⧱ ZEBRA

An unequalled legacy of Android-based innovations.
Look To The Market Leader: Zebra

It's anything but an industry secret: when it comes to Android-based technology, innovations, achievements and advancements, no one can touch Zebra's illustrious history. And not only that, it's a well-known fact that Zebra is continuing to set the pace.

Foresight Is Our Forte

Zebra has always been ahead of the curve: we transitioned to an all-Android portfolio focus long before our competitors. It began nearly 10 years ago with the 2011 launch of the ET1 tablet. And though Windows was the preferred OS at the time, we anticipated the coming shift and began building a hardened Android OS platform. That way, customers could securely migrate to Android and deploy their applications when ready.

But we didn't stop there. In 2015, when Microsoft announced that the legacy-embedded CE and Windows Mobile operating systems would reach end of life in five years, Zebra made a long-term commitment to Android and accelerated our innovation efforts. At the time, over 15 million Zebra rugged handheld mobile computers were in the field — and we knew that customers running these older Windows operating systems would have to rewrite their applications and essentially overhaul their systems.

So, we launched a targeted, global initiative that supported our customers through this OS Migration initiative with Software Application Migration Service strategies. We also acquired ITR Mobility and its mobile platform iFactr in 2015 to expand our mobile app modernization capabilities.

Easy Transitions For Customers

Though Zebra is essentially a technology solutions provider, we pride ourselves on being a trusted partner and advisor, too. So, we make sure our customers have both the technology and long-term support they need to develop, deploy, manage and support their enterprise deployments. And we've been diligent about ensuring that the guidance we provide — and the decisions our customers make — are based on demonstrated results, not educated guesses.

Every design decision for our Android hardware and software solutions has been premised on protecting our customers' infrastructure investments and interests.

Going all-in on our Android development efforts gives customers time to thoroughly assess their options and make the transition. And, the Android solutions we're developing and deploying now are giving them the flexibility and scalability to expand and adapt workflows as needed over time.

While others led their customers to a dead-end operating system and have been trying to play catch-up ever since with a smaller, less mature and lagging portfolio, our customers are ahead of the technology adoption curve.

A Leader With A Commanding Lead

This is fact: Zebra has a majority of the total global market share for enterprise mobile computers — and that number is steadily growing. How far behind are our competitors? Here's another fact: the next closest has only a 12% market share. And VDC Research reports that more than 58% of new Android mobile devices sold in the enterprise space right now are Zebra devices.

Our customers need purpose-driven devices, in different form factors, for different workflows, with varying price points. So, today, we offer over 43 products (more than 2.5x our nearest competitor and with more to come). It helps that we offer these products at varying levels of price, functionality and longevity to meet our customers' needs. Zebra's strategy allows a Right Size, Right Budget offering that provides more choice to better serve a customer's mobile computer requirements.

Another key to our success is differentiating our platform. Even though most rugged enterprise providers are on the same SD660 platform, Zebra has always provided a differentiated platform. Always.

™- Android is a trademark of Google LLC.

Mobility DNA = Successful Migration

Zebra's Mobility DNA was the first Android OS enterprise software suite to provide comprehensive development, management, security and workflow solutions. Our investments in Mobility DNA enabled the Android operating system to be broadly adopted in the enterprise, and several of our innovations were ultimately adopted as core features within Android to help grow the overall ecosystem for all enterprise Android customers.

Most enterprise device solution providers today have developed some version of their own Android software tools. But Zebra was the first. These ecosystems take time to build out — not just in slideware, but in actually making the features available in the market. Zebra has maintained an edge over competitors for some time in terms of both time-to-market and overall breadth of the suite. In fact, many competitors have since modeled their efforts to enrich Android after Mobility DNA.

Of course, our market leadership stems from the vision we have for bringing next-gen technologies — both hardware and software — to our customers sooner. Because nowadays, every hardware purchase is a software decision in disguise.

EXTENDING THE LIFE OF MOBILE COMPUTING HARDWARE

Many customers prefer not to update devices to the newest Android dessert update upon availability. Why? Significant costs. Timely integration testing efforts. And the need to balance these with the set of features and functionality that the upgrade may or may not bring them.

At Zebra, we get it. A crucial part of our lifecycle strategy is allowing customers to stay on their established proven platforms while getting the frequent software updates to keep their deployments operational and secure. And a basic tenet of our solution offering focuses on the extended lifecycle of our devices across both hardware and software.

That's why, in 2017, we developed LifeGuard: the first rugged device lifecycle extension model to provide comprehensive enterprise lifecycle support. Our monthly and quarterly security and support updates keep our customer platforms secure and up to date. And that update cadence is more frequent than most OEMs offer, helping deter things like the security threat vulnerabilities recently identified in the broader market.

Zebra is 1st:

- To introduce an Android device designed specifically for front-line workers **(2011/ET1)**
- To offer a comprehensive software suite to make Android ready for the Enterprise – with Mobility DNA **(2012)**
- To introduce an Android-based wearable mobile computer **(2016/WT6000)**
- To have an extended security solution providing 10-years of support for Android mobile devices - with Lifeguard **(2017)**
- To introduce Android 10 on rugged mobile handheld computers **(2020)**

Zebra is #1:

- In rugged mobile computing
- In purpose-built mobile computers running Android
- Portfolio of Android Enterprise-Recommended (AER) certified devices for front-line workers.
- Zebra is the only company named a Leader in the IDC MarketScape: Worldwide Rugged Mobile Devices 2020 Vendor Assessment.*
- In Android rugged/durable tablet form factors

BREADTH OF ANDROID BASED PORTFOLIO: **43**

COMMITMENT TO R&D: **For '20, Zebra is expected to invest 5x more in R&D than Honeywell**

For unrivaled Android-based solutions, go with the true leader and visit www.zebra.com/android-leadership

*IDC MarketScape: Worldwide Rugged Mobile Devices 2020 Vendor Assessment (doc #US46826320, September 2020)