ZEBRA CAPTURE YOUR EDGE

The Intelligent Enterprise Index

October 2019

Context

- In September 2016, the Technology and Entrepreneurship Center at Harvard (TECH) hosted the Strategic Innovation Symposium: The Intelligent Enterprise, where leaders from across industries developed a list of criteria that define today's Intelligent Enterprise.
- Earlier this year, Zebra Technologies conducted an end-user survey tracking these criteria, essentially 11 metrics designed to conceptually understand where companies are on the path to becoming an Intelligent Enterprise.
- The online survey was fielded from Aug. 12 – Sept.18, 2019 across the healthcare, manufacturing, retail and transportation and logistics industries. In total, 950 IT decision makers from nine countries were interviewed, including the U.S., U.K./Great Britain, France, Germany, Mexico, Brazil, China, India and Japan.

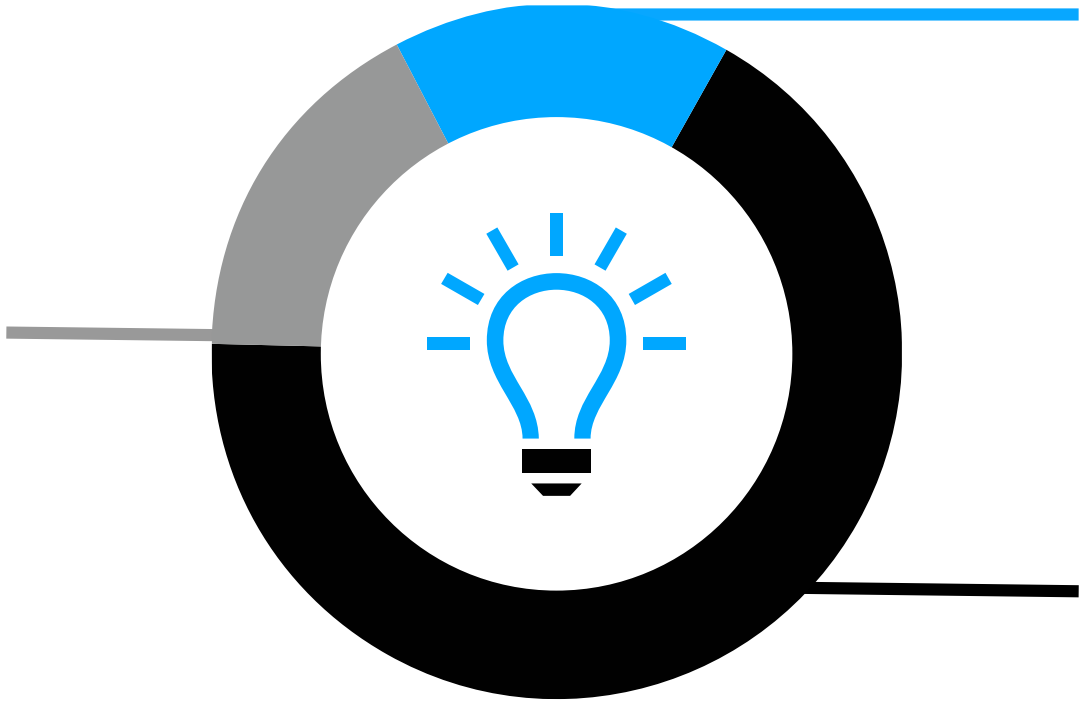
Criteria

	Criteria	Description	Weight
1	**IoT Vision**	Driving transformational innovation starts with a vision	10%
2	**Business Engagement**	Complex initiatives require a clear business case	10%
3	**Technology Partner**	Intelligent IoT solutions require a holistic perspective	10%
4	**Adoption**	New user adoption is one of the most cited challenges	10%
5	**Change Management**	Key to success is the end-user utilization	10%
6	**Point-of-Use Application**	IoT solutions offer contextual and situational awareness	5%
7	**Security**	IoT solutions need to be monitored to prevent disruption	10%
8	**Deployment**	Time to implementation is a key consideration	10%
9	**Infrastructure**	IoT execution requires a system to manage the technologies	5%
10	**Data Management Plan**	One of the greatest challenges with IoT is how to best manage all the data	10%
11	**Intelligent Analysis**	Insights derived by data can be instrumental for the business	10%

The Intelligent Enterprise Index

2019: 22%
2018: 40%

scored between 25-50 points on the Index, using half of their "intelligence"



2019: 17%
2018: 11%

scored above 75 points on the overall Index, considered "Intelligent Enterprises"

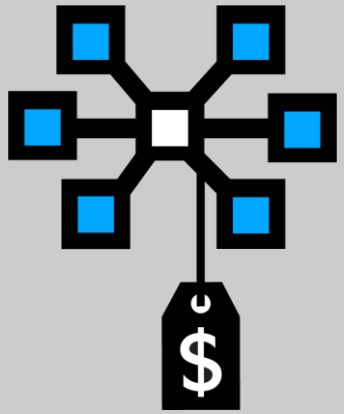
2019: 61%
2018: 49%

are on the path to becoming "Intelligent," scoring between 50-75 points on the Index

Overall Score

2019: 61.5
2018: 55.9

IoT Vision



39% **Increase in average annual spend on IoT from 2018 to $6.4 million**

19% invest between **$500,000 - $1M** in IoT annually

61% **have an IoT vision and are currently executing their IoT plans**

46% currently have company-wide deployments

Adoption

2019: 22%

2018: 24%

expect resistance to adopt their IoT solution, yet do not have a plan in place to address it

2019: 25%

2018: 20%

who expect resistance, have a plan to address it

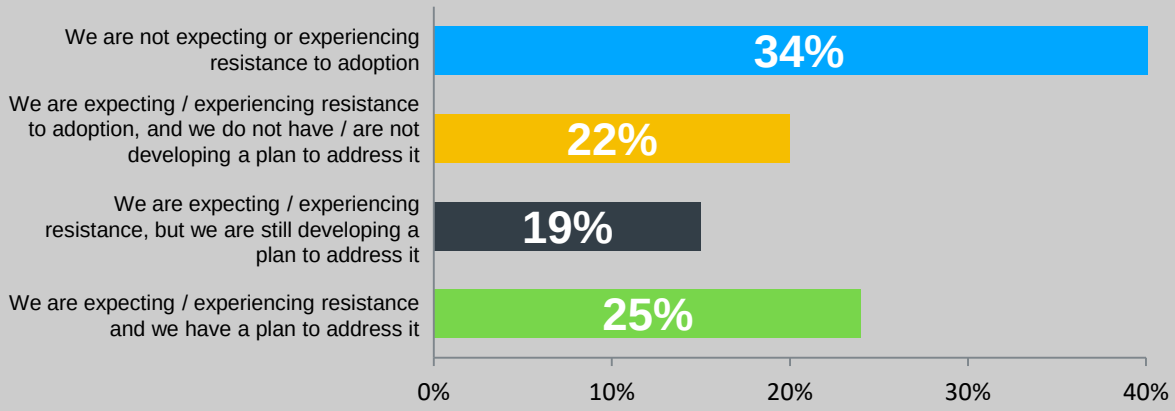
2019: 34%

2018: 36%

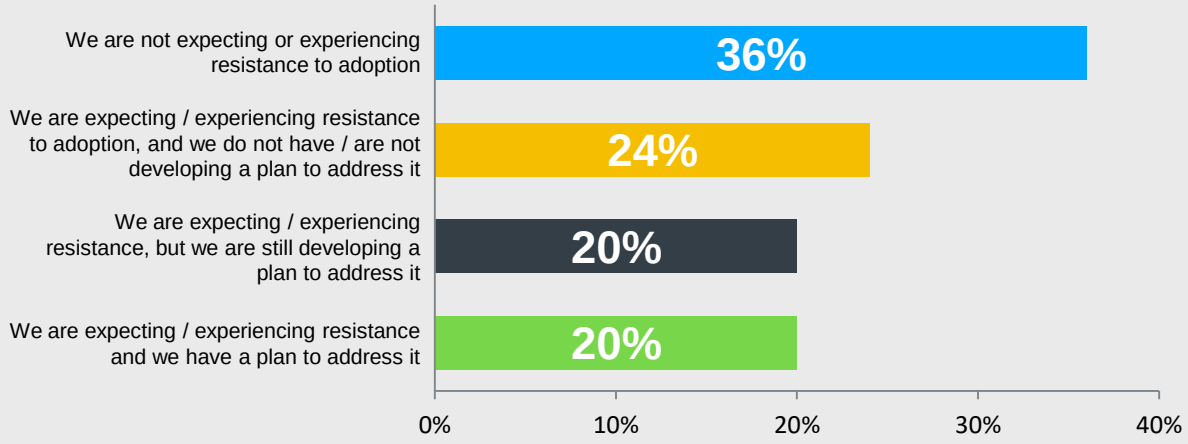
do not expect resistance to the adoption of their IoT solution

Adoption

- Are you experiencing / expecting to experience resistance to the adoption of your IoT solution? If so, do you have a plan to address the resistance?

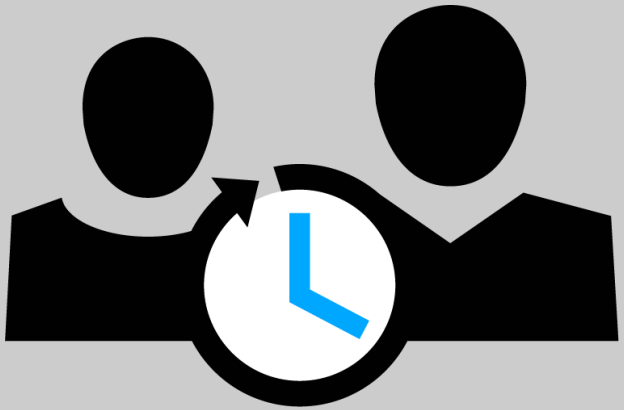


2019



2018

Point-of-Use Application



2019: 50%

2018: 39%

share information from their IoT solutions with employees in real or near-real time

2019: 40%

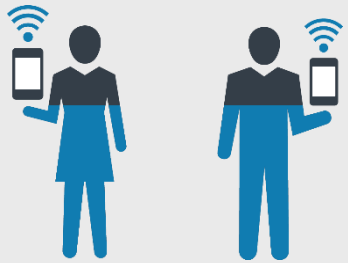
2018: 32%

provide actionable information to all employees via:

Text

2019: 45%

2018: 37%



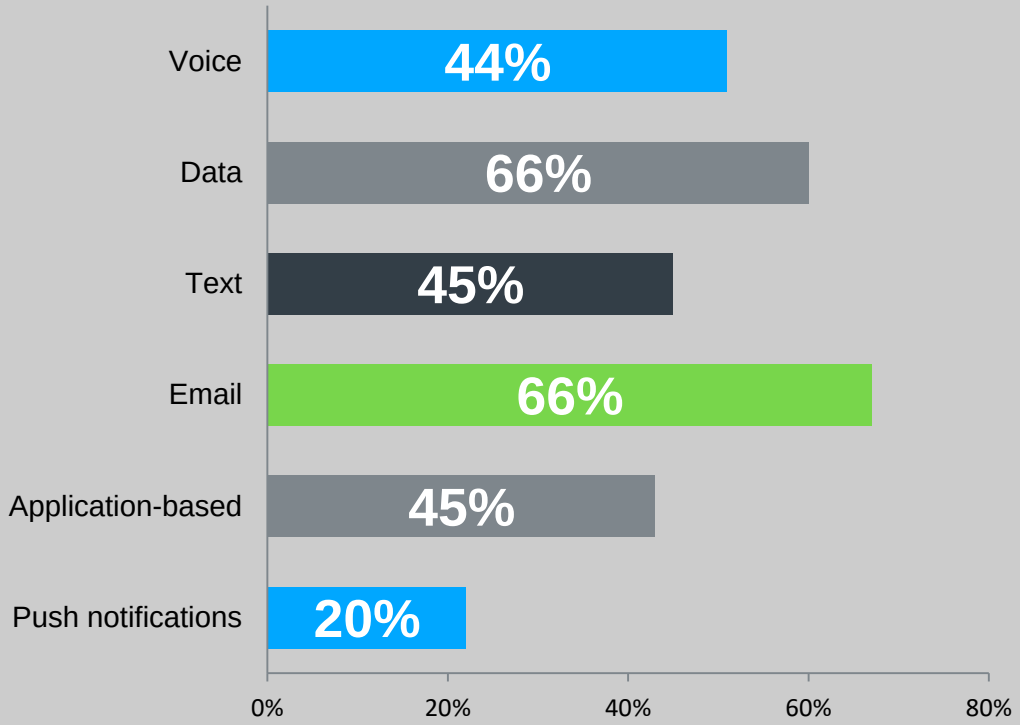
Voice

2019: 44%

2018: 38%

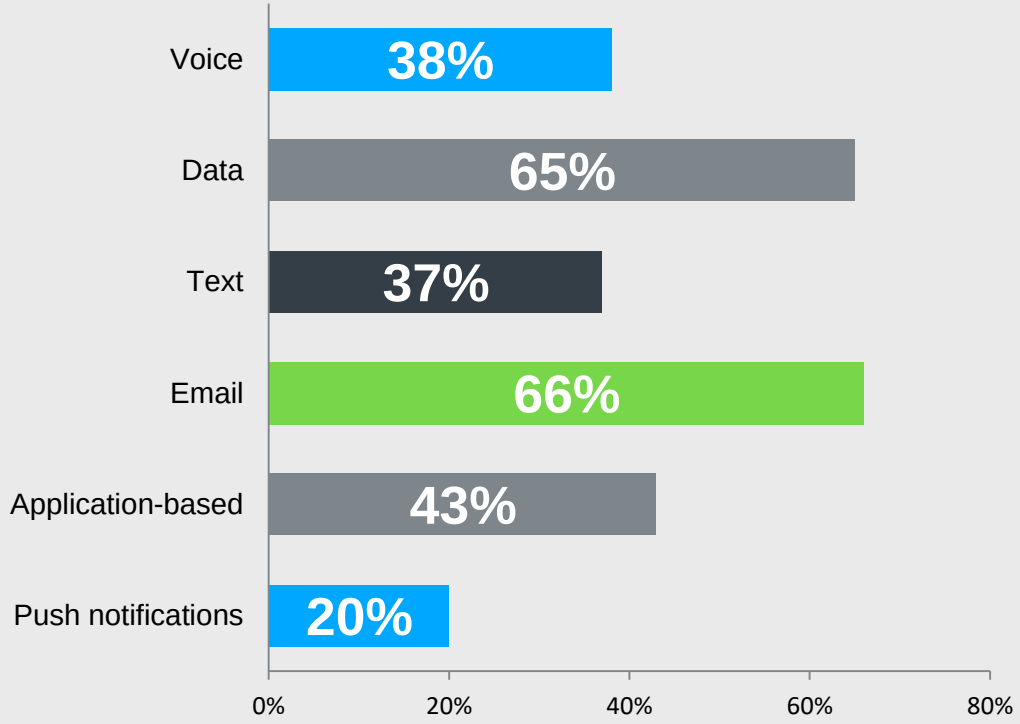
Point-of-Use Application

How are you delivering your IoT information to your employees?



2019

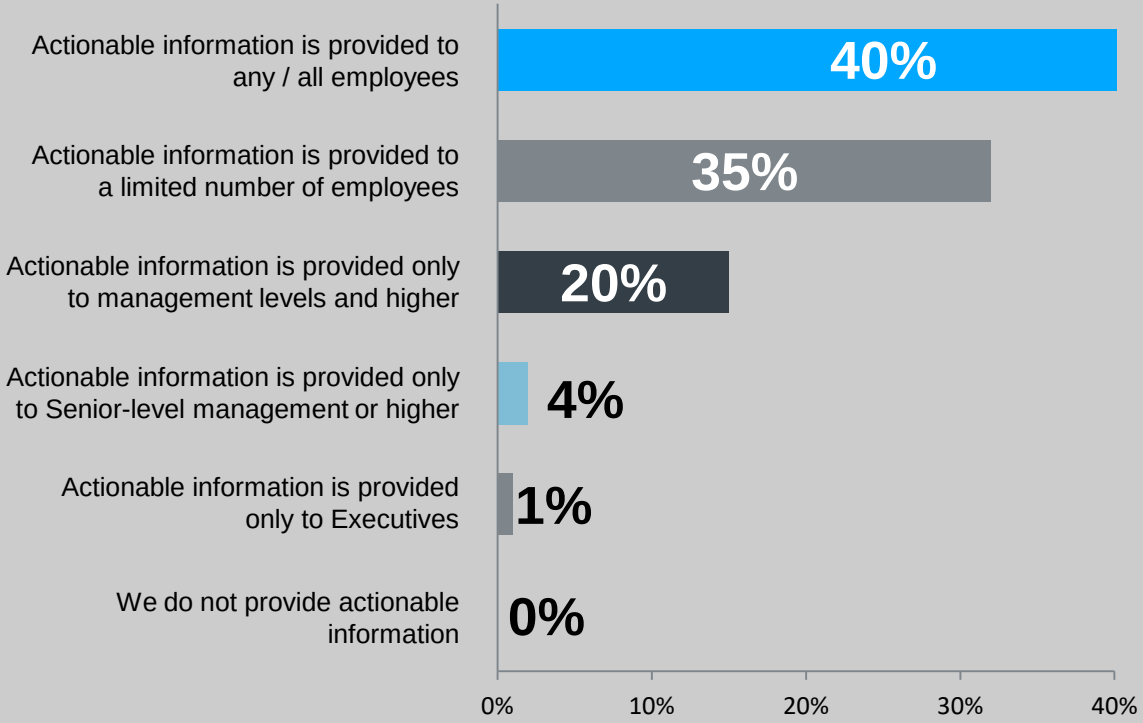
How are you delivering your IoT information to your employees?



2018

Point-of-Use Application

How broadly is actionable information from your IoT solutions shared with employees?



2019

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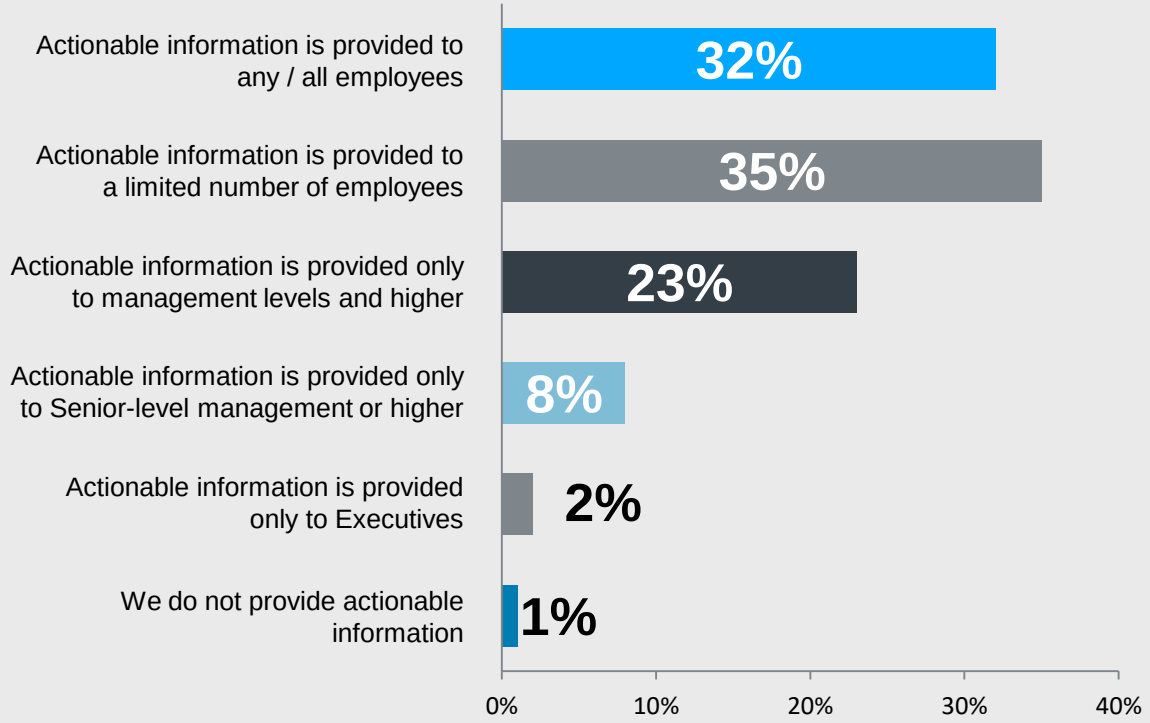
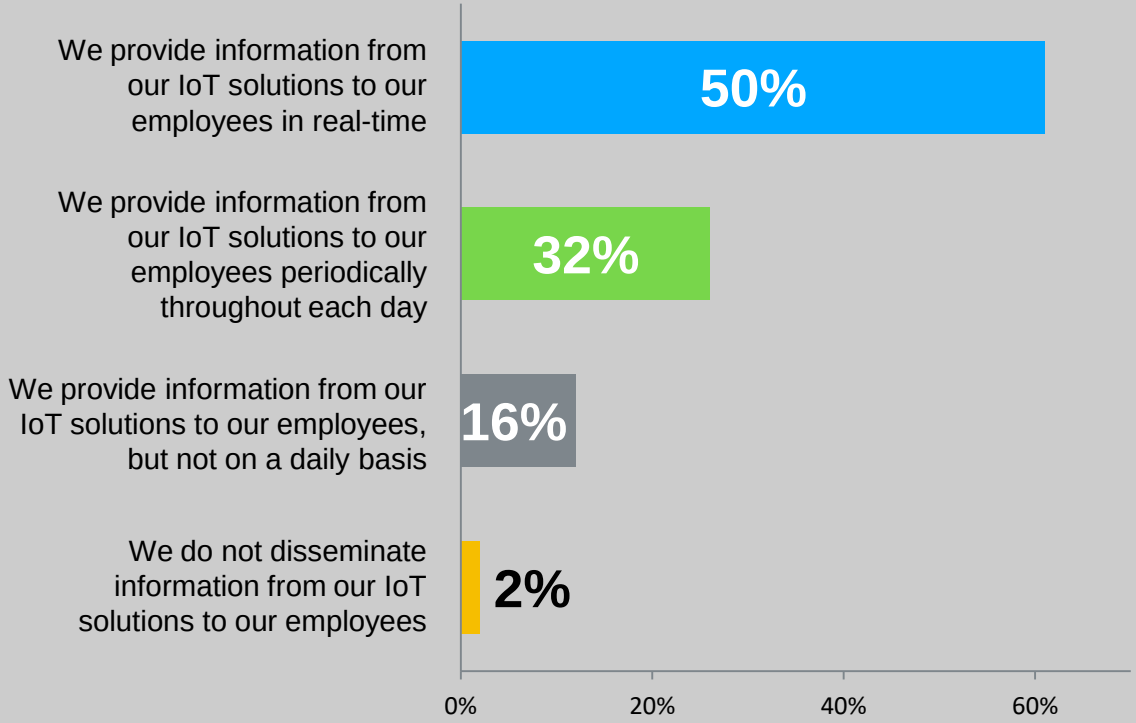


2018

Point-of-Use Application

Which of the following best describes how your company shares information from its IoT solution?



2019

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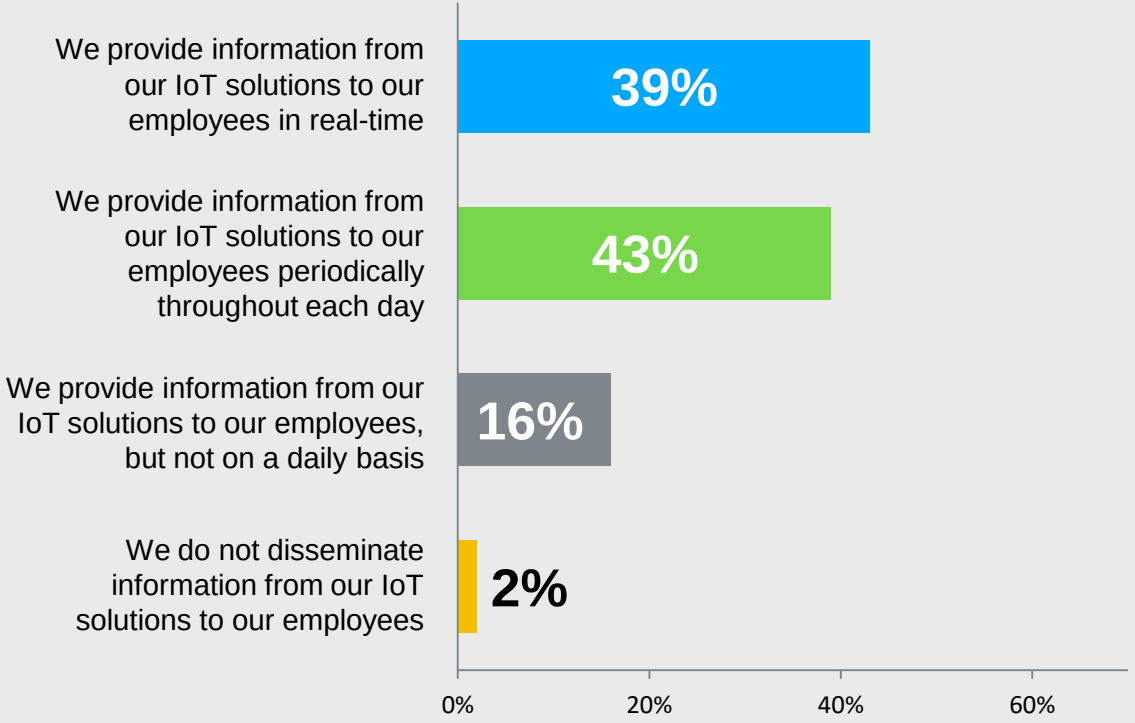
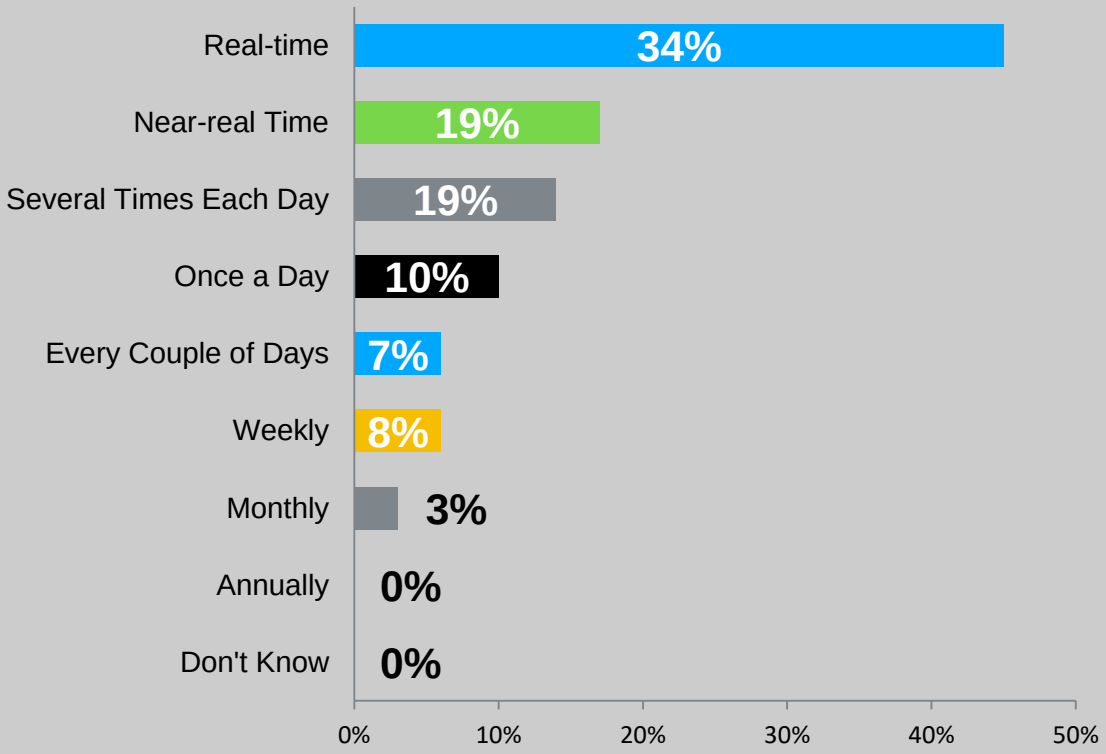


2018

Point-of-Use Application

How often do you share your IoT solution information?



2019

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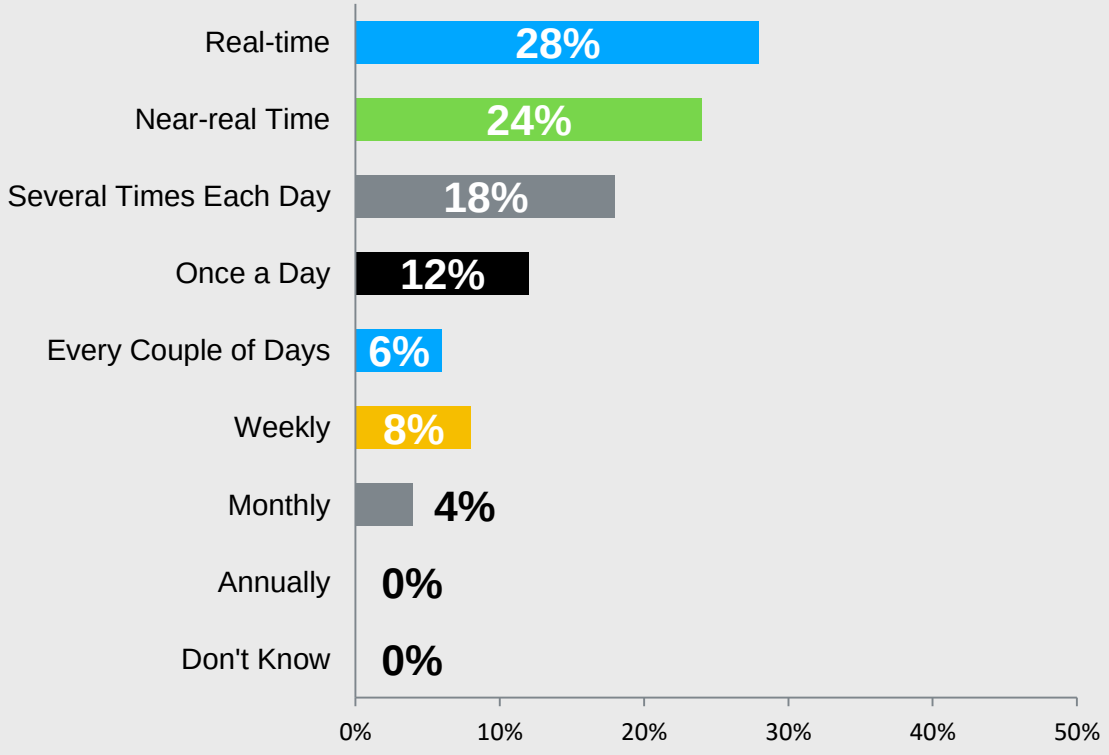


2018

Security

2019: 97%
2018: 95%

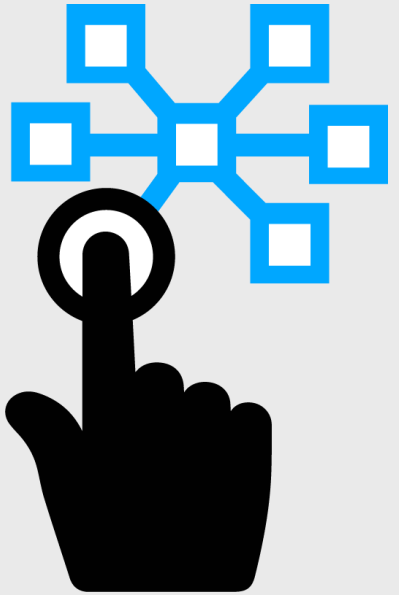
monitor their IoT security and employ standards to ensure integrity and privacy

Constantly
2019: 62%
2018: 58%

Routinely
2019: 35%
2018: 37%

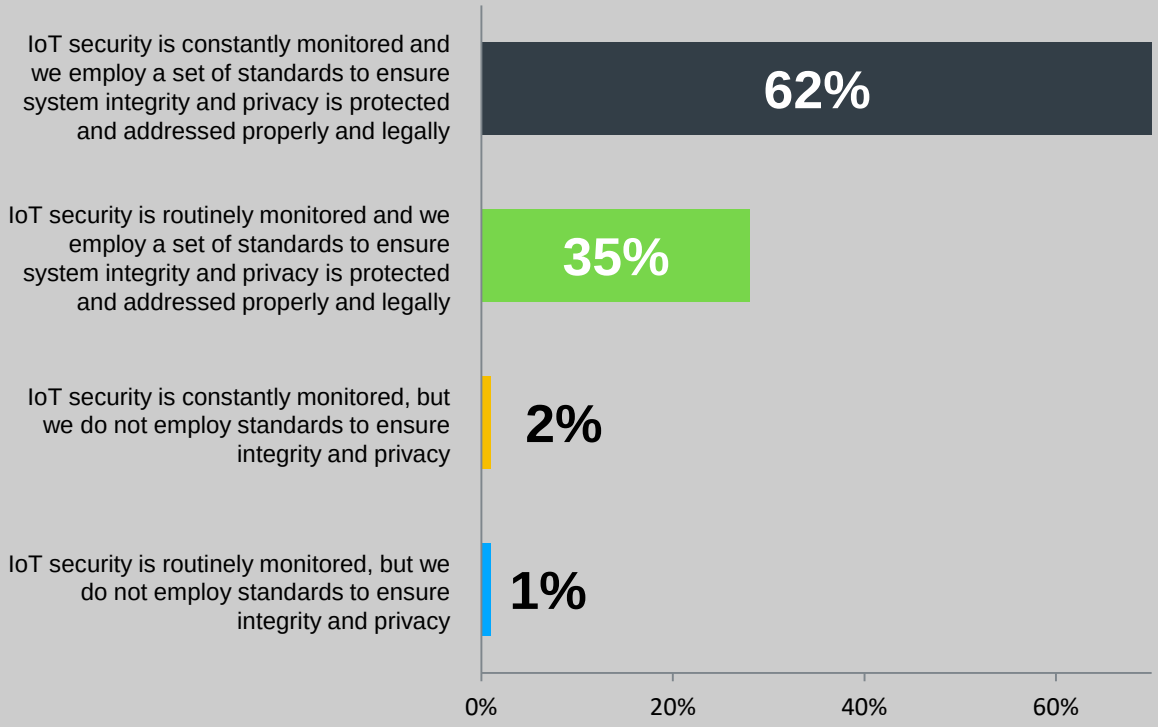
2019: 67%
2018: 69%

have some sort of proactive approach to IT security and network management



Security

Which of the following best describes your company's IoT security?



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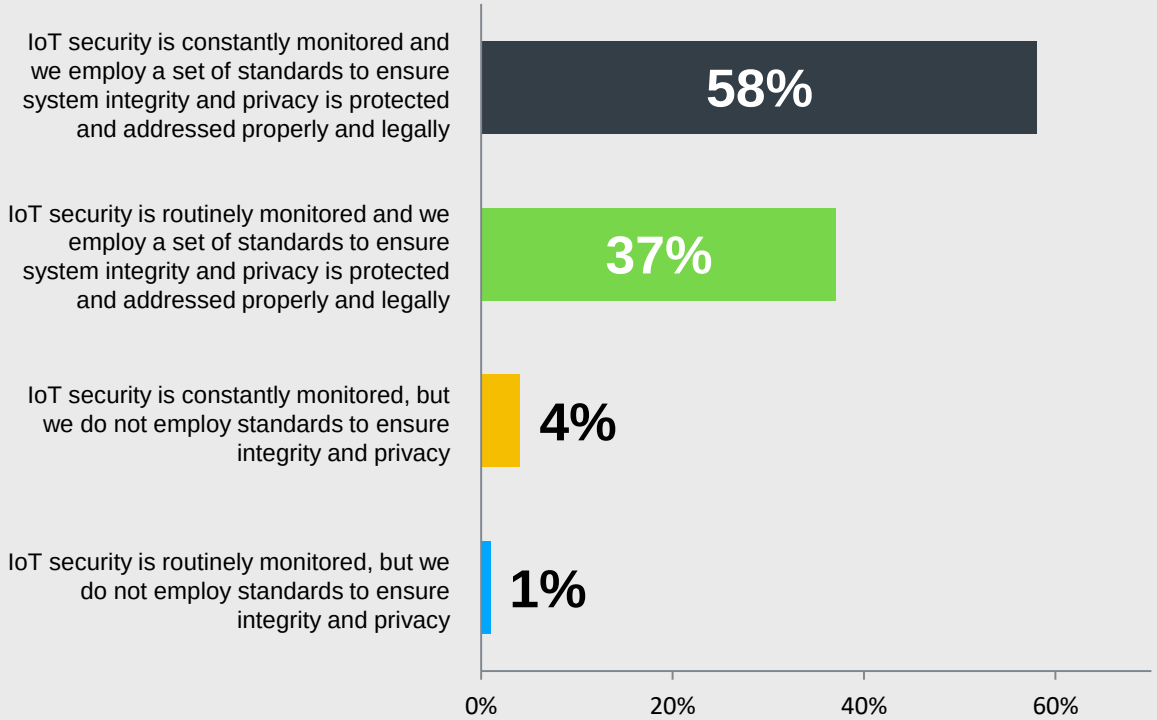
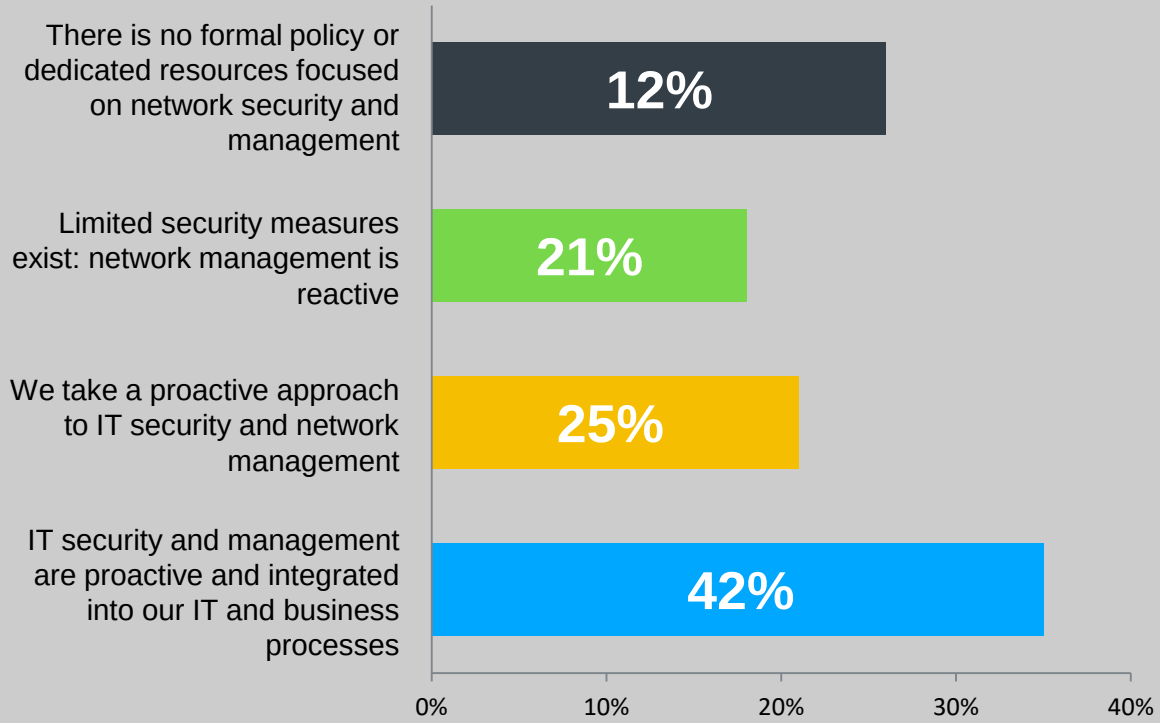


2018

Security

How would you describe your network security and management practices?



2019

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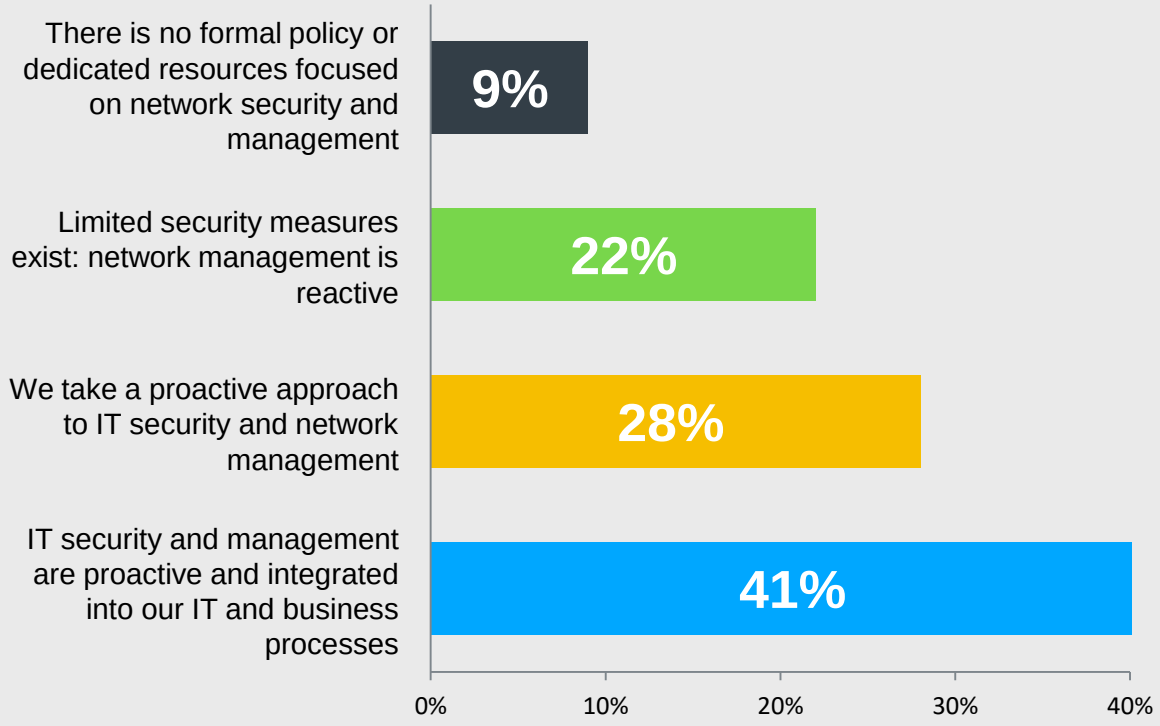
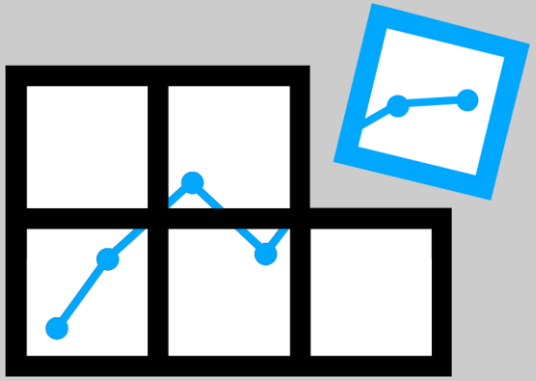


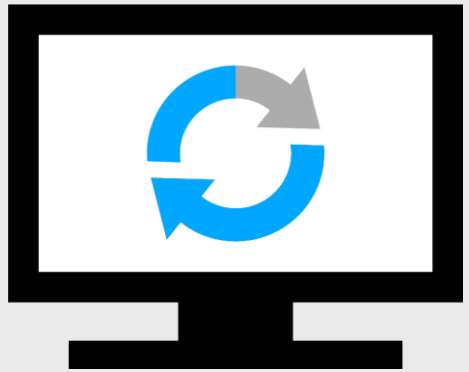
2018

Deployment



2019: 85%
2018: 84%

expect to complete their IoT implementations within 2 years



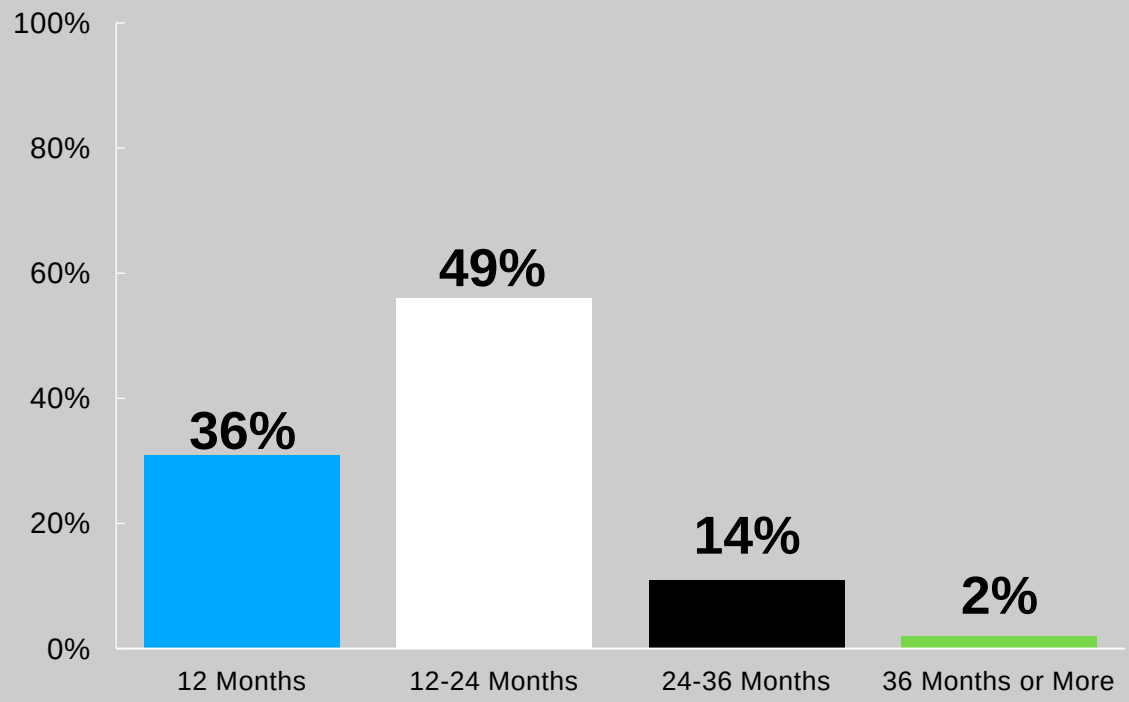
Most companies are about

2019: 45%
2018: 37%

complete in implementing their current IoT plan

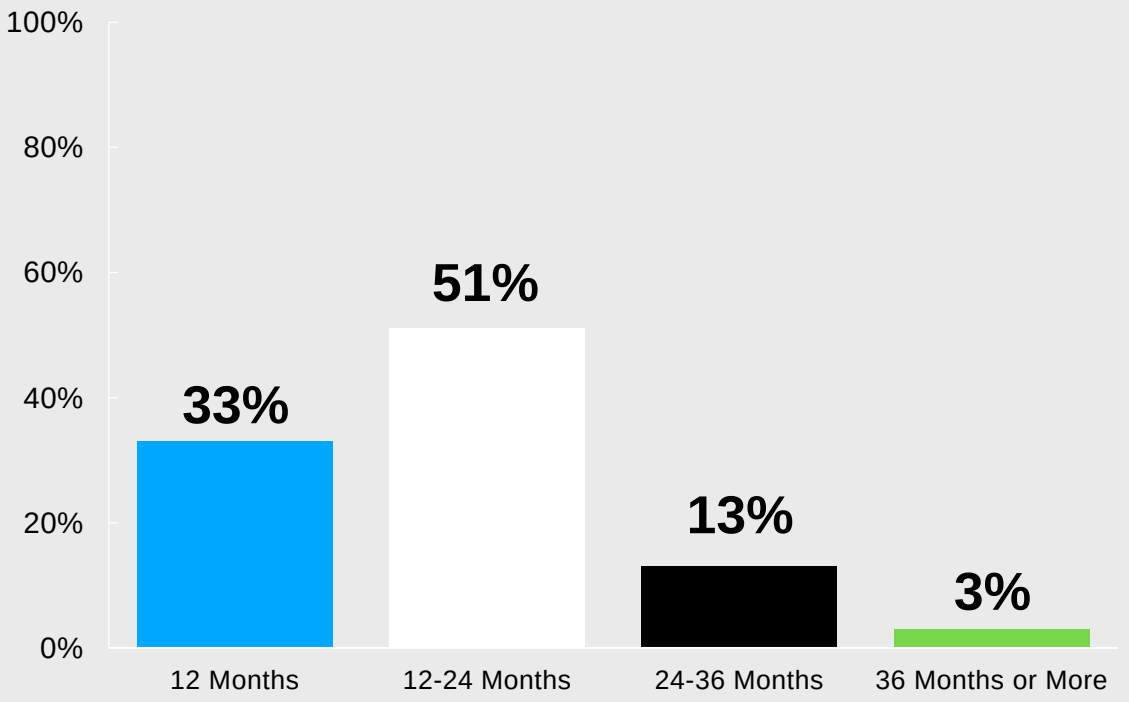
Deployment

What is the anticipated timeline to complete your implementation?



2019

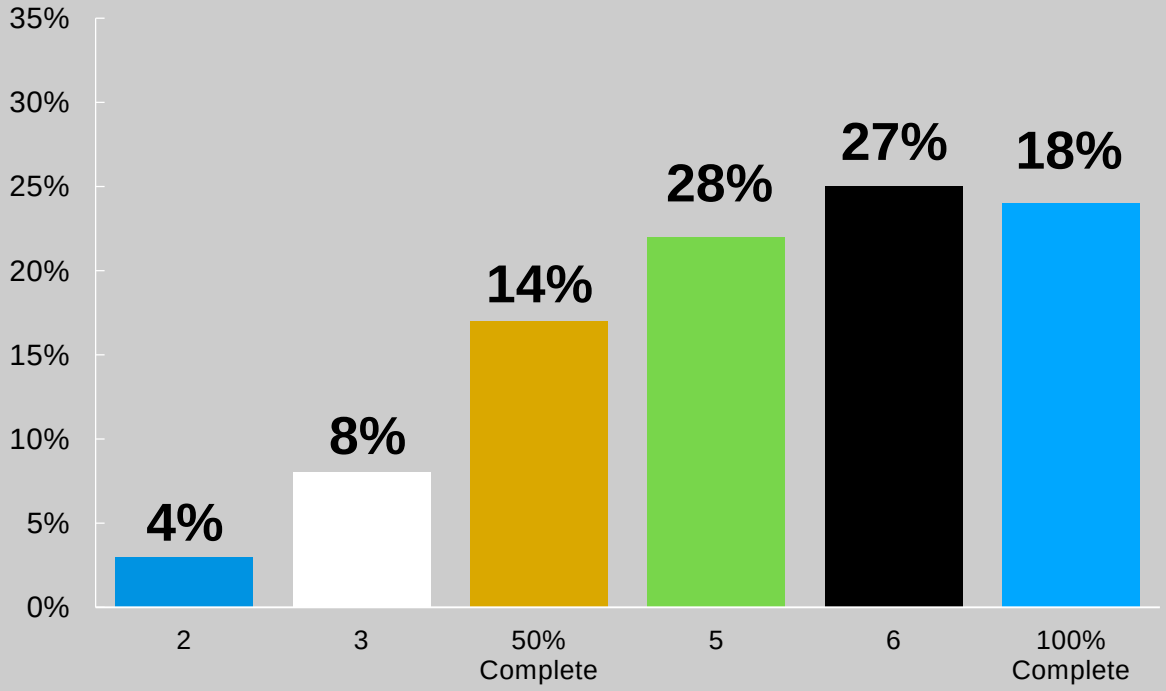
What is the anticipated timeline to complete your implementation?



2018

Deployment

On a scale of 1-7, where a 1 represents "just starting" and a 7 represents "completed", please rank how far along your company is in its current plan.



2019

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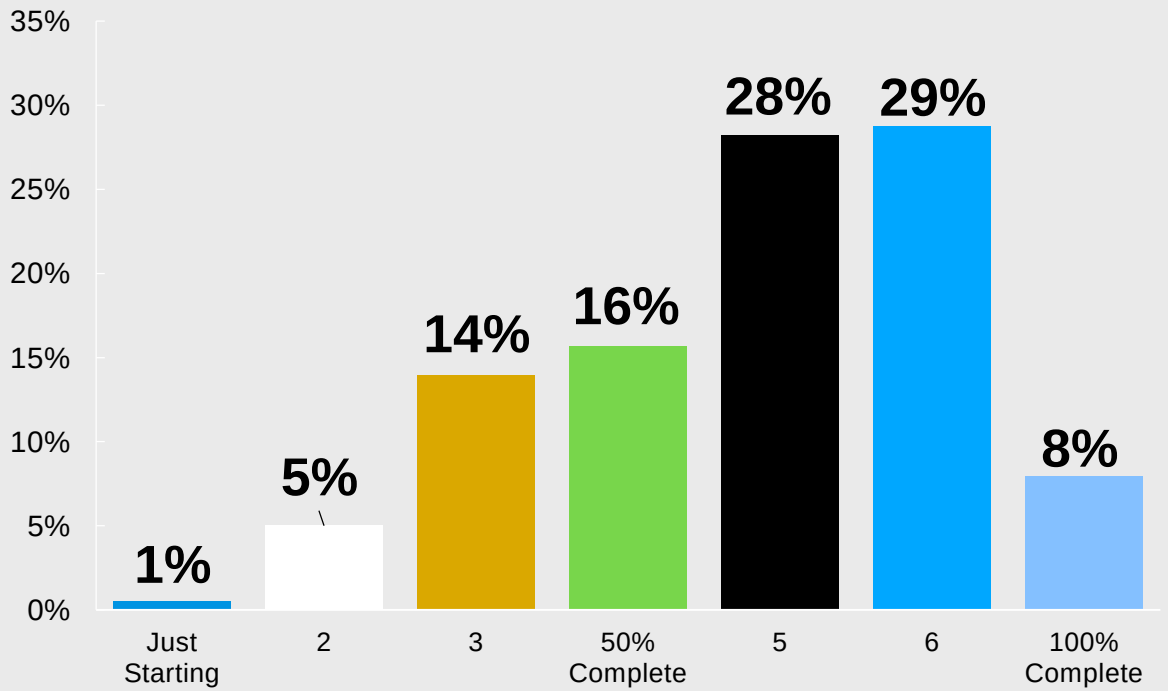
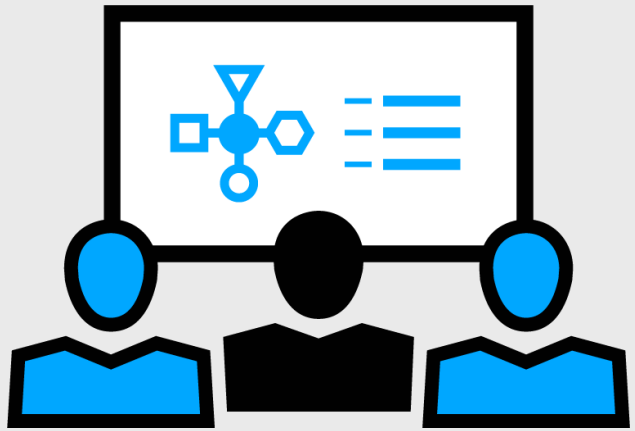


2018

Technology Partner

2019: 36%
2018: 43%

Have strategic partners that together as a team to implement their IoT plans

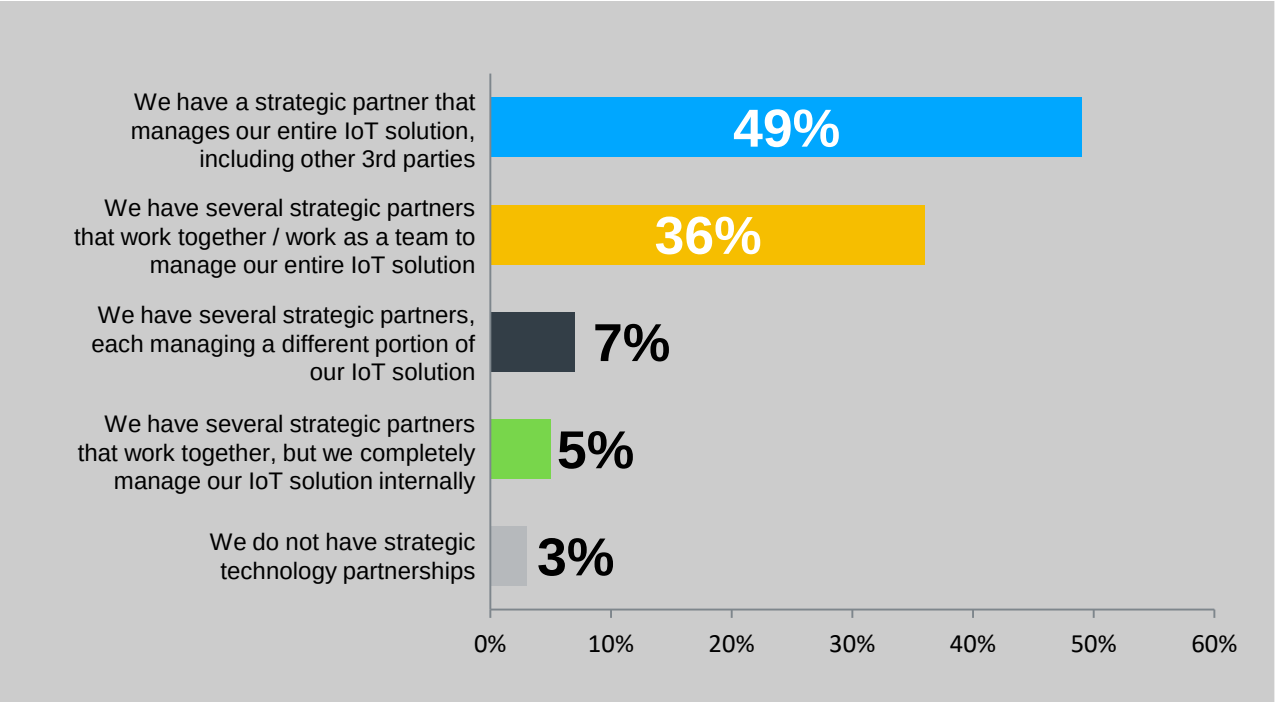


2019: 49%
2018: 40%

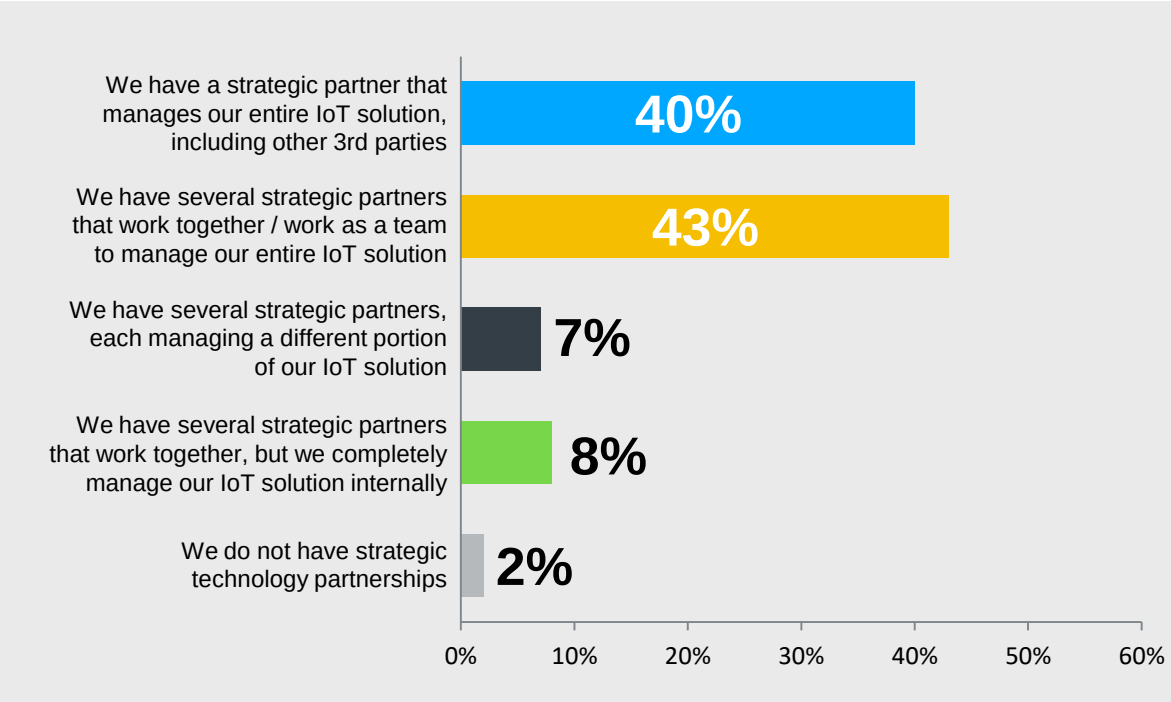
use strategic partners to manage the entire IoT solution

Technology Partner

Which of the following best describes your company's use of technology partners for its IoT solution (beyond hardware purchases)?

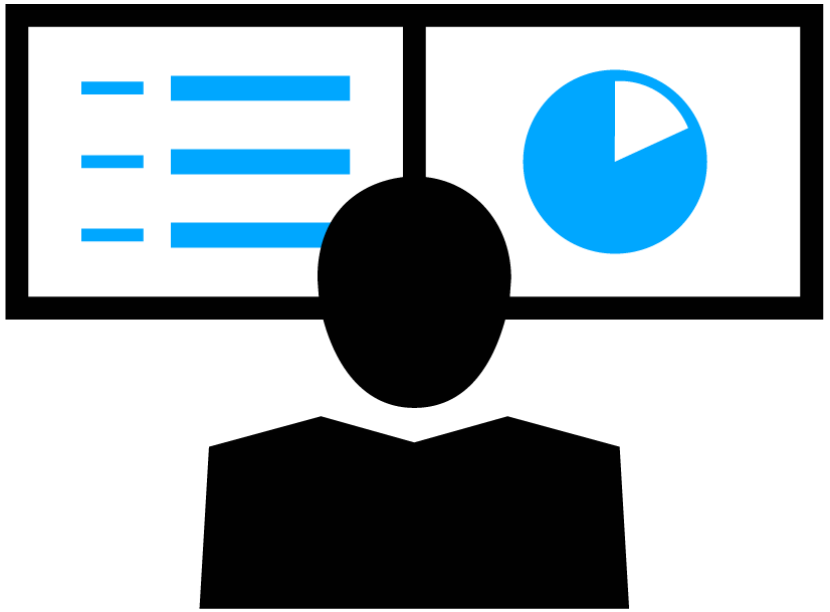


2019



2018

Data Management Plan



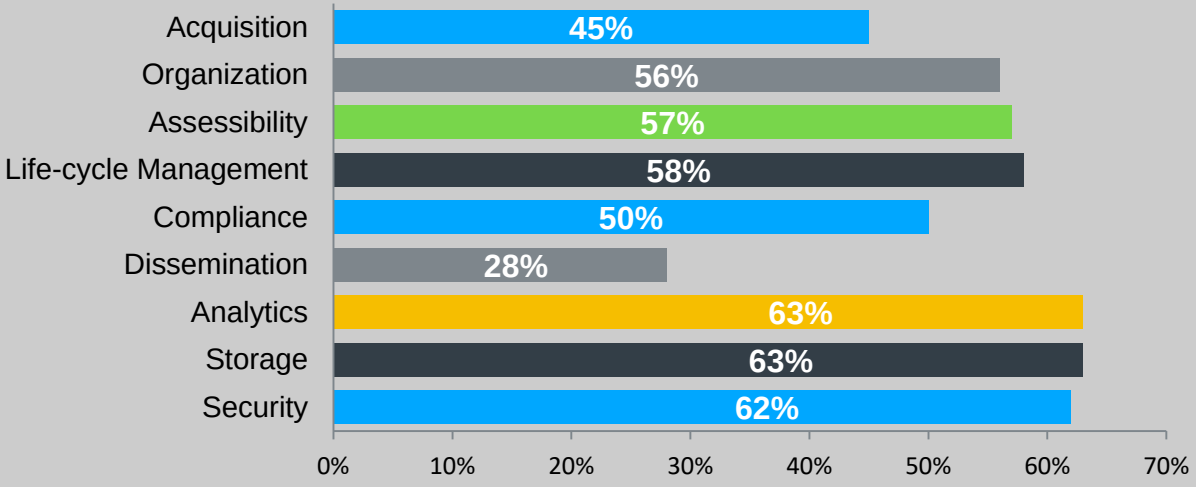
2019: 63%

2018: 54%

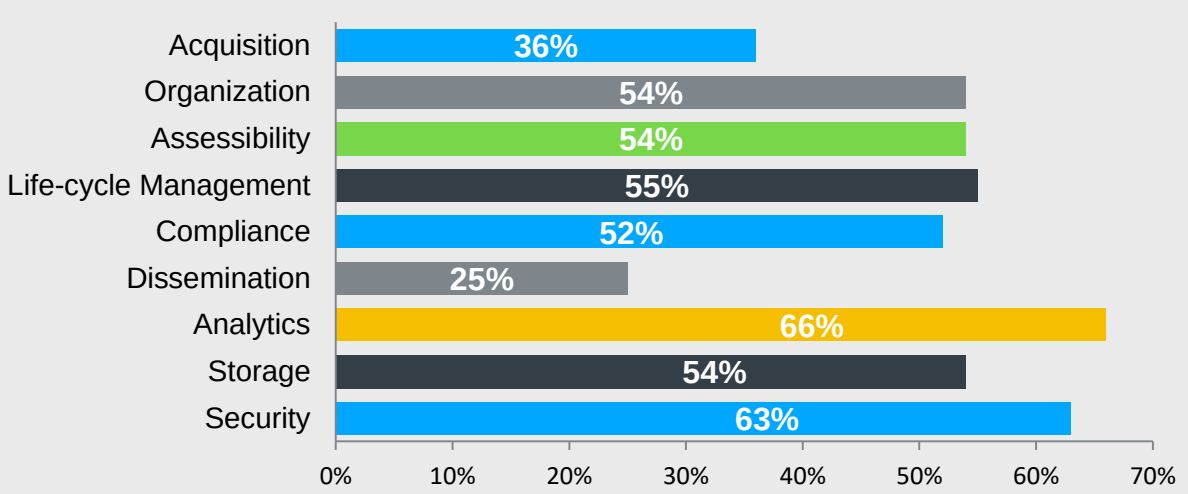
are including storage into their data management plan

Data Management Plan

Which of the following are included in your IoT data management plan?

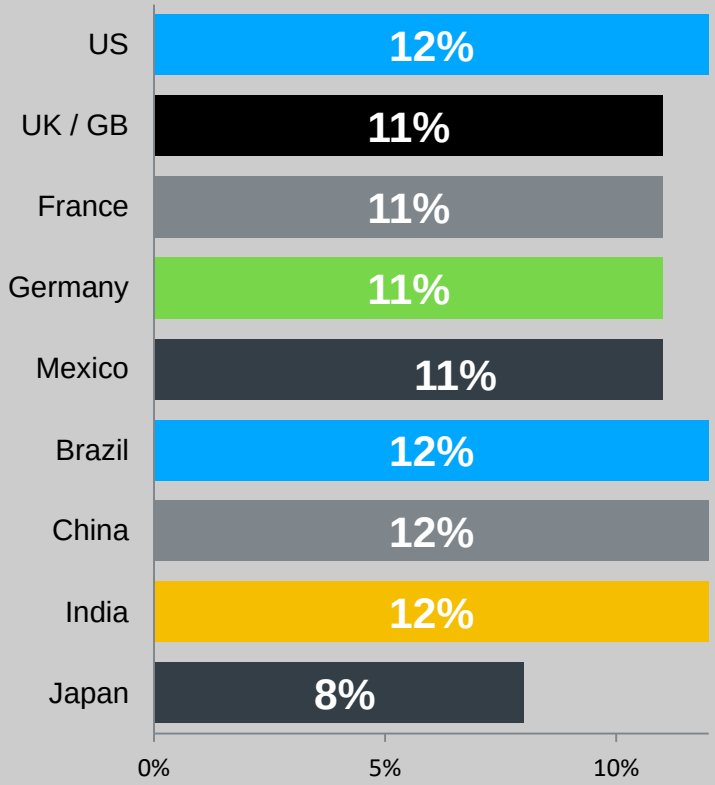


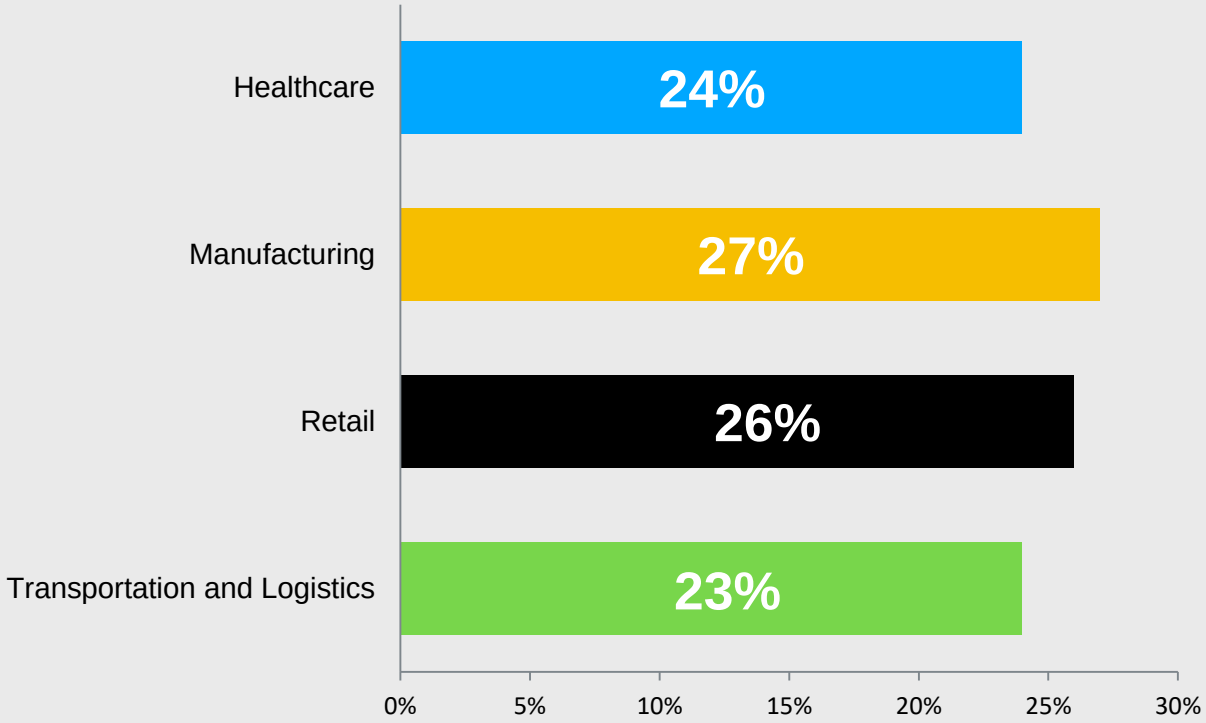
2019



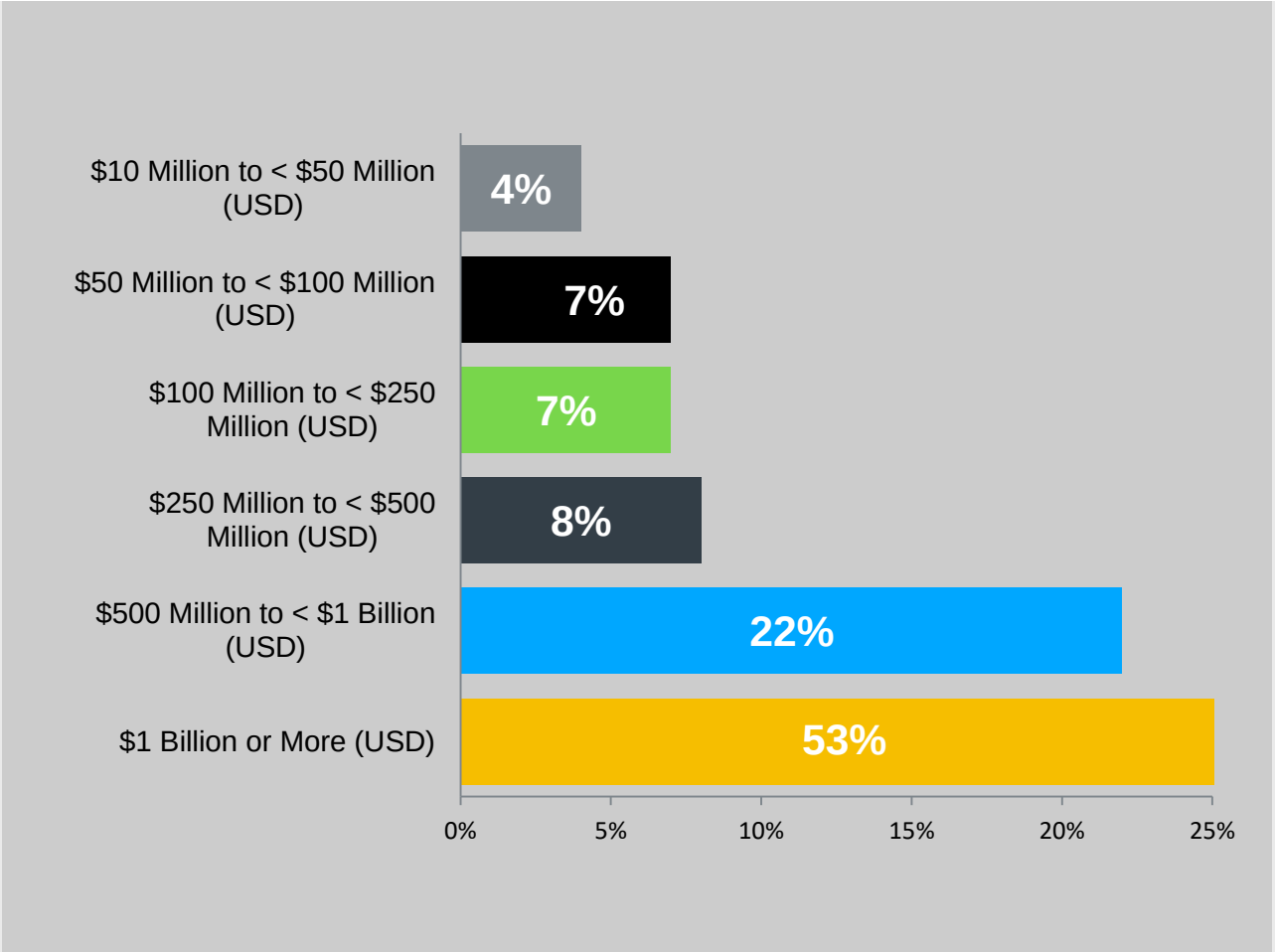
2018

2019 Demographics





Demographics



Thank You

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