

F R O S T & S U L L I V A N

FROST & SULLIVAN BEST PRACTICES AWARD

IOT PLATFORMS - GLOBAL

Growth Innovation & Leadership
Frost Radar 2018



FROST & SULLIVAN

BEST
2018 **PRACTICES**
AWARD



F R O S T R A D A R

CONGRATULATIONS!

Frost & Sullivan's global team of analysts and consultants continuously research a wide range of markets across multiple sectors and geographies. As part of this ongoing research, we identify companies that consistently develop new growth strategies based on a visionary understanding of the future, and thus more effectively address new challenges and opportunities. This involves extensive primary and secondary research across the entire value chain of specific products. Against the backdrop of this research, Frost & Sullivan is pleased to bestow Amazon Web Services with the Frost & Sullivan Radar Growth, Innovation and Leadership (GIL) Award for IoT Platforms.

The GIL best practice is bestowed upon companies that are market leaders that are at the forefront of innovation. These companies consolidate or grow their leadership position by continuously innovating and creating new products and solutions that serve the evolving needs of the customer base. These companies are also best positioned to expand the market by strategically broadening their product portfolio.

Achieving Growth, Innovation and Leadership (GIL) is never an easy task, but it is one made even more difficult considering today's intense competitive environment, customer volatility, economic uncertainty, and rapid technology evolution. Within this context, your receipt of this Award signifies an even more significant accomplishment.

Moreover, we recognize that your selection as recipient of this Award is the result of many individuals (employees, customers, and investors) making daily choices to support in the organization and contribute in a meaningful way to its future. We enthusiastically acknowledge and celebrate these achievements.

Once again, we congratulate you on your accomplishments and wish you great success in the future.

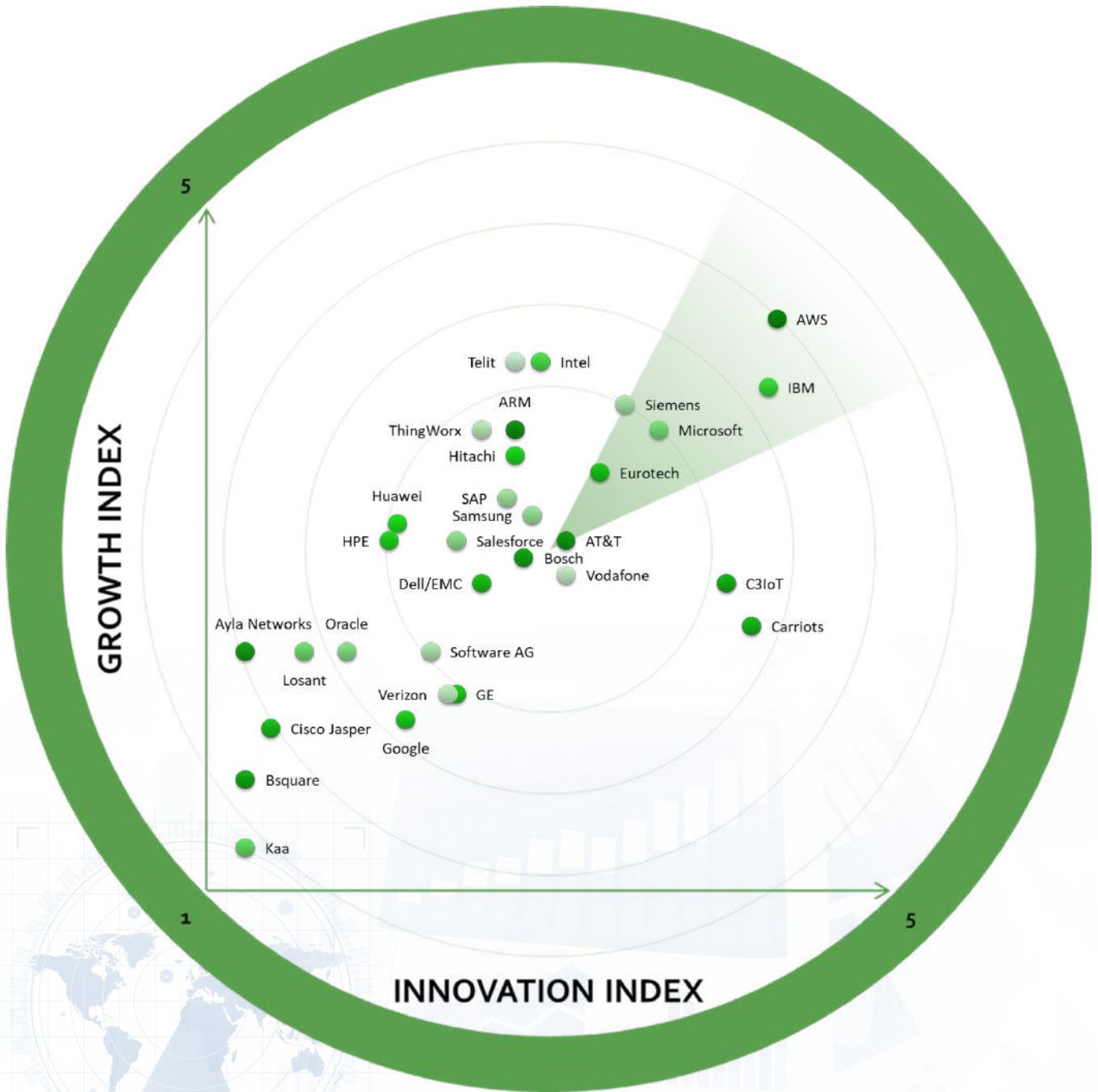
Sincerely yours,

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The Frost Radar

The Internet of Things (IoT) Platforms Market



Frost Radar Growth, Innovation & Leadership Award

Amazon Web Services

- AWS provides customers and developers a full-suite of IoT services with its platform to connect their devices to the cloud.
- From the Amazon FreeRTOS to technology building blocks, customers can enable services they need to deploy IoT across their enterprise.
- In addition, AWS customers can manage their devices at the edge of the network, making it easy to securely onboard, monitor and remotely manage all IoT devices across disparate applications.

COMPANY DIAGNOSTIC



- Vast and diverse product portfolio includes FreeRTOS, core IoT platform, developer network, edge and cloud-based device management, security, and analytics.
- Expanding partner ecosystem that allows customers to enable a vast array of services and technologies to constantly improve and update their IoT solution.
- The consistent rollout of new features and functionality helps AWS customers adapt faster to technology improvements and improve their solutions for customers.

STRENGTHS

FROST RADAR POSITIONING

- AWS is by far the leader in the IoT platforms space and is considered by Frost & Sullivan to be a trailblazer in the industry.
- AWS has used innovation to develop a full-suite of IoT technologies and services that customers have consistently rated as the top IoT platform in the industry.
- With relationships across the IoT ecosystem and availability of a vast range of solutions, AWS is poised to dominate this market for the foreseeable future.
- The company's continued dominance in the cloud market and increased penetration of the enterprise management market will help AWS remain the leader in IoT.

OPPORTUNITIES

- With its role as the leader in IoT solution development, AWS has the unique opportunity to dominate both the enterprise and consumer segments.
- Consumer IoT solutions integrated with AWS services would help the company continue its dominance in the consumer segment expanding from the home to also include consumer mobility.
- In the industrial segments, the availability of edge computing and analytics from AWS helps ease the burden of manufacturers looking for connected services and real-time monitoring and management.

What is the Frost Radar?

A Practical, High Impact, Scalable C2A Tracking Solution



What is it?

A robust analytical tool that benchmarks companies' innovation focus and growth performance in a given market.



How is it built?

Through in-depth analysis built on our 360 degree research methodology (primary and secondary research) and objective rating of companies in any given market.



Why do we need it?

To understand how companies benchmark against each other in their ability to innovate and grow against a backdrop of industry transformation and evolution.



What will it accomplish?

Companies will gain an objective, independent perspective of their innovation and growth strategies, including their robustness, effectiveness, and relative competitive strength, and implications on their long-term success.



How to use it?

Frost Radar is a dynamic tracking tool that offers frequent rating and positioning of companies that are agitating, contending, or torchbearers of their industry, or are positioned as trailblazers. Owing to changes in operating environment and internal changes within these organizations, their positioning in Frost Radar will change over time. It is important to leverage Frost Radar to ensure that companies are aware of changes to their ecosystem and their relative positions in it.



What does it mean to be on the Frost Radar?

Every company that finds itself on the Radar has been chosen by Frost & Sullivan analysts because they have proven themselves to be quite noteworthy in the industry; demonstrating excellence in either growth, innovation, or both, and are able to translate that into proven solutions that benefit their clients.

Frost Radar

2 Major Indices, 10 Analytical Ingredients, 1 Platform

Vertical Axis – The Growth Index:

Growth index is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

- **GI1: Market Share (previous 3 years):** Market share relative to its competitors in a given market space for the previous three years.
- **GI2: Revenue Growth (previous 3 years):** Revenue growth rate for the previous three years in the market/ industry/ category that forms context for the given Frost Radar.
- **GI3: Growth Pipeline:** This is an evaluation of the strength and leverage of the company's growth pipeline system, to continuously capture, analyze and prioritize its universe of growth opportunities.
- **GI4: Vision and Strategy:** This is an assessment of how well a company's growth strategy is aligned with its vision . Are the investments the company is making in new products and markets consistent with the stated vision?
- **GI5: Sales and Marketing:** This is a measure of effectiveness of a company's sales and marketing efforts in helping the company drive demand and achieve its growth objectives.

Horizontal Axis – The Innovation Index:

Innovation index is a measure of a company's ability to develop products/services/solutions that are developed with a clear understanding of disruptive Mega Trends, are globally applicable, are able to evolve and expand to serve multiple markets, and are aligned to customers' changing needs. Key elements of this index include:

- **II1: Innovation Scalability:** This determines whether the organization's innovations is/are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.
- **II2: Research and Development:** This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.
- **II3: Product Portfolio:** This is a measure of the product portfolio of the company, focusing on the relative contribution of new products to its annual revenues.
- **II4: Megatrends Leverage:** This is an assessment of a company's proactive leverage of evolving long-term opportunities and new business models, as the foundation of its innovation pipeline.
- **II5: Customer Alignment:** This evaluates the applicability of a company's products/services/solutions to current and potential customers (7-year horizon), as well as how its innovation strategy is influenced by evolving customer needs.