# CANADIAN

# INTERNET OF THINGS & MACHINE-TO-MACHINE SERVICES

# MARKET REPORT

**2019 EDITION**

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# CANADIAN IoT & M2M SERVICES MARKET REPORT
# 2019 EDITION

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### ABOUT THIS REPORT

The *Canadian Internet of Things (IoT) and Machine-to-Machine (M2M) Services Market Report, 2019 Edition* is NBI/Michael Sone Associates' third annual report examining the IoT and M2M services market in Canada. As it is in other jurisdictions, the IoT market in Canada is comprised of a large and varied provider ecosystem that includes IT companies, platform providers, equipment vendors, device manufacturers, networking companies, wireless service providers, start-ups, and systems integrators. This report focuses on IoT services offered by the three major Canadian wireless carriers (Bell, Rogers and TELUS) as well as non-aligned provincial ILEC, SaskTel, with in-depth profiles given for each. We have also elaborated on the most prevalent IoT management platform providers in Canada, Cisco Jasper Control Center and Ericsson, with a description of their Canadian activities specific to IoT.

The Market Overview and Analysis section provides a detailed analysis of the developments and trends driving the Canadian IoT and M2M market generally. Given the growing importance of LPWAN, we have thoroughly elaborated on how its advent is affecting the industry. New to this study, we have specifically detailed the presence and potential impact of unlicensed LPWAN in Canada. Essential IoT use cases are also highlighted and the importance of security for IoT is examined.

Finally, a quantitative summary of the Canadian IoT industry sizes the market held by the wireless carriers for both number of connections and associated revenues for the period of 2017 to 2021.



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