



The Intelligent Enterprise Index

November 2018

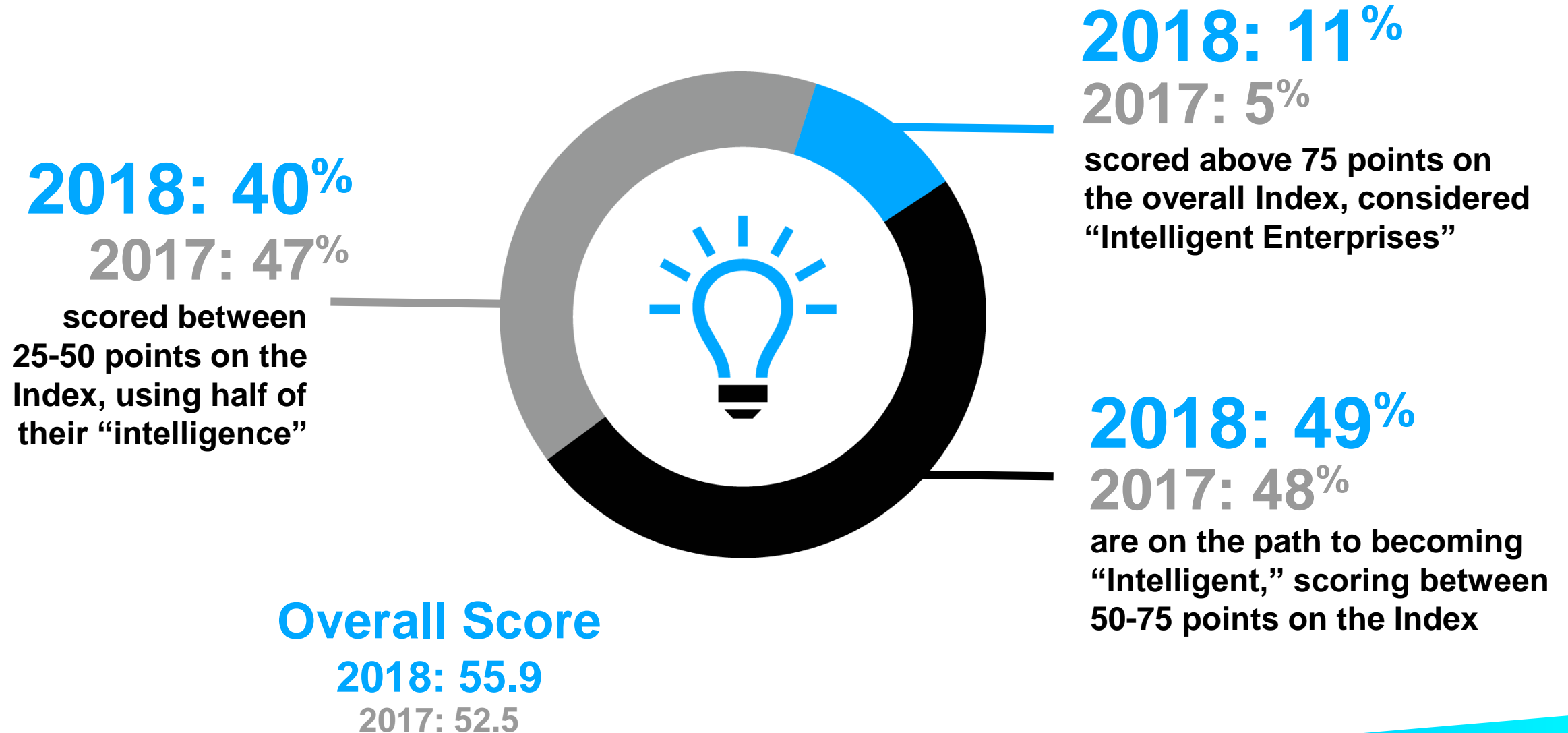
Context

- In September 2016, the Technology and Entrepreneurship Center at Harvard (TECH) hosted the 2016 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. 6 – Sept. 14, 2018 across a wide range of segments, including healthcare, manufacturing, retail and transportation and logistics. In total, 918 IT decision makers from nine countries were interviewed, including the U.S., U.K./Great Britain, France, Germany, Mexico, Brazil, China, India and Japan.

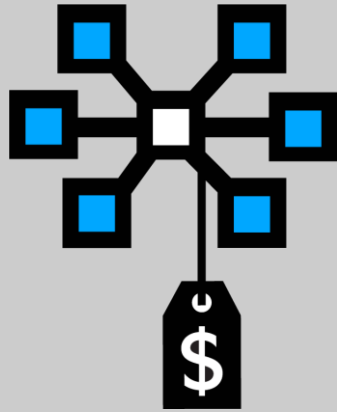
Criteria

	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



IoT Vision



4% Increase in average annual spend on IoT from 2017 to **\$4.6 million**

86% expect that number to increase in the next **1-2 years**

49% expect their IoT investment to increase by **11-20%**



55% have an IoT vision and are currently executing their IoT plans

38% currently have company-wide deployments

30% of remaining companies plan to deploy IoT company-wide in the future

Adoption



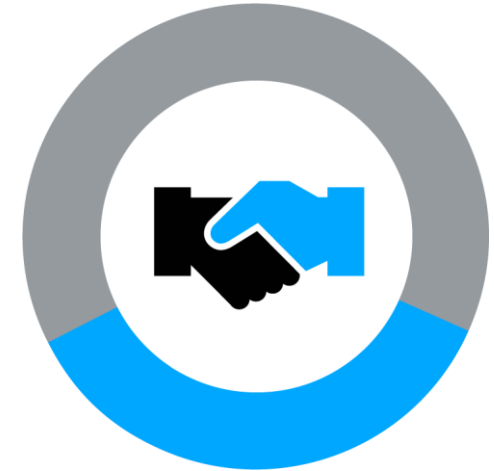
2018: 24%
2017: +50%

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



2018: 20%
2017: 21%

who expect resistance, have a plan to address it

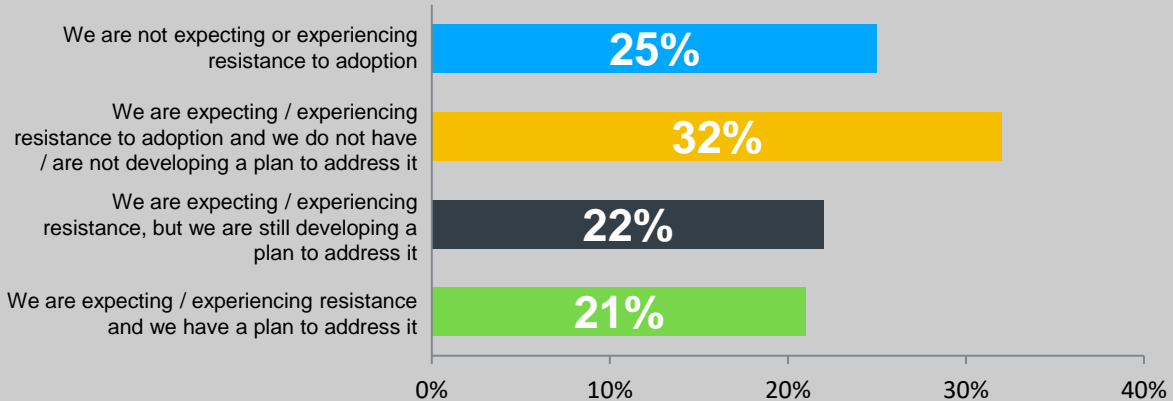


2018: 36%
2017: 25%

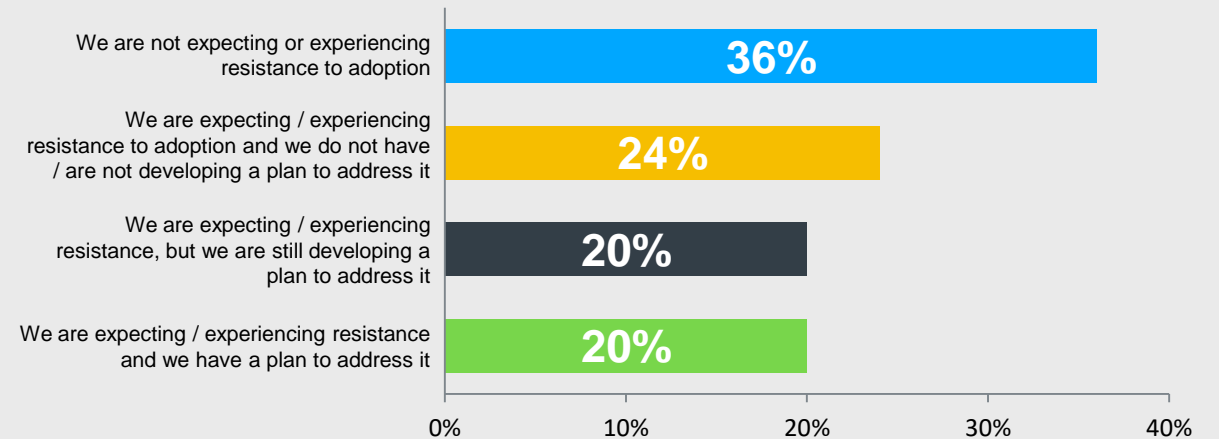
do not expect resistance to their IoT plan

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?

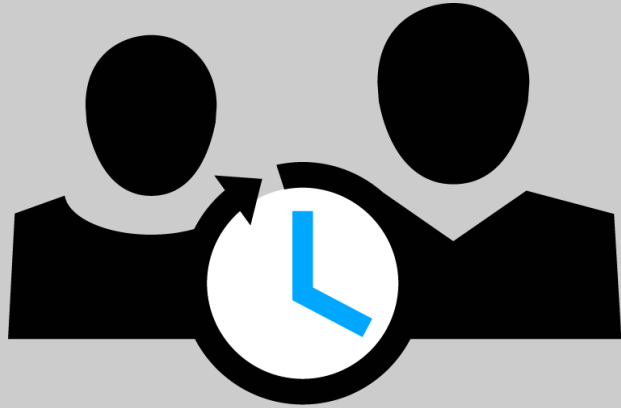


2017



2018

Point-of-Use Application



2018: 82%

2017: 70%

share information from their IoT solutions with employees more than once a day and approximately 2/3 of these share it in real or near-real time

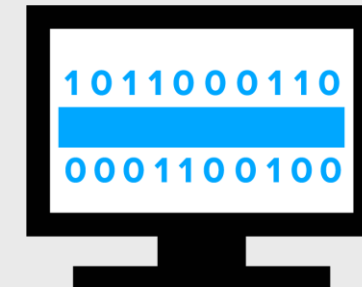
2018: 32% provide actionable information to all employees via:
2017: 32%



Email

2018: 66%

2017: 69%



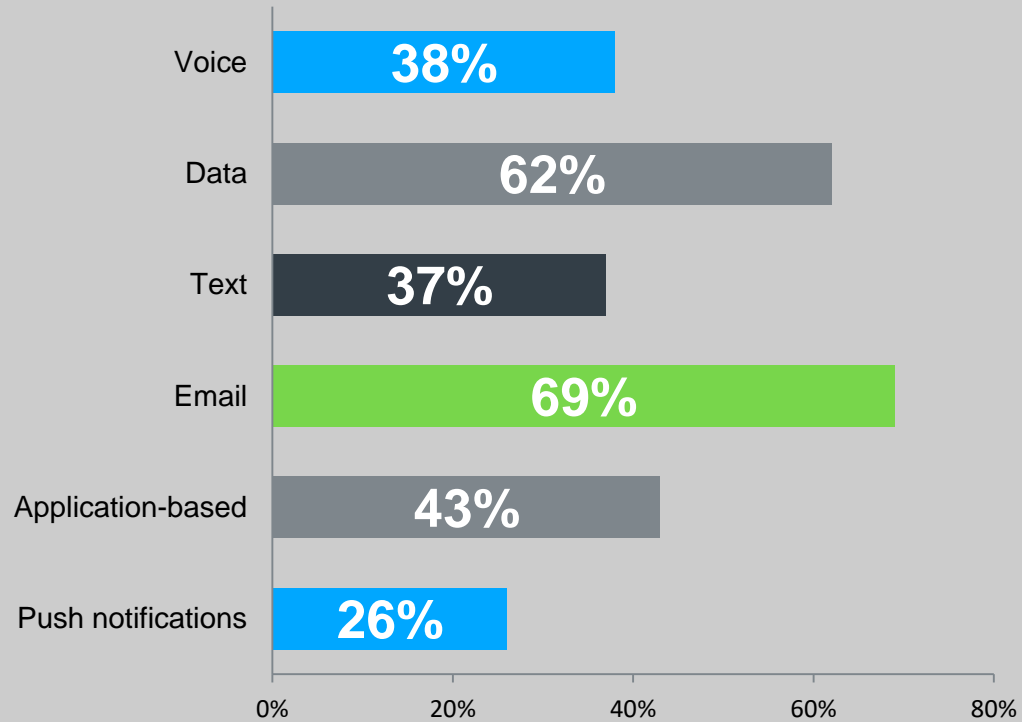
Raw Data

2018: 65%

2017: 62%

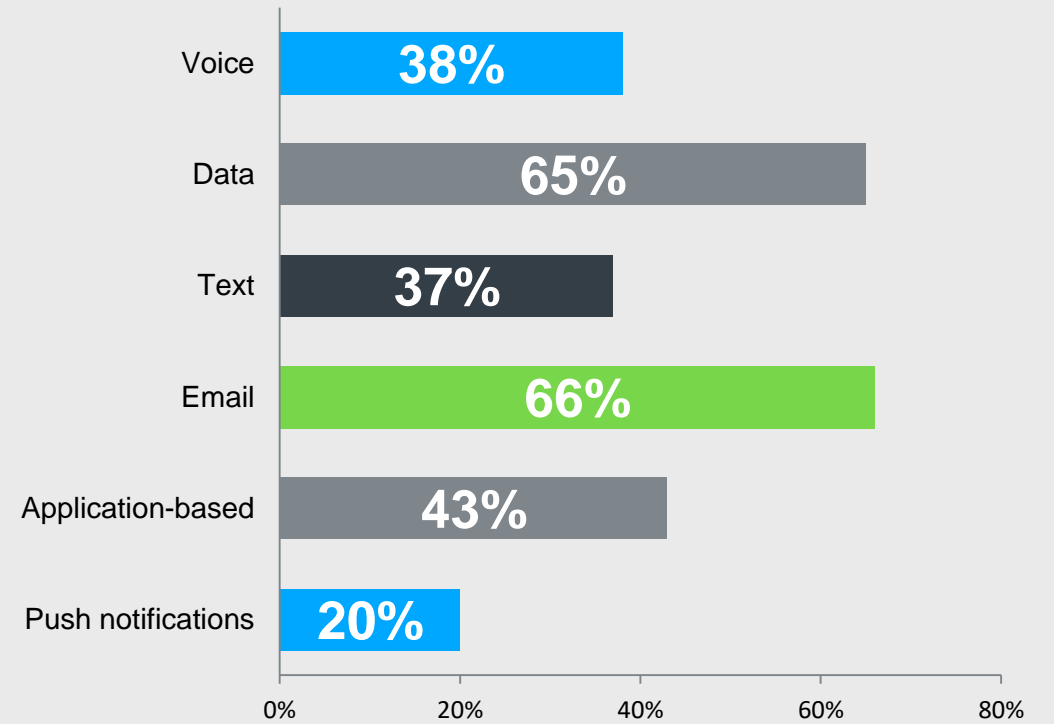
Point-of-Use Application

How are you delivering your IoT information to your employees?



2017

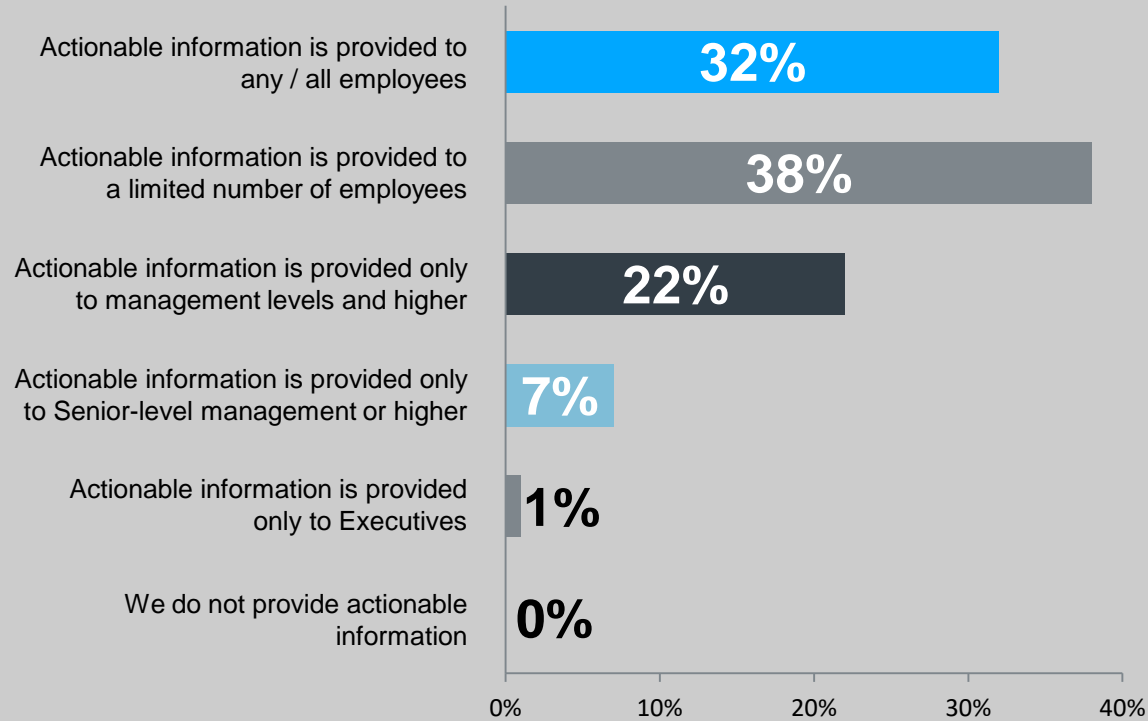
How are you delivering your IoT information to your employees?



2018

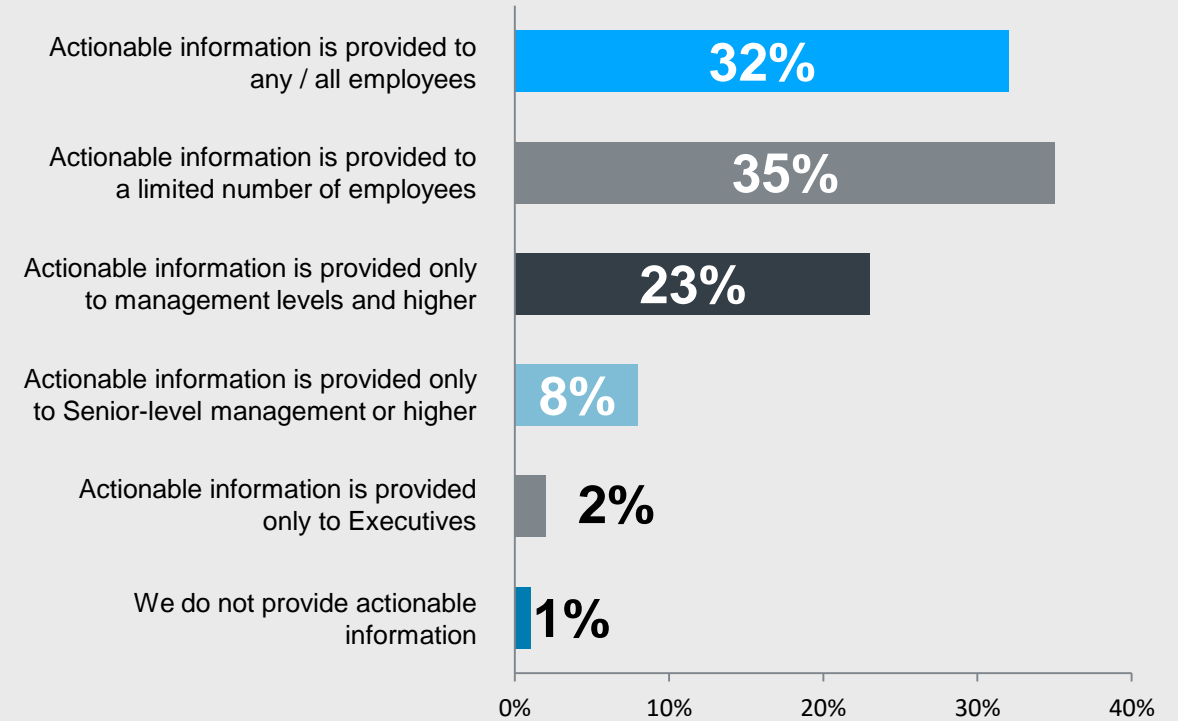
Point-of-Use Application

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



2017

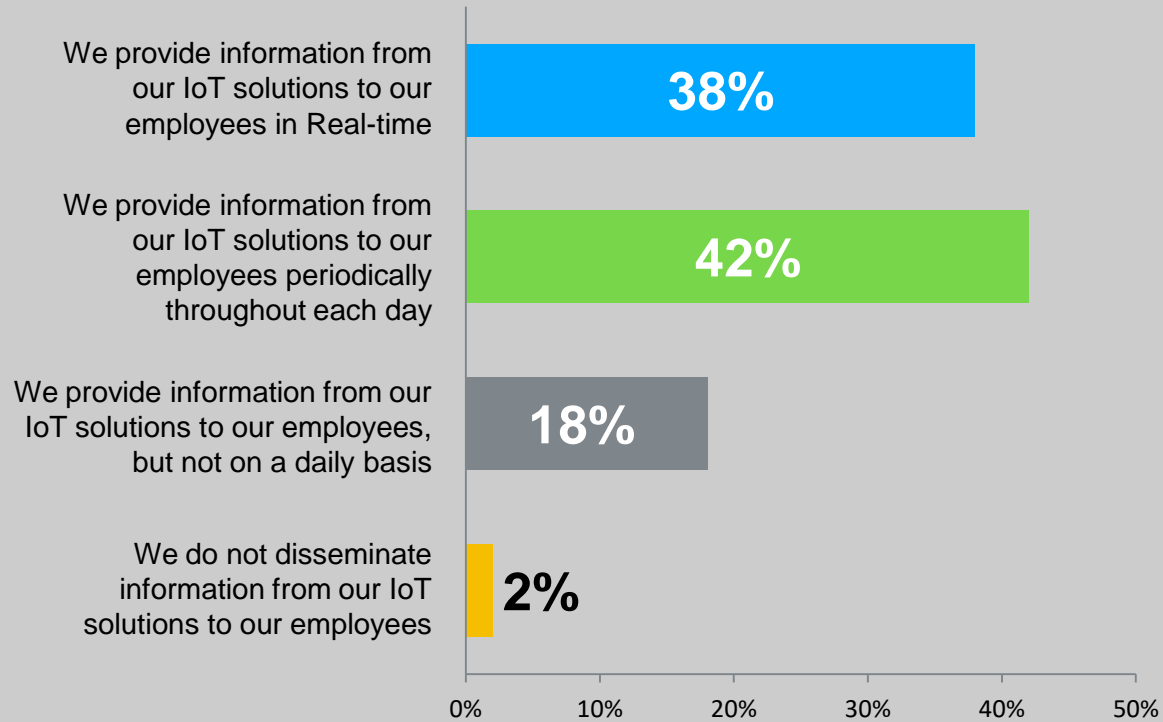
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2018

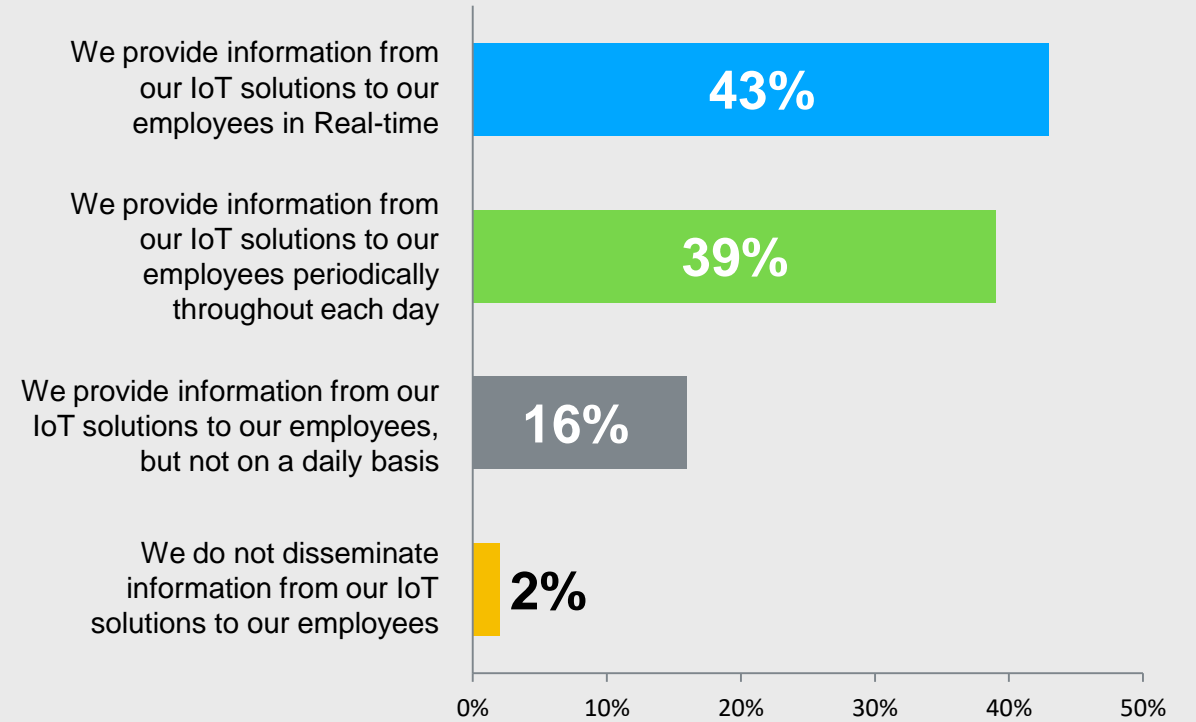
Point-of-Use Application

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



2017

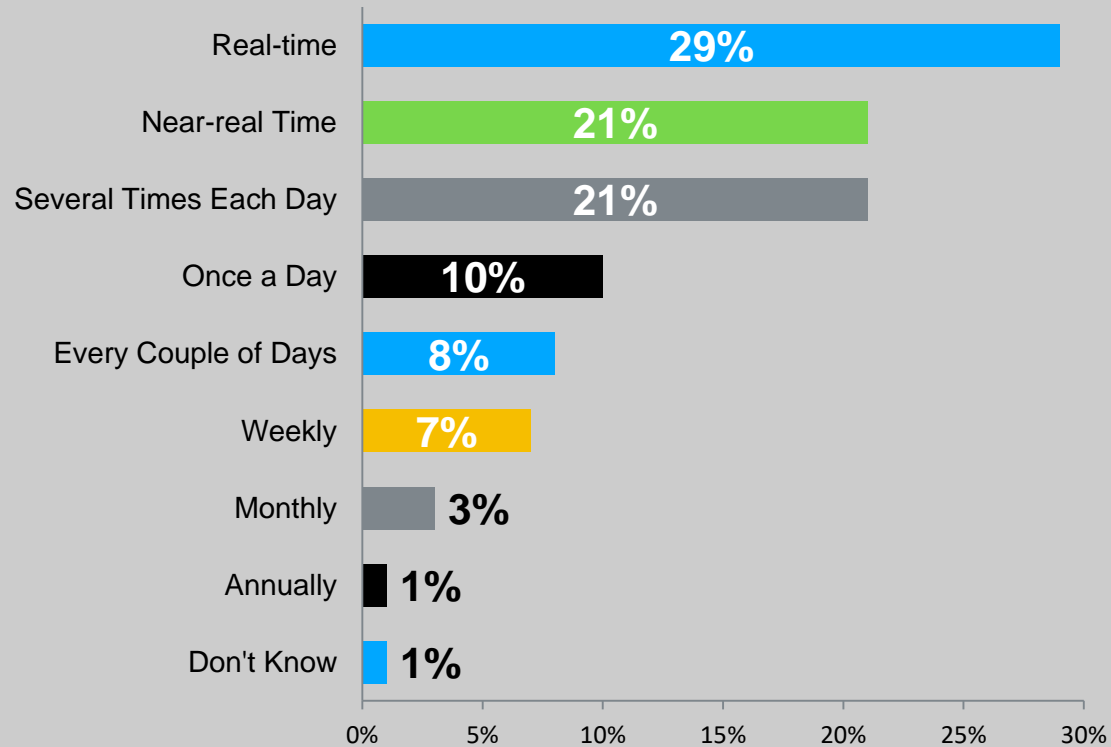
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2018

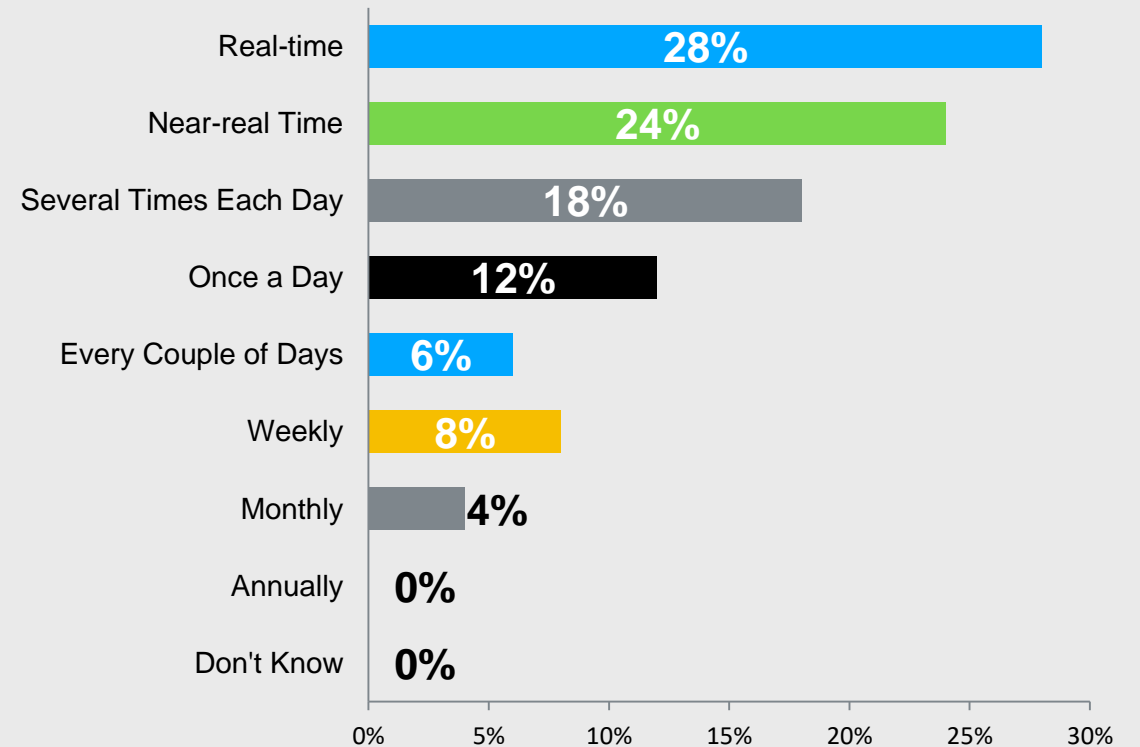
Point-of-Use Application

How often do you share your IoT solution information?



2017

How often do you share your IoT solution information?



2018

Security

2018: 95% monitor their IoT security and employ standards to ensure integrity and privacy
2017: 96%



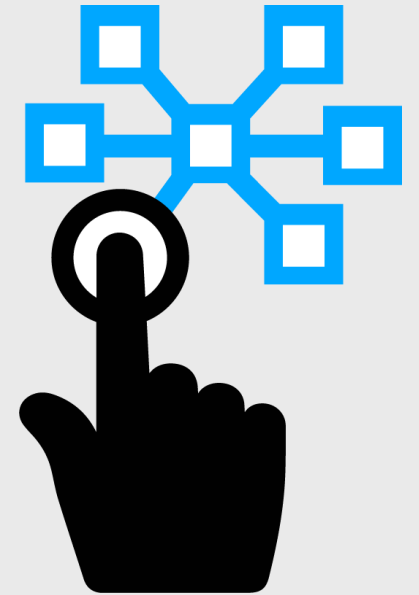
Constantly
2018: 58%
2017: 49%



Routinely
2018: 37%
2017: 47%

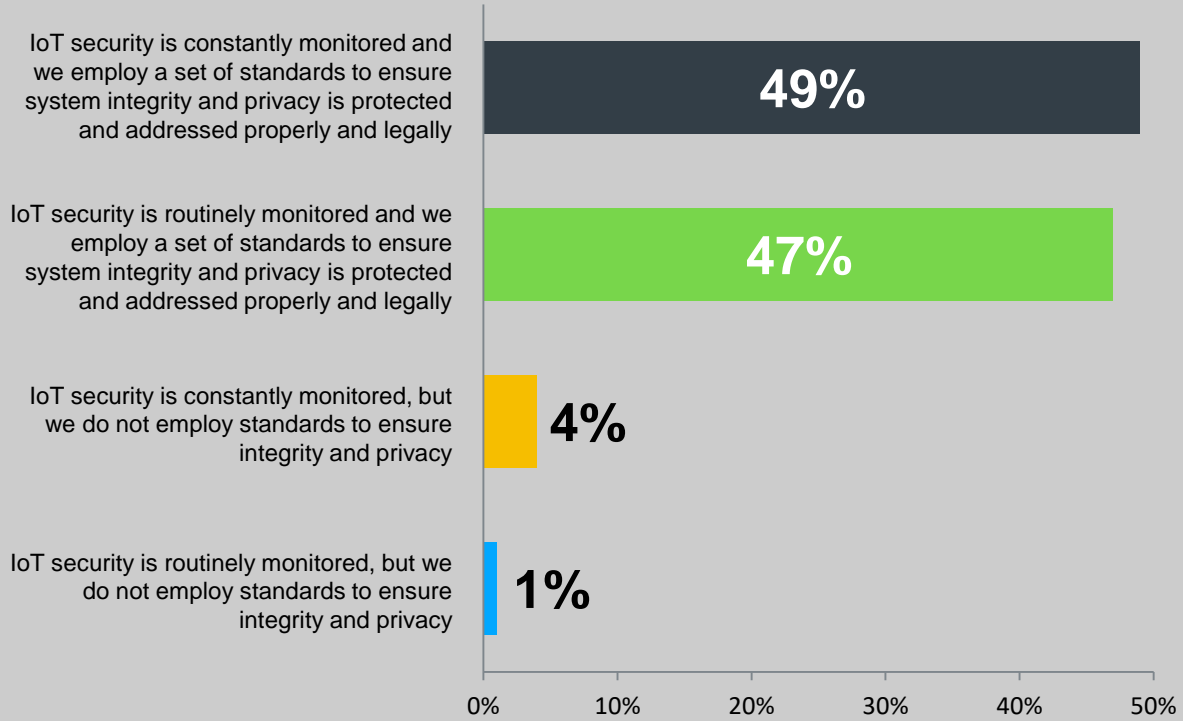
2018: 69%
2017: 63%

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



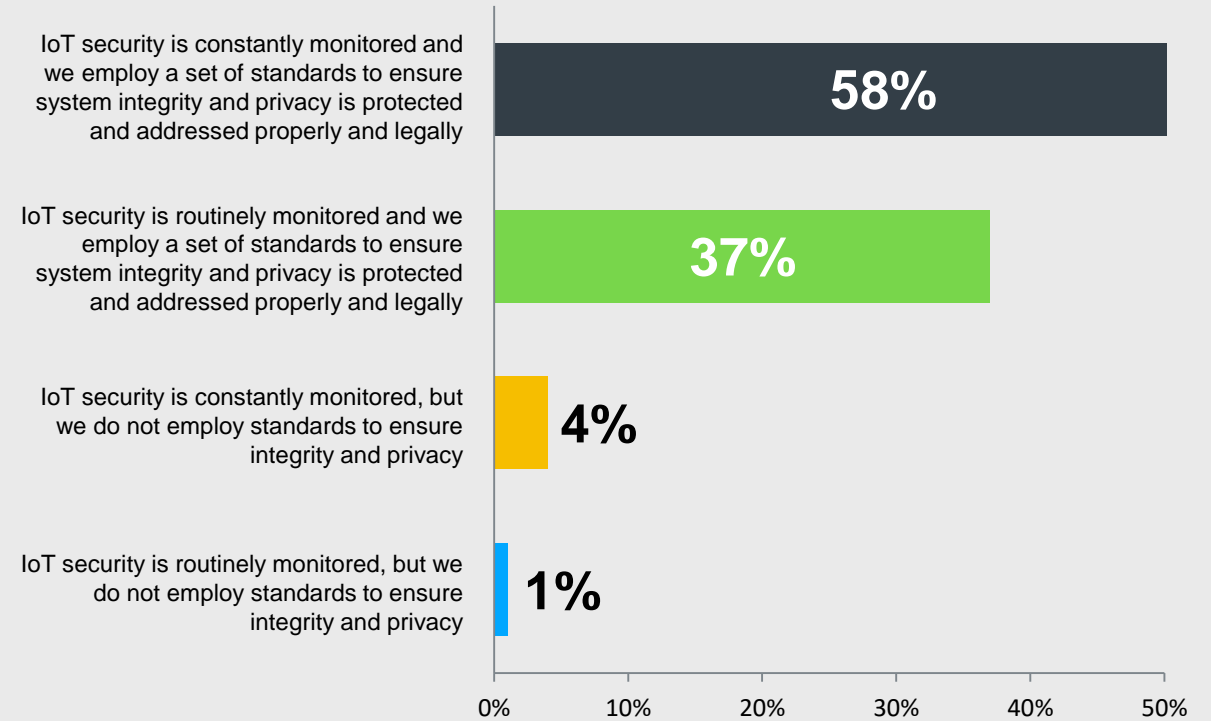
Security

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



2017

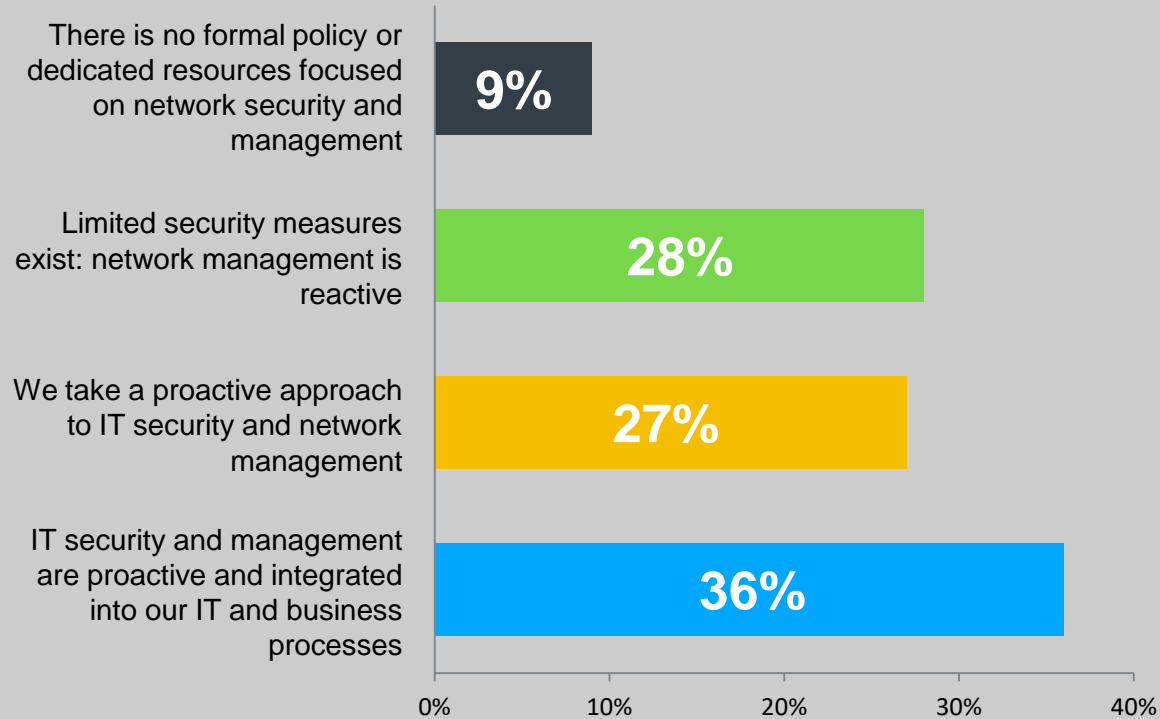
Which of the following best describes your company's IoT security?



2018

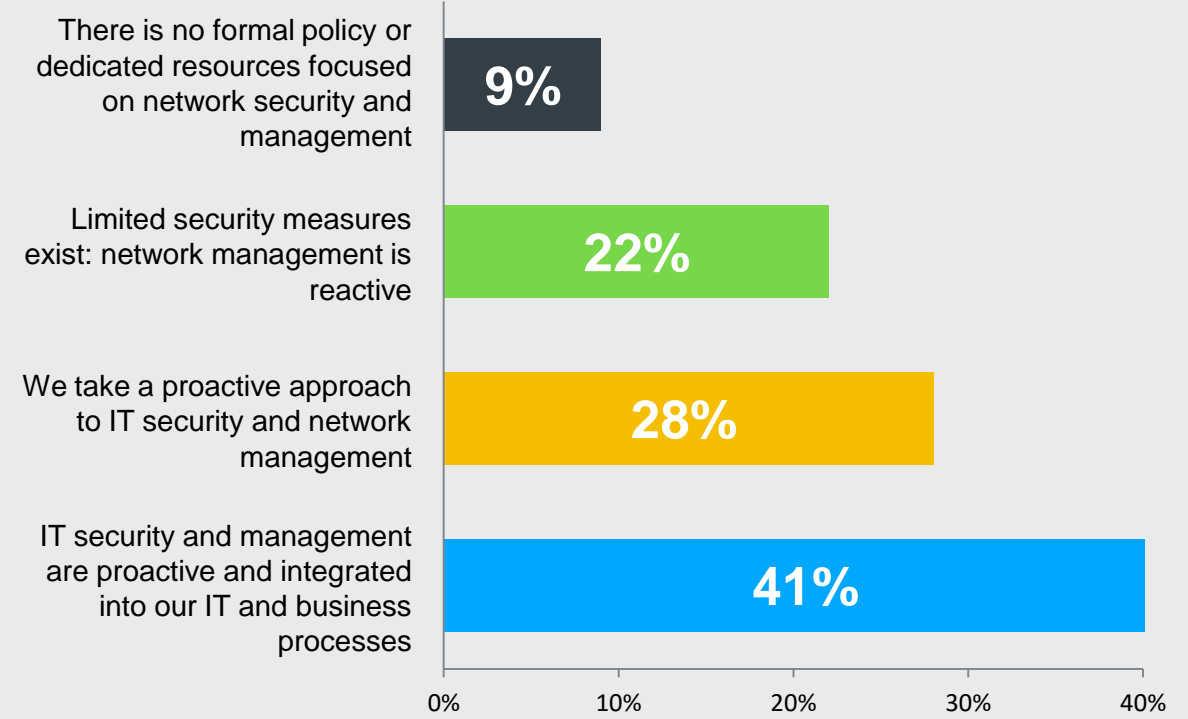
Security

How would you describe your network security and management practices?



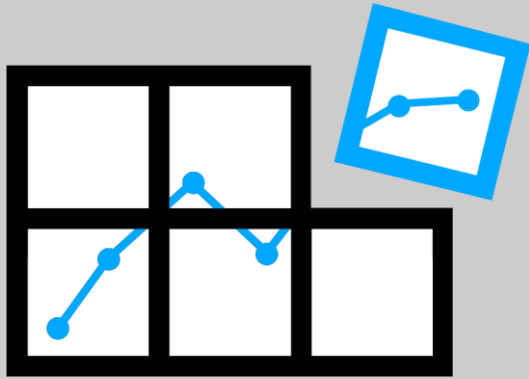
2017

How would you describe your network security and management practices?

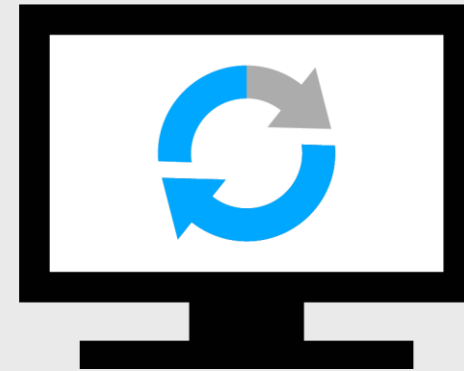


2018

Deployment



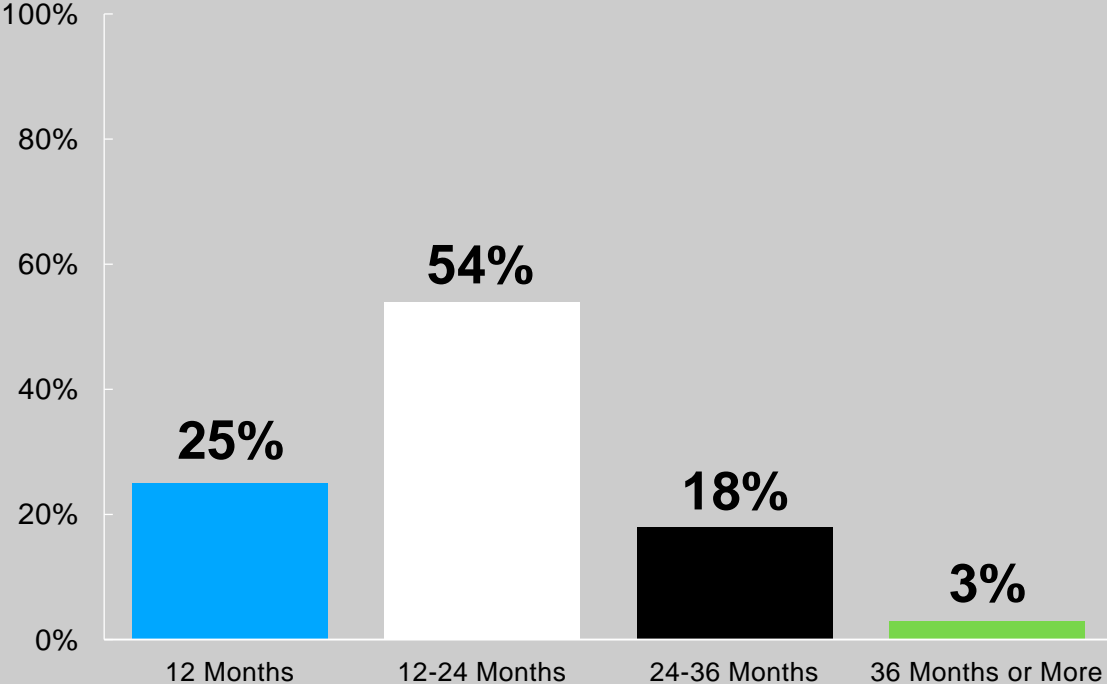
2018: 84% expect to complete their IoT implementations within 2 years
2017: 80%



Most companies are about
2018: 69%
2017: 75%
complete in implementing their current IoT plan

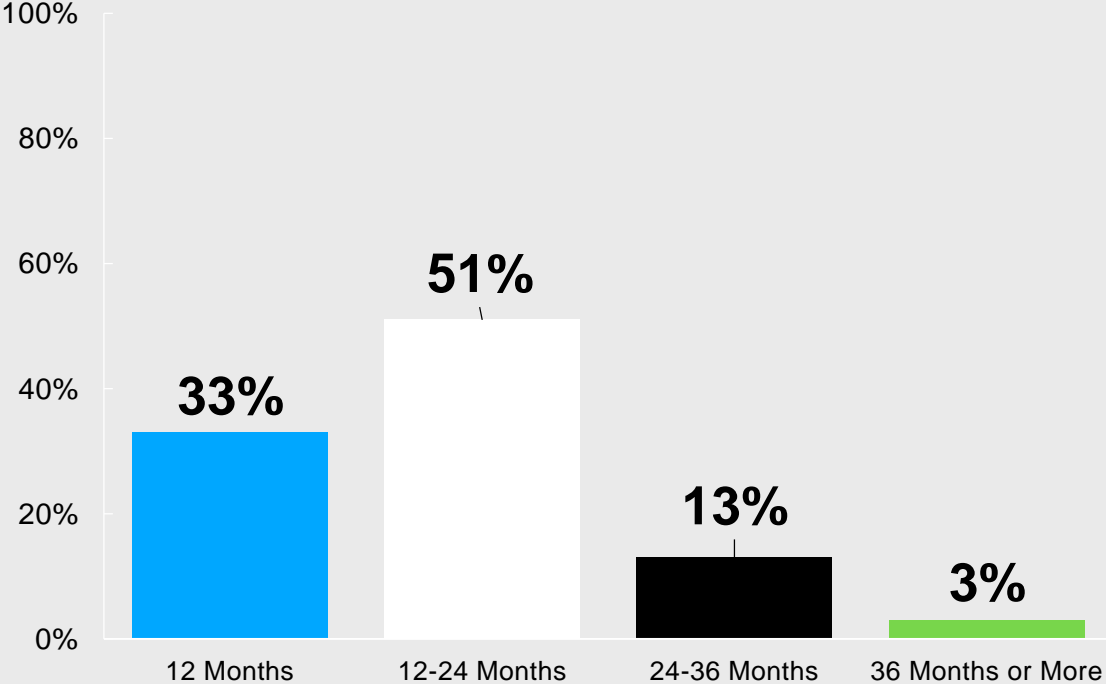
Deployment

What is the anticipated time line to complete your implementation?



2017

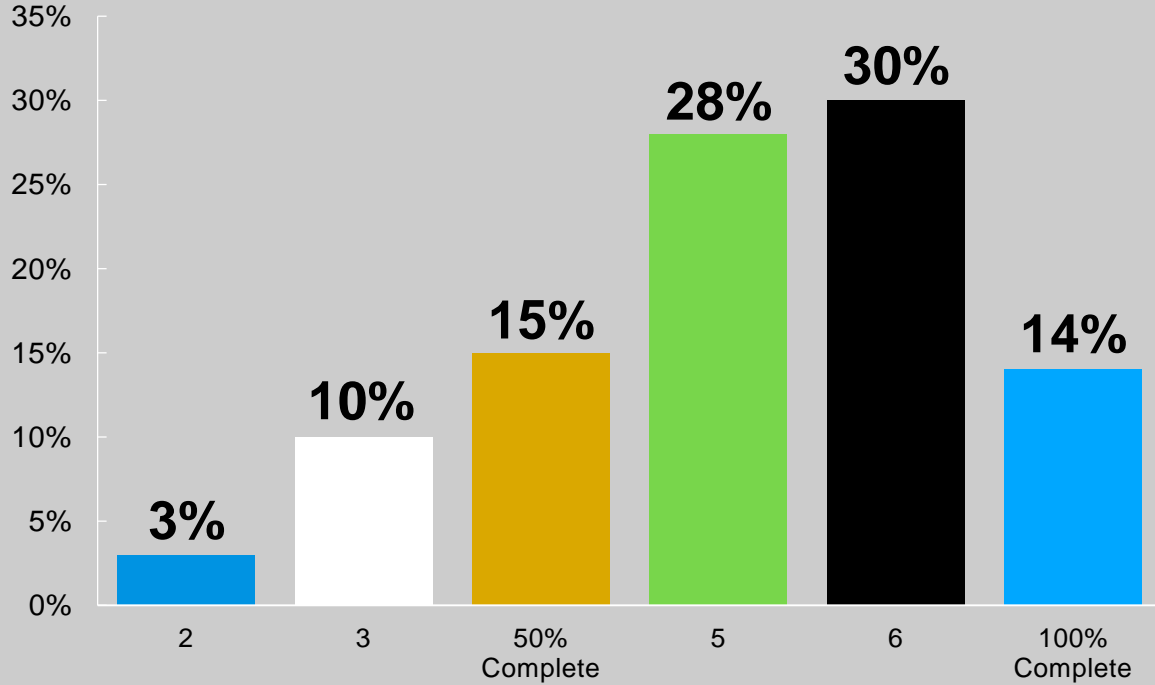
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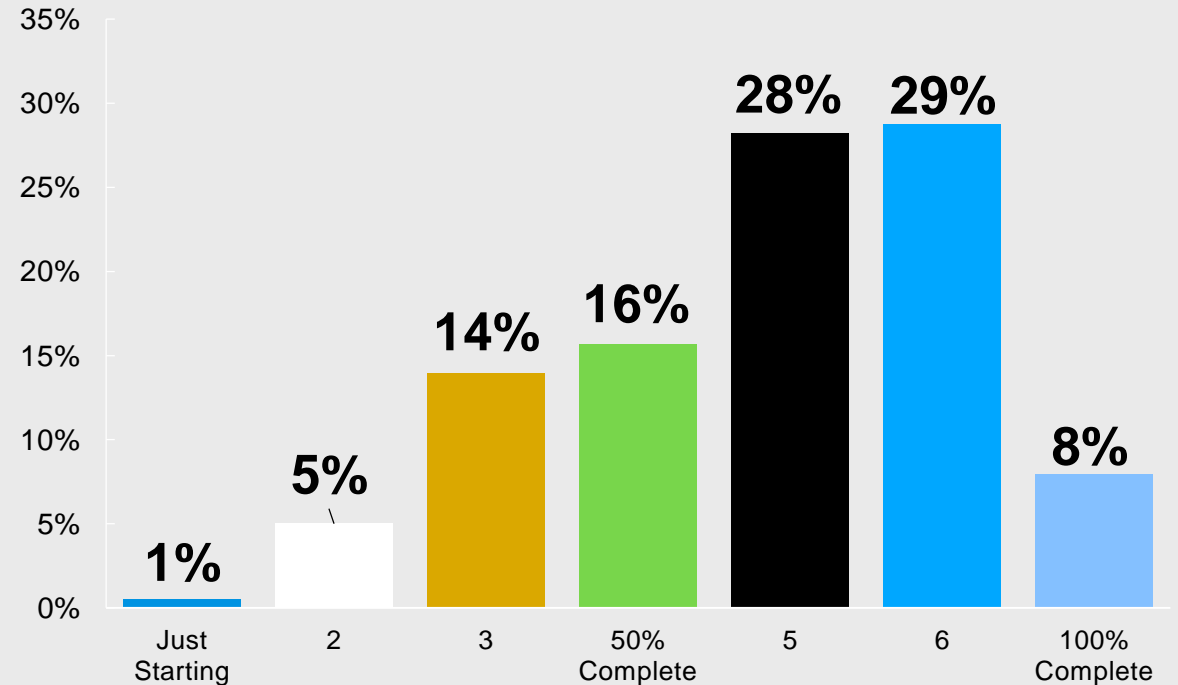
Deployment

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.



2017

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.

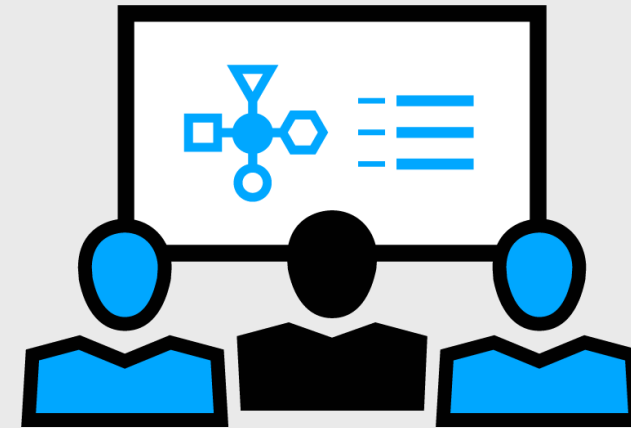


2018

Technology Partner



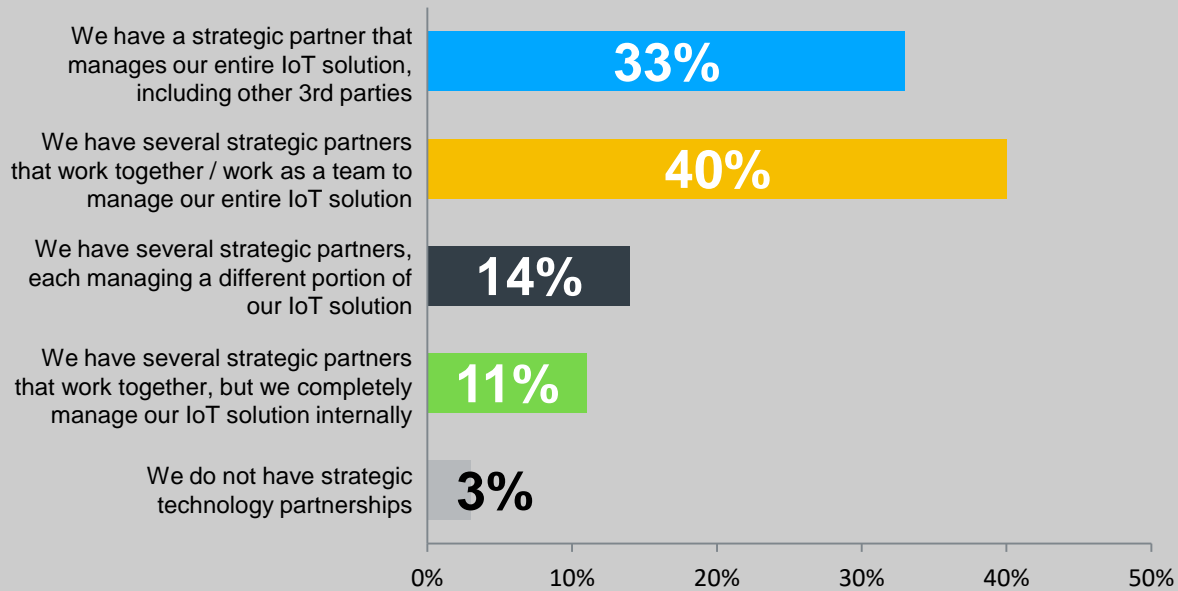
2018: 43% work with strategic partners as a team to implement their IoT plans
2017: 40%



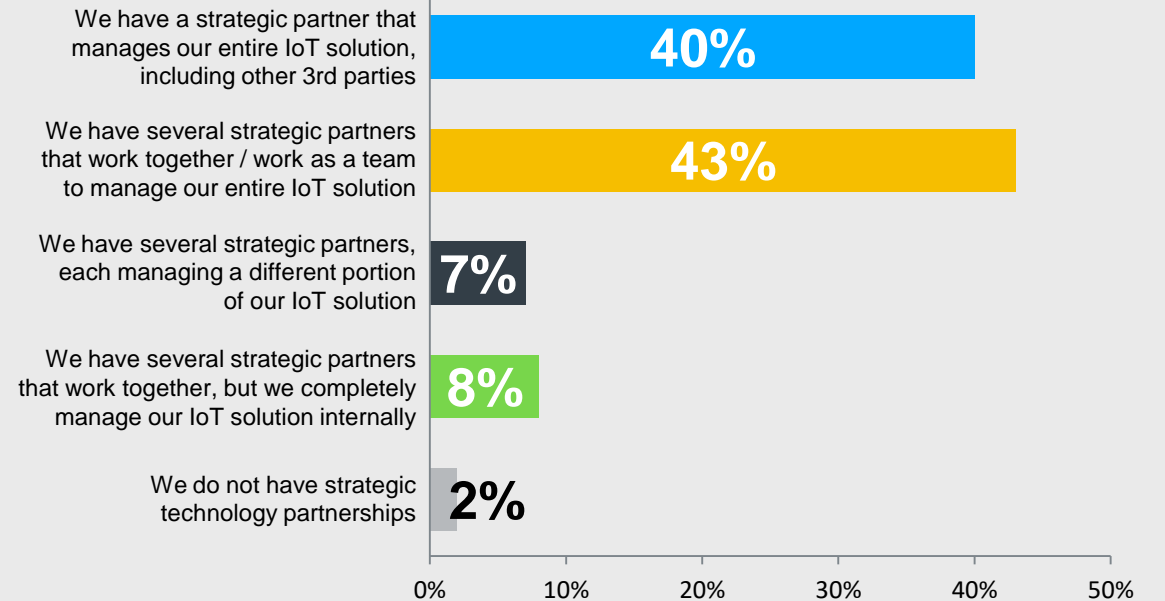
2018: 40% use strategic partners to manage the entire IoT solution
2017: 33%

Technology Partner

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

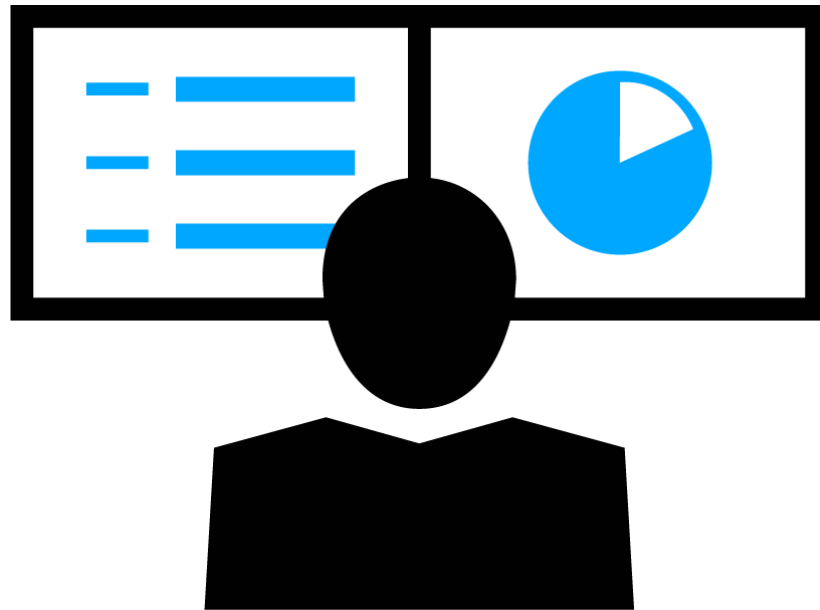


2017



2018

Data Management Plan



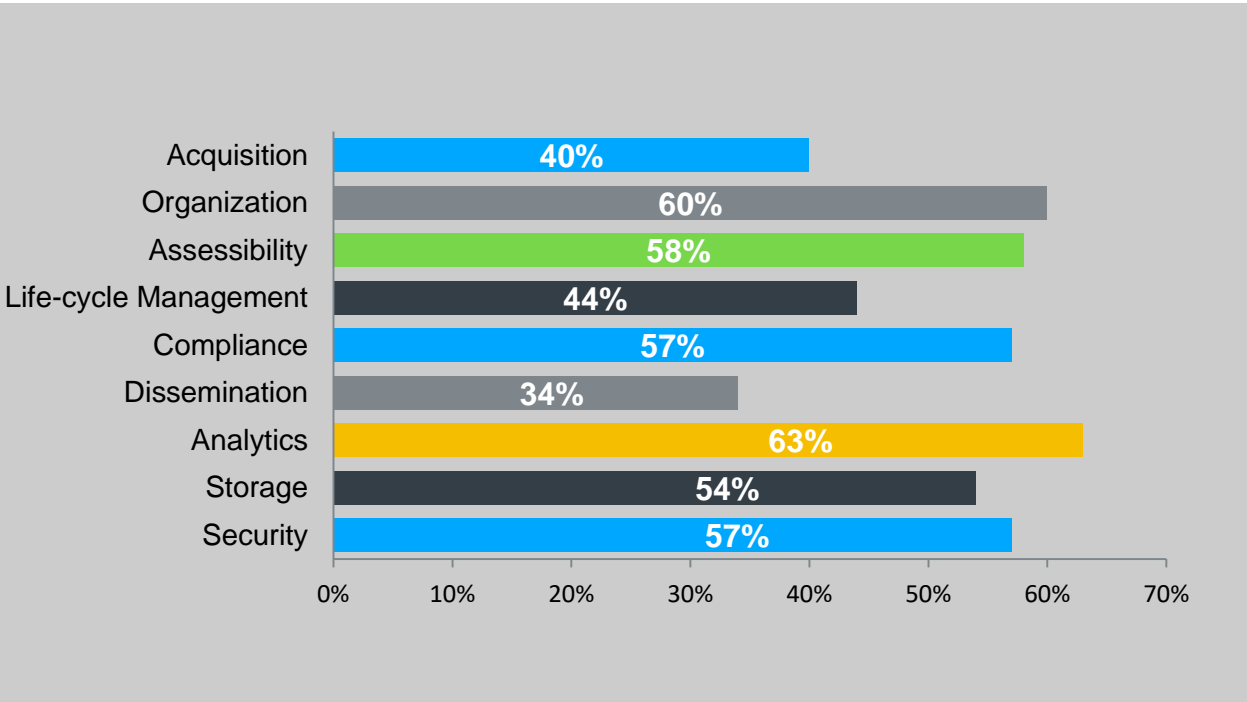
2018: 66%

2017: 60%

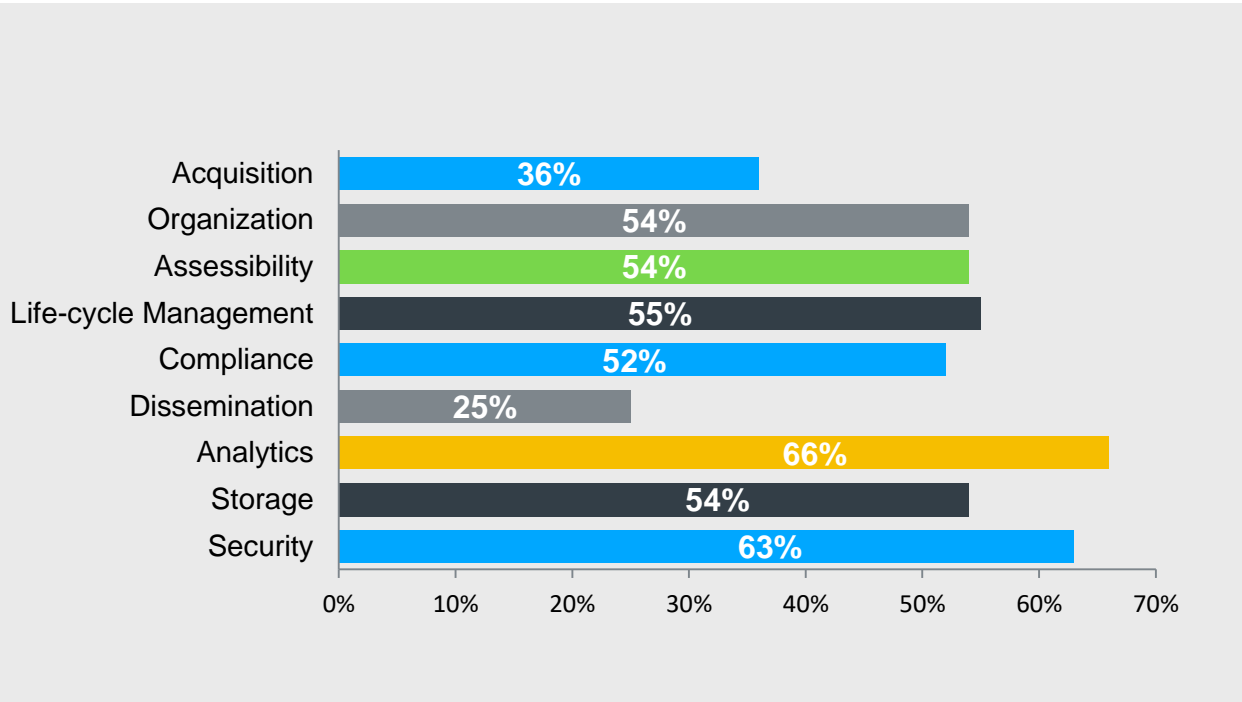
have a plan on how to
organize and analyze data

Data Management Plan

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

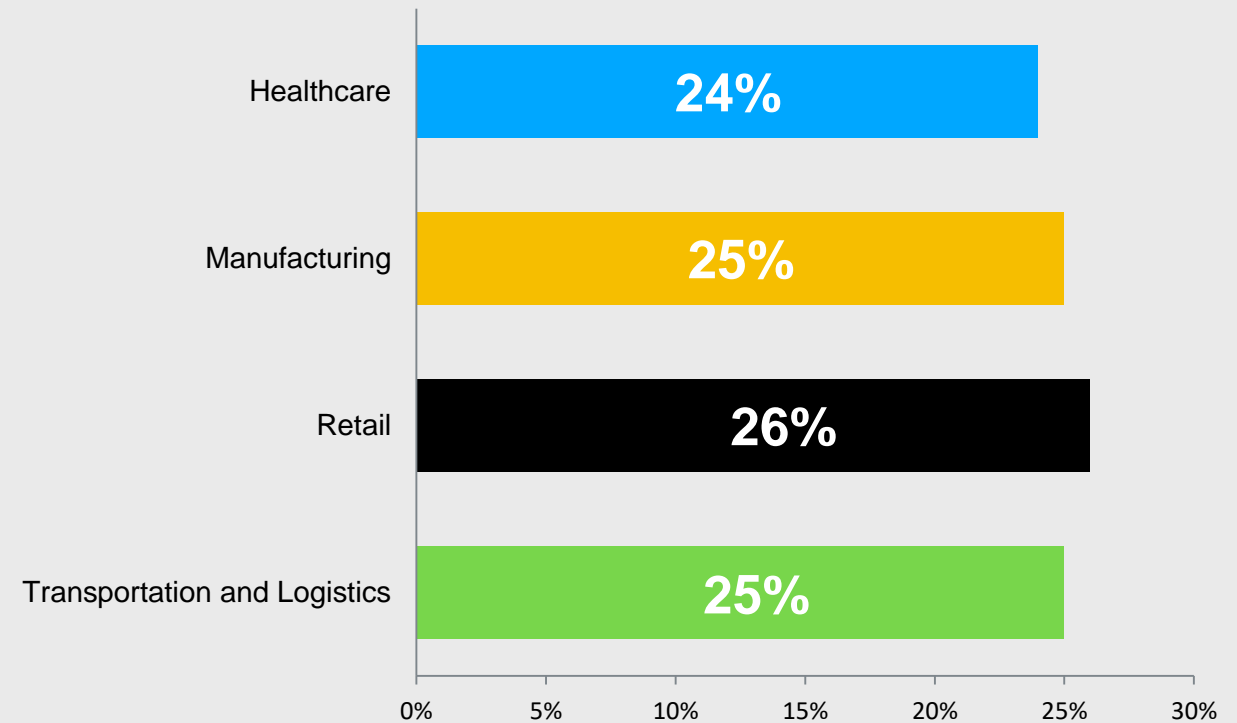
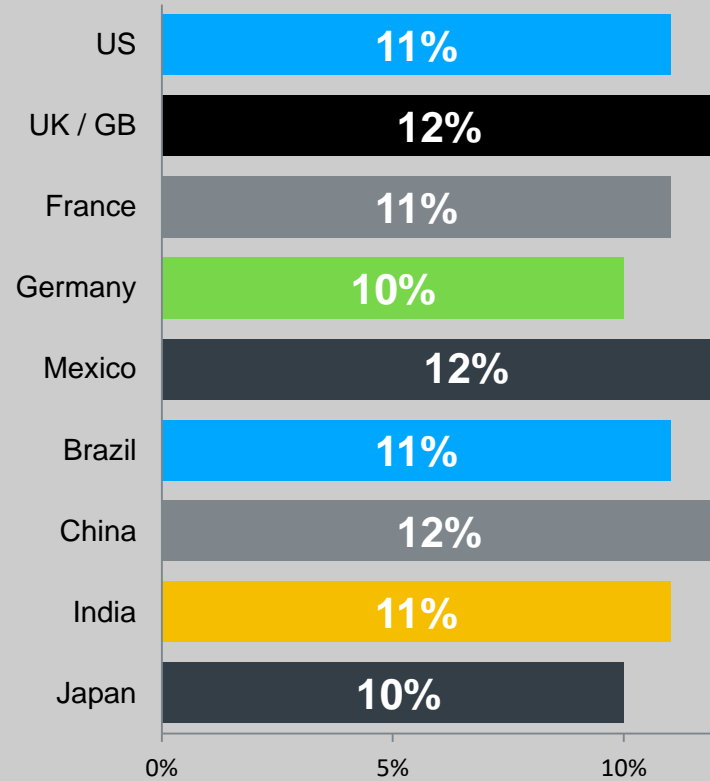


2017

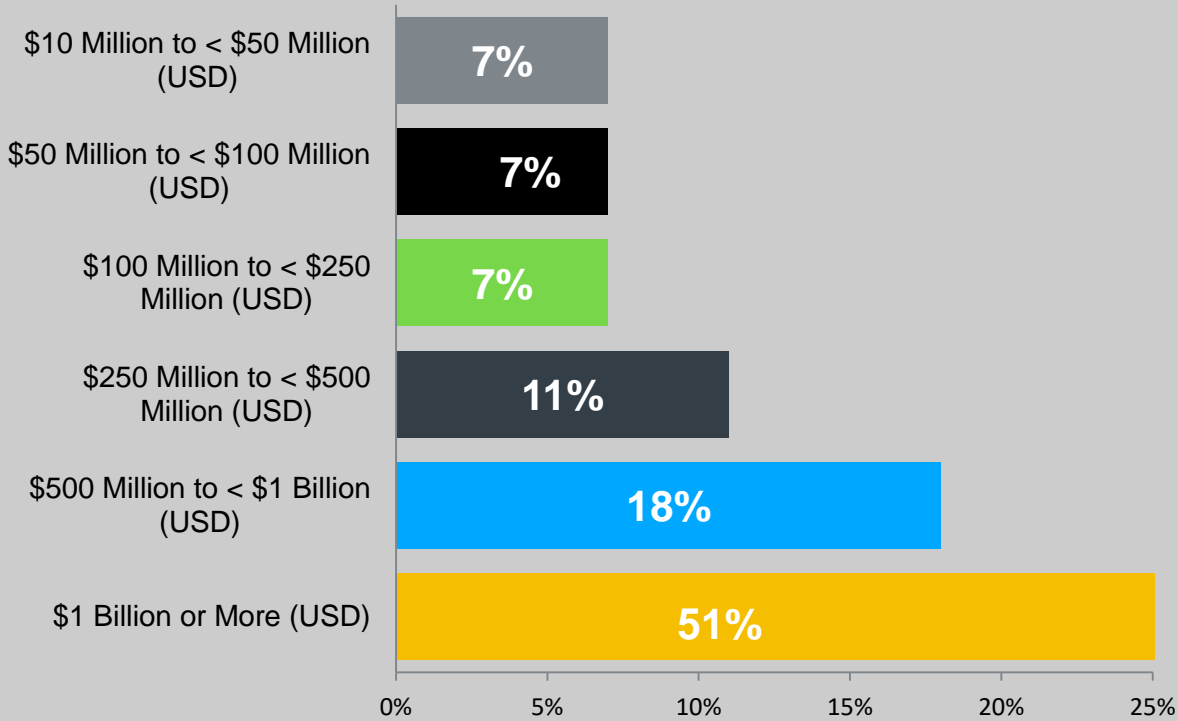


2018

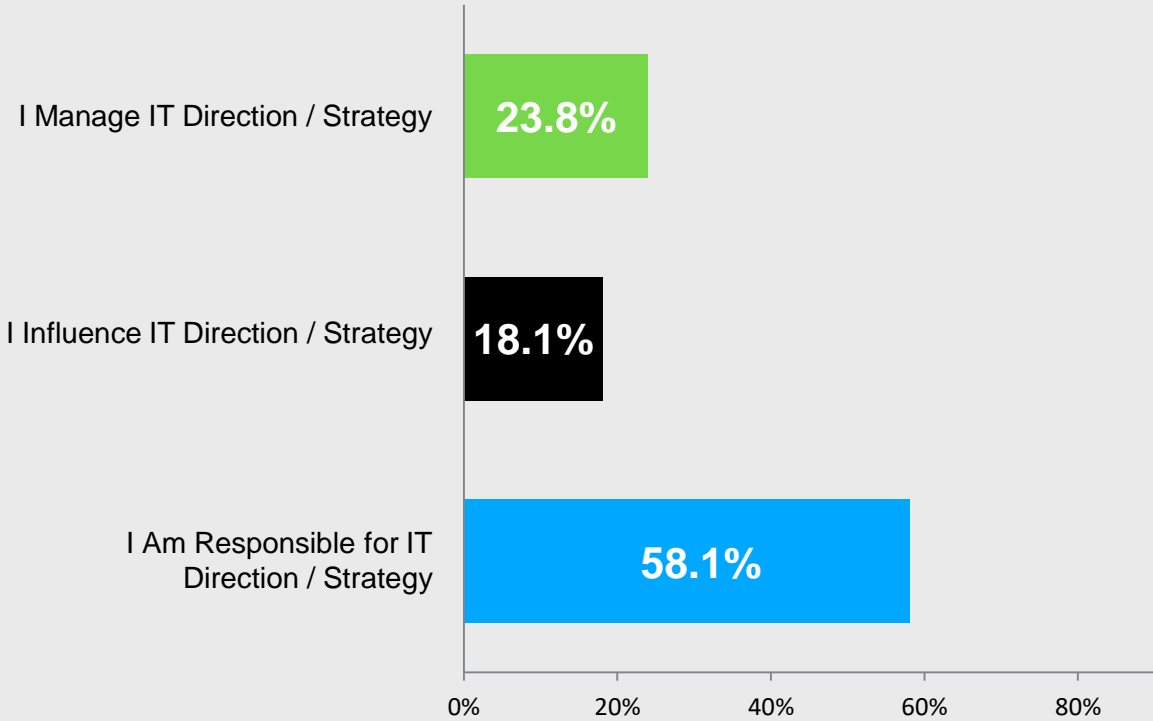
2018 Demographics



Demographics



Role in the Influence of the Information Technology (IT) Direction / Strategy



Thank You



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