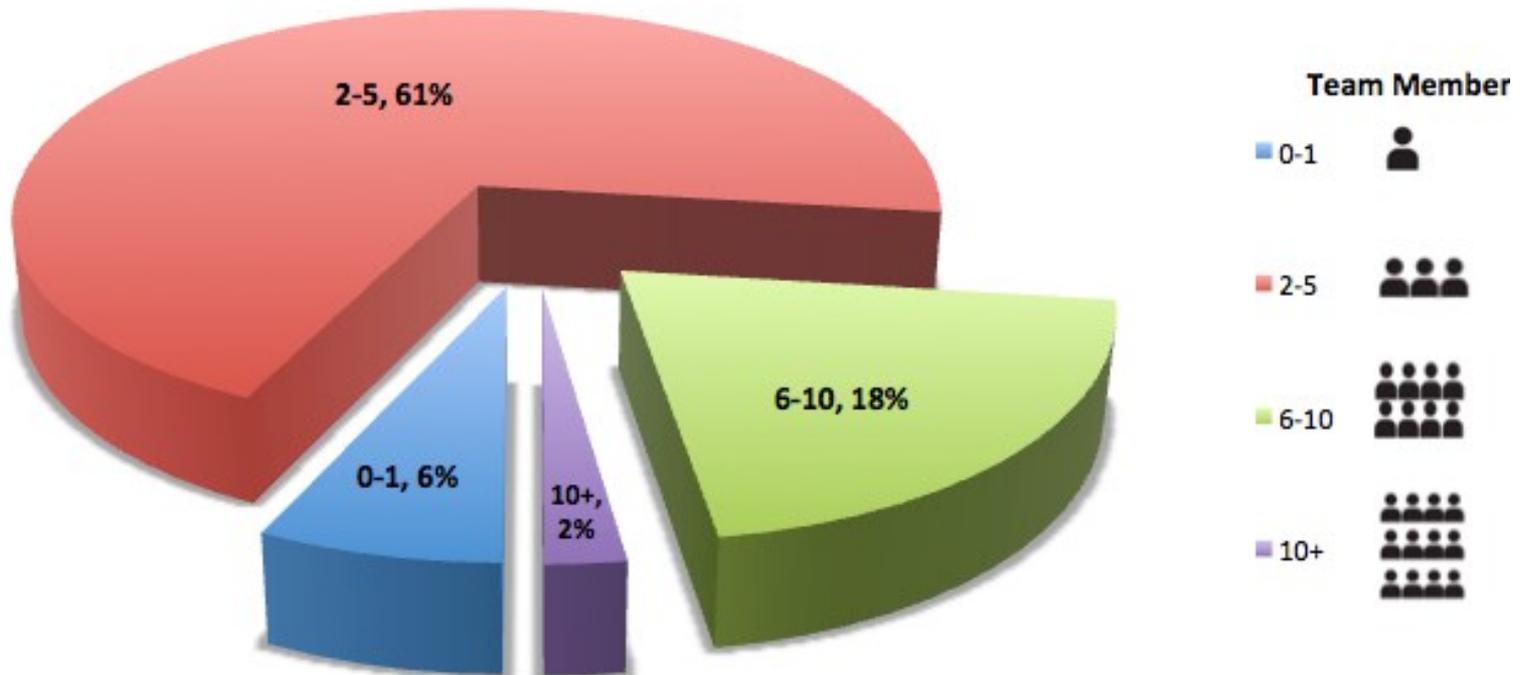


Base: 725 selected Initiatives (12% did not provide information)

15 accelerators, excludes FrontierCities



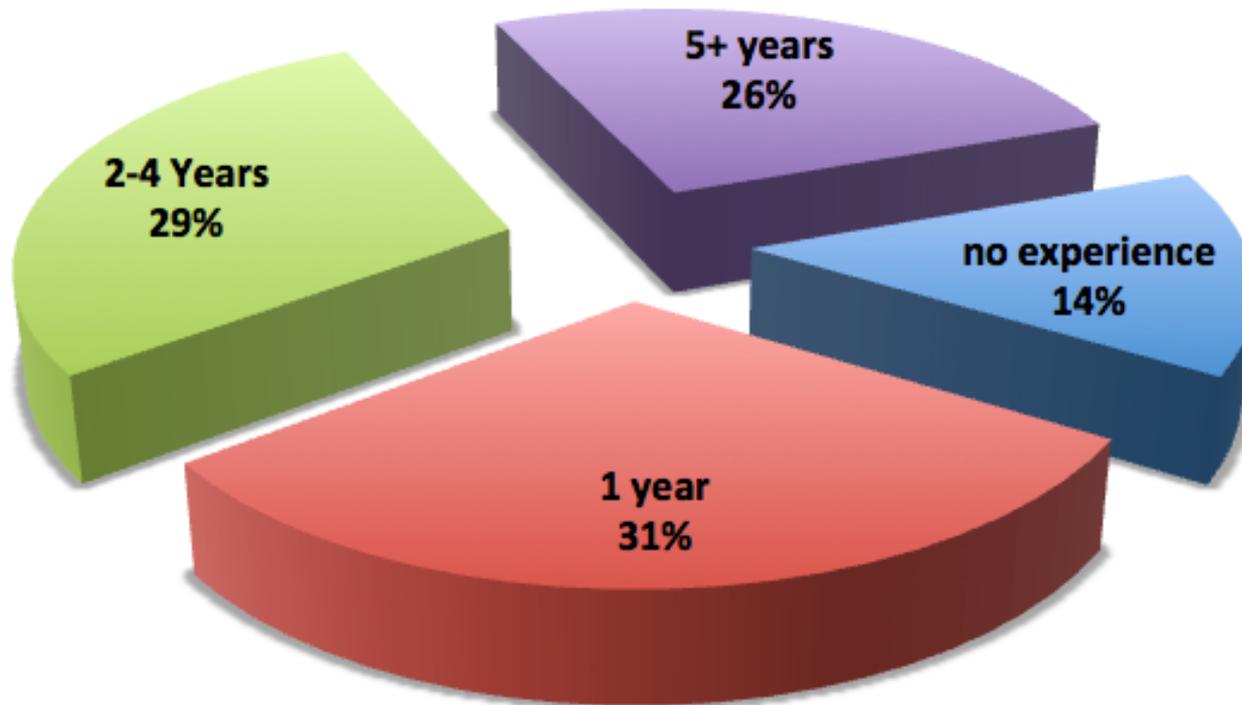
Lots of Small and Micro Enterprises



Base: 725 selected Initiatives (12% did not provide information)

15 accelerators, excludes FrontierCities

Start-Ups Abound



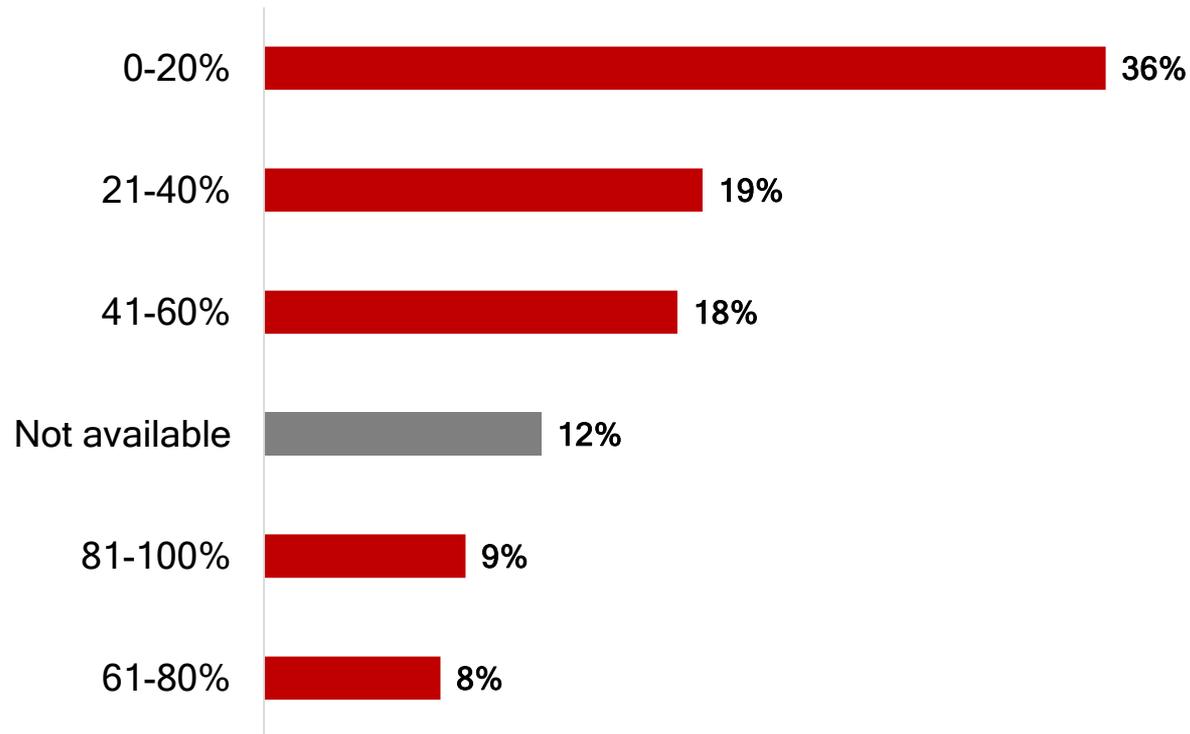
Base: 725 selected Initiatives (17% did not provide information)

15 accelerators, excludes FrontierCities

Just Getting Started, Still looking for Capital



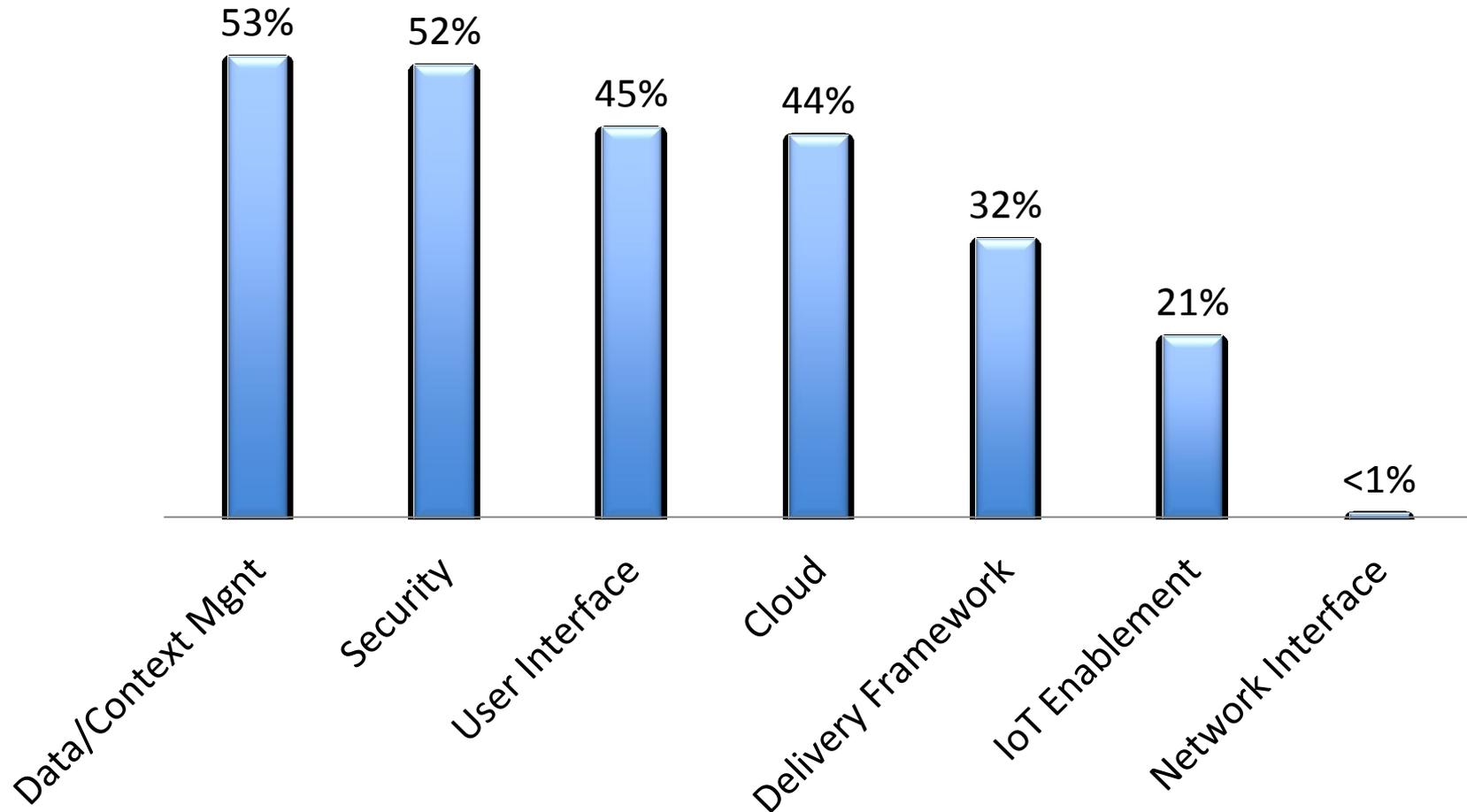
What is the % of required funding already secured?



n = 466; respondents to the Self-Assessment tool

Base: 15 accelerators, excluding FrontierCities

Core Technology Needs Being Addressed

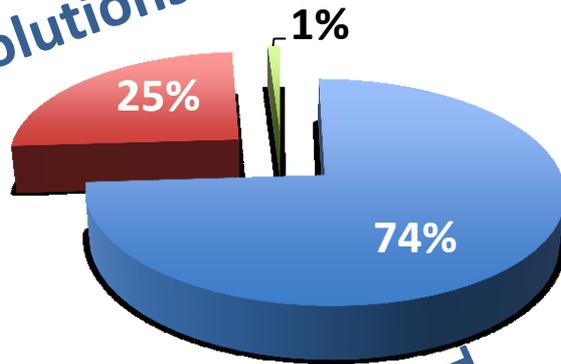


%, number of initiatives using specific FIWARE Chapters on number of Self-Assessment tool respondents based on 466; respondents to the Self-Assessment

Innovative Ideas Based on FIWARE

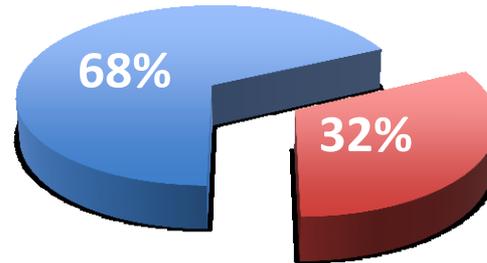


Non IT
Solutions



Technical Solutions

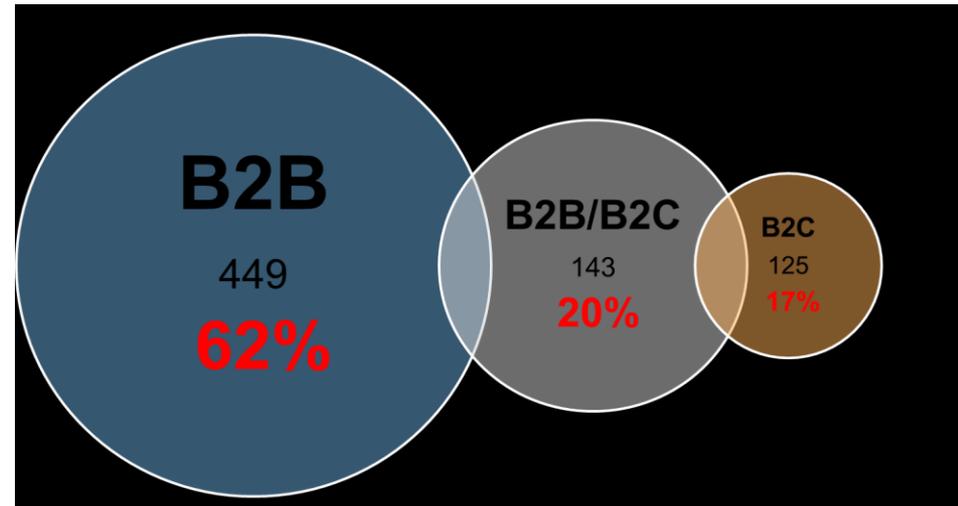
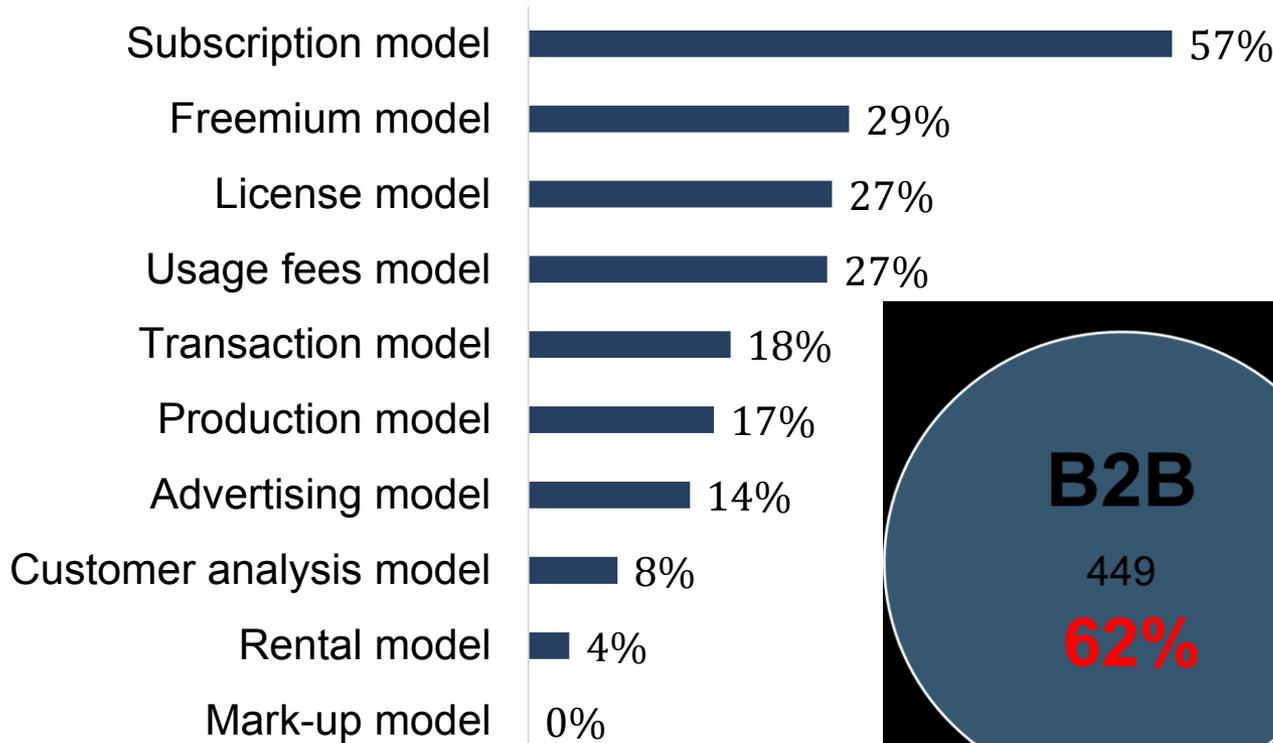
Technical Solutions
Software



Hardware
& Software

n = 725; all available selected proposals
Base: 15 accelerators, excluding FrontierCities

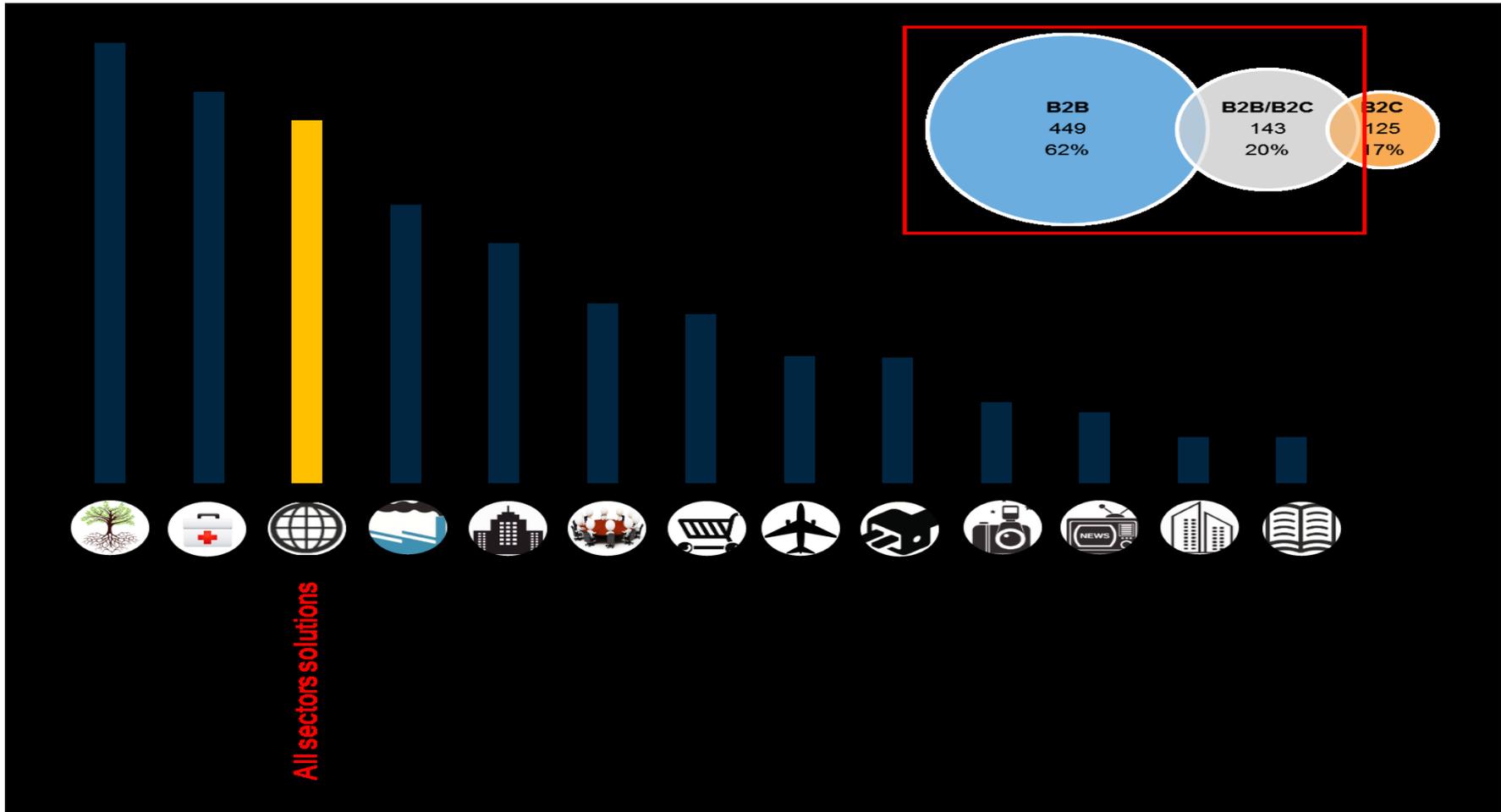
Proven Business Models & Approaches



Base: 725 selected Initiatives (1% did not provide useful information)

15 accelerators, excludes FrontierCities

Not Your Usual Business Sectors



Base: 592 selected proposals targeting the B2B/B2C and B2B market

15 accelerators, excludes FrontierCities



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FIWARE Outlook – Hot Markets

Joint Fiware Networking Session

Gabriella Cattaneo, IDC

Lisbon, ICT 2015, 20 October 2015



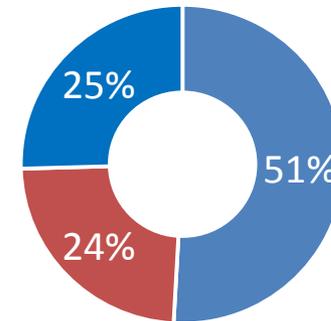
Market Revenue Forecast Model: the starting point

- **Model inputs:**

- Type of Company (SW, HW/SW, non IT)
- Year of market entry (2015-2020)
- Market target (national vs multinational)
- Death rates per year
- Average revenues growth rates
- Initiatives profiles: team, target sector

Scope: all initiatives funded by Phase III

1000 Funded Initiatives



■ Pure SW ■ HW and SW ■ Non-IT services

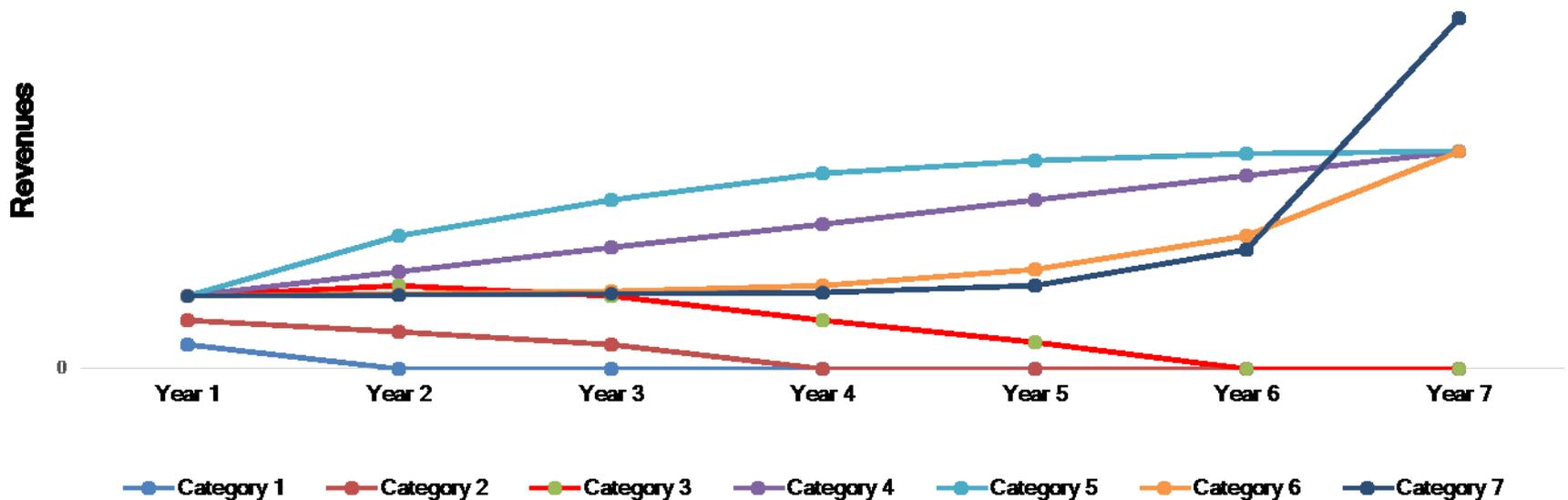
- **Assumptions:**

- Start-ups and smaller companies grow faster
- Competition higher for pure SW solutions = slower growth
- HW/SW solutions = new markets, higher potential growth
- Potential market opportunity: different by industry sector targeted with different impacts on potential revenues

Source: FI-IMPACT Market Model 2.0, October 2015

Main Steps: Modeling Revenues by Category and Scenario

- **Main Steps:**
 - Classification of funded initiatives under 7 potential Categories (revenue growth paths) to 2020
 - Estimate of average cumulated growth rates by category and type of initiative



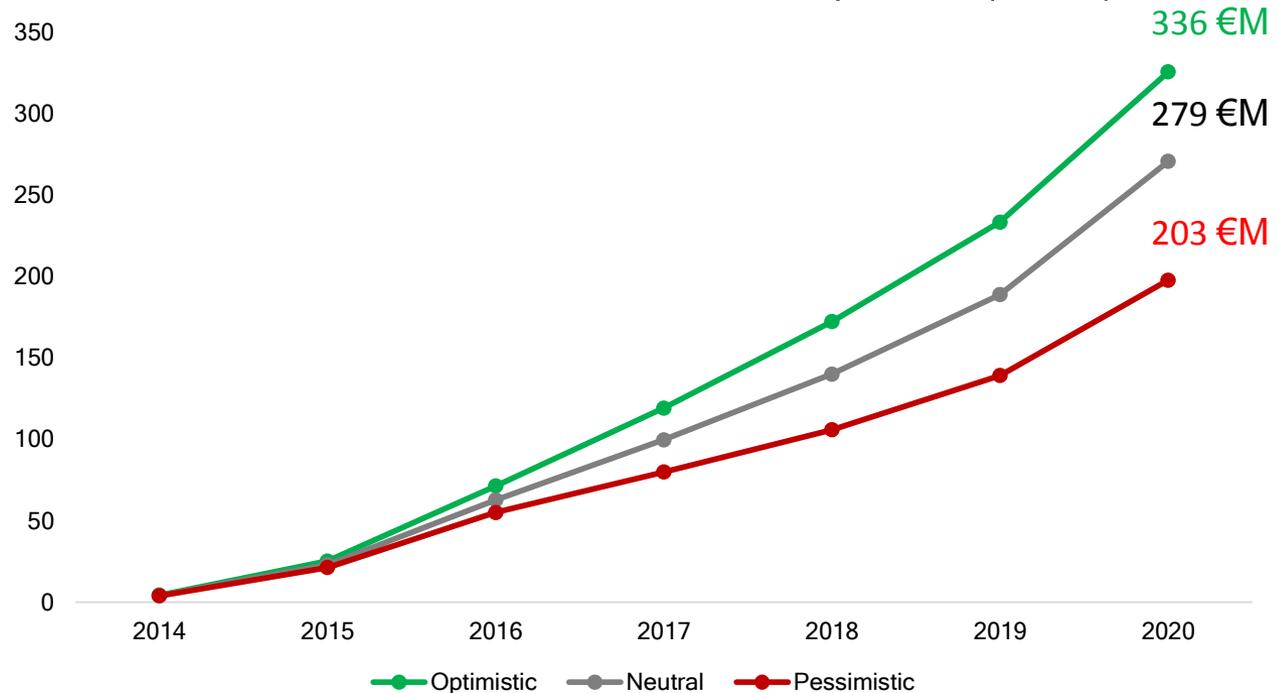
Source: FI-IMPACT Market Model 2.0, October 2015

Potential Market of Funded Initiatives by 2020

Scenario Assumptions

- **Optimistic Scenario:**
 - Good match with potential demand
 - Death Rates: 33% of initiatives
- **Neutral Scenario:**
 - Most likely match with potential demand
 - Death Rates: 46% of initiatives
- **Pessimistic Scenario:**
 - Weak match with potential demand
 - Death Rates: 60% of initiatives

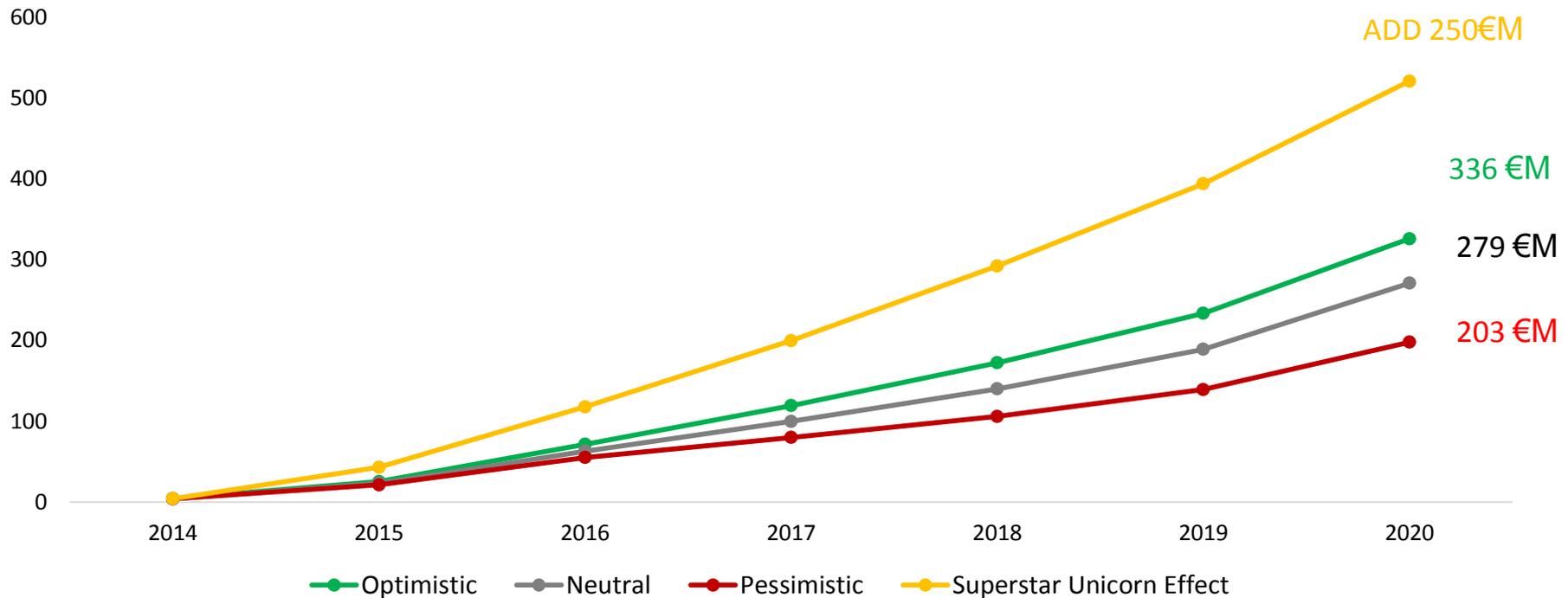
Funded Initiatives Potential Revenues 2014-2020 by scenario (€ Million)



Source: FI-IMPACT Market Model 2.0, October 2015

One Superstar Success Doubles Market Impact

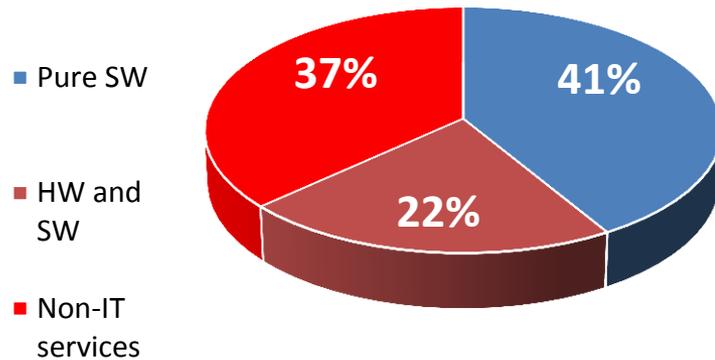
The "Unicorn" Effect (€ Million)



Source: FI-IMPACT Market Model 2.0, October 2015

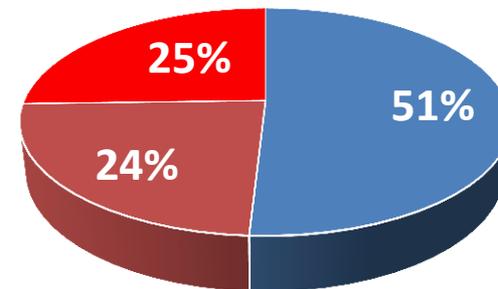
Estimated Market Impact by Technology Solution

Share of Forecast Revenues by Technology,
2020, Neutral Scenario



Total: 279 €M in 2020

All Funded Initiatives by Technology
(n.1000)

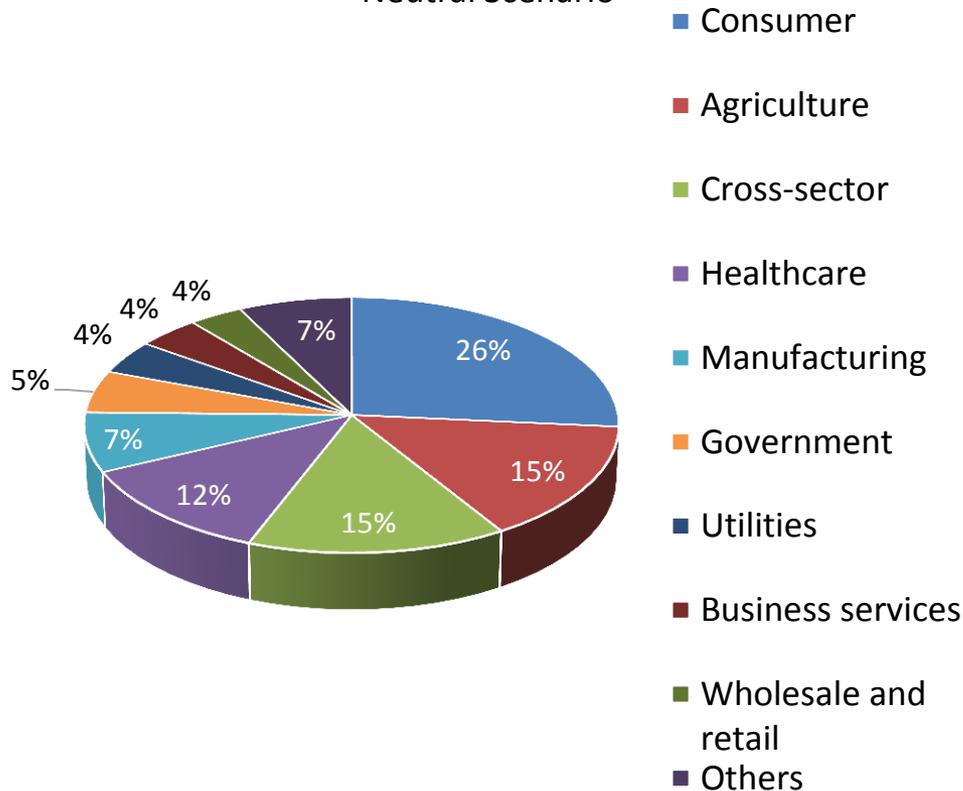


- The companies offering Pure Software solutions are the majority
- HW and SW (mainly IoT) companies and non-IT companies address more innovative and higher potential markets with higher average revenues per company

Source: FI-IMPACT Market Model 2.0, October 2015

Hot Markets: Estimated Revenues in 2020 by sector

Forecast Revenues by Market Sector, 2020,
Neutral Scenario



Focus on Emerging Markets

- The top ranking sectors by number of funded initiatives and share of potential revenues are Consumer, Agriculture, Healthcare, Manufacturing;
- These are not the top ranking sectors in terms of potential IT spending to 2020, according to IDC.
- However, they have high potential and high barriers, are prioritized by EC strategies and R&D investments, and offer opportunities for newcomers

Source: FI-IMPACT Market Model 2.0, October 2015

Key Findings and Reflections

- **Relevant Market Impacts**

- From 1000 funded initiatives, by the year 2020 there are likely to be approximately 500 new, or newly grown companies in Europe leveraging Fiware to gain revenues of 279 € Million;
- If many of these companies match demand needs, revenues could be as high as 336 € Million (Optimistic scenario); if many have made wrong decisions, they could be as low as 203 € Million (Pessimistic Scenario)
- One superstar company with worldwide success would be enough to add more than 250 €Million to these estimates (Unicorn Scenario)

- **High Return on Phase III Investment**

- Compared to the 80 €Million investments in the FI-PPP Phase III, this seems a valuable return on investment

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Phase III the FI-PPP Today

