

IoT Insight Series - Edge Computing M&A Analysis

<https://marketpublishers.com/r/I4999BE616BBEN.html>

Date: October 2019

Pages: 62

Price: US\$ 2,950.00 (Single User License)

ID: I4999BE616BBEN

Abstracts

Edge computing is redefining the cloud computing space. The growing de-emphasis on the cloud's role in connected environments is expected to lead to smarter and faster autonomous solutions that have the potential to reshape the IoT landscape.

Companies are transforming their business models to attain edge computing capabilities necessary for offering end to end services. Startups with innovative networking technologies and newer software-defined architectures are aiming to enhance flexibility in hybrid networks. Emerging technologies like AI and neuromorphic computing are changing data processing and decision-making. Data center architectures are being rewritten with easily available off the shelf, cost-effective, and efficient solutions. Further, the upcoming 5G networks are projected to fuel the expansion of edge infrastructure for high speed communication.

Edge computing will transform the IoT landscape into a hyperconnected environment where the restrictions related to latency and computation capacity will be eliminated. It is important for the incumbents to keep up the pace of innovations to stay ahead of the competition. Also, companies from other industries can be expected to cash in the opportunity at hand.

The recent years have witnessed a number of mergers and acquisitions in the edge computing space for IoT services, with the increase in M&A activities representing the industry's conundrum of cloud, edge, and hybrid architectures, and the race to achieve a considerable market share.

Acquisition Trends:

The report includes an analysis of approximately 60 deals, along with a detailed technology overview and the purpose of the acquisitions. The M&A analysis section

offers a comprehensive view of the transactions around edge computing, covering different technology aspects including data center, AI, security, software-defined WAN (SD-WAN), analytics, interoperability, multi-access edge computing (MEC), and others.

Some prominent deals observed include:

Veeva – Virtuosys

American Tower – ColoATL

Compass Data centers – EdgePoint System, BitBox

VmWare – VeloCloud

Intel – Xilinx, Movidius

Apple – Silk Labs

HPE – Niara

Wave Computing – MIPS Technologies

Analog Devices – Otosense

Patent Capabilities of Target Companies:

IP acquisition is a key strategy for technology companies to drive innovation in the edge computing space, with the goal to develop next generation solutions. We have assessed the patent capabilities acquired in the M&A deals to understand and evaluate IP value creation.

Key Insights:

The last five years have witnessed an increased spate of innovations in the edge computing space.

Data center, AI and, security-related deals combined account for half of all M&A

activity in the edge computing market.

Data center technologies have attracted the largest number of acquirers with incumbents focused on expanding their geographical footprint.

Modular data center solutions are accelerating time to market for the various participants and enabling entry for quite a few companies into the edge computing market.

Semiconductor companies are getting acquired for their AI capabilities that will drive the future of on-device processing.

Software-defined networking technologies are gaining traction, enabling acquirers with the flexibility required for developing a complete cloud to edge solution.

In terms of IP portfolio, most of the acquired patent capabilities were in microprocessors and instruction set architectures, mainly due to the deal between Wave Computing and MIPS Technologies.

The top five assignees in terms of patent count included MIPS Technologies, DeePhi, Vasona Networks, Virtuosys, and Movidius.

Other key acquired patent capabilities related to AI, mesh networking, and security are expected to contribute significantly in the development of intelligent and secure edge solutions.

Key questions addressed in the report:

What are the key trends and drivers of edge computing in the IoT ecosystem?

How is the acquisition trend changing over the years in the edge computing space?

What is the preferred route for companies looking for strategic acquisitions in the edge computing domain?

How are target companies leading the acquisition of different edge computing

technologies in the US, Europe, Asia, and other regions?

Who are the different acquirers actively involved in the acquisition scenario?

What are the different technology capabilities acquired in the edge computing space and how are they strengthening the portfolio of the acquirers?

What are the post-acquisition scenarios for the major deals?

What are the IP capabilities acquired with the deals?

What are the untapped technology areas that can be considered as potential targets in the future?

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