

April 3, 2014

MORGAN STANLEY BLUE PAPER



The 'Internet of Things' Is Now Connecting the Real Economy

The Internet of Things is the next revolution in computing. While smartphones and the mobile internet saw the advent of applications for the consumer, we expect to see the pervasive integration of semiconductors, mobile communication, and Big Data/analytics propelling the Internet of Things into the wider economy.

The two key drivers of IoT are: 1) price reduction and standardization of key hardware and software components, and 2) the level of integration with Big Data/analytics, from which companies in various sectors can increase revenues and reduce inefficiencies.

Our polling of Morgan Stanley analysts globally found that the IoT could be an opportunity for several large industries, driving potential changes in business models and/or significant cost savings. The industries with the greatest potential Internet of Things impact are: Utilities (smart metering and distribution), Insurance (behavior tracking and biometrics for Auto and Life product lines), Capital Goods (factory automation, autonomous mining), Agriculture (yield improvement), Pharma (clinical trial monitoring), Healthcare (leveraging of human capital and clinical trials), Medtech (patient monitoring), and Autos (autonomous driving). Key IoT-exposed companies we cover are Apple, ARM, Avnet, Crown Castle, CSR, Freescale, Google, Imagination Technologies Group, Intel, Linear Technology, Microchip Technology, NXP, Renesas, Richtek, Salesforce.com, SAP, Software AG, Spansion, Splunk, and STMicroelectronics.

MORGAN STANLEY RESEARCH
Global

François Meunier¹
Adam Wood²
Keith Wines³
Katy Huberty²
Simon Flannery²
Joseph Moore²
Craig Helfenbach²
Bill Lu²

¹See page 2 for all contributors to this report.

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