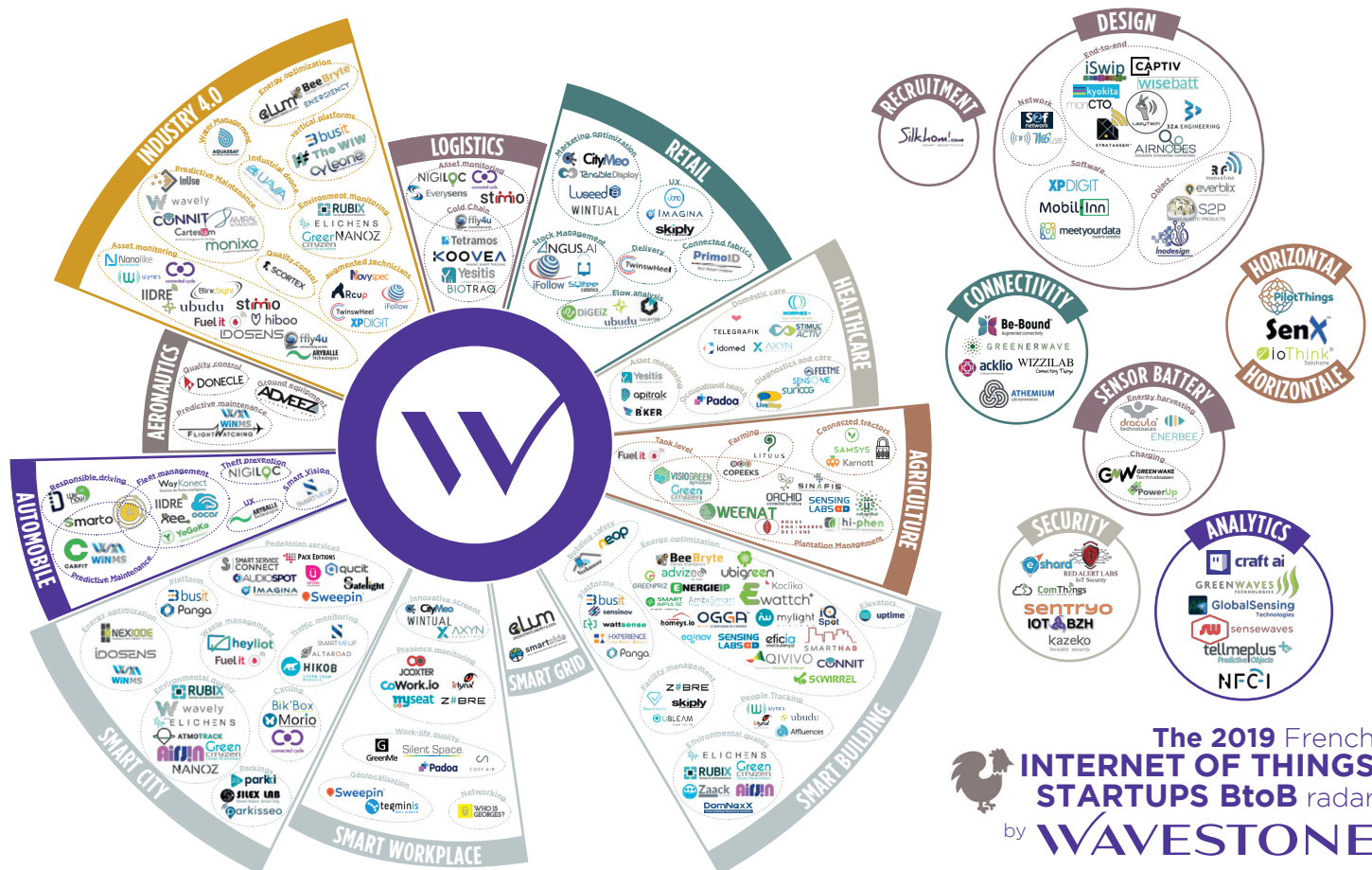




WAVESTONE

# THE 2019 FRENCH IOT B2B STARTUPS RADAR

# FRENCH B2B IOT STARTUPS BY WAVESTONE



The 2019 French  
**INTERNET OF THINGS**  
**STARTUPS BtoB** radar  
 by **WAVESTONE**

IOT STARTUPS RADAR

# FRENCH IOT STARTUPS RADAR: OUR APPROACH

**500**  
STARTUPS ON  
OUR GLOBAL MONITORING FILE

## Global monitoring

OF ALL IOT ACTORS  
IN FRANCE

**197**  
STARTUPS SELECTED FOR OUR RADAR  
IN LINE WITH THE FOLLOWING CRITERIA

### OUR CRITERIA



Operating in  
the IoT B2B market



Headquarters  
located in France



**35 employees**  
or less



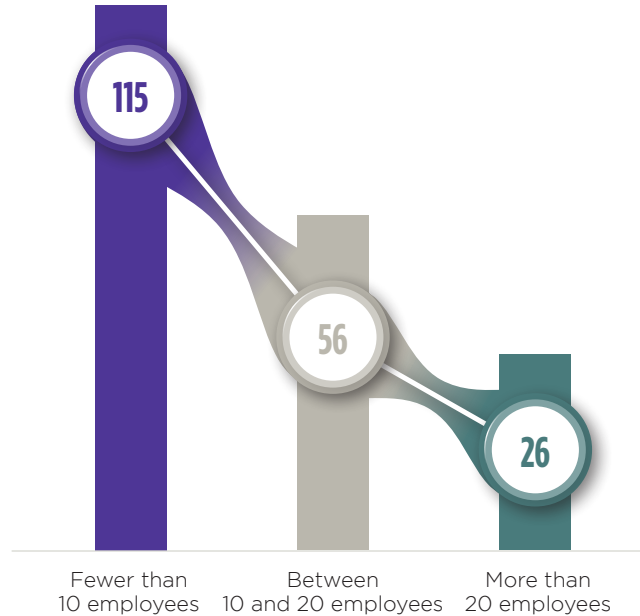
8 years or less of  
**existence**

# A LARGE SOURCE OF JOB CREATION

**197**  
STARTUPS

MORE THAN  
**2000**  
JOBS CREATED

**10** AN AVERAGE OF  
EMPLOYEES  
PER STARTUP



**Number of startups by number of employees**

# A DOZEN FRENCH CITIES CONCENTRATE MOST STARTUPS



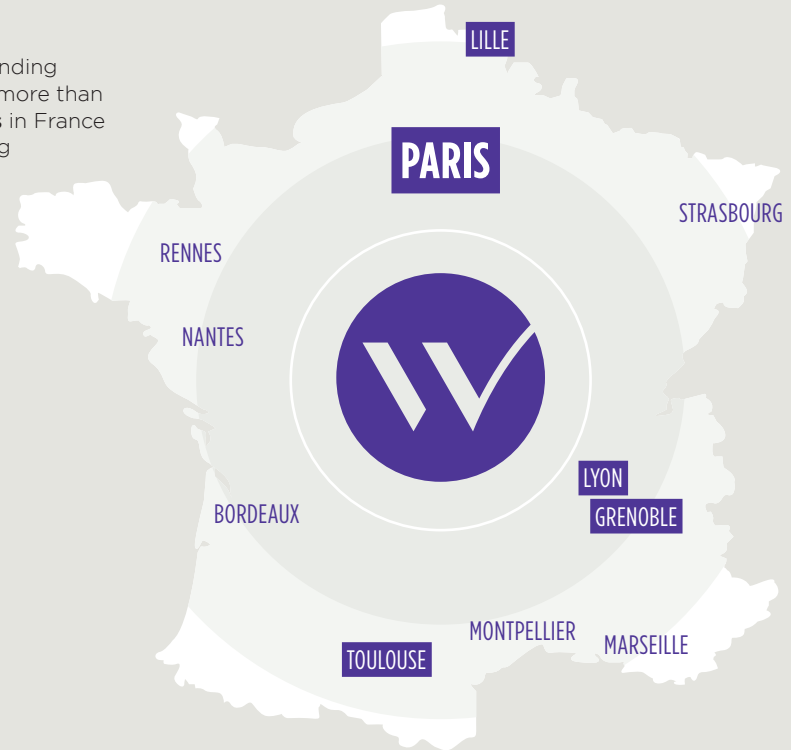
**Paris** and its surrounding region account for more than **33% of IoT startups** in France thanks to its thriving ecosystem



Other large cities like **Lyon, Lille, Grenoble and Toulouse** stand out thanks to their dynamism and **international influence**: they represent **nearly 33% of French IoT startups**



**A homogeneous distribution** among the other major French cities which are trying to enrich their ecosystem



# IOT STARTUPS ACCORDING TO THEIR AGE

## AERONAUTICS

The **aeronautics** sector has few startups overall, but it accounts for some of the oldest and those with the highest number of employees

6 YEARS

## AGRICULTURE

IoT startups are beginning to take an interest in the **agricultural** sector. Most of these are at an early stage of development, with few employees.

3 YEARS

## OTHER SECTORS

**Automobile, Smart City, Smart Building, Retail, Logistics, Healthcare, Industry 4.0 :**  
most 4-5 year old startups with an average number of employees are concentrated within these sectors

4-5 YEARS

Average age of startups by sector

# MAJOR FUNDRAISING TO SCALE-UP



## Twice

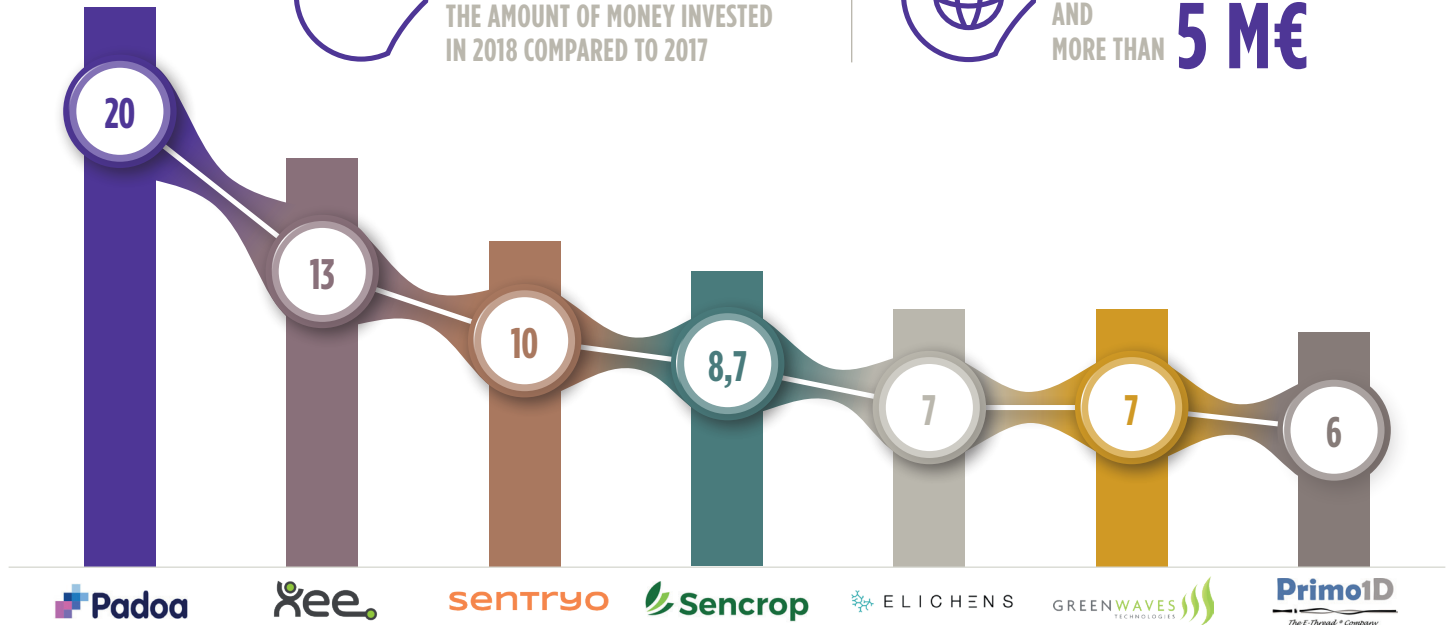
THE AMOUNT OF MONEY INVESTED  
IN 2018 COMPARED TO 2017



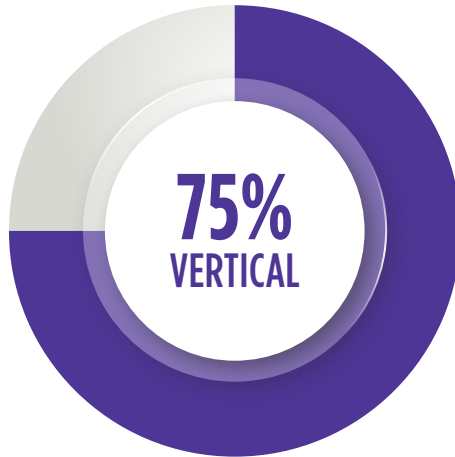
FUNDRAISING CONSISTING OF

## 7 investments

AND  
MORE THAN **5 M€**



# THE POSITIONING OF STARTUPS



**75% OF THE SOLUTIONS ARE POSITIONED ON ONE OR TWO SPECIFIC SECTORS** of the market (Automobile, healthcare, agriculture).



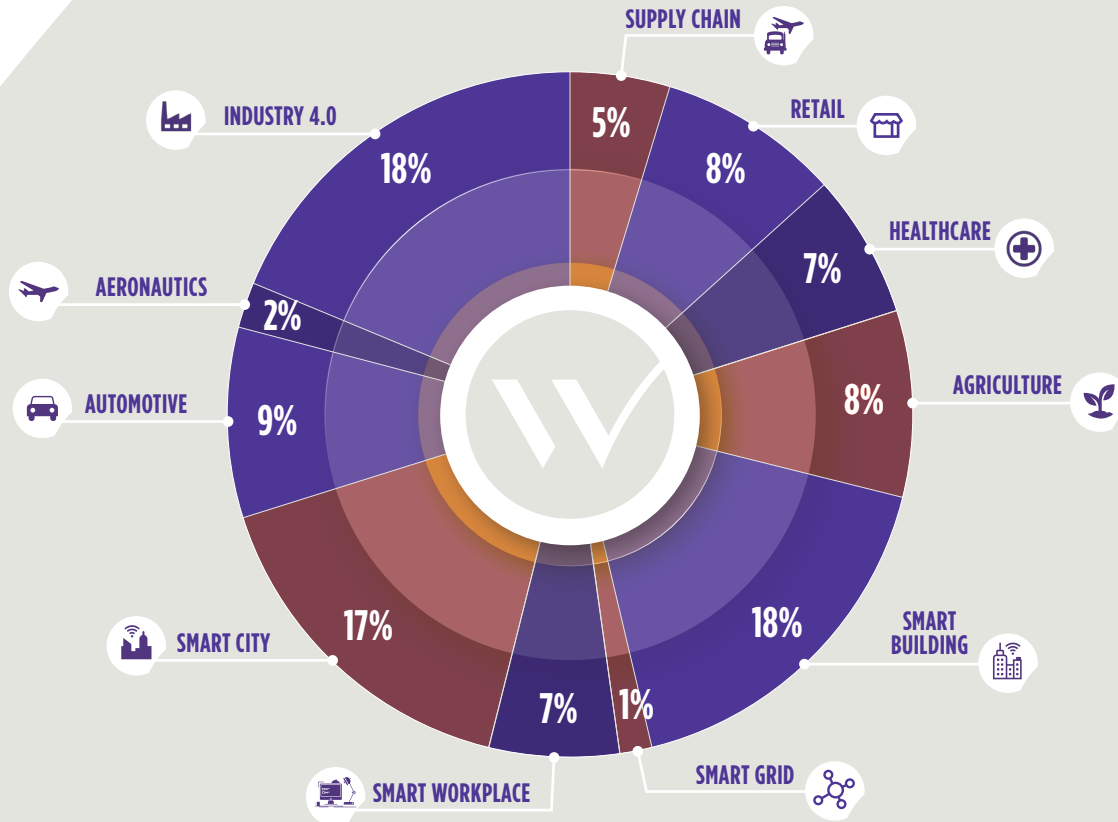
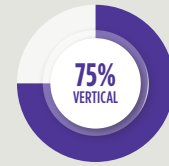
**25% OF STARTUPS HAVE A CROSS-SECTOR OFFER** (design, connectivity, security, etc.).





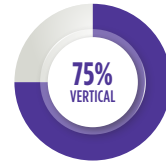
IOT STARTUPS RADAR

# 11 SECTORS OF ACTIVITY TARGETED BY «VERTICAL» IOT STARTUPS



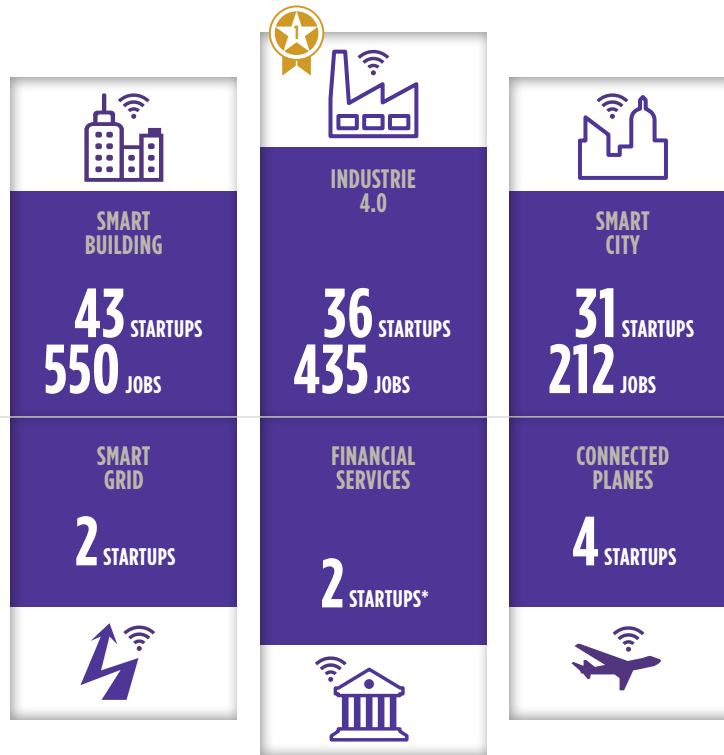
*Among these «vertical startups», a large majority offer end-to-end turn-key solutions*

# THE MOST REPRESENTED SECTORS AND THE LESS REPRESENTED ONES AMONG VERTICAL STARTUPS



## Top 3

MOST + REPRESENTED  
SECTORS



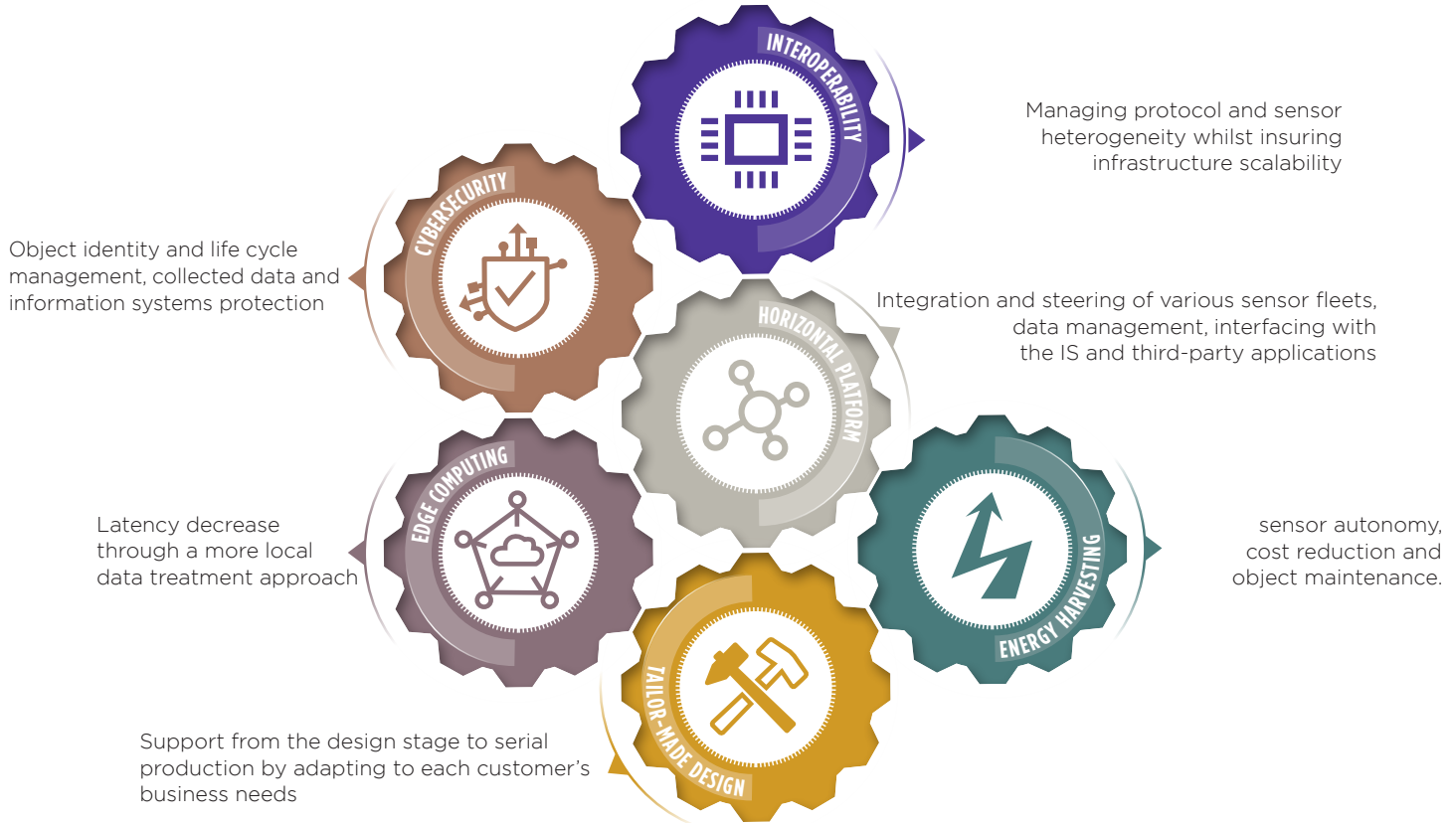
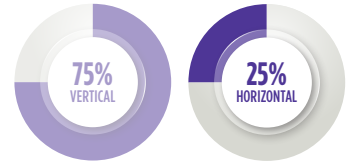
## Top 3

LEAST - REPRESENTED  
SECTORS

\*2 startups in the field of automotive insurance

IOT STARTUPS RADAR

# 25% OF STARTUPS DEAL WITH CROSS-SECTORAL ISSUES





**CONTACT US TO ENHANCE  
THIS PANORAMA OF...**

**+** **By email:** [contact.shakeup-iot@wavestone.com](mailto:contact.shakeup-iot@wavestone.com)

**+** **For startups, please fill out our questionnaire:** <https://fr.research.net/r/B6BMQ8R>

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