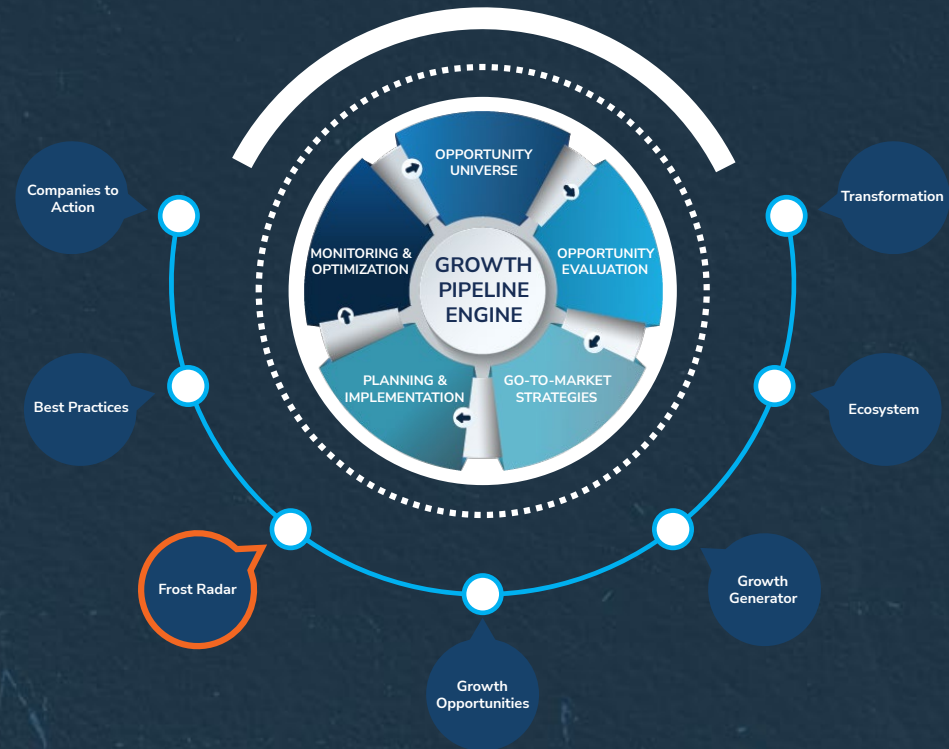


Frost Radar™: Augmented Connected Worker (End-to-End Platforms), 2025

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



KC1A-10
November 2025

Strategic Imperative and Growth Environment



Strategic Imperative

- Manufacturers across verticals are facing a complex challenge: the growing skilled labor shortage. As they try to find a solution to this problem, augmented connected worker (ACW) platforms can become a key ally to train the new workforce and strengthen employee retention through comprehensive upskilling capabilities, skills management tools, and assistance throughout their shifts.
- ACW platforms have been rapidly evolving, introducing new technologies that can empower frontline workers and digitize factory floors. As AI advances, new use cases have been found for the technology in ACW platforms, ranging from automated document digitization and task execution assistance (e.g., digital copilots) to cutting-edge capabilities, such as predictive upskilling, shift planning, root cause analysis, and metric monitoring and reporting. The main goal is continuous improvement.
- Also in development is augmented reality (AR), which is appearing across different segments of the ACW market. AR technology is especially helpful for frontline workers by providing hands-free guidance through digital work instructions. It also has training, safety, and compliance applications.
- As ACW platforms carve out their place in the industrial software space, they increasingly come into contact with mainstream solutions, such as manufacturing execution systems (MES), quality management systems (QMS), enterprise resource planning (ERP), and learning management systems (LMS). ACW vendors choose different approaches to their relationship with these solutions, but compatibility remains a top priority for all companies as they put considerable effort into integrating their platforms with the most widely adopted solutions.
- The market's high growth rate makes it attractive for newcomers. Over time, this has led to an oversaturation of ACW vendors, where competition for contracts is fierce, differentiation becomes increasingly difficult, and lengthy sales cycles complicate things further. In this context, mergers and acquisitions are becoming more common as companies from adjacent markets or large software companies with extensive portfolios try to tap into the growth and fill gaps in their solutions.

Growth Environment

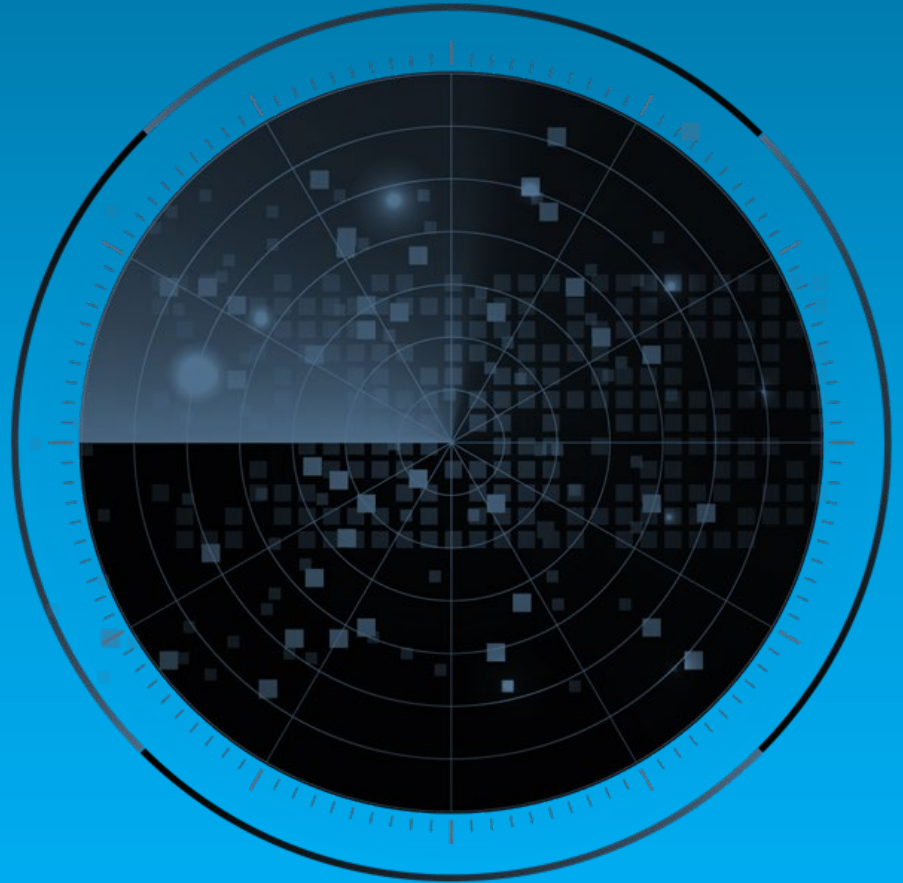
- As competition intensifies, ACW vendors need to follow industry best practices to appeal to manufacturers. Platforms need to be introduced to existing tech stacks so a variety of systems can work together to compile valuable data and present it to frontline workers and supervisors.
- ACW platforms are still at a stage where vendors need to justify the value they bring to operations, especially to mid-market manufacturers that have not embarked on digital transformation journeys. Brand awareness initiative and marketing messaging are extremely important.
- As ACW platforms become more difficult to distinguish from one another, time to value becomes a key differentiator for vendors. Robust implementation frameworks and detailed deployment processes are imperative.
- ACW platforms have extended their reach on the shop floor, guiding execution across a multitude of use cases, such as maintenance, quality, and performance. Platforms must facilitate communication and collaboration among frontline workers and with their managers to keep operations running smoothly.
- ACW platforms have also dived deeper into workforce-oriented capabilities—specifically those linked with training and skills management. They help plant leaders ensure that their workers are up to date with the newest training courses, thus satisfying different compliance standards.
- Most ACW vendors have as their core verticals hybrid industries such as consumer-packaged goods and food and beverages. There's also considerable penetration in process verticals such as pharmaceuticals, chemicals, and energy. Finally, discrete industries such as automotive and aerospace and defense have seen limited presence of ACW platforms, making it an important growth segment for the future, something several vendors have taken note of.

Growth Environment (continued)

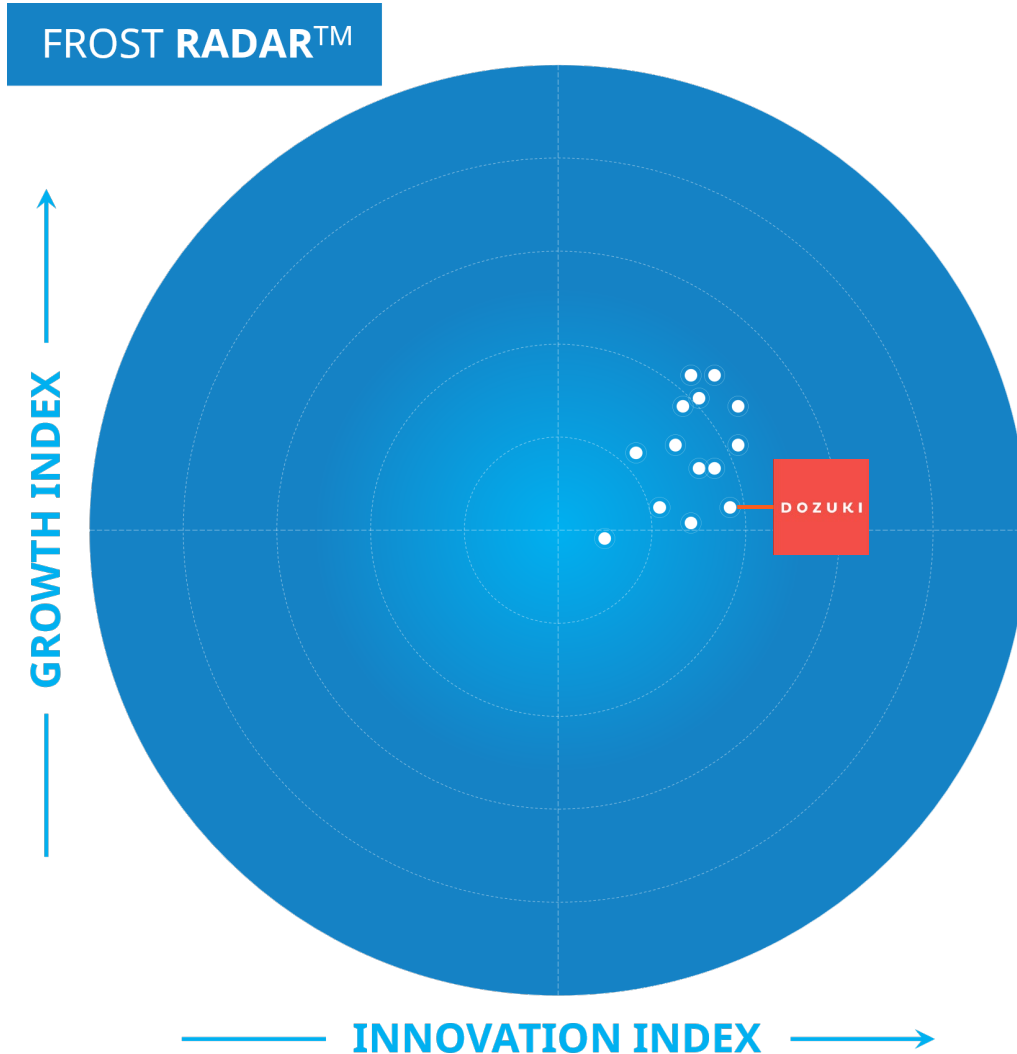
- Regionally, ACW platform adoption is strongest in Europe and the US, where the large majority of vendors in the market are headquartered. Asia-Pacific still represents a significant challenge for vendors due to geographic distance and cultural differences, but plans are being drafted to enter this market through local and regional partnerships. Other smaller markets such as the Middle East and Latin America have seen some limited adoption stemming from specific industries.

Frost Radar™

Augmented Connected Worker (End-to-End Platforms)



Frost Radar™: Augmented Connected Worker (End-to-End Platforms)



Frost Radar™ Competitive Environment

- The ACW market is fragmented and volatile. As new companies appear, others leave; some reformulate their approach to the market by their own volition or as a result of an acquisition. Competition is fierce, and differentiation becomes a key asset.
- This Frost Radar™ considers only providers of end-to-end ACW platforms that address most, if not all, shop floor use cases and include extensive workforce development capabilities. The common thread is that the platforms enable broad enterprise transformations, embodying concepts such as continuous improvement, operational excellence, and manufacturing intelligence.
- Augmentir addresses a multitude of use cases in its portfolio and has embraced AI as the groundwork upon which its platform is built. The company recently introduced AR technology to the platform and adopted a single-pane-of-glass vision.
- Azumuta has a clear operational focus, developing adaptive digital work instructions, a simplified interface for users, innovative AI models to assist in execution, and its own MES. It has a comprehensive roadmap and has embraced collaborations with universities.
- Dozuki's focus is on continuous improvement, with core features centered on learning pathways for frontline workers. It has developed an extensive roadmap for its modules and boasts a solid digital transformation services offering.
- Innovapptive's suite addresses the most relevant shop floor use cases and features workforce development tools across its modules. It has one of the most advanced warehousing suites in the market, while also having an extensive roster of AI agents that customers can avail.

Frost Radar™ Competitive Environment (continued)

- L2L's market standing was solidified by its acquisition of SwipeGuide in 2014, which bolstered its platform. L2L is focused on the concept of manufacturing intelligence, providing extensive issue management, monitoring, and reporting capabilities.
- In 2024, Parsable was acquired by CAI Software, which has provided it with a clear vision for an integrated manufacturing OS and opened new doors for its sales strategy. The company also has strong partnerships and a comprehensive roadmap for the future.
- Poka's commitment to operational excellence is supported by its extensive collaboration capabilities and a methodology for rapid, multisite rollouts. Its acquisition by IFS in 2023 has allowed it to pursue an ambitious strategy of expanding sales, embarking on new partnerships, embracing solution co-development with customers, and developing new integrations.
- QAD Redzone's extensive portfolio allows it to address compliance and maintenance use cases with deep capabilities, as well as develop advanced features for scheduling. The company has embraced its community of customers and developed tools to onboard them to the platform.
- Solvace is overhauling its sales and marketing strategy and transforming its partner ecosystem. The company has embraced modularity and focuses on delivering operational excellence for its clients, having pledged a strong R&D investment.
- Stryza is the youngest company in the market but has already made great strides to align itself with the main trends in the space, developing adaptive workflows and a roadmap to introduce new AI capabilities and become an industrial copilot that assists frontline workers in real time.

Frost Radar™ Competitive Environment (continued)

- SymphonyAI's strength lies in its no-code composability, allowing users to develop their own workflows, applications, and AI agents. The company has a large partner ecosystem, extensive integrations to connect with more data sources, and a solid implementation process.
- Webalo recently shifted its efforts toward the development of a Frontline Intelligence Service platform, which helps workers execute their tasks, provides real-time monitoring and reporting on an enterprise's multiple sites, and is easily deployed through a standardized framework.
- Workerbase's platform is based around the no-code creation of long-tail applications that can address specific use cases in factories. This is supported by a considerable AI investment, growing analytics capabilities, a strong issue management solution, and its Value Framework to facilitate implementation.
- Zaptic's single-pane-of-glass strategy is geared toward the achievement of operational excellence. This is supported by a feedback loop for KPIs and compliance, a dynamic workflow engine, and a well-refined method to receive and act upon customer feedback.

Frost Radar™

Companies to Action



Dozuki

INNOVATION

- Dozuki's platform helps manufacturers overcome their learning and development, productivity, quality, and health and safety challenges. The platform's modules include Knowledge Management, Learning Pathways, Operational Workflows, Workforce Collaboration, and Proactive AI Analytics.
- To facilitate continuous improvement, Dozuki's platform is designed to function like a continuous flywheel: the more it is used, the more momentum it builds, scaling and sustaining improvements across the organization over time. Manufacturers can capture tribal knowledge and legacy documentation into standardized, version-controlled digital guides that then serve as the foundation for structured learning pathways, role-based training, and workforce development. The standards then guide execution through digital work instructions and data capture, ensuring compliance and consistency. Worker feedback is captured through collaboration tools, turning their insights into process updates. These updates feed into Knowledge Management, propelling the flywheel forward and continuously scaling improvements in safety, quality, and productivity.
- Dozuki's Knowledge Management incorporates document control, structured approval workflows, version management, and change-awareness tracking. Change Aware ensures that workers acknowledge changes in digital work instructions, while Periodic Review sets regularly scheduled reviews of work standards.
- Dozuki's Learning Pathways consider workforce training as part of an integrated readiness system. Standardized guides are fed into courses, which then stack into Learning Pathways aligned to specific roles. Pathways automatically update the Skills Matrix, giving leaders visibility into competency by role, line, or site. Each pathway includes two levels of assessment: quizzes to validate knowledge, and on-the-job assessments to confirm applied skills.

Dozuki (continued)

INNOVATION

- By linking how employees are trained with how they actually perform on the line, Dozuki's Proactive AI Analytics makes visible the connection between workforce readiness and key operational metrics, such as safety incidents, quality escapes, throughput, and downtime. The result is a continuous improvement loop where training is a measurable driver of operational and business outcomes.
- Dozuki's AI strategy has three pillars: Create, Action, and Insight. Dozuki's CreatorPro AI can transform documents and videos into standardized guides and will be expanded to quizzes and other formats. For the Action pillar, Dozuki is developing natural language search capabilities and ChangeAware AI to summarize changes to work instructions. Dozuki is co-developing the Insight pillar with its customers. It will provide AI-powered analytics that measure training impact, identify risks, and surface predictive recommendations.
- Dozuki's roadmap includes enhancements on all main components of its platform: Knowledge Management will provide context-aware information and include external system integrations to deliver knowledge in the right device; Learning Pathways will be dynamically generated based on company needs and the worker's skill set, utilizing AI to personalize them and seeking to encourage worker involvement in its upskilling options; Operational Workflows will include AI-powered deviation and anomaly detection, as well as predictive inspections and dynamic task assignments based on worker skill set; Worker Collaboration will share insights and troubleshooting across the workforce to improve responsiveness and remote guidance and embrace gamification to increase engagement; and Proactive AI Analytics will generate a workforce development plan to close skill gaps, provide real-time guidance to workers, and recommend actions to optimize productivity.

Dozuki (continued)

GROWTH

- Dozuki has two driving concepts for its platform: workforce readiness and seamless worker experience. The latter focuses on providing workers a friendly user experience, which includes a mobile-first design, in-app QR code generation and scanning, and offline access.
- Dozuki's ideal customer profile is mid-market and enterprise manufacturers across numerous sub-industries, most notably heavy equipment; chemicals; building materials; food, beverage, and tobacco; automobile and components; and oil, gas, energy, and utilities. The company is planning to expand beyond manufacturing into grocery, hospitality, construction and field services, and facility operations.
- Dozuki's clients are predominantly in North America, but it covers other locations through partners. Referral partners highlight Dozuki to their client base and include TWI Institute, with which Dozuki adopts job instruction best practices to ensure that training is structured and behavior-focused. Reseller and implementation partners help Dozuki serve clients in Europe, Southeast Asia, and Latin America. Service partners are part of Dozuki's document creation and conversion services.
- Dozuki Digital Transformation Services accelerate customer' shift to data-driven operations with minimal disruption. Services combine expert-led implementation, structured document migration, and system integrations to ensure rapid adoption and minimize operational disruption.
- Dozuki's pricing consists of a base platform fee supplemented by per-user pricing. The per-user rate is set below the average hourly wage of a frontline worker, aiming to provide manufacturers a strong ROI within the first six months of platform adoption.

Dozuki (continued)

GROWTH

- Dozuki's marketing efforts feature a well-refined inbound motion, driven by paid and organic search campaigns. The company leverages outbound marketing as well. Most importantly, Dozuki's brand equity is strong, and customer evangelists provide word-of-mouth sales and marketing opportunities.
- In its sales efforts, Dozuki targets leaders in operations, continuous improvement, quality, and training/HR. The company works closely with regional plant managers who are responsible for oversight of numerous facilities and their production operations.
- Dozuki features integration with MES, LMS, human resource information systems (HRIS), CMMS, and systems for cross-domain identity management (SCIM) solutions.

Dozuki (continued)

FROST PERSPECTIVE

- Dozuki's continuous improvement loop provides one of the clearest paths toward operational excellence available in the market, making training a measurable driver of operational outcomes.
- Driving concepts, such as workforce readiness and seamless workforce experience, ensure a strong connection with the needs of frontline workers and manufacturers. Dozuki's presence across discrete, hybrid, and process verticals confirms the versatility of the platform.
- The company should consider developing new technology partnerships and increasing the number of reselling and implementation partners, which could help with platform development and provide an opportunity for growth beyond North America.
- Continuing the development of integrations (expanding existing ones and adding QMS, ERP, and machine and hardware integrations) would make the platform compatible with more manufacturers' system infrastructures.
- Dozuki could deepen its workforce management capabilities, especially those related to shift planning and predictive workforce upskilling to close and prevent skill gaps.

Best Practices & Growth Opportunities



Best Practices

1

Compatibility with IT ecosystems is a priority for connected worker vendors. Integrations are the main driver, allowing platforms to seamlessly introduce themselves into existing tech stacks.

2

Attracting new customers and the length of sales cycles are among vendors' main challenges. They are paying close attention to the implementation stage, which can make or break a deal. A successful implementation is intertwined with compatibility.

3

ACW platforms must be user friendly to ensure widespread adoption across the shop floor. Task simplification, worker guidance through execution, and a single pane of glass through which workers interact with all tasks are essential to achieve this.

Growth Opportunities

1

ACW platforms do not yet fully serve discrete verticals, such as automotive and transportation, aerospace and defense, and medical devices. This gives vendors a large pool of potential customers.

2

As connected worker platforms continue to expand in scope, more cutting-edge capabilities are being developed. The most prominent include warehouse and logistics, shift scheduling, and predictive upskilling.

3

Heavily regulated industries pose a challenge for connected worker vendors because of the compliance requirements tied to these industries. However, as the core connected worker verticals become more mature, this niche could be an interesting segment to address by enhancing compliance and standards tools and ensuring the security of the platform itself.

Frost Radar™ Analytics



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.

Legal Disclaimer

Frost & Sullivan is not responsible for any incorrect information supplied by companies or users. Quantitative market information is based primarily on interviews and therefore is subject to fluctuation. Frost & Sullivan research services are limited publications containing valuable market information provided to a select group of customers. Customers acknowledge, when ordering or downloading, that Frost & Sullivan research services are for internal use and not for general publication or disclosure to third parties. No part of this research service may be given, lent, resold, or disclosed to noncustomers without written permission. Furthermore, no part may be reproduced, stored in a retrieval system, or transmitted in any form or by any means—electronic, mechanical, photocopying, recording, or otherwise—without the permission of the publisher.

For information regarding permission, write to: permission@frost.com

© 2025 Frost & Sullivan. All rights reserved. This document contains highly confidential information and is the sole property of Frost & Sullivan. No part of it may be circulated, quoted, copied, or otherwise reproduced without the written approval of Frost & Sullivan.