

# Field Mobility

## Considerations in choosing handheld devices for mobile field workers

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Survey conducted by IDG Connect



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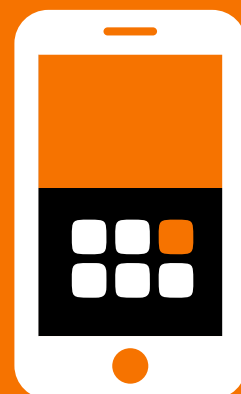
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## Application Use is Growing



Today enterprises use on average over **5 applications** for field staff



Over the next 24 months, this number is expected to increase to **over 8**

## Costs



**59%**

Today enterprises focus mostly on annual operating cost **(59%)**

**5 years**



But they also believe TCO should really be considered over 5 years **(39%)**



With a further **20%** saying that it is not currently a consideration but that it should be

## Enterprise Capabilities



Data security is the biggest challenge **(60%)**



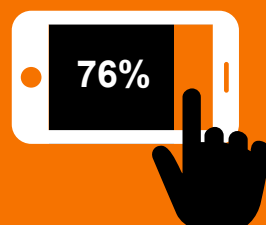
And it's the most worrying aspect of buying off-the-shelf smartphones **(61%)**



followed by battery life **(49%)** and physical robustness **(42%)**

## Device Requirements

Users want smartphone screen familiarity **(76%)**



But they also want usability in bright sunshine **(79%)** with workgloves **(68%)** and in the rain **(65%)**

# Who did we ask?

Field Mobility



Increasing numbers of enterprises are enabling their field workers to operate more efficiently by providing them with mobile devices that will let them get to customers faster, carry out tasks more effectively and report back more quickly. The aim is to reduce costs and raise satisfaction levels of increasingly demanding customers.

As this strategy becomes more widespread we wanted to find out how enterprises are rating its success. Specifically we wanted to know which key features of mobile devices give the best return on investment and what concerns enterprises have around their use.

We talked to 100 businesses across the UK, Germany, Italy, France and Spain with 250+ employees. 40% of those companies had more than 5000 employees. The companies were all focused primarily on service, sales, delivery or inspection in the field.

The organisations taking part in the survey came from a wide range of industries, including field service, facilities management, heating/plumbing/air conditioning, utilities/energy, local government, social housing, professional services, field sales/merchandisers, field delivery, courier/logistics, direct store delivery and postal services.

Our respondents were senior IT management and managers with responsibilities within field operations.

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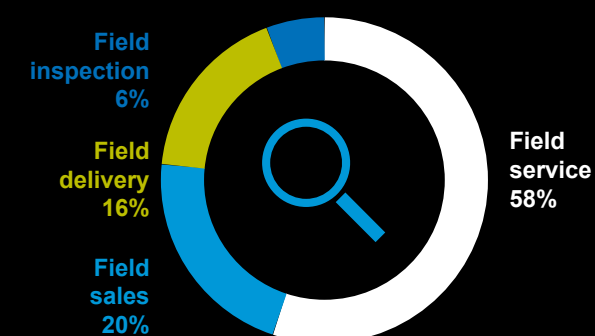
## Business size



## Geography



## Primary Business Focus

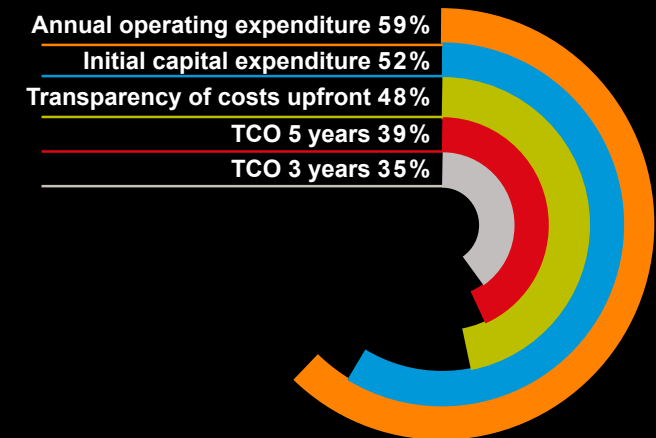


# How should enterprises view the cost of field mobility?

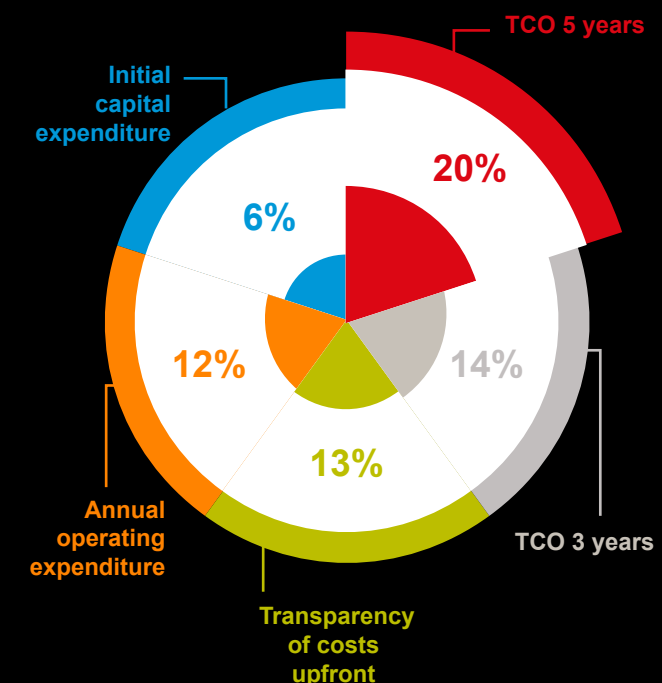
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## Major cost focus today



## What is not a consideration but should be?



We wanted to understand how enterprises make their purchasing decisions when it comes to mobile devices for the field.

Cost is clearly going to be a major factor so our initial questions were geared to finding out how businesses evaluate the cost of handheld devices. Digging deeper, we also wanted to know if they believed they have the right approach to cost evaluation.

### HOW ENTERPRISES ARE VIEWING COSTS TODAY

Respondents told us that right now they are focusing first of all on annual operating expenditure (59%) and up-front capital expenditure (52%), with transparency of support costs not far behind (48%).

More “minor” cost considerations are the longer term total cost of ownership (TCO), with 3-year views being cited by 50% and 5-year views by 40%.

The picture isn’t the same across the board. Smaller companies (fewer than 5000 employees) and those operating in field service and inspection showed the greatest sensitivity to cost. We can see the effects of the global recession in the answers too, with countries in Southern Europe showing greater cost-sensitivity than those in Northern Europe.

### HOW ENTERPRISES BELIEVE THEY SHOULD BE VIEWING COSTS

While it’s clear that TCO is currently a secondary consideration, when we also asked respondents how they thought they “should” be viewing costs, the top answer was “over a five-year period”. The

responses suggest there is a gap between how organisations are looking at costs now and what they believe they should be doing.

If businesses are concerned about costs, and the responses show that cost transparency is important to many, then the longer-term view has to be important. It’s only by looking beyond the cost of acquisition that the “hidden” costs such as break/fix support and management over time can be calculated.

To understand the real cost of field devices it’s worth looking at what should be included in TCO. According to research consultants VDC\*, it comprises the hard costs of deployment (hardware, accessories, software, implementation and training) and the softer operational costs (productivity loss, opportunity loss and IT support costs).

By evaluating hard and soft costs, organisations may well find that short-term purchasing decisions do not deliver the greatest value to the business in the long term. VDC estimates that hard costs may only account for 10% or less of TCO over five years.

Whether you’re already deploying field devices or are considering doing so, are you sure that your cost calculations accurately reflect all your costs over time? Will your real TCO deliver the return on investment that you need?

\* “Mobility in manufacturing and logistics: investment acumen for next generation mobile solutions” VDC Research, August 2013

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Return on investment is just as much about the effectiveness of the investment as its cost. If ROI is to be achieved the technology must support field workers to carry out the tasks that fit their role.

To find that out we started by asking how enterprises are currently supporting the activities of their field workers. We suggested ten activities:

- Using a mobile computing device to allocate jobs to field workers
- Issuing and recording job notes via paper with field mobility personnel
- Issuing and recording job notes via mobile devices with field mobility personnel
- Route planning
- Rescheduling tasks in real time to meet changing priorities and customer requirements
- Real-time reporting on job completion
- Electronics signature capture for proof of service/sale/delivery/inspection
- Asset scanning by field personnel for inventory management
- Mobile point of sale
- Enable Bring Your Own Device (BYOD) for field mobility personnel

## APPLICATION USE TODAY

More than half of the companies we spoke to said they were already using six out of ten of these applications.

Which applications are used naturally varies from industry to industry and role to role. For example, real-time reporting, task rescheduling and asset scanning for inventory management

featured more strongly for field service/inspection companies that they did for field sales and delivery organisations. At the same time businesses in field sales and delivery placed more importance instead on electronic signature capture and issuing/recording job notes.

Smaller organisations (fewer than 5000 employees) appeared to be more focused on asset scanning than larger organisations. They were also more likely to still be using paper rather than mobile devices to record job notes. Larger organisations on the other hand reported more use of electronic signature capture.

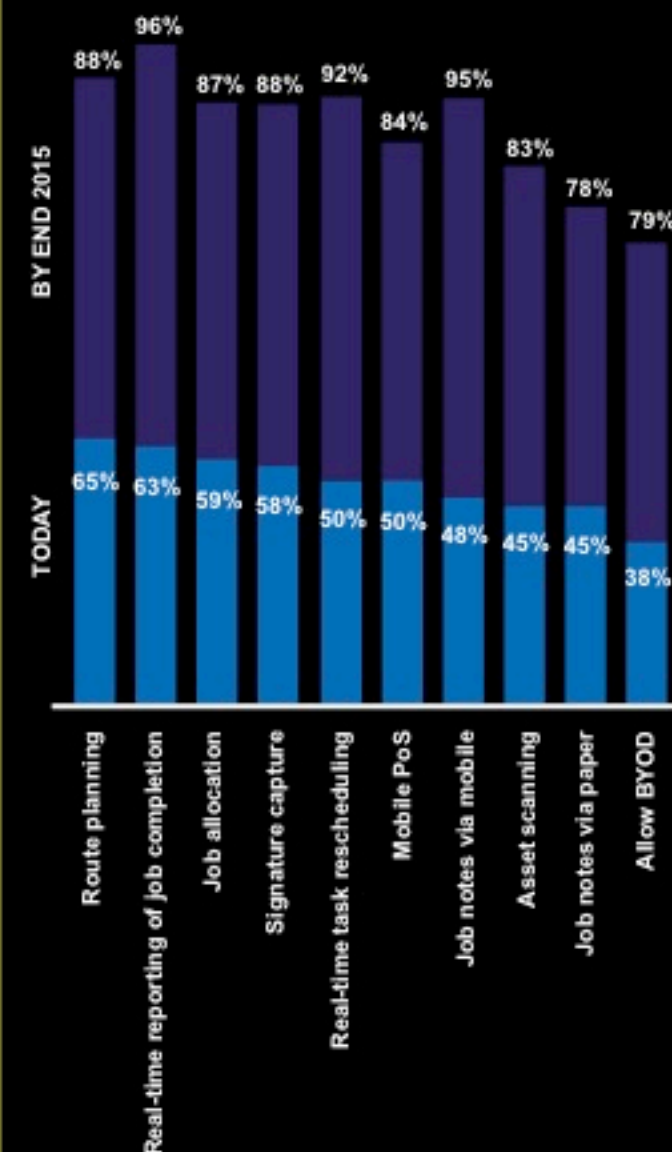
Field service and inspection companies reported more activity than field sales and delivery companies around real-time reporting, rescheduling tasks as needs change, and use of asset scanning. The field sales and delivery companies were conversely more focused comparatively on electronic signature data capture and issuing and recording job notes with a mobile device.

Regionally we see Southern Europe making more use of mobile point of sale functionality (58% vs 42%) and BYOD (42% vs 34%).

## THE NEXT TWO YEARS

The use of mobile applications in the field is set to grow significantly. Responses suggest that the use of all 10 applications we discussed is set to rise by between 23% and 47%.

## How do enterprises support the activities of field workers?



# Application use is growing

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In particular businesses are expecting to do more to issue and record job notes with a mobile device (47% predicted growth) as well as rescheduling tasks in real time as priorities and customer needs change (42% predicted growth).

While allowing use of BYOD devices is currently the least popular application (38%), growth over the next 24 months is predicted to be 41%, and we'll return to the implications of that **later in the report**.

## ENSURING THE RIGHT DEVICE STRATEGY

Given this clear trend for users to use their field devices for a growing range of activities it's vital that an enterprise field mobility has a strategy to support this - not just to meet the needs of the workers but also because it is key to driving productivity and remaining competitive.

It makes sense for a business to look at mobile devices that have the processing power and functionality to support a growing number of multiple applications. For example, as shown in the infographic on the previous page, 58% of our respondents are already using mobile devices to capture signatures electronically, and another 30% plan to over the next two years. Similarly 45% are currently using devices to scan assets to help in inventory control, and the next 24 months will see a further 38% doing so.

## BARRIERS TO EFFICIENCY

While learning how organisations are improving their field efficiency we believed it was important to understand what was impeding that. We asked our respondents what was causing delays in the service they deliver.

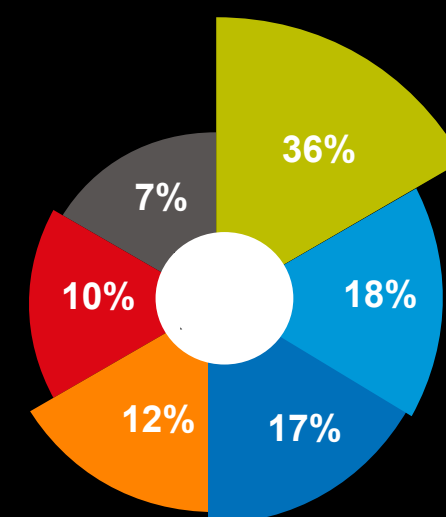
Diagnosing customer problems is by far the biggest challenge (36%) and it's a particular problem for smaller organisations (39%). Fixing the incident is the second most-mentioned cause of delays, cited by 18% of respondents. It takes knowledge and experience backed up by excellent support for a field representative to find the answer to a problem fast. Receiving better information in advance about the problem before a visit and having instant visibility of known issues and fixes can all help to limit delay in diagnosis and ensuring the right parts are available if required. Once the diagnosis is made, fixing the incident is the next most time-consuming task.

Getting to and from the customer takes time too, with 17% of respondents citing this as a challenge. This delaying factor was mentioned significantly more often by field sales and delivery organisations (24%) than by service/inspection organisations (13%). We would expect mobile devices with real-time route planning applications that take account of traffic conditions to address this issue.

Other delaying factors discussed were the customer sign-off process (12%), failure or performance issues of the field device (10%), and allocating the right worker to the task (7%). These factors highlight questions about company processes and making the right choices around technology.

We advise enterprises to consider how their mobile devices will be used to support field workers over the lifetime of their devices and ensure that they have the capacity and functionality to deliver efficiency gains whatever the task in hand.

## What causes delays in field task completion?



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# Priorities for effective field mobility

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When enterprises are designing their mobile device strategy, they will have priorities and concerns around what the technology can do - and what it should not do.

## SECURITY IS TOP OF CONCERNS

When we talked to companies about their concerns, top of the list of challenges by some distance was security. Data security in general is a huge concern for any organisation and mobile access is no exception. While security was a concern across the board (60%) it was particularly important in the field service and inspection organisations (63%).

The results of our survey show that it's imperative that mobile solutions provide access controls that will protect the enterprise if the device falls into the wrong hands and guard against the growing tide of viruses and non-vetted applications that can compromise the security of data stored on the device. That will require some level of centralised management.

## ENABLING GREATER SPEED AND SATISFACTION IN A MANAGEABLE WAY

Also a priority is the ability to reduce the time spent getting to and from jobs, especially in Southern Europe (53%), possibly where distances to be covered are greater. More than half of field services/inspection organisations also flagged this up as a concern.

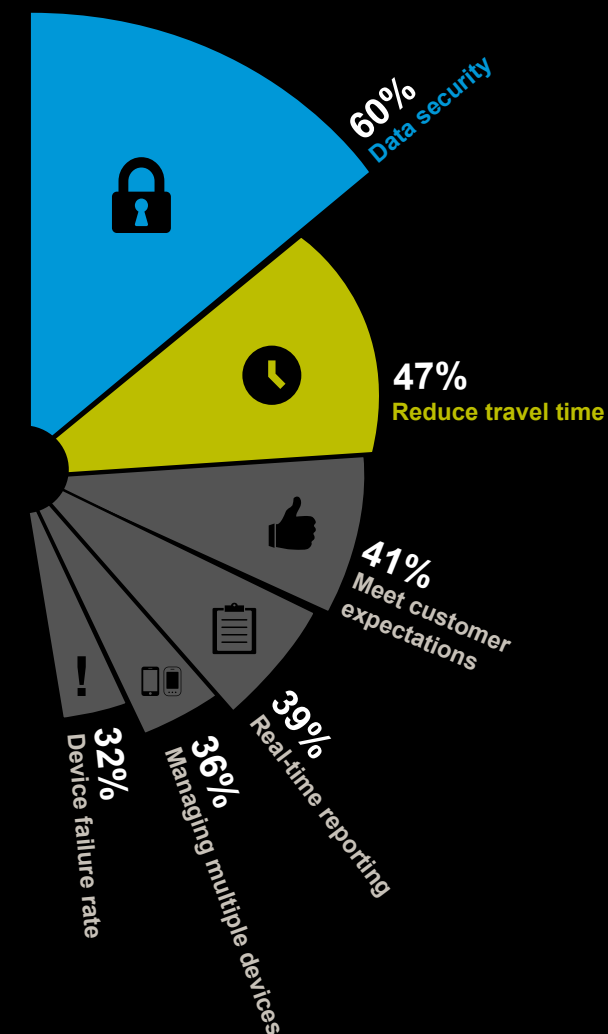
This can be addressed by ensuring that field staff are using a good route planning feature that is always up-to-date. Notifying staff in real time of task priority changes will also save time and travel costs. Both of these features can be made available through a single mobile device.

Meeting rising customer expectations is important for 41% and this is likely to be about getting to the customer on time and being able to carry out the required task efficiently. The desire to meet customer expectations was particularly strong in larger organisations (45%) and also in field sales/delivery organisations (45%).

Real-time reporting, enabling field staff to let head office know as soon as jobs are completed – or delayed for some reason – can have a positive impact on efficiency of people and processes, and is considered important by 39% of respondents, including 42% of smaller companies.

Managers have to consider how to manage multiple devices and this was a particular concern in Northern Europe (42%). It's an issue that was highlighted significantly more in field service/inspection organisations (41%) compared with sales/delivery organisations (26%). This is an issue around managing complexity. If field workers have smartphones, tablets and/or laptops, what are the implications for managing multiple versions of multiple operating systems, synchronisation of data and access controls, for example?

## Major concerns or priorities for field mobility



# Priorities for effective field mobility

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While applications and functionality can get workers to the right place fast, speed up processes, and improve customer service, all this will be for naught if the device fails. The rate of device failure is highlighted as a concern by a third of our respondents – more in smaller companies (36%) - and is likely to have major repercussions for any business that depends on its mobile technology. We talk more about device failure **later in the report**.

## SPEEDING UP INVOICING

We asked specifically about speed of invoicing as field technology can do much to improve this process.

Currently the average invoicing speed is 4.2 days and on the whole enterprises (94%) are satisfied with that, but only a minority (39%) are very satisfied. Smaller organisations tend to invoice slightly faster (4.1 days) on average than larger ones (4.5 days).

Because invoicing speed has such a direct effect on revenue and the bottom line it's worth looking to see if the process can be improved.

Our responses suggest that for most there is room to do more. Only 32% of our respondents said they are already invoicing instantly. Of those who take 2-5 days to invoice just 38% are very satisfied with their invoicing speed. As for taking 6-10 days to invoice – there were no enterprises that were very satisfied with this speed.

Technology is key here. The right device can enable customers to sign off immediately on service or delivery, prompting the invoicing system into action faster. In some industries

it could even act as a point-of-sale device, enabling the field worker to take immediate payment for work done or items delivered.

Do these concerns and priorities resonate with you? Are you satisfied that your mobile technology is up to the task of delivering the services you need when you need them, and maximising your return on investment?

“

Only 32% of our respondents said they are already invoicing instantly. Of those who take 2-5 days to invoice just 38% are very satisfied with their invoicing speed

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How satisfied are you with current invoicing speeds?



39%  
Very satisfied



55%  
Fairly satisfied



6%  
Fairly unsatisfied



# Off-the-shelf vs. enterprise smartphones

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Once a business has determined its need around mobile devices, where does it turn to purchase them?

There are plenty of consumer-focused smartphones available today that offer entertainment and business functionality on tempting terms. The question is whether they have the right physical characteristics, capabilities and support to meet the needs of workers in the field and their support team.

When we asked about problems with off-the-shelf smartphones, our respondents came back with an average of 2.5 issues that were causing them concern.

## WHAT'S WORRYING ABOUT OFF-THE SHELF SMARTPHONES?

Top of the list of concerns were security features, with 61% of respondents worried that off-the-shelf smartphones might not offer enough to protect enterprise data.

Battery life may have improved in recent years but it was still a major issue for 49% of our respondents, including 55% of larger organisations.

The basic physical robustness of devices came in for scrutiny too by 42% of respondents. That's not surprising given that these mobiles are likely be subjected to a variety of weather and working conditions. Knowing that smartphone displays can be difficult to read in sunlight, 35% of our respondents agreed that having an outdoor readable screen could be an issue. At the same time 21% were concerned that the device seals would not be good enough to withstand wet or

dusty environments.

More than a third of our respondents were concerned that off-the-shelf smartphones can be used for non-business purposes, such as entertainment and the huge range of apps available.

We also found some worries (19%) about the length of warranty support. Enterprises need to be able to rely on their devices, and if they are not sure that the smartphones they are purchasing are sufficiently robust to meet the need, then the cost of support becomes even more important.

There are some geographical differences around the importance of these concerns. Security concerns are greater in Northern Europe (68%) than in Southern Europe (55%). On the other hand, organisations in Southern Europe spoke of greater concern than the Northern countries around battery life (58%) and the physical robustness of devices (55%).

## DOES BYOD MAKE THE TASK HARDER?

We've mentioned that 78% of enterprises want to enable workers to bring their own devices over the next 24 months, and that 38% of respondents already do, despite the concerns we've outlined about.

## Issues around off-the-shelf smartphones



Security features  
61%



Battery life  
49%



Physical robustness  
42%



Non-business use  
37%



Outdoor readable display  
35%



Environmental protection  
21%



Length of warranty support  
19%

# Off-the-shelf vs. enterprise smartphones

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People are used to smartphone form factors and feel comfortable with their usability. Allowing workers to bring their own phones to the job seems to be a winner for the enterprise as it could cut costs in the short term.

However, the survey results also illustrate that any move towards BYOD needs to be balanced with the need for security and also the features and functionality needed to do the job, both now and in the future. We've highlighted the concerns around physical robustness, battery life and an outdoor readable display for example. We would also ask whether these personal phones are able to support business applications such as signature capture and scanning effectively.

Added to this is the overhead of managing and supporting mixed devices and potentially operating systems, complicated by the user tendency to replace and upgrade their own devices at regular intervals.

It seems then that although users are keen to use a device that they are familiar with, the off-the-shelf smartphone may well not deliver the functionality that field workers need. In this case enterprises need to consider other options that have been designed for field work but still retain a familiar interface.

The vital question is whether the devices that your employees use are up to the task or will they bring further challenges through lost or stolen data, device downtime, feature limitations, inability to use in certain conditions and lack of ongoing supplier support?

“

Top of the list of concerns were security features (61%). This suggests that off-the shelf smartphones might not offer enough to protect enterprise data. Second were concerns over battery life. Despite improvements in battery life in recent years it was still a major issue for 49% of our respondents, including 55% of larger organisations.

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# Importance of a good screen

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For enterprises carrying out fieldwork the usability of the screen is immensely important. As we've seen, over a third of respondents were concerned that the screen of an off-the-shelf smartphone wouldn't be readable outdoors. If it can't be viewed by field workers and customers where necessary, efficiency will drop and so will customer satisfaction.

We asked our respondents two questions: which screen features are important and which of those are the most important?

## WHICH SCREEN FEATURES ARE IMPORTANT?

We suggested a range of features (see infographic on the right). Every one of these was considered important by at least half of our respondents. Each organisation pointed to an average of 3.7 features they wanted to see on their devices.

Field workers want the familiarity and ease of use of a smartphone screen design (76%) but they also need much more than an off-the-shelf phone can deliver. They need to be able to see their screen without moving out of the sun (79%) or protecting it from the elements (65%) and to use it without removing any special work-related gloves (68%).

Flexibility in data entry is important too, with organisations wanting touch screens predominantly, but also a stylus for signatures (55%) and a physical keypad (54%). There were differences across our sample. Field service/inspection companies put more emphasis on touch screens than sales and delivery businesses, which in turn were keener to have

physical keypads and be able to use the devices wearing gloves. The touch screen is also in demand more in smaller organisations than large.

## WHICH SINGLE FEATURE IS THE MOST IMPORTANT?

When we asked specifically which was the one most important feature in a device screen, a smartphone-like touch screen came up top at 28%, emphasising the need for ease of use and familiarity for field workers.

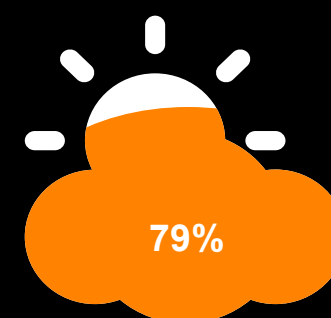
Almost as important, at 21%, was the ability to use the device outdoors in bright sunlight.

These were followed by use with gloves (13%), use of a screen stylus (13%), usable in the rain (12%) and inclusion of a physical keypad (12%).

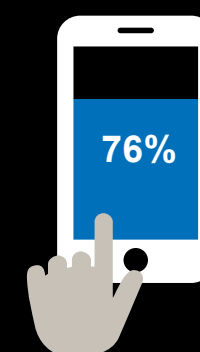
Comparing these key requirements with the concerns that enterprises have about off-the-shelf smartphones there do seem to be discrepancies. Yet it's clear that enterprises want to give their employees a familiar smartphone-type interface that will enable them to use their devices with confidence and speed.

Do the mobile devices you provide for your field workers, or are thinking of providing, meet the requirements for all-weather operation use with flexible functionality – or do you need to consider a wider range of options?

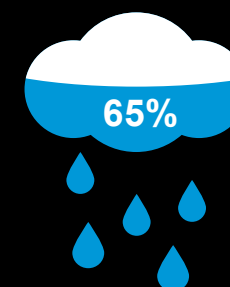
## Which screen features are important?



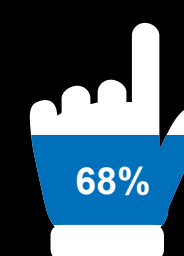
Usable in bright sun



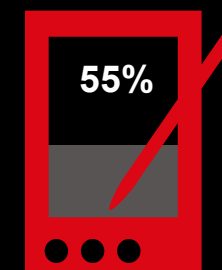
Touch screen



Usable in rain



Usable with gloves



Screen stylus



Physical keypad



# The importance of robustness and resilience

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We've talked already about the value of mobile field devices for organisations in improving efficiency and customer satisfaction. According to our respondents device failure has a serious impact on both of these goals.

## THE KNOCK-ON EFFECT OF FAILURE

A failed device can greatly affect the number of jobs completed and reporting.

No route planning can mean longer travel times and a quarter of our respondents said device failure would mean it would take longer to get to jobs.

No access to online information can mean parts not being available when they're needed. A third of our respondents said device failure would mean reduced visibility of field task status and 29% were concerned that field workers would not be able to continue their jobs.

No field reporting facilities means slower job completion. The lack of reporting accuracy concerned 42% of our respondents while 20% said failure would adversely affect the accuracy of inventory records.

Speed of invoicing, which we've already discussed as important to the bottom line, would also fall. A third of respondents said invoicing would be delayed if devices failed.

The outcomes of failed technology can lead directly to a drop in income from fewer jobs completed as well as a fall in customer satisfaction resulting in less repeat business. Some 37% said there would be an effect on customer satisfaction.

Research by VDC\* corroborates this view, finding that for each percentage point increase in device failures, the total cost of ownership increases by 5%.

All these aspects can improve when devices are working well, and we believe that there is a secondary impact – that field workers enjoy higher job satisfaction which in turn drives productivity and quality.

## THE GLOBAL VIEW

We wanted to delve deeper to discover if there were any differences between geographies and vertical markets.

We found that Southern European businesses showed a higher concern than Northern Europe counterparts around customer satisfaction (43% vs 30%) and the inability of the field worker to continue their job (34% vs 19%).

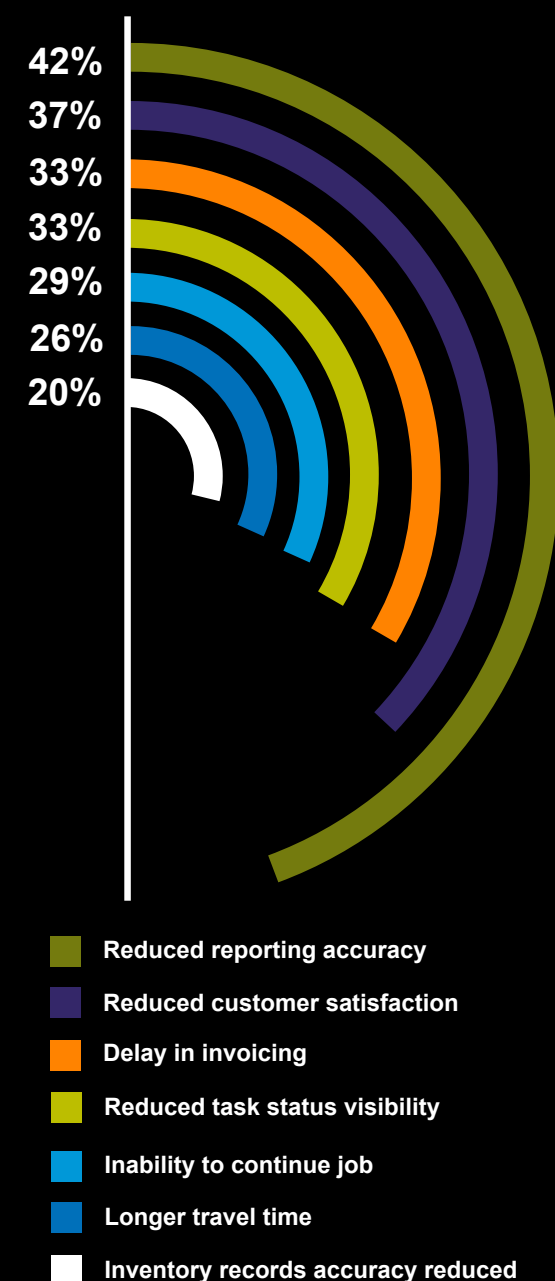
We also found, unsurprisingly, that field sales/delivery businesses were more concerned than field service/inspection organisations about reduced reporting accuracy (53% vs 37%) and reduced visibility of the status of tasks in the field (39% vs 29%).

It's clear that whatever the region or industry, devices need to keep working. When there is a problem, the issue is resolved as quickly as possible. Receiving technical support fast is imperative to continuing operations.

Are you clear about the impact on your day-to-day operations of any level of device failure? And if you do suffer failures are you satisfied with the level of support you'll receive from your supplier?

\* "Mobility in manufacturing and logistics: investment acumen for next generation mobile solutions" VDC Research, August 2013

## What happens when a device fails?



# Making the most of a field mobile device strategy

Our research shows that enterprises across many industries believe that equipping their field workforce with the right mobile devices can increase efficiency, reduce costs and raise customer satisfaction.

It's equally clear that for a mobile strategy to deliver those benefits the technology must be fit for purpose. Off-the-shelf smartphones may provide the right user experience but are less likely to make the grade for resilience, usability and functionality.

In addition enterprises need to assess how devices will afford them the right level of security and how far suppliers are prepared to go to support those devices.

All these issues need to be taken into account to achieve a realistic view of the return on investment in mobile devices. Many of the enterprises we talked to recognise that a long-term view is more important than the short term to understand the true total cost of ownership. If you're planning to mobilise your field workforce, or are already doing so, do you believe you are making the most of your strategy with the right technology?

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