What does Government understand of IoT

Organizations understand the impact IoT can have, but not all recognize its benefits.

- **Have already deployed**: 45%
- **Plan to deploy next 12-24 months**: 27%
- **Developed an IoT solution but it was unsuccessful**: 11%
- **Have considered an IoT strategy/solution but decided not to pursue**: 11%
- **Have not considered an IoT strategy/solution**: 6%

**65%** Of those that have, or plan to deploy in the next 12-24 months, think the impact on business will be strategic or transformational.

**14%** Of government organizations that have, or plan to implement IoT, are using it to address a specific business problem.

**21%** Of those that have, or plan to deploy IoT, are yet to be convinced of the benefits.

Base = Respondents indicated have already deployed, plan to deploy, or developing an IoT solution (n = 185 government respondents)

What drives IoT in Government Today

Government IoT projects are driven by initiatives that aim to secure and improve the management of physical assets.

Has your organization deployed any of the following solutions as part of IoT initiatives?

- 45% Physical security solutions
- 42% Smart building management solutions
- 41% Connected workforce
- 34% Remote asset management
- 28% Fleet management

Base = Respondents indicated have already deployed, plan to deploy, or developing an IoT solution (n = 185 government respondents)
Key Investment Priorities in Government

The pivotal role of Smart Cities

Source: IDC Worldwide Smart Cities Spending Guide, 2019

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Strategic Priorities are turned into Use Cases
Where Smart Cities reign

**Top 5 Largest Smart Cities Use Cases in Europe in 2018**

- **Fixed Visual Surveillance**: €1,7 B (17%)
- **Advanced Public Transit**: €1,6 B (8%)
- **Smart Outdoor Lighting**: €1,0 B (28%)
- **Smart City Platforms**: €0,6 B (24%)
- **Connected Back Office**: €0,6 B (13%)

**Top 5 Fastest Growing Smart Cities Use Cases in Europe**

- **Digital Twin**: €21 M (61%)
- **Vehicle to Everything (V2X) Connectivity**: €25 M (57%)
- **Officer Wearables**: €9 M (54%)
- **Next-Gen Emergency PSAPS**: €79 M (41%)
- **Intelligent Traffic Management**: €0,4 B (39%)
And new players and business models emerge

The city of the future and its ecosystem
And, by the way... top cities that use data and technology to enable European urban transformation
An IDC Market Assessment

<table>
<thead>
<tr>
<th>City</th>
<th>Spending (M EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>€798.2</td>
</tr>
<tr>
<td>Paris</td>
<td>€248.5</td>
</tr>
<tr>
<td>Milan</td>
<td>€137.1</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>€179.1</td>
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<tr>
<td>Eindhoven</td>
<td>€13.4</td>
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<tr>
<td>Santander</td>
<td>€4.3</td>
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<tr>
<td>Barcelona</td>
<td>€92.8</td>
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<tr>
<td>Tallinn</td>
<td>€8.5</td>
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<tr>
<td>Hamburg</td>
<td>€211.0</td>
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<tr>
<td>Berlin</td>
<td>€366.1</td>
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<tr>
<td>Warsaw</td>
<td>€91.7</td>
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<tr>
<td>Brussels</td>
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<tr>
<td>Bucharest</td>
<td>€12.8</td>
</tr>
</tbody>
</table>

Source: IDC Worldwide Smart Cities Spending Guide, 2019

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Thank you!

Follow our activities in CREATE-IoT an in the European IoT LSP Programme

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