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# The Mobile Landscape

**Ellen Daley**

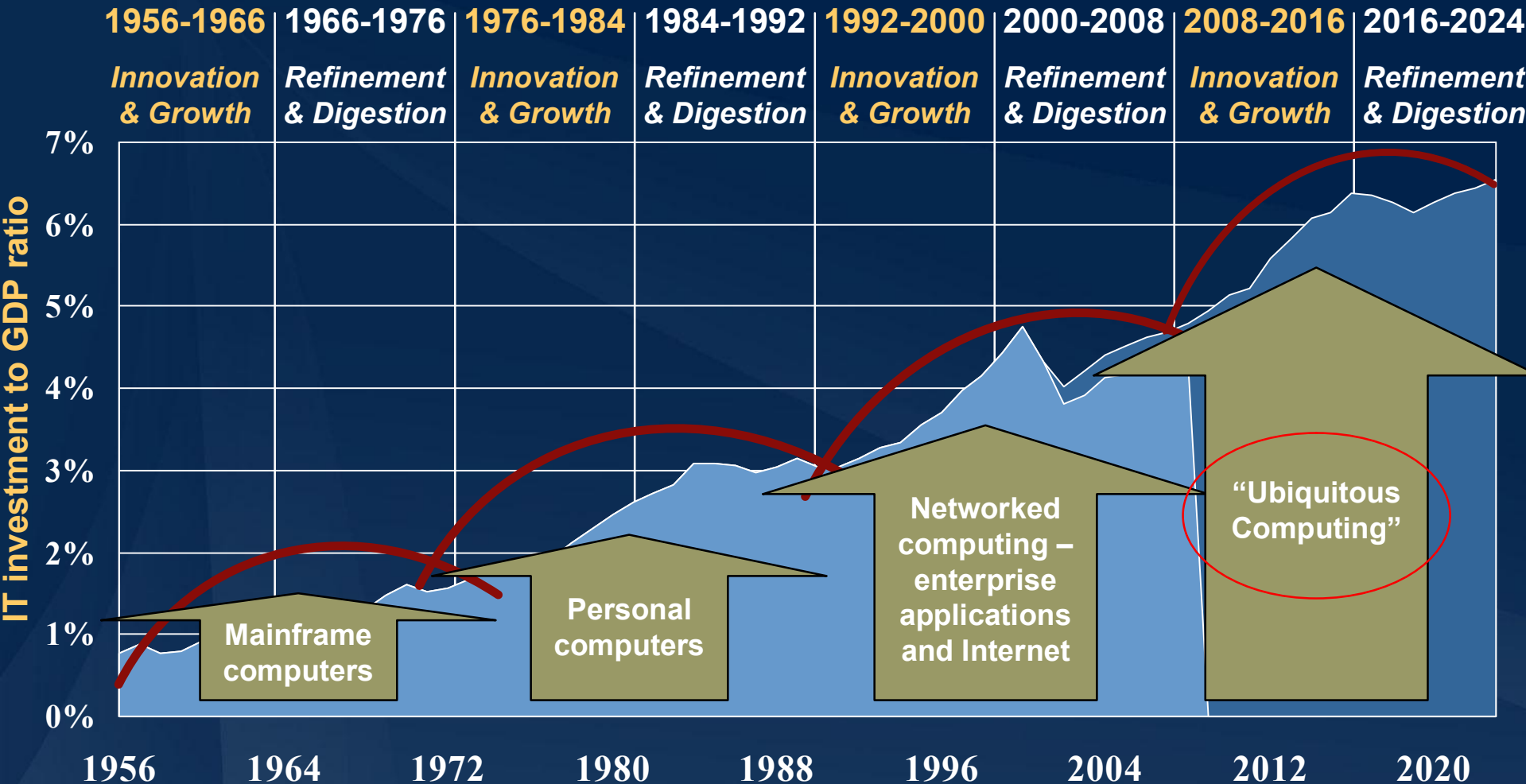
VP, Research Director

Forrester Research

# Agenda

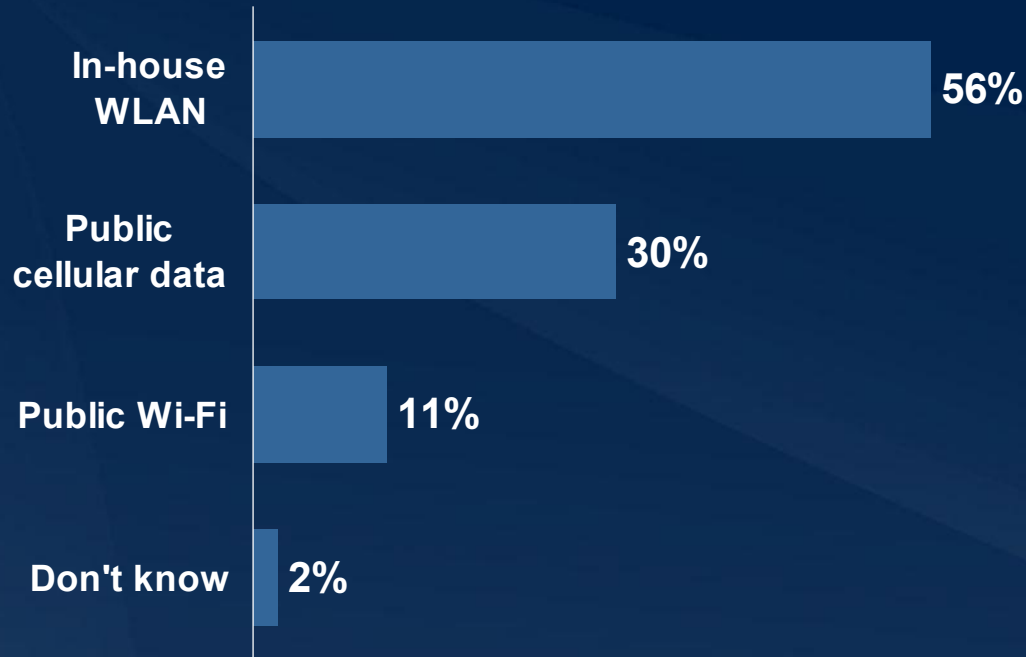
- What are companies doing?
- How are applications being created?
- Where is the industry going?

# Mobility is the core of the next big thing



# Enterprise are embracing a variety of wireless networks

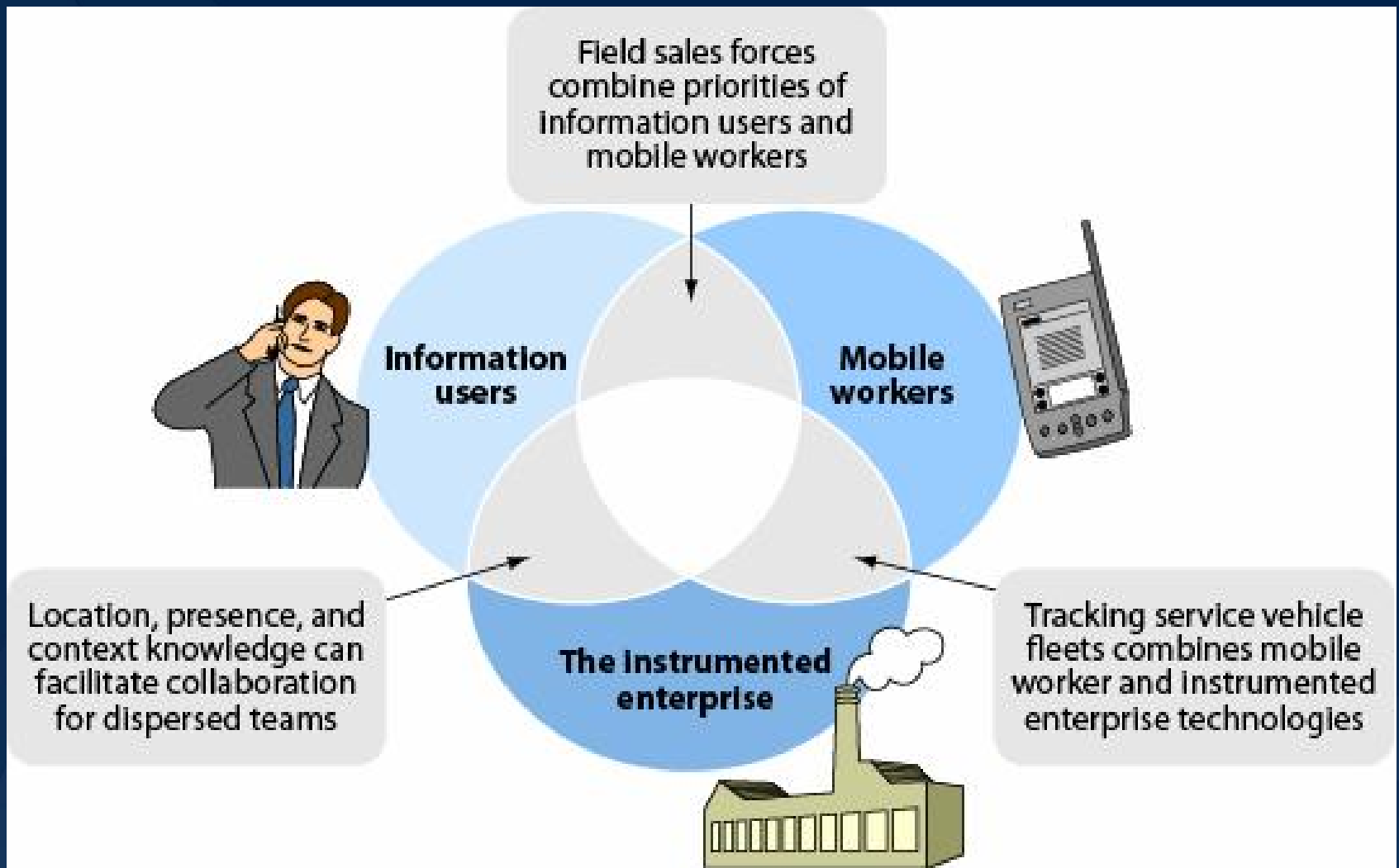
“What types of wireless networks do you use (in your enterprise)?”



Base: 292 telecom decision-makers at North American enterprises

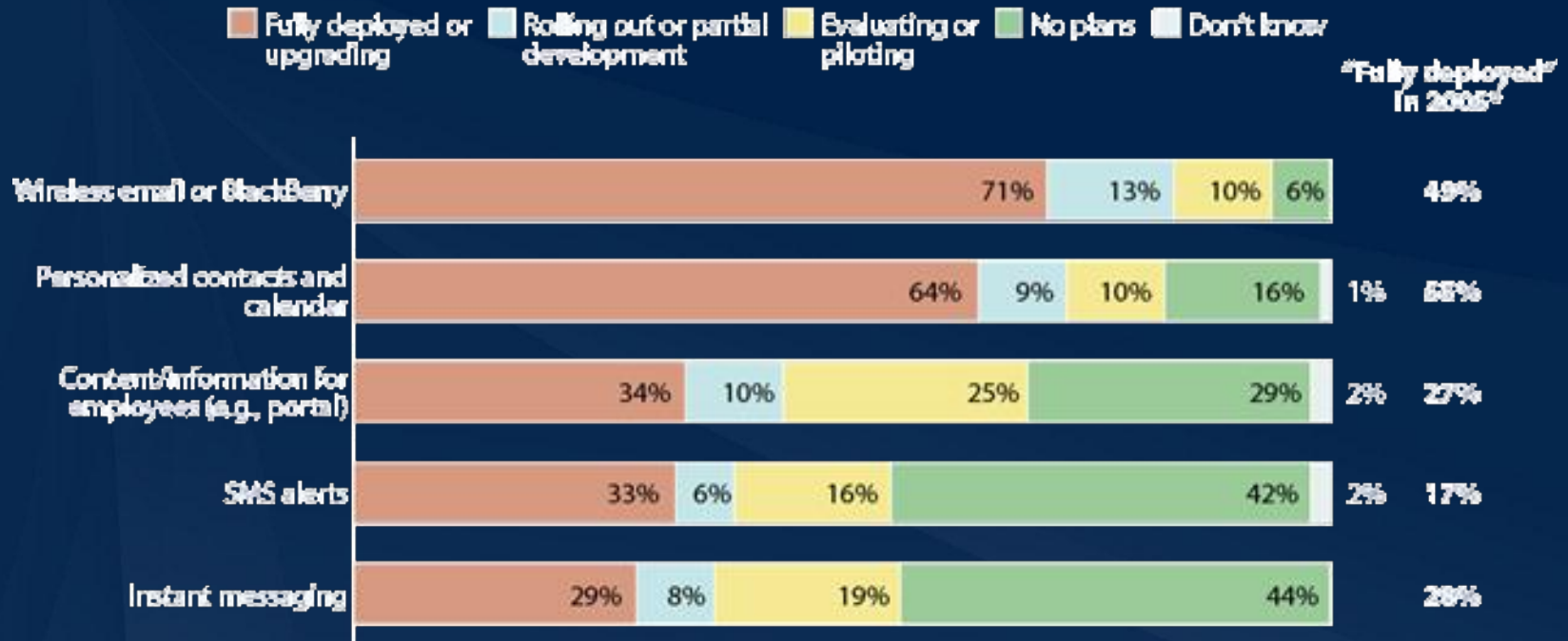
Source: Forrester's Business Technographics May 2005 North American And European Network And Telecommunications Benchmark Study

# How enterprises see mobility



# Apps: Enterprise mobile ‘information’ application adoption is broad, but not deep

“At what stage is your company in the adoption of these mobile applications?”



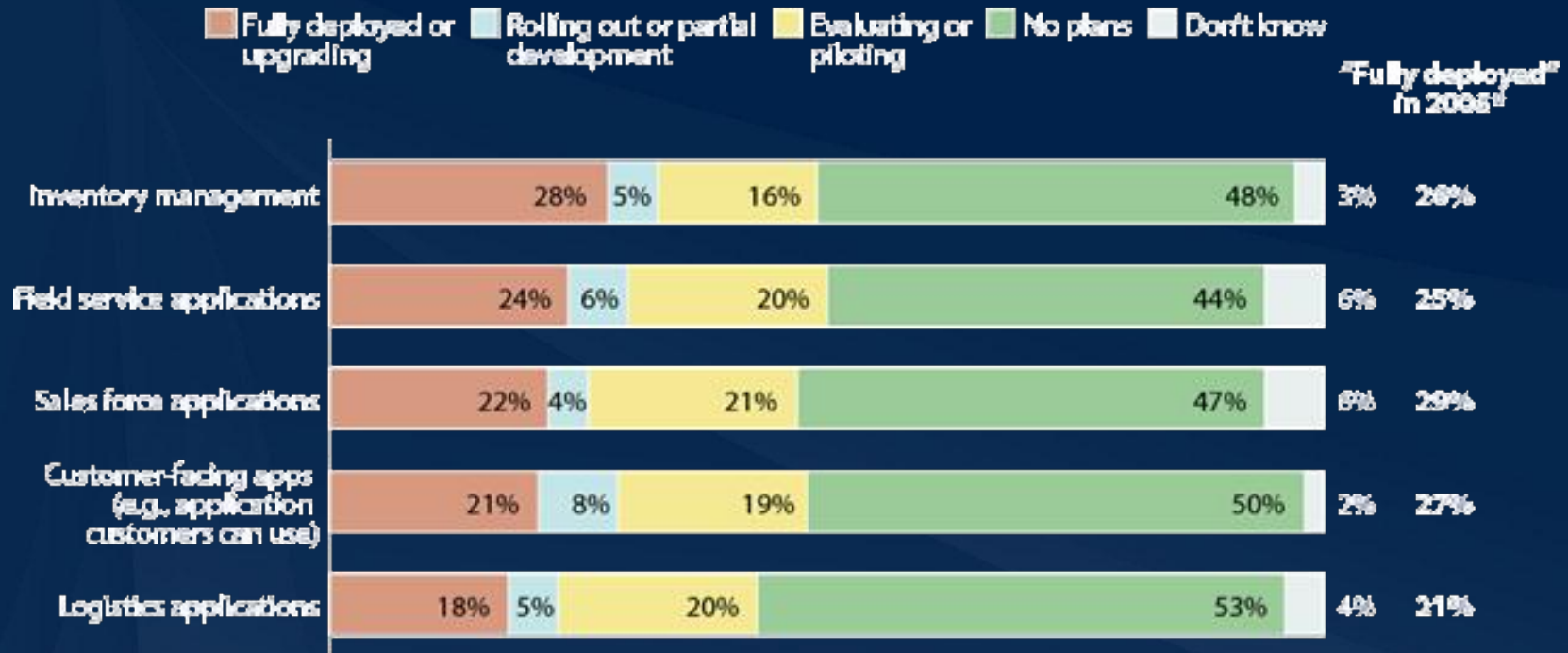
Base: 324 mobile technology decision-makers at North American enterprises  
<sup>a</sup>Base: 252 mobile technology decision-makers at North American enterprises  
 (percentages may not total 100 because of rounding)

\*Source: Forrester's Business Technographics® May 2005 North American And European Network And Telecommunications Benchmark Study

Source: June xx, 2006, Data Overview “The State Of Enterprise Telecom And Network Adoption”

# Apps: Enterprise LOB mobile is not broad – but tends to be deeper

“At what stage is your company in the adoption of these mobile applications?”



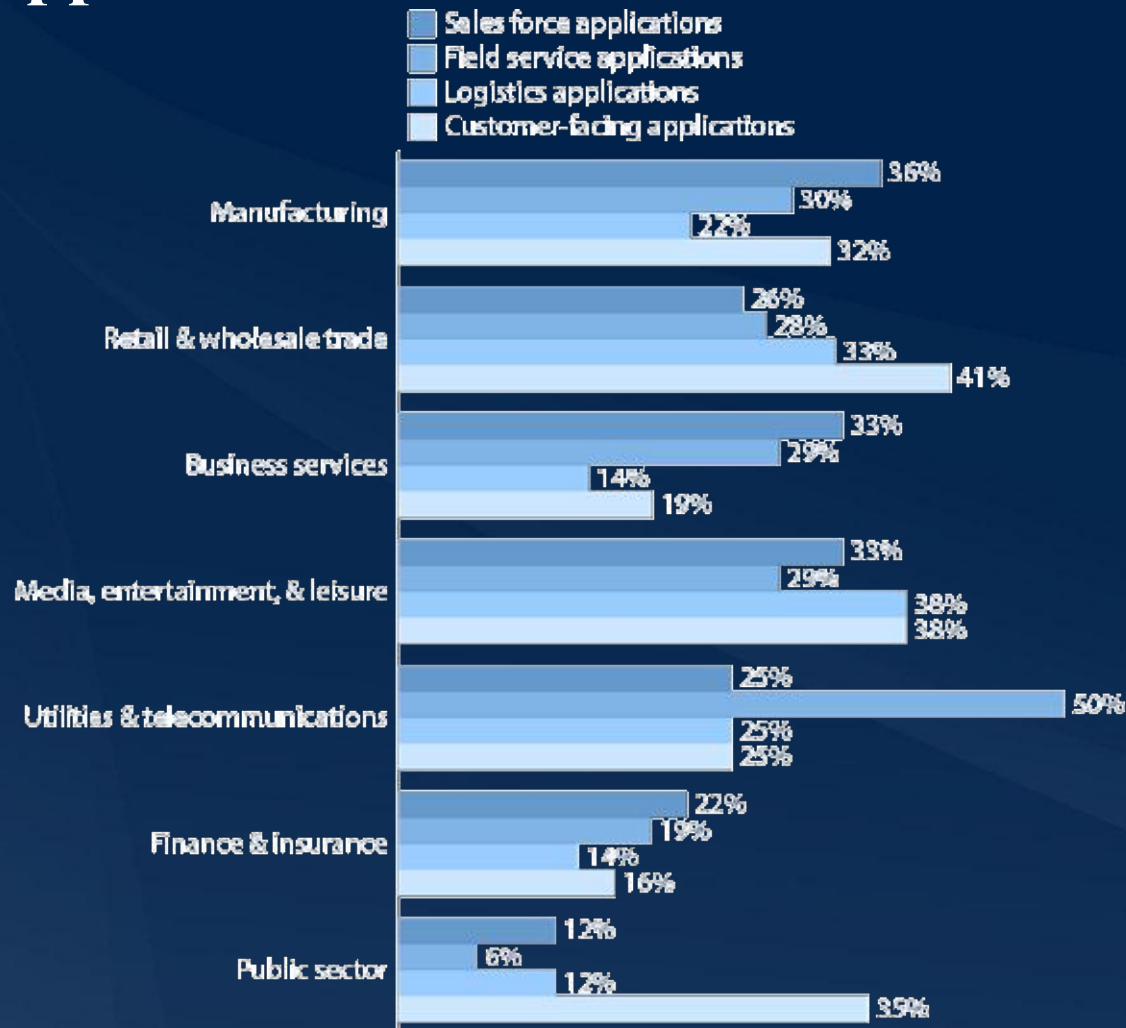
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# LOB Application Interest Varies With Industry



Base: 292 telecom decision-makers at North American enterprises

Source: Forrester's Business Technographics® May 2005 North American And European Network And Telecommunications Benchmark Study

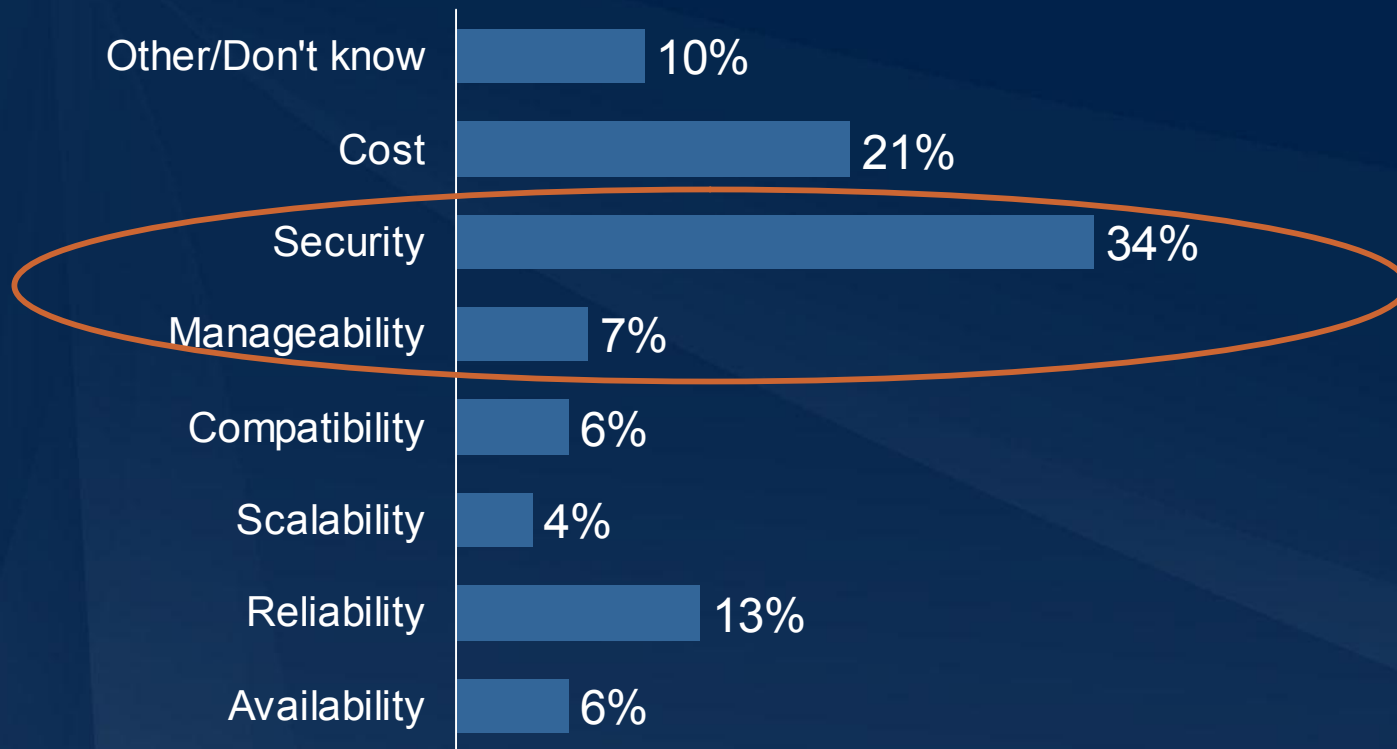
\*Note: Interest figures were derived from respondents who answered that they were in the "evaluating," "piloting," or "initial rollout underway" stages for the respective technologies.

# What are users & developers wrestling with?

- What platform should companies invest in?
  - » Acceptance of having to support multiple mobile device OS's
- How should mobility be managed?
  - » Management questions are second in inquiry volume
- What is best practice for development?
  - » On-line/off-line application adoption and mobile middleware
- What is the ROI?
  - » Where should they concentrate first
- What about Windows Mobile Vs. Blackberry?
  - » Exchange push email is seen as a way to alleviate Blackberry cost – though pain is not intense

# Enterprises are still understanding mobility...

*“What is the largest obstacle while acquiring wireless technology”*



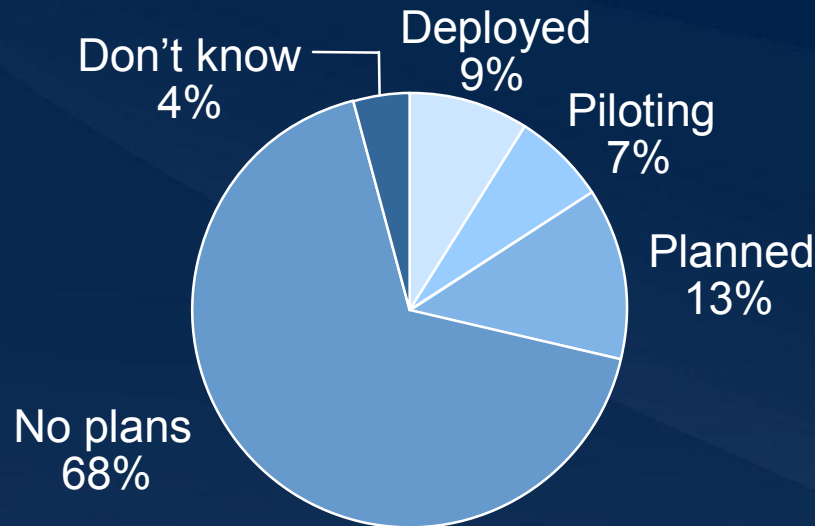
\*Base: 653 U.S. & European enterprise decision makers

Source: Forrester's Business Technographics May 2005 North American And European Network And Telecommunications Study

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# But Users Aren't Doing Much...

“Are you using client management tools to track or otherwise manage PDAs?”



Source: June 2004 Forrester TechnoGraphics survey  
Base: 112 North American companies  
(percentages do not total 100 because of rounding)

# Agenda

- What are companies & consumers doing?
- How are applications being created?
- Where is the industry going?

# What types of devices are being used?

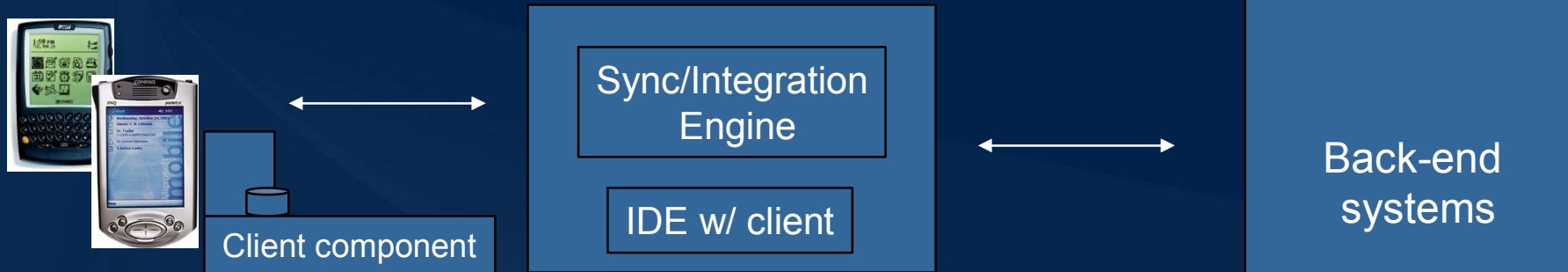
- Almost exclusively, connected devices
  - » WLAN or Cellular (or GPS)
- Forrester segments devices in two ways:
  - » Voice-centric devices
    - Phone-like keyboard
  - » Data-centric devices
    - QWERTY keyboard
- Enterprises are developing applications for data-centric devices
  - » Devices types are not converging
  - » ....but operating systems are
- Carriers want applications for phone-oriented devices

# Thick client is architecture of choice in the enterprise

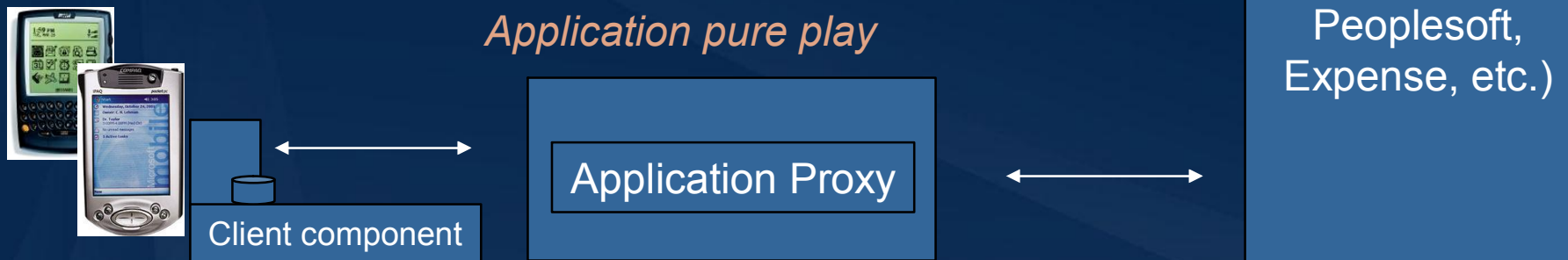
- To mitigate only 'sometimes' available networks
- To protect investment
- Thin clients are rare and not typically used in enterprise environment
  - » Unless for pure WLAN solution (e.g. CPOE in healthcare)
- Mobile MW is being re-examined by companies

# (Simplified) mobile architectures And approaches

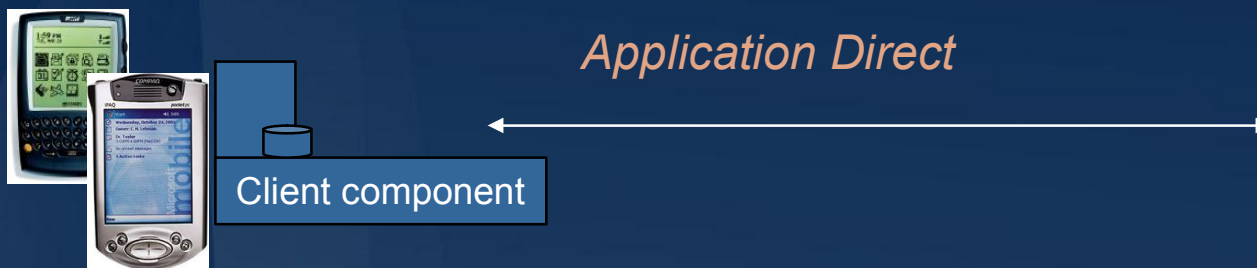
## *Middleware*



## *Application pure play*

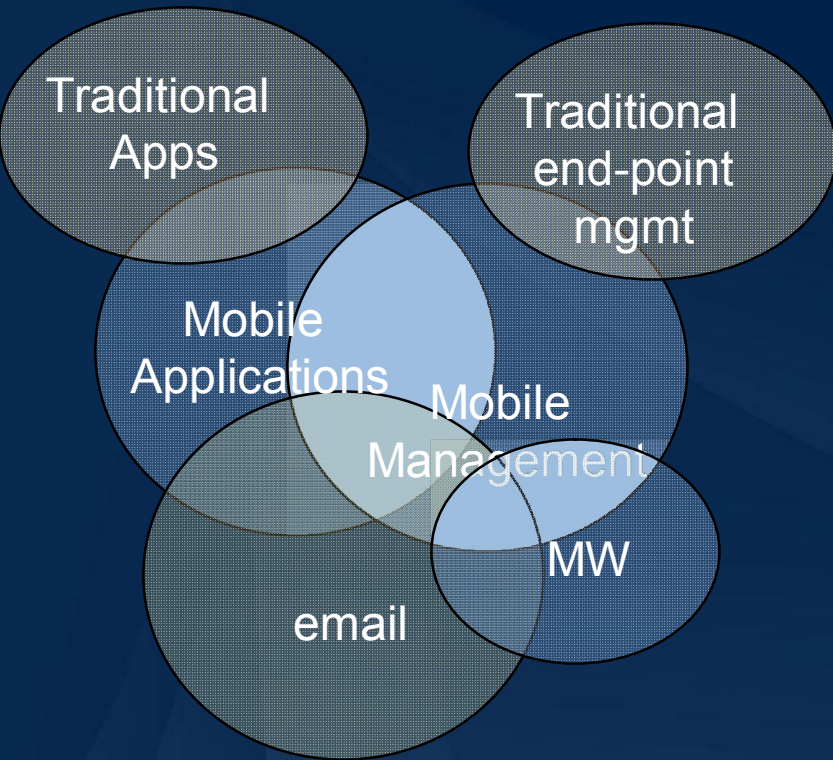


## *Application Direct*





# Mobility becomes a part of true IT ...but it will take a while



*Mobility is an overlay to Traditional IT*

Today



*Traditional IT delivers over any channel*

Tomorrow

# Agenda

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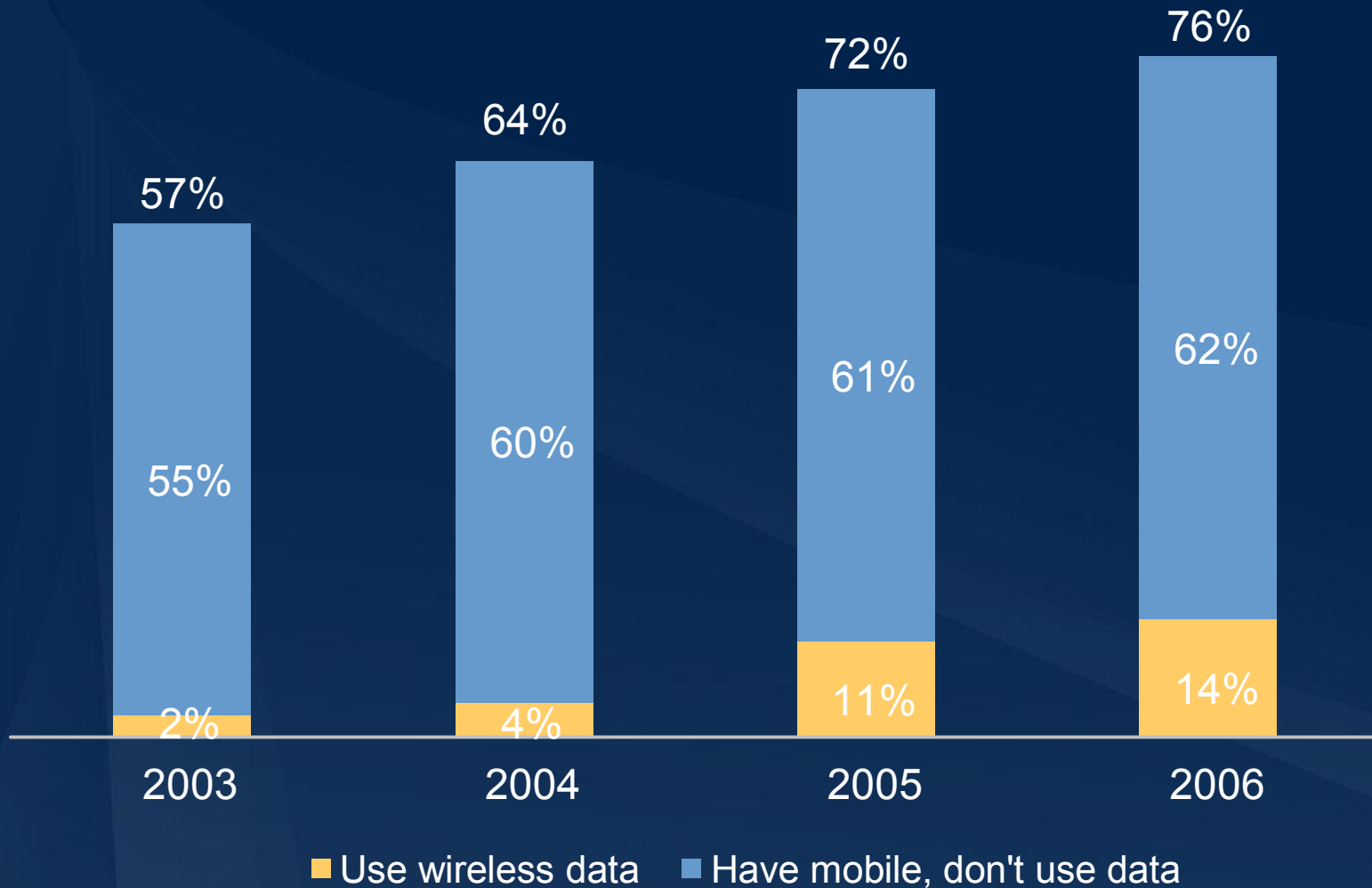
# How will networks change?

- Megabit speeds -- akin to broadband today
- In both directions -- both to and from the subscriber
- Broadcast video networks will emerge
- The shift from circuits (traditional telecom) to packets (Internet) will accelerate
- Distinctions between networks will begin to blur
- Location will be automatic

# The future of enterprise mobility

- Mobility will become more pronounced over the next 2 years
  - » More WLAN deployments
  - » More 3G rollouts and adoption
  - » More devices
  - » More mobile applications
- Mobility will become 'expected'
  - » Debate shifts from "why" to "how"
  - » Interaction with companies via mobile devices for B-B will be necessary
  - » Not supporting mobility will paint a company as non-modern

# Use of mobile data in the U.S. is growing



Base: All North American households

Source: Forrester's Consumer Technographics® 2003-2006 North American Benchmark Surveys

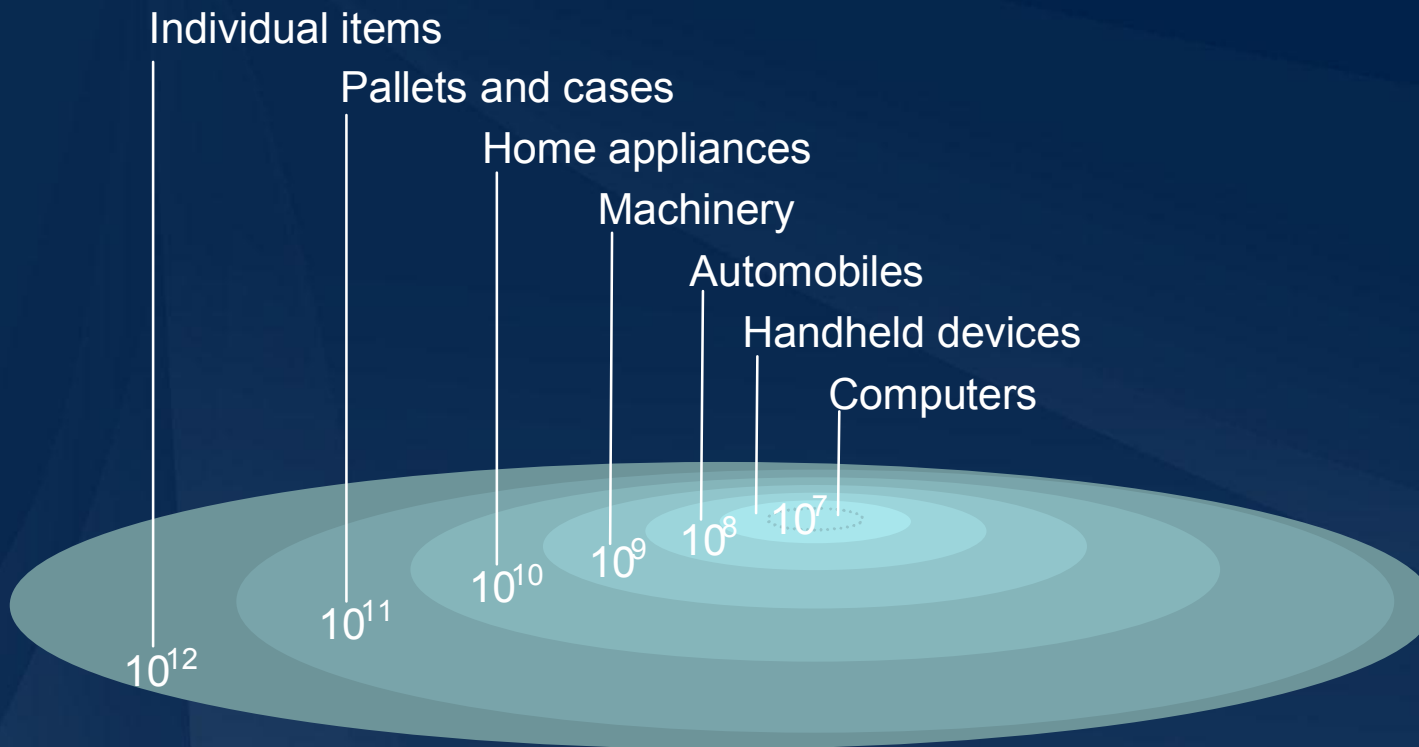


# The future of consumer mobility

- They will grow as reliant on mobile broadband as they are on broadband today at home
- They will tolerate advertising -- as they do in other media -- to reduce costs
- They will grow to expect more relevancy in the content, applications, and marketing they consume

# Next: Ubiquitous access extends the Internet to the physical

*Billions of endpoints await connection*



# Thank you

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