

WHITE PAPER



Wavelink's Market Leadership in
**ENTERPRISE MOBILITY
AND AUTO IDENTIFICATION
AND DATA CAPTURE**

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INTRODUCTION

Since its inception in 1992, Wavelink® has been a visionary company in the Auto Identification and Data Capture (AIDC) industry, which has positioned the company as the clear market leader in an industry that has evolved into what is today also known as Enterprise Mobility. In fact, the very evolution of the industry name to Enterprise Mobility is reflective of the early vision Wavelink had about what customers wanted and needed to be successful. Wavelink's vision is represented by two clear goals for Wavelink products, which still drive the company today:

1. Provide completely vendor-independent software solutions in which *any* device with a radio can be confidently adopted by the customer
2. The creation of a complete *Wireless Ecosystem Management* solution

By understanding its customers' current and future needs better than any other vendor, Wavelink has become the clear market leader as defined by customer installed base, technology adoption, and through pioneering new technologies and ongoing innovation. This paper provides a brief overview of the evolution of AIDC into today's Enterprise Mobility market and defines how Wavelink is the dominant market leader.

FROM AIDC TO ENTERPRISE MOBILITY – A INDUSTRY EVOLUTION

The development of the bull's-eye barcode scanners in 1952 and the commercial adoption of barcoding in 1966 ushered in a new method in monitoring and maintaining large quantities of a variety of products without being encumbered by manual, error-prone systems. Barcoding was originally intended to provide a solution to grocery stores seeking a better way to oversee and control inventory; however, it soon became apparent that other industries could benefit from the technology and efficiencies barcoding imparted. Barcoding created a new mantra for efficiency and accuracy, enabling companies to electronically monitor their systems and products. Increased accessibility to this new technology poised companies to save money and increase productivity.

The development of barcoding eventually led to the birth of wireless terminal emulation, which allows for software to digitally capture information and process it to another location — thus the birth of AIDC. As advancements have been made, a new era of technology entered the realm of terminal emulation and expanded services to more networks with added ease and functionality. New functionalities were developed to provide a full-featured terminal emulator as an alternative to the less flexible original technology. Wavelink Terminal Emulators were designed to offer customers a tailored product and provide the overall market a more polished and feature-rich user experience.

During this period, Wavelink recognized the need for application solutions beyond terminal emulation. This market demand led to the development of Wavelink Studio, an application development tool allowing partners and enterprises to write custom data collection applications in their chosen development environment. This product was revolutionary in that it enabled developers to create applications that ran on virtually any wireless device without the developer making any changes to the application. This very successful product line solidified Wavelink's commitment to creating high quality, vendor-independent solutions.

UNMET CUSTOMER NEEDS CREATES OPPORTUNITY FOR WAVELINK

As momentum built behind the new technologies driving the AIDC market, dissatisfaction grew with customers' inability to manage the increasing number of devices that were available from multiple vendors. Because an independent software platform did not exist, customers were required to maintain and have expertise on a variety of proprietary software systems. This dissatisfaction presented a large challenge to the market – but proved to be an exciting opportunity for Wavelink.

Starting in 1992, Wavelink's answer was to create solutions that allowed customers to use any mobile device from any vendor, and even provide the freedom to change device vendors over time – all the while maintaining a consistent user experience and interface. These new systems transitioned from a cumbersome technology into solutions that easily ran across hardware manufacturers and applications while users maintained a consistent interface they were familiar with. This development allowed customers the option of choosing the right device for their specific needs with no concern as to software compatibility.

The Wavelink vision of providing a completely independent solution to customers was the first step. As the need for mobile management expanded beyond mobile devices to wireless access points (APs) & switches, printers, proprietary devices and wireless wide-area devices, it was apparent that customers had greater needs that were not being met. Wavelink's answer was to provide a *Wireless Ecosystem Management* solution, which allowed customers to manage an entire wireless enterprise. The market transformation from AIDC to Enterprise Mobility was lead by Wavelink as it unveiled its enterprise Avalanche product for mobile device and infrastructure management in 2000.

Over the next several years, Wavelink continued to pioneer new technology innovations by adding the capability to manage other enterprise elements such as wireless printers, Ethernet-to-Wi-Fi bridges, RFID interrogators, and virtually any device with an integrated radio. As Enterprise Mobility customers needed the peace-of-mind that their wireless ecosystem was secure, Wavelink delivered by adding powerful security management including WKR (WEP Key

Rotation), WEP, WPA with TKIP, WPA2 with AES-CCMP, and 802.1x based EAP types such as, LEAP, PEAPv0, PEAPv1, EAP-TTLS, and EAP-TLS.

Moving to present day, Wavelink's Speakeasy™ product family is answering the call for companies to improve productivity through a voice-enabling solution. Additionally, Wavelink's Industrial Browser allows customers an even higher level of application capability and freedom in delivering Web-based applications to the mobile workforce.

Today, approximately 80% of all enterprise mobility devices use terminal emulation software, although the market has also expanded to include Web-based applications. Due largely to Wavelink's vision and efforts, every company has the option of choosing the device(s) that will best benefit their specific needs. The user experience is heightened by the increased capabilities of the market's products—upgrades, help desk, security—which can be seamlessly controlled by the company's choice of device management. Having a clear vision and understanding the ever-changing Enterprise Mobility market, has positioned Wavelink as the front-runner in the industry.

DEFINING MARKETING LEADERSHIP

For the purposes of this paper, market leadership is defined with four key attributes, including

1. Recognition as an industry pioneer
2. Ongoing technology innovation
3. Market adoption and standardization of the company's products
4. Customer base

Being a leader in just one of the above categories is an exciting accomplishment for any company. From its inception, Wavelink has roared out of the gates by pioneering innovative new products. Over time, broad adoption by 90 percent of the world's top 30 retailers and 90 percent of North America's top 50 retailers, and 80 percent of the total terminal emulation market. Today, most leading Enterprise Mobility equipment manufacturer's pre-load Wavelink software on the devices distributed to customers, representing an unofficial industry standard.

The combination of technology leadership and the wide acceptance of Wavelink solutions by both industry device manufacturers and a majority of the overall total market, illustrates the case that Wavelink is the clear market leader.

Industry Pioneer

Being a pioneer can be accomplished by creating a revolutionary a new concept and bringing it to market before any competitor. However, true pioneering spirit is only achieved by those organizations that consistently push the limits of the market, continually bringing new products to market first. Understanding the needs of the customer, often before they themselves see it, is a core attribute of a pioneer.

Wavelink's arrival in the market signified the beginning of a new industry standard. Specifically, Wavelink's development of the Wavelink Avalanche®, Terminal Emulation, and Wavelink Studio® products represent some of the first products available to free the customer from being locked into one device type or manufacturer. These unique multi-vendor, multi-platform products minimized customization needs and allowed the choice of any device to supply the

customer's needs. Today, these products are continually improved and upgraded to meet the needs of the evolving mobile enterprise market.

Innovator

Being an Innovator involves constantly exploring the edges of technology to meet customer needs. While innovation for an innovator's sake is often a misguided effort, a long-term innovator understands the market and how technology plays a role in meeting market requirements.

Wavelink's industry leading innovation began when the company was first established. Below is a brief list of Enterprise Mobility market *firsts* by Wavelink:

- Rapid Application Development tool for AIDC
- Multi- vendor Wireless Terminal Emulation
- Vendor-independent software environment to deliver complete customer flexibility and choice
- Complete wireless ecosystem management (mobile devices, infrastructure and peripherals)
- Wireless enterprise security (i.e. WEP Key Rotation)
- Integration of RFID in terminal emulation and rapid application development
- Voice-enabled terminal emulation
- Truly integrated, end-to-end Enterprise Mobility solutions

Market Standardization

Market Standardization can be achieved, even unofficially, with a strong endorsement by major complementary products.

Over time, Wavelink has created the most powerful partner program in the Enterprise Mobility software market. It has also built up the largest installed-base of any single vendor by a large margin. Today, fifteen of the world's leading device manufacturers – more than all competitors combined - pre-load and/or pre-license Wavelink software on Enterprise Mobility devices. Key Wavelink partners include industry-leaders Motorola, Oracle and Cisco. Endorsement by these

leading companies is often unspoken, yet the standardization on the Wavelink platform delivers an extremely powerful message to the entire market: Wavelink is clearly the preferred provider.

Leadership as Measured by Customers

In evaluating any enterprise, one of the strongest indicators of the market position of the organization is its customer list – not only who – but also how many.

In exploring Wavelink customers & Wavelink product adoption, the raw numbers speak for themselves:

- More than 10,000 customers in 85 countries
- More than 3,500 companies rely on the Avalanche management family
- Wavelink software running on over four million devices – significantly more than all competitors combined
- Nine out of ten (90%) of the world's top retailers are Wavelink customers
- Wavelink customers equal approximately 80 percent of the total terminal emulation market in retail.
- More than half of the top 250 global retailers

A MARKET LEADER IN EVERY CATEGORY

After a brief review of AIDC and Enterprise Mobility market history, the conclusion is simple: Wavelink is the clear market leader. From its entry into the market in 1992, Wavelink has exceeded every other vendor by consistently pioneering innovative solutions, achieving market standardization with complementary products and partner companies, and finally, through serving the largest customer base worldwide. In a world where every company claims to be the leader, only one organization can hold the title.

BUYERS CHECKLIST

What should be considered when choosing a company/product to satisfy a company's needs?

□ *Depth of supported device types and operating systems*

Consider the diversity of needs and users in your organization. Selecting a vendor whose versatility matches your needs today and into the future is an important decision.

Wavelink offers the broadest range of support for mobile devices, infrastructure and operating systems. Additionally, Wavelink provides world-class support for these devices and operating systems.

□ *Staying power*

The company you choose should have the longevity to back up its services and support.

Understand the history of the company and consider the likelihood of its survival for two, five and even 10 years.

□ *Expertise*

Consider the history of the company. Specifically, how long the support staff has been with your vendor and in the Enterprise Mobility industry. Also, what is the complexity-level of the product? For example, is the software a loosely cobbled set of tools, created by different vendors over time? Wavelink writes all of the code for its products in-house and is recognized for its best-in-class customer support. Additionally, the Wavelink management team alone has over 120 years of combined Enterprise Mobility industry expertise.

□ *Market leadership*

Going with the market leader is a safe bet as long as the company is continuing to perform and invest in its products and staff. As the Enterprise Mobility market leader, Wavelink is continuing to develop its products and solutions, and is investing heavily into growing its partnership programs.

□ *Available features*

Do the main product features meet your current and future needs (security, wireless, vendor agnostic, Voice integration, Web-enabled, etc.)? Understanding your highest priority features and matching those features to the right product and company is important.

□ *Existing clientele*

What are peer companies using? By understanding which product your competitors or other similar organizations have gone with, you will minimize your risk. Wavelink's products are more robust and perform to a higher level due to the large and very demanding customers in its install base.



www.wavelink.com

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