

CTIA: Enterprise Mobility Is Top of Mind

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Technology has always been a fickle industry, and few segments have evolved and adapted as quickly as wireless and mobility. Here we discuss where mobility is going in the enterprise based on our recent attendance at CTIA, one of the biggest wireless events on the planet.

Enterprise mobility

Talk about fickle! Last year's CTIA event focused on mobile entertainment and offered an event full of wireless television, video on demand, music management, and ringtone software. This year, the hot topic, anchored by Steve Ballmer's keynote unveiling of **Microsoft** Mobile Device Manager 2008 (MDM)—is enterprise mobility.

Microsoft's MDM (not to be confused with master data management, another important enterprise issue) is a set of functionality integrated with Microsoft System Center. It is designed to let IT departments manage, provision, and control Windows Mobile 6-based devices through Active Directory, similar to the way in which PC assets are managed.

Applications can be pushed out to devices and provisioned over the air (OTA) to users. Mr. Ballmer used the example of pushing out Microsoft's mobile Instant Messenger client to all sales personnel in the company. Security policies, such as mandatory passwords and password levels, can be enforced on devices based on a profile that includes user, department, or device type. Active Directory Management (ADM) templates are shipped with the product to provide a set of customizable user profiles and parameters for policy and security administration.

One of the more significant pieces of MDM's functionality, a mobile VPN, should provide a persistent, secure connection to corporate resources, applications, and data behind the firewall, letting mobile employees access to enterprise SFA, field service, or ERP applications from their mobile phone. MDM's functionality is not unique or totally complete. Other products, such as **Nokia's** Intellisync product and **Sybase's** iAnywhere, offer similar sets of functionality, as well as the ability to support Windows Mobile and non-Windows Mobile-based devices such as Nokia or **Sony/Ericsson** smart phones that run Symbian. Microsoft's MDM is limited to supporting Windows Mobile devices.

Research in Motion (RIM), makers of the Blackberry and Microsoft's primary competitor in the mobile enterprise segment, has provided the ability to manage and provision mobile devices almost from day one. However, the fact that Microsoft is making this move indicates that enterprise mobility is going mainstream. Additionally, the infrastructure needed to deploy, provision, manage, and protect mobile devices and data is becoming more readily available and tightly integrated with core IT infrastructures.

Several device manufacturers, including **LG**, **Motorola**, **Palm**, and **Samsung** have plans to support MDM for their Windows Mobile 6-based mobile devices. Palm says it will support MDM on Palm Mobile 6 devices (but not for Palm OS-based devices).

Mr. Ballmer used the MDM news to assert that Microsoft was distinguishing itself from competitors (namely RIM and **Apple**, though he didn't mention them by name) by remaining open to multiple platforms, products, and devices, as opposed to the end-to-end mobile device strategies that those companies have followed.

He also made an oblique reference to **Google**, confirming that Microsoft had no intention of participating in the upcoming 700 MHz spectrum auction and potentially alienating wireless operators such as **AT&T**. AT&T is partnering with Microsoft in the rollout of MDM, along with a new venture, **Enterprise Mobility**, started by Mort Rosenthal who also founded mobile phone retailer **IMO** and **Corporate Software**.

Mobile navigation

Navigation and location-based services were also highly visible at CTIA. Buoyed by Nokia's proposed acquisition of **NavTeq** and **TomTom's** acquisition of **TeleAtlas**, navigation devices and, more importantly, mash ups of navigation and applications were center stage in multiple events and

booths.

NavTek and **SIRF**, a provider of GPS chipsets and navigation software, each offered full-day or half-day sessions focusing exclusively on nav-enabled technologies, while the SmartPhone Summit and mainstream CTIA panel discussions all covered what was coming in mobile navigation. The takeaway from all of these sessions is that navigation appears to be the next big thing—mobile e-mail being the first big thing—in mobility.

Extending beyond simple “where am I” functionality, navigation is supporting the context of enterprise and consumer applications to provide new functionality and to hopefully spur user adoption.

For the wireless operator, location-aware social networking applications may make it easier for **Facebook** friends to find each other on the move and use up data capacity in the process. Imagine being in a meeting and needing to locate someone with expertise in an area. A quick lookup on your mobile phone or PDA will show where she is and let you message her to come join you. Or it could be used to help a field technician locate the parts he needs to complete a call with a minimum of time and travel.

More and more mobile...

One inhibitor to mobile applications has been the complexity of retooling enterprise applications for the form factor, screen size, and resources of a mobile device. **Netbiscuits** offers a mobile application development environment that lets a developer drag and drop chunks of code—say, a .NET application—that is then formatted automatically for the target device.

NetBiscuits supports more than 5,000 device types in its environment, and counts corporate customers such as eBay and WeatherBug among its users. It is initially targeting companies looking to offer mobile access to external users. However, there is also a strong play for internal, behind-the-firewall usage, offering internal IT a relatively low-cost, low-resource way to repurpose code for the growing numbers of mobile users inside of the enterprise.

One of the more innovative products is from **Edioma**, an Austin-based startup. Edioma provides a mobile learning and gaming tool targeting kids that are trying to learn English. Supported either by a monthly usage fee or contextual ads, Edioma is targeting Hispanic families initially and hopes to penetrate the Chinese speakers market next.

i-mate is a Dubai-based wireless device manufacturer with a presence in the Asian, European, and Middle East markets. It provides its own line of Windows Mobile phones and a suite of software services called iQ services, with device customization, management, and security. It is now launching its Ultimate range of products devised in the United States.

The company may find its efforts to sell its own mobile phones through distributors and resellers in the U.S. market challenging. Companies as big as Nokia have been stymied by the idiosyncrasies of the U.S. wireless distribution model. But i-mate’s unique offering of high-spec devices combined with iQ services is worth looking at for its device management, security, and access to assets behind the firewall.

Air2Web is merging with **MindMatics** to create mobile marketing products designed to let companies promote, service, and transact with customers in a B-B-C sales model.

Air2Web has an impressive number of customers, including **AT&T**, **American Express**, **J&J**, **Quaker State**, **UPS**, and **VW**. Air2Web sets itself apart in the very busy mobile marketing space by serving customers (such as confirming package delivery via mobile) and executing transactions (such as reminders to take a prescription) in addition to its mobile marketing/promotion capabilities.

Given the large number of start-ups in the mobile marketing/advertising space, Air2Web’s experience, customer base, and promote-service-transact positioning may help it to provide a more unique value proposition than its competitors.

In closing

The wireless industry has grown tremendously the past decade, with CTIA estimating that a billion

text messages a day are being sent in the US, with 81% of the total population (243 million subscribers) owning and using mobile devices.

For the enterprise, the opportunity to invest in mobility is broad, with options that include anything from using mobile devices to optimize the activities of mobile field service workers, to providing access to mission critical information for mobile executives in a reliable and secure fashion, to using mobile phones as one way to create a closer and more immediate relationship with customers. Mobility continues to be complex; it's a combination of devices plus applications plus networks plus content plus security), but the mobile industry continues to grow and to innovate – and so should your company. CTIA gave us a lot of food for mobility thought, and renewed our optimism in the ability of the tech industry to innovate and grow. If you have ideas let us know, cfletcher@amrresearch.com.

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