

# Frost Radar™: AR-Centric Augmented Connected Worker Platforms, 2026

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



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# Strategic Imperative and Growth Environment



# Strategic Imperative

- Manufacturers across verticals are facing a complex challenge: the growing skilled labor shortage. Augmented connected worker (ACW) platforms can be a key ally in training a new workforce and strengthening employee retention through comprehensive upskilling, skills management tools, and assistance throughout workers' shifts.
- ACW platforms that have a strong foundation of augmented reality (AR) technology can empower manufacturers by providing hands-free guidance during assembly and maintenance, overlaying critical information on the physical world, guiding workers through the shop floor, and providing remote expert assistance.
- As AI advances, new use cases for the technology in ACW platforms range 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. In the AR-centric platforms segment of the market, not every company has widespread AI-driven features, as many of them are still developing use cases for the technology.
- 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 priority.

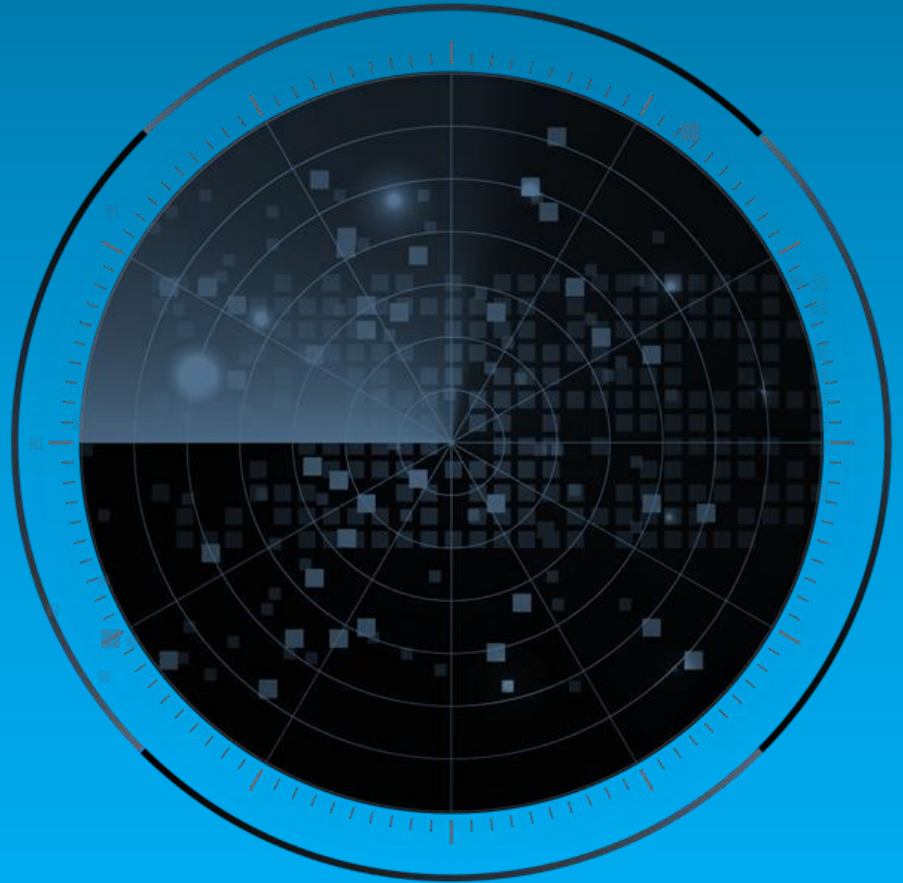
# Growth Environment

- The ACW market's high growth rate, exhibiting a remarkable double-digit compound annual growth rate, makes it attractive for newcomers. Over time, this has led to an oversaturation of ACW vendors: 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.
- As competition intensifies, ACW vendors need to follow industry best practices to appeal to manufacturers. Platforms need to be introduced into existing tech stacks so a variety of systems can work together to compile valuable data and present it to frontline workers and supervisors.
- The integration of AR technology into ACW platforms is the key differentiator for companies in this market segment and allows them to address some use cases more effectively. However, vendors are still encountering resistance to AR technology use, especially when it comes to the adoption of AR hardware.
- 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.

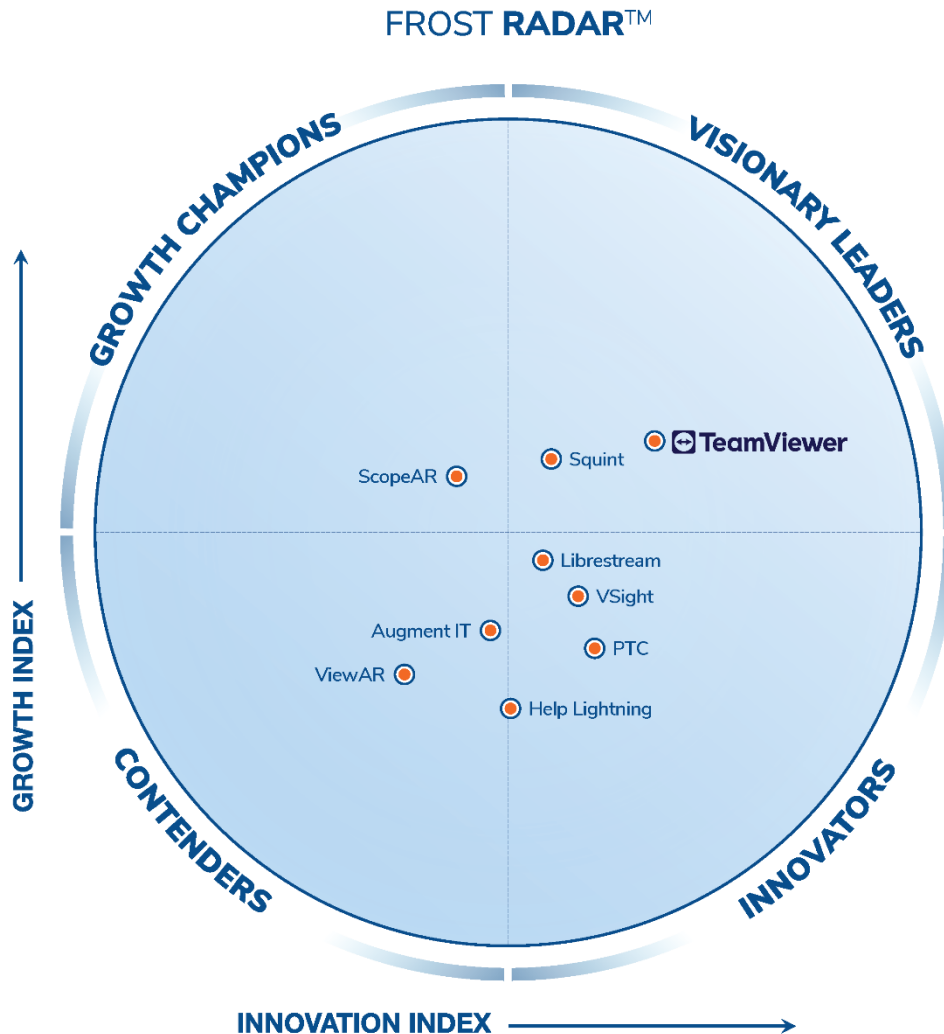
## Growth Environment (continued)

- ACW platforms have extended their reach on the shop floor, guiding execution across a multitude of use cases, including maintenance, quality, and performance. Platforms must facilitate communication and collaboration among frontline workers and with their managers to keep operations running smoothly.
- Most ACW vendors have hybrid industries, such as consumer packaged goods and food and beverage, as their core verticals. There is also considerable penetration in process verticals, such as pharmaceuticals, chemicals, and energy. 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 that several vendors have taken note of.
- ACW platform adoption is strongest in Europe and the United States, where the large majority of vendors are headquartered. Asia-Pacific still represents a significant challenge for vendors because of geographical distance and cultural differences, but plans are being drafted to enter this market through local and regional partnerships. Smaller markets, such as the Middle East and Latin America, have seen limited adoption stemming from specific industries.

# Frost Radar™: AR-Centric Augmented Connected Worker Platforms



# Frost Radar™: AR-Centric Augmented Connected Worker Platforms



In a fragmented market, Frost & Sullivan independently evaluated the landscape and selected just nine 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 market leadership.

# 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.

# 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 ACW companies that have AR technology as the foundation of their platforms, allowing them to deliver unique features that most companies in other segments of the ACW market cannot, such as hands-free digital work instructions, shop floor navigation tools, enhanced remote collaboration, and the superimposition of product and asset data over the physical world.
- Augment IT has a comprehensive platform that addresses most of the AR use cases currently available in the market. The company has developed a strong partnership with RealWear, has expansion plans in the future, and has a realistic perspective on the future of AR technology.
- Help Lightning's platform allows companies to create a curated knowledge base that can be delivered to users via remote assistance, and it is compatible with many of the AR devices available in the market. It leverages partnerships in a unique way, creating and promoting thought leadership initiatives.
- Librestream has a robust platform with remarkable remote assistance features, custom workflows with conditional pathing, and is extensively adopting AI to facilitate operations for its customers. The company has developed an impressive partner ecosystem that secure Onsight Now's compatibility and provide the company with an extended global reach.
- PTC's Vuforia has a series of solutions that take advantage of the company's expertise in spatial computing and its portfolio of product lifecycle management (PLM) offerings to capture knowledge and deliver it to the user. PTC's AR solution has gone beyond the manufacturing world: the Vuforia Engine can be used for commercial purposes.

## Frost Radar™ Competitive Environment (continued)

- ScopeAR partners with several companies to equip WorkLink with unique integrations to enterprise systems, particularly those of Siemens. The company's messaging focused on frontline intelligence helps it stand out in the market.
- Squint has developed its whole platform around AI, providing users with valuable content while on the shop floor and creating innovative ways to store tribal knowledge and produce efficient procedures. The company has developed tailored commercial strategies for different markets, improving its success rate when talking with potential clients.
- TeamViewer has the most comprehensive portfolio of solutions in the market, addressing advanced use cases, such as logistics. The company has a clear AI strategy in place, and its platform development path is defined in concert with its customers. It has developed an impressive partner ecosystem and scaling frameworks for customers.
- ViewAR's point-of-interest markers create a layer over the physical world to display valuable asset data for frontline workers. The company has connected AR technology with Industry 4.0 as part of its marketing strategy, which can resonate with a broad part of the industrial landscape.
- VSight has an AI vision based on data personalization for each member of the frontline workforce and has developed specialized, AI-driven tools. The company has several initiatives to target large enterprises in the coming months, which could provide a continuous source of growth.

# Frost Radar™: Companies to Action



# TeamViewer

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## INNOVATION

- TeamViewer's solutions span the manufacturing supply chain, addressing training, logistics, assembly, quality assurance, maintenance, and troubleshooting. The company seeks to simplify work through intuitive technology, elevate quality and productivity through data analytics and augmented guidance, and accelerate smart automation through AI-guided workflows.
- TeamViewer's portfolio for the frontline workforce consists of Frontline Upskill, which provides just-in-time knowledge transfer to onboard and upskill employees; Frontline Pick, allowing for hands-free material handling by assisting warehouse workers with inbound and outbound logistics, inventory, and sorting; Frontline Make, delivering augmented instructions to help workers during assembly and quality assurance and providing changeover support; Frontline Inspect, assisting workers during maintenance, enabling guided diagnosis and enhancing auditing and reporting; and Frontline Assist, enabling remote collaboration between frontline workers and experts for troubleshooting.
- Frontline Pick optimizes manual workflows in warehousing through AR-powered vision picking technology, digitalizing the process by displaying visual instructions via smart glasses and mobile devices to prevent errors. Workers can also confirm actions through voice control and integrated scanner options. The solution can be easily integrated with warehouse management systems (WMS) and ERP, and its KPI dashboard provides real-time insights into key metrics to enable process optimization.
- Frontline Command Center acts as a central management hub for users, tasks, and remote troubleshooting; Frontline's workflow tools allow for no-code authoring to create 2D and 3D workflows; and Frontline Workplace, the end-user application, provides employees with a fully digital workplace integrating different device applications usable on wearables and mobile devices.

# TeamViewer (continued)

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## INNOVATION

- TeamViewer's founding point was IT support, and its portfolio still has several competitive products addressing those needs. Through TeamViewer Remote and TeamViewer Tensor, the company provides standardized remote access and administration, secure-by-design access controls, governed third-party access, compliance and auditing capabilities, and scaling opportunities. TeamViewer DEX is focused on finding and solving IT issues before they affect users.
- TeamViewer ONE is a unified digital workplace platform that combines endpoint management, remote connectivity, digital employee experience, and AI-assisted support. It is suitable for environments of all sizes and is designed to replace multiple stand-alone IT tools.
- The company's solutions are modular, and its portfolio includes packages tailored for different industries. These include automotive, aerospace, and food and beverage.
- TeamViewer's AI strategy for Frontline is to make AI practical and impactful across enterprise operations in three levels: the collaboration of humans and AI, present in features such as the PDF-to-Workflow converter that accelerates AR content creation; building a symbiotic data ecosystem that powers integrated knowledge bases and trains embedded AI models to create a self-reinforcing loop between people, process, and intelligence to improve deployed Frontline solutions; and AI as a catalyst for customer success, which would involve users bringing their own AI and securely connect it to frontline teams.
- TeamViewer offers customers prebuilt connectors to link its solutions with enterprise systems, such as ERP, WMS, PLM, and MES. The solutions support industrial-grade smart glasses, wearables, mobile devices, and legacy hardware.

# TeamViewer (continued)

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## INNOVATION

- TeamViewer’s roadmap for the next few years will expand and enhance the platform across training, operations, logistics, and collaboration. Recently, the company implemented augmented training, integrated workflows and real-time analytics, core integrations for warehouse operations, and improved troubleshooting. For the future, one of TeamViewer’s strategic focuses is on increasing its data-driven capabilities by creating and managing complex knowledge, providing AI suggestions in remote assistance calls, a new knowledge hub where teams can verify trusted and available information, and a “bring-your-own-AI” option where customers can securely connect their own AI or LLM stack to frontline teams. Moreover, TeamViewer is seeking to enhance its autonomous capabilities, developing an operations copilot, self-managing operations with AI-driven decision support and compliance, enabling intelligent logistics through AI-powered picking and workforce orchestration, and introducing AI-powered maintenance.
- TeamViewer Frontline’s platform development strategy has considerable customer input. Customers’ requirements and use cases inform product direction and prioritization. The company is formalizing customer feedback channels, such as roundtables and advisory-style formats that allow selected customers to provide structured input on roadmap themes, feature priorities, and market trends. The company also is expanding its early adopter programs to gain valuable feedback during implementation.

# TeamViewer (continued)

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## GROWTH

- TeamViewer's ideal customer profile is midsize to large logistics, automotive, consumer goods, aerospace, energy, and heavy equipment enterprises with complex, high-volume operations. The majority of TeamViewer's revenue comes from the region encompassing Europe, the Middle East, and Africa. This is closely followed by the Americas, with a smaller portion coming from Asia-Pacific.
- TeamViewer built its Frontline solutions to be scalable and seamlessly integrate with enterprise systems. Deployment can be either cloud-based or on premises, focused on letting customers expand digitalization across regions and sites without disruption. TeamViewer's experts stay hands-on throughout the implementation process, orchestrating integration, deployment, and change management whether directly or through dedicated partners.
- Strategic alliances include SAP, Siemens, Microsoft, and Manhattan Associates, supporting joint customer engagements, technical integrations, and access to industry-specific use cases. For example, TeamViewer's partnership with Siemens allows the company to access PLM and CAD data for Frontline solutions for training, manufacturing, and maintenance. TeamViewer works with hardware providers, such as RealWear, and supports a broader ecosystem of AR devices for frontline use. Global system integrators and regional value-added resellers support regional expansion, industry specialization, and solution integration. Direct sales are focused on large enterprise accounts.
- TeamViewer's own digital channels are the foundation of its go-to-market approach. Its website acts as the primary hub for demand generation and product education. The company leverages account-based marketing to align marketing and sales around defined buying groups and tailor messaging by industry and use case. It participates in digital forums and industry events, and engages in partner co-marketing and selective brand sponsorship, such as Formula 1, to extend reach and strengthen brand recognition.

# TeamViewer (continued)

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## GROWTH

- TeamViewer's enterprise pricing is tailored to customer requirements, including scale, use case, and deployment scope, in a structured licensing framework. Engagement with customer success and project implementation teams starts pre-implementation to understand manufacturers' priorities and continues throughout deployment. After go-live, customer success formalizes a success plan defining KPIs and stakeholder alignment, and quarterly business reviews focus on benchmarking and roadmap alignment.
- TeamViewer's position in the ACW and industrial AR space has been shaped by a mix of in-house innovation and targeted acquisitions. The acquisitions of Ubimax, Viscopic and Upskill became the foundation of the TeamViewer Frontline solution and expanded its capabilities. In 2025, TeamViewer acquired 1E, strengthening its ability to deliver DEX by adding real-time visibility and autonomous remediation capabilities at the endpoint layer, providing actionable insights and measurable outcomes.
- DEX is one of TeamViewer's driving principles as it seeks to improve how effectively employees can interact with the digital tools, devices, applications, and services required to do their work. In an enterprise, this encompasses the performance and reliability of digital environments and the identification and resolution of digital friction.
- TeamViewer's perspective on mixed reality (MR) devices in manufacturing environments is that they have not kept up with MR solutions or satisfied demands from manufacturers. Manufacturers need the hardware to be optimized for comfort and battery life and allow frontline workers to have full vision of their environments. The volatility in the MR devices market makes adoption more complex. To address these issues, TeamViewer's solutions can be deployed on mobile devices, and the company is working closely with hardware partners to adapt their devices by testing development kits and beta hardware.

# TeamViewer (continued)

## VISIONARY LEADER

INNOVATION SCORE **4.35**

GROWTH SCORE **4.05**

## FROST PERSPECTIVE

- TeamViewer's capabilities span manufacturers' operations and the frontline workforce's daily activities, addressing use cases that are increasingly relevant for the industrial landscape and the ACW market, such as warehousing.
- The company's partner ecosystem is extensive and diverse, allowing TeamViewer to serve its customers across different industries and regions, connect its platforms to enterprise systems, deploy its platform in more devices, and define the future of AR hardware.
- TeamViewer has a clearly defined roadmap for the future of its solutions, creating a clear path for platform development and aligning with the main needs of its customers through extensive feedback.
- TeamViewer could offer different solution packages to attract new customers, especially SMBs. Prebuilt suites could be made more affordable and align with smaller companies' more grounded needs.
- Solution co-development with customers might allow TeamViewer to further tailor its solutions to satisfy manufacturers' demands, as well as spark new ideas for platform development initiatives.

# Best Practices & Growth Opportunities



# Best Practices

# 1

Most companies in the market have a pragmatic view on manufacturers' adoption of AR devices, acknowledging that AR-specific hardware can be a bottleneck to market development. As such, their platforms can be deployed across mobile devices and tablets to address their respective use cases.

# 2

Maintenance is the most widespread use case for AR technology in the ACW market. Field technicians use these solutions extensively to perform their tasks more effectively.

# 3

Indoor navigation can help frontline workers traverse growingly complex shop floors and identify key assets and their real-time data. Worker geo-localization can serve as a powerful safety tool.

# Growth Opportunities

# 1

AI in the AR-centric segment of the ACW market is not as extensively used as in other segments. Developments in this area can give vendors a competitive advantage.

# 2

Many AR-driven platforms have not realized their full potential when it comes to workforce development. Most do not place enough emphasis on training and lack skills management tools.

# 3

Many vendors in this market segment have underdeveloped partner ecosystems. Solid partnerships could make their platforms compatible with more enterprise systems, help them deliver better implementation services, and expand their reach across verticals and regions.

# 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 (continued)

### 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

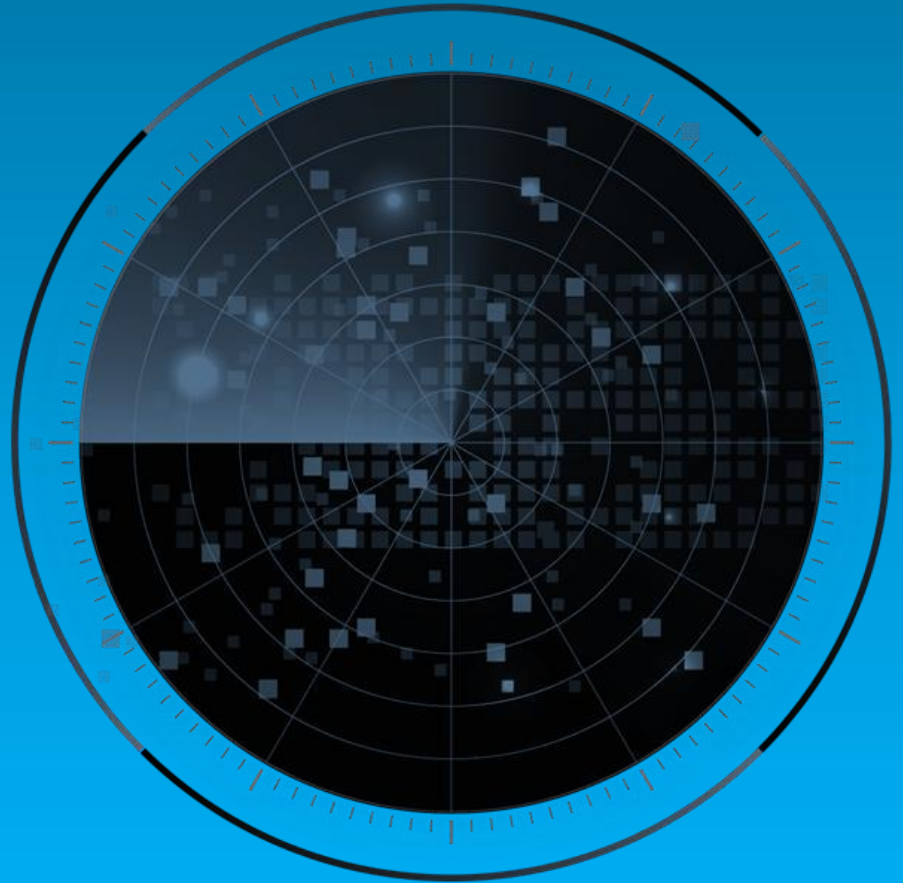
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found [here](#).

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.

# Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders



# Significance of Being on the Frost Radar™

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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.

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## 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

## STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

## LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

## NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

# Frost Radar™ Empowers Investors

## STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

## LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders
- Investors can continually benchmark performance with best practices for optimal portfolio management.

## NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

# Frost Radar™ Empowers Customers

## STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

## LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

## NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

# Frost Radar™ Empowers the Board of Directors

## STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

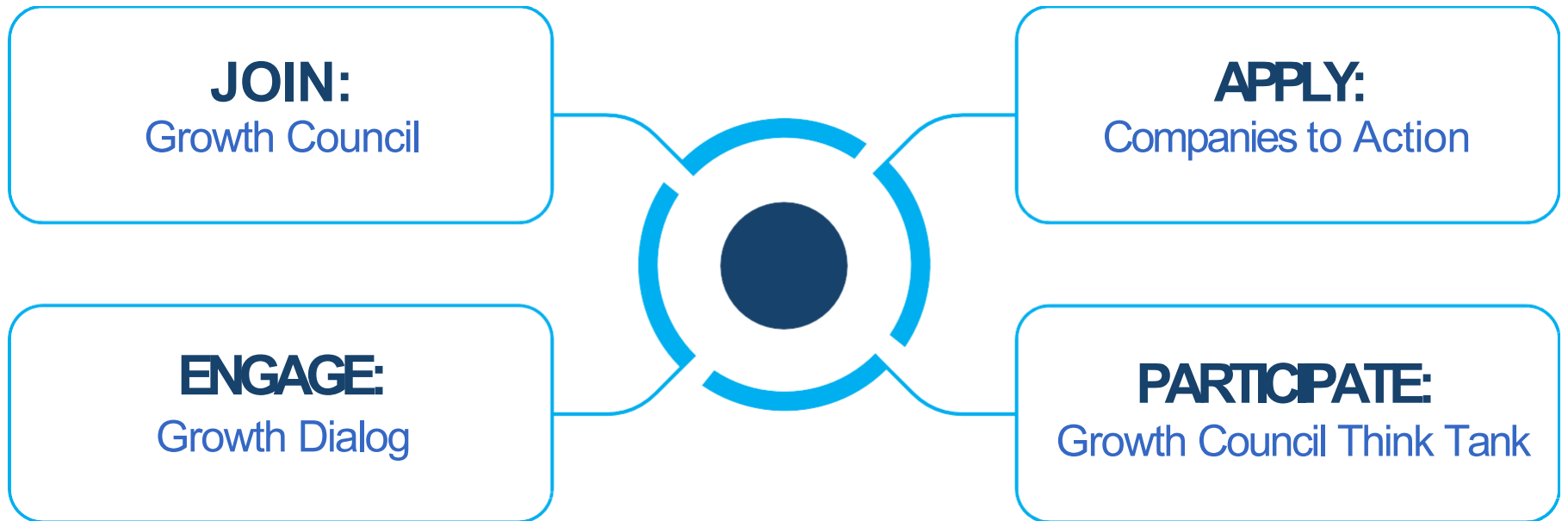
## LEVERAGING THE FROST RADAR™

- 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.

## NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

# Next Steps



**Does your current system support rapid adaptation to emerging opportunities?**

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