

Frost Radar™: Industrial Connectivity Software, 2026

A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

Frost Radar / KCD6 / 00

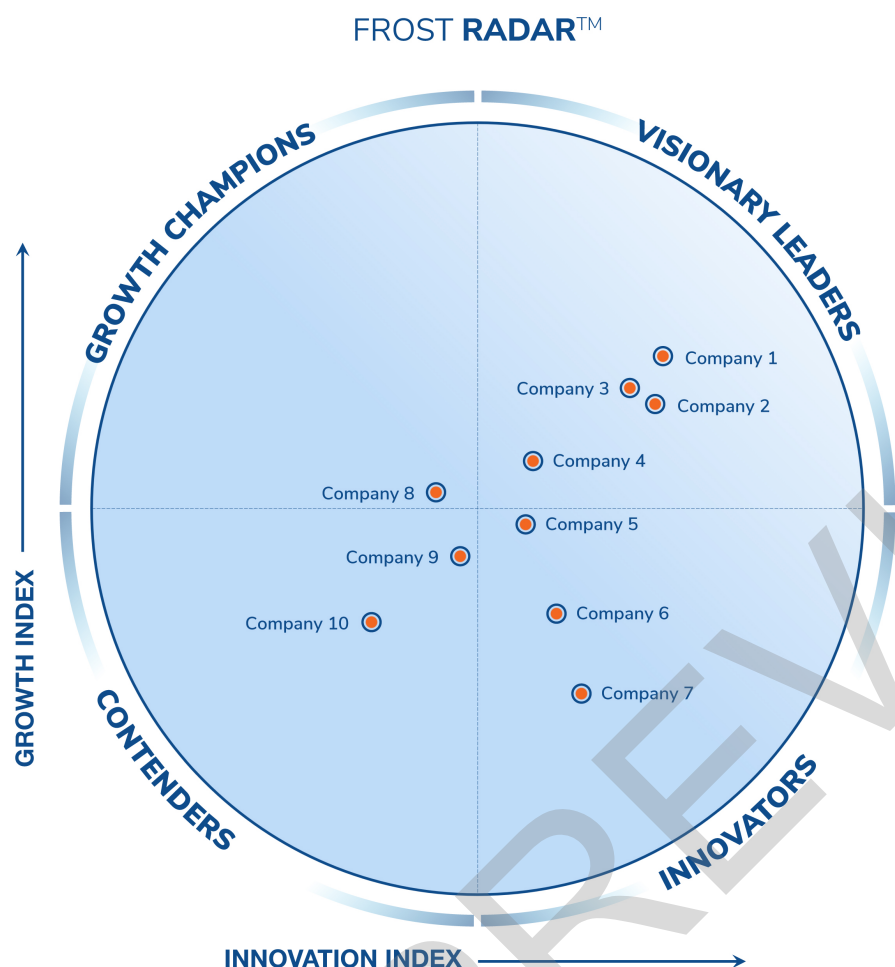
Strategic Imperative

- Industrial connectivity software has become a strategic layer in industrial digital transformation because manufacturers cannot scale AI, analytics, enterprise visibility, or multisite optimization without reliable access to OT data. The market is moving beyond basic protocol conversion to software that can connect heterogeneous assets, contextualize industrial data flows, and make OT information usable across edge, cloud, and enterprise environments.
- The current state of the industry is defined by a gap between digital ambition and operational reality. Most industrial organizations still operate fragmented environments built around legacy protocols, point-to-point integrations, siloed systems, and site-specific architectures. Connectivity software provides a practical modernization path for brownfield facilities while also supporting more standardized data architectures in greenfield projects.
- Competitive differentiation is shifting from how many protocols a vendor supports to how effectively a vendor can make industrial data scalable, contextualized, secure, and reusable. OPC UA, MQTT, Sparkplug, Unified Namespace architectures, edge deployment, and cloud integration are becoming important as they help customers reduce integration complexity and create repeatable data access patterns across plants and assets.
- Successful companies in this space must balance industrial reliability with modern data architecture. Established vendors benefit from installed-base trust, broad driver coverage, and deep OT credibility, while emerging challengers are gaining traction through event-driven architectures, scalable MQTT infrastructure, AI-ready data workflows, and cloud-aligned deployment models. Leadership in this market will depend on combining both strengths rather than choosing one over the other.

Growth Environment

- The industrial connectivity software market remains a relatively specialized but expanding segment of the broader industrial automation software ecosystem. Global revenue is estimated at approximately \$469 million in 2026, with growth expected to continue through 2032 as manufacturers increase spending on OT data access, protocol interoperability, edge connectivity, data operations, secure data movement, and enterprise integration, as explored in the upcoming report on Growth Opportunities in Industrial Networking and Connectivity (KCA2-10).
- The market is still fragmented, with vendors competing from different historical starting points. Traditional OPC server and driver providers remain important because most plants still need reliable access to PLCs, machines, devices, and legacy systems. At the same time, MQTT brokers, Unified Namespace specialists, edge data platforms, semantic interoperability vendors, and secure data movement specialists are capturing attention as customers look for more scalable data architectures.
- Growth is not being driven by the replacement of existing automation systems, but by the need to extract more value from installed assets. Brownfield facilities account for a large percentage of demand because customers need to connect heterogeneous equipment, reduce integration effort, and make site-level data available to historians, cloud platforms, data lakes, analytics tools, and enterprise applications. Greenfield projects contribute to demand as customers seek to embed connectivity and data standardization earlier in the automation architecture.
- Adoption patterns vary by customer maturity. Smaller and site-level buyers often prioritize simple deployment, protocol coverage, and low implementation risk. Larger enterprises increasingly evaluate connectivity software as part of broader, multisite standardization programs where scalability, governance, security, deployment flexibility, and ecosystem compatibility become more important than individual driver availability alone.

Frost Radar™: Industrial Connectivity Software



In a market with 65 qualified participants with active commercial traction, customer deployments, and differentiated capabilities, Frost & Sullivan independently evaluated the landscape and selected just 10 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market, demonstrating not only strong growth but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts, Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true

Source: Frost & Sullivan

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Achieve significant market growth through effective execution.
- Leverage proven technologies and scalable business models.
- Maintain competitiveness via operational efficiency and customer focus.
- Require increased innovation investment for sustained leadership.

CONTENDERS

- Emerging players with modest market presence and cautious strategies.
- Often new entrants or niche participants establishing their position.
- Emphasizes continuous improvement and ensures operational reliability.
- Hold potential for growth through innovation, alliances, and market expansion.

VISIONARY LEADERS

- Market leaders with strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

INNOVATORS

- Drive technological advancement with disruptive ideas and solutions.
- Prioritize R&D, IP development, and pioneering concepts.
- Strong innovation foundation with opportunities to accelerate commercialization and scale.
- Benefit from strategic partnerships and targeted go-to-market strategies.

Best Practices

1

Leading connectivity providers prioritize vendor neutrality and broad interoperability to support heterogeneous industrial environments. By enabling integration across protocols, platforms, cloud ecosystems, and enterprise applications, successful vendors reduce customer dependency on proprietary architectures and become trusted foundations for long-term industrial data strategies.

2

Successful vendors combine deep OT expertise with modern capabilities, such as edge computing, cloud integration, data contextualization, and enterprise management. Maintaining production-grade reliability while evolving toward scalable industrial data architectures is essential to address legacy environments and next-generation digital initiatives.

3

Market leaders expand beyond stand-alone connectivity offerings by developing strong partnerships, reference architectures, and integration ecosystems. Collaborating with system integrators, cloud providers, and industrial technology vendors allows connectivity companies to influence architecture decisions and accelerate adoption across complex industrial environments.

Growth Opportunities

1

Industrial organizations are moving from isolated connectivity deployments to standardized, enterprise-wide industrial data architectures. Vendors that enable scalable, secure, and interoperable access to OT data across multiple sites will benefit as companies seek to reduce integration complexity and accelerate digital transformation initiatives.

2

The continued presence of heterogeneous industrial environments creates significant demand for connectivity solutions capable of integrating legacy assets with modern data platforms. Vendors that combine broad protocol support, interoperability, and flexible deployment models will be positioned to capture modernization investments across industries.

3

The adoption of industrial AI and advanced analytics is increasing demand for reliable, contextualized, and governed operational data. Connectivity providers that evolve beyond data transport to data enablement, edge integration, and enterprise interoperability will have an important role in preparing industrial environments for next-generation intelligence applications.

Frost Radar™: Benchmarking Future Growth Potential 2

Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)

This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)

This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE

This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY

This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING

This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Frost Radar™: Benchmarking Future Growth Potential 2

Major Indices, 10 Analytical Ingredients, 1 Platform

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY

This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO

This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE

This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found [here](#).

II5

CUSTOMER ALIGNMENT

This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Significance of Being on the Frost Radar™

Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline™ best practices in your industry.

COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

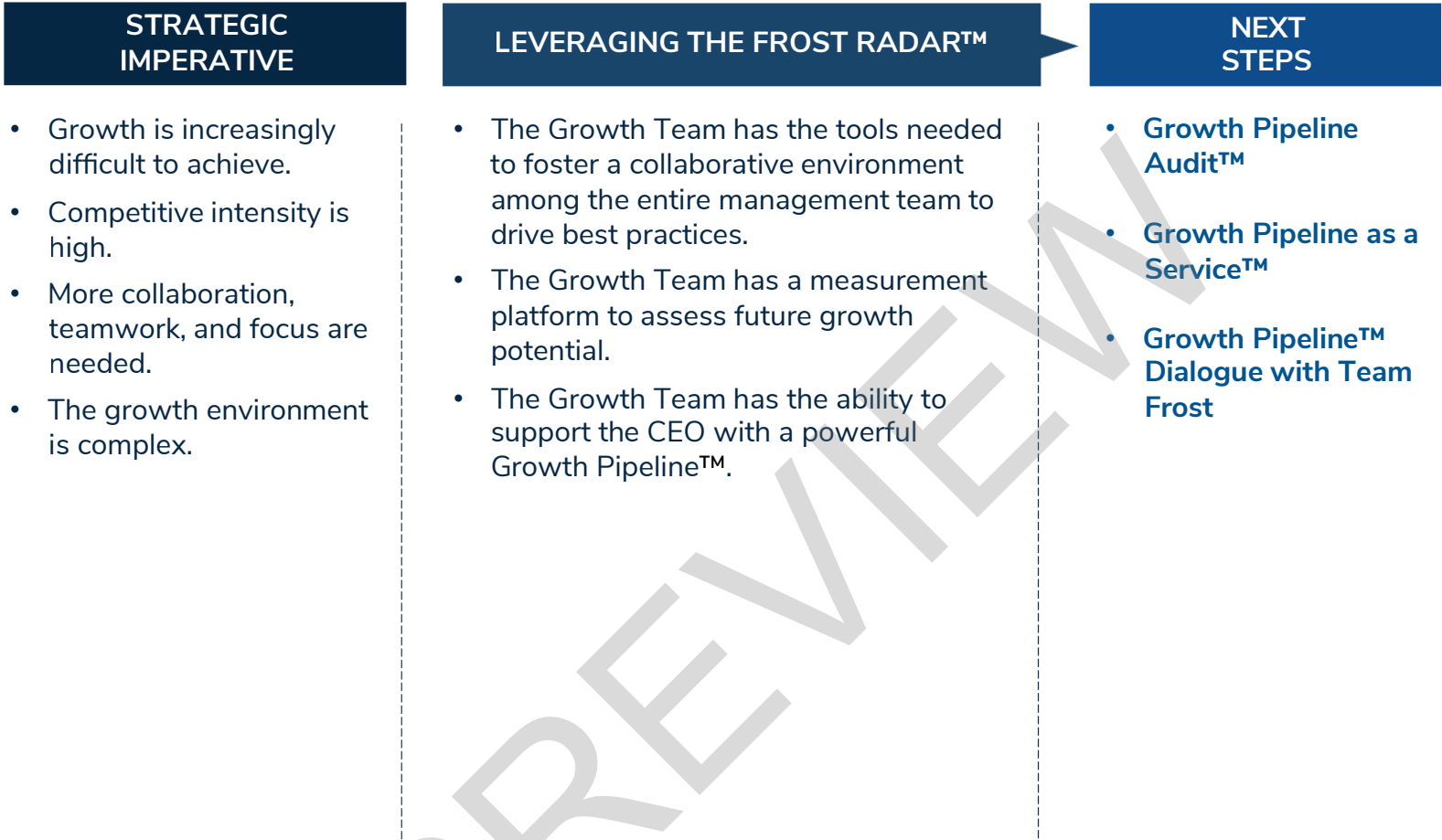
CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

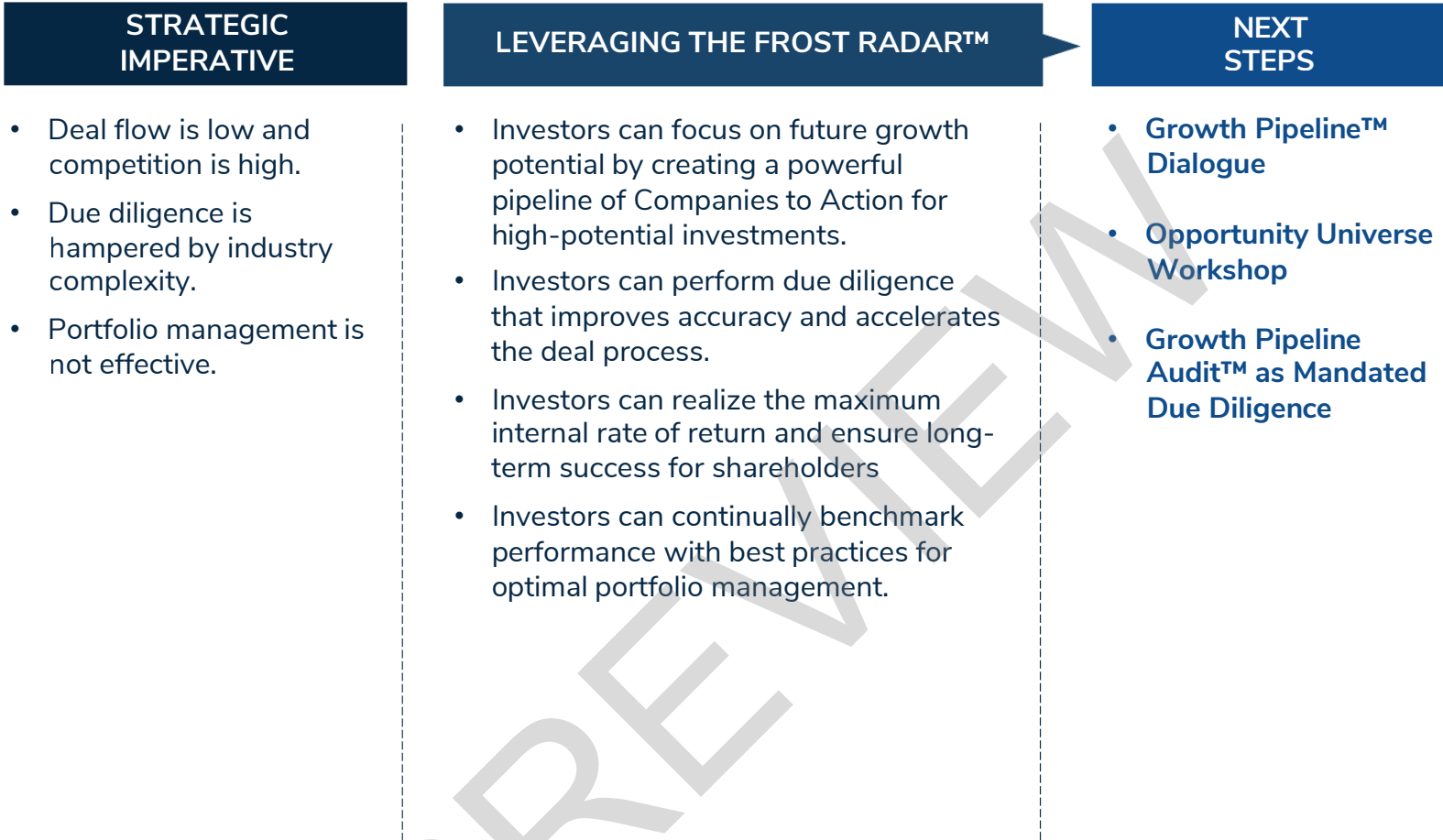
PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

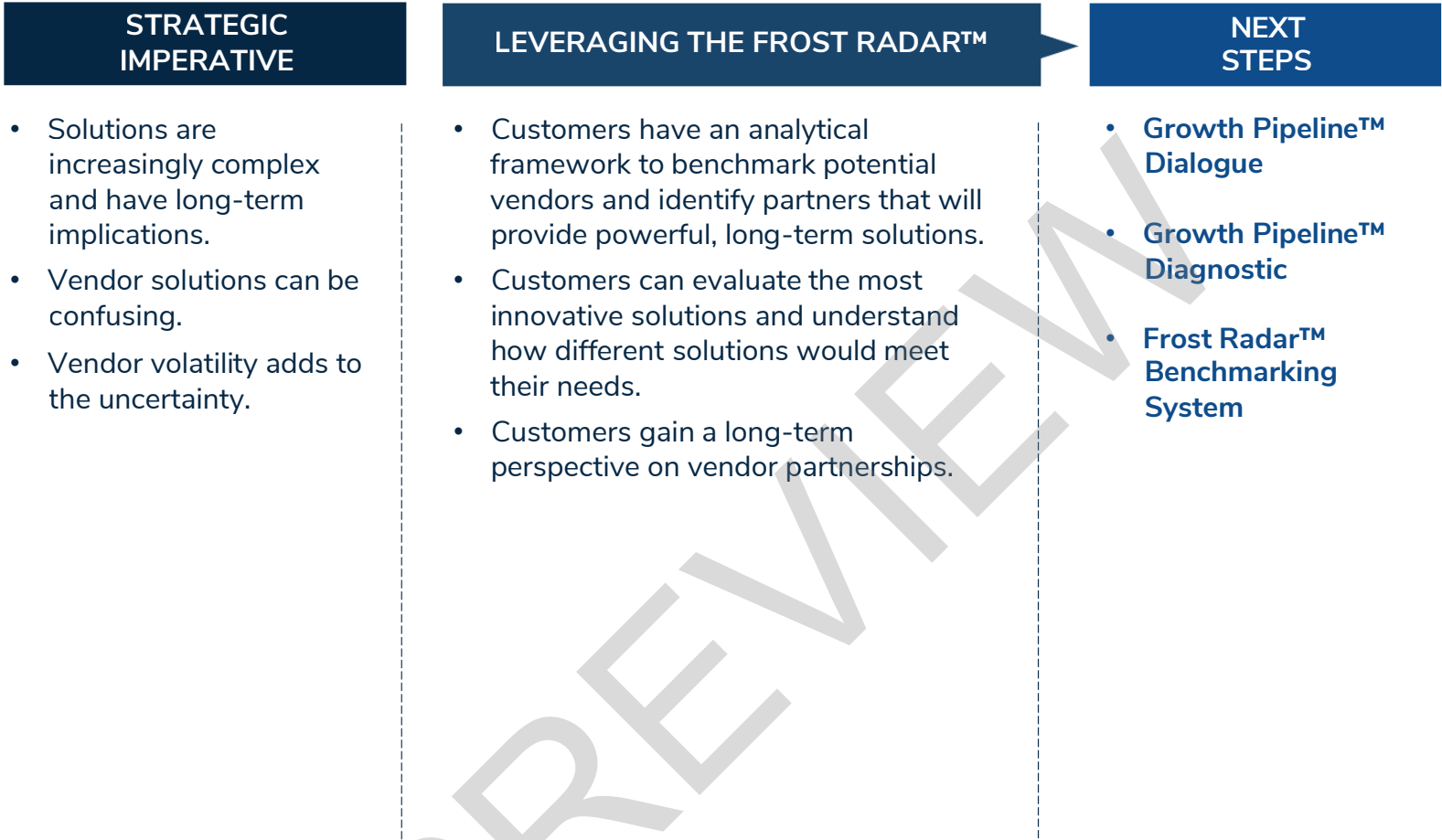
Frost Radar™ Empowers the CEO's Growth Team



Frost Radar™ Empowers Investors



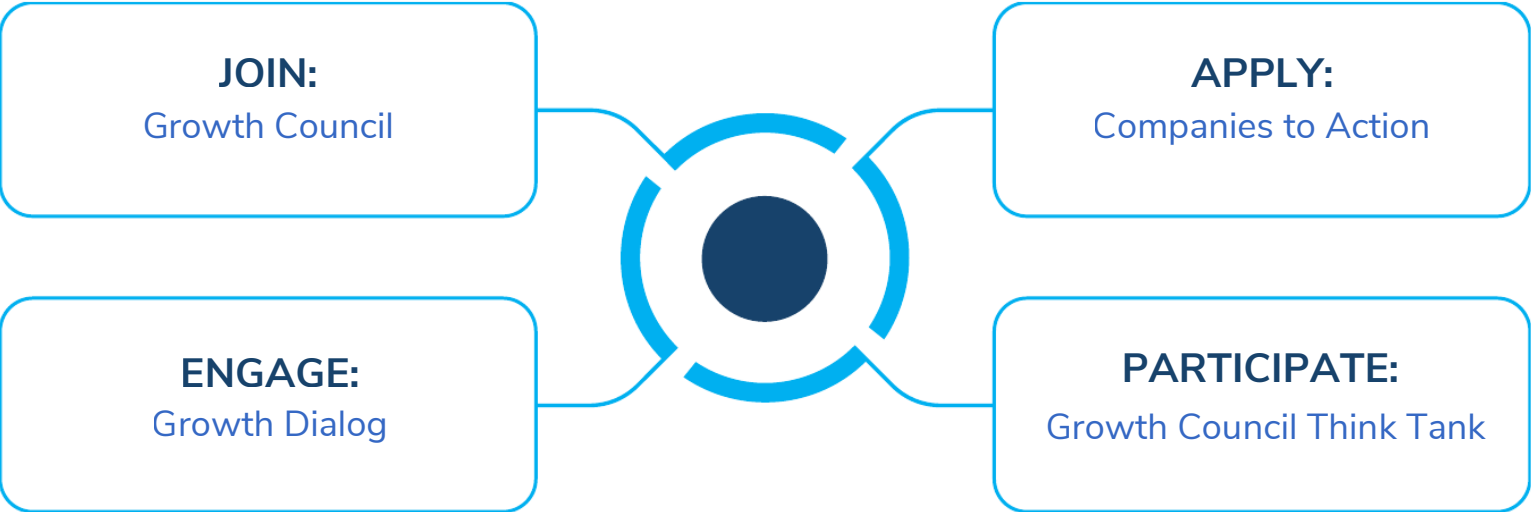
Frost Radar™ Empowers Customers



Frost Radar™ Empowers the Board of Directors

STRATEGIC IMPERATIVE	LEVERAGING THE FROST RADAR™	NEXT STEPS
• Growth is increasingly difficult; CEOs require guidance. • The Growth Environment requires complex navigational skills. • The customer value chain is changing.	• The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success. • The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment. • The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.	• Growth Pipeline Audit™ • Growth Pipeline as a Service™

Next Steps



Does your current system support rapid adaptation to emerging opportunities?

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