MobiDM.com

empowering the mobile workspace

whitepaper

A whitepaper on

Managed Mobility

MobiDM provides managed mobility in the cloud. Like the electricity grid that is delivering electricity. Making managed mobility simple has been the starting point for developing MobiDM uniting the fragmented challenges faced by IT.

This whitepaper describes why enterprises will migrate to managed mobility services, that offer strategic, not simply operational benefits.

Authors: Alex Bausch & Nathan Kotek; **Main Sources:** Yankee Group, Joshua Holbrook (Managed Mobility Comes of Age, May 2010); **Other Sources:** Forrester Research and IDC

January 2011

Introduction

MobiDM is uniquely offered as an online cloud service, called Mobility-as-a-Service (MaaS®). Enterprise subscribers pay per device per month without having to invest in hardware, software, manpower or research & development. The benefits for clients and partners to work with MobiDM is a clear total cost of ownership (TCO), a fast return on investment (ROI) and a big reduction in mobile risk (such as meeting compliancy standards and regulations). MobiDM offers a full suit of operational, tactical and strategic mobile functionalities:

- **Mobile Enterprise Devices**
- **Mobile Enterprise Connectivity**
- **Mobile Enterprise Security**
- **Mobile Enterprise Media**
- **Mobile Enterprise App Store**
- **Software Development Kits (SDKs) for Third Party Development and Integration**
- **Plug-ins, such as for Telecom Expense Management**

The Managed Mobility Landscape is Fragmented

The managed mobility vendor community servicing the enterprise market has been in between hope and fear over the last decade. Each year has been anticipated as the big breakthrough year. Conventional wisdom suggested that enterprise managed mobility adoption would keep up with consumer mobile device adoption. Although some vendors had quite some success, such as Sybase, the real enterprise mass market breakthrough is yet to come. This delay has ushered consolidations amongst different vendors. So far, the enterprise managed mobility market has often been characterized as a supply-driven market although a soon breakthrough is inevitable since today's challenges demand it.

Taking a deeper look at the market dynamics explains why. Players on the supply and demand side struggle to grasp this complex playing field. The enterprise mobility market is characterized by fragmentation in five key areas:

1 Lifestyle Fragmentation - Today's workforce increasingly works from anywhere, due to technological possibilities, economic considerations, environmental consciousness or social political reasons. People typically use mobile technology for private as well as their work life. Mobile devices and applications are the epicentre to making today's mobile lifestyle possible. This development is an important driver for enterprise managed mobility adoption. Employees are increasingly using their personal devices, such as smart phones or iPad's at work. This places enterprise IT out of control. Even stronger, the iPhone has created awareness among users that rich mobile application experience are a realistic expectation. The high expectation regarding mobility puts enterprise IT further under pressure. Smartpads, such as the iPad, are rapidly replacing small netbooks and are increasingly becoming part of this blended-lifestyle experience. Management, in consultation with HR and IT departments, are currently weighing whether this development poses a threat or opportunity. IT is out of control and is seeking how to get back in control finding a balance between monitoring and managing enterprise assets without infringing on the personal privacy of users.

2 Cost Fragmentation - Enterprises are challenged to manage the costs of mobility. Phone subscription for voice and data and device purchasing bills are often expensed in decentralized P&L units as they are purchased though private channels. At a central level these costs remain unclear. Different vendors have been focussing on this issue with point-solutions for telecom and mobile expense management (TEM).

3 Device Fragmentation - Device manufacturers are introducing new models, operating systems and form factors such as the iPad and eReaders with the speed of light in order to conquer the hearts and wallets of mobile users. Android, BlackBerry, iPhone, Symbian, Windows Phone, Bada, Meego, J2ME – and more to come. It seems almost impossible for vendors and enterprises to keep up with this innovation pace, and therefore most focus on the platforms with the most volume or enterprise support. Many vendors position themselves as device agnostic, while in actual fact their solutions remain focused on, at best, up to three or four specific device and operating system platforms. This makes them in the eyes of IT a point-solution for enterprise device management. Recent attempts to standardize have failed and only added wood to the device fragmentation fire. So although enterprises yearn for standardized and interoperable devices and operating systems, it's clear that device fragmentation is here to stay for the foreseeable future.

4 Data Fragmentation - With the mobile devices entering the enterprise and the shift from voice towards data-centric subscriptions, mission critical enterprise data is at risk. This causes substantial security issues for companies. Compliancy and SoX regulations are forcing enterprises to face these risks and take action. Different vendors have been focussing on this issue with point solutions.

5 Application Fragmentation - Mobile technology has opened up new opportunities for the enterprise to unlock their corporate systems and by doing so gaining competitive advantage. How easy and convenient would it be to download your CRM, ERP or any other corporate application through an enterprise app store? The ability to execute on this vision that exists for years has not yet materialized. Enterprises struggle with their existing fixed application portfolio and therefore struggle to envision an additional mobile layer. Various vendors have started to focus on this strategic opportunity to make the lives of enterprise employees, customers and partners easier and the business more productive and competitive. Yet in reality the solutions are point-solutions for specific application, such as SalesForce.com for mobile CRM.

The overall picture should be clear:

- **Supply Side** - The vendor community fails to put the different point solutions together into a cohesive managed mobility offer, including required professional services capabilities, and add a clear overall road-map for managed mobility. Mobile lifestyles, costs, devices, data and application management solutions remain in silos. Even successful vendors such as Sybase have been slow to respond to this opportunity. The vendor community offers fragmented managed mobility point-solutions and fight among each other who's best positioned to serve the enterprise.

- **Demand Side -** At the same time enterprise IT remains squeezed. Employees taking control over their personal business devices in the enterprise with self-service as their modus operandi, and enterprise IT seeking for end-to-end suppliers relieving their pain.

The question remains who are best positioned to serve enterprise IT with managed mobility? Internal Mobile Experts, Independent Software Vendor's, System Integrators, Operators, OEM's, Solution Providers or perhaps a blend of these players?

As enterprise IT is out of control, enterprises are looking for new end-to-end solutions that are simple in their build up, distribution and cost structure (KISS), and powerful in their ability to execute. Most enterprises are still in their early days of adopting managed mobility and therefore require fairly simple solutions today. Nevertheless, as their requirements become more strategic in nature, vendors need to be ready with a future-proof roadmap in order to build trust and qualify to get access to the enterprise.

Mobility-as-a-Service (MaaS®)

Making managed mobility simple, has been MobiDM's starting point uniting the fragmentation challenges faced by enterprise IT. MobiDM provides managed mobility on demand in the cloud (or internet-based), like the electricity grid is delivering electricity. Making functionality available as a utility, with a pay-as-you use model, is taking away many barriers for enterprise IT to make a start with managed mobility. The current take-off proves that the MobiDM cloud offering is an accelerator for enterprise managed mobility. Other market developments that favour the MobiDM MaaS® approach is that cloud-based services have become so pervasive that enterprises will finally being forced to play catch up. Especially for the managed mobility space cloud computing is an opportunity as mobile device and mobile apps adoption has already empowered workers to expect (and demand) cloud-based easy to use mobile services 24 x 7. The recession-related technology spending delays from 2007 to 2010, will work in favor of cloud services. Many of the challenges with cloud-based services are now fixed, that were not enterprise-ready before 2007. Last but not least, cloud-based security concerns have abated somewhat as enterprises realize the difference in risk profile between internal and external environments is lower than they once believed.

Market Developments

The total number of mobile workers, in the core categories office-based mobile workers, non-office-based mobile workers, and home-based mobile workers, using mobile devices accessing enterprise systems worldwide will top the 1 billion mark in 2010 on the way to 1.2 billion by 2013, or more than 33% of the world's workforce, according to IDC. Western Europe's mobile workforce will grow at an annual rate of 6 % over the five-year period to reach 129.5 million, or 50.3 % of its workforce. Western Europe's mobile workforce will surpassing the total number of mobile workers in the U.S in 2013. The U.S. is the most highly concentrated market for mobile workers with 75.5 % of the workforce, or 119.7 million workers in 2013, up from 72.2 % in 2008. Emerging-market countries in Central and Eastern Europe, the Middle East, Africa, Latin America and Canada will see total mobile worker population grow to 153.2 million by 2013, only 13.5 % of the total workforce in those countries.

According to Forrester Research, 46 % of firms provide some sort of support for mobile devices today. Although this sounds high, taking a closer look at the facts shows a somewhat threatening picture. Reason is that 60% of enterprises currently have only manual processes for supporting mobile workers (requiring physically exchange of mobile devices for all sorts of small, large and security support). When asked what technologies and services could help mitigate the burden of supporting mobile workers, 91% of enterprises with manual mobile support processes currently in place believe that the ability to connect to remote user's devices to install automated updates, repair software issues, or gather diagnostic information would be a key IT investment to starting to assist with improving these processes.

Enterprises surveyed by Forrester in Europe and the US believe these proactive support abilities will increase mobile workers' and executive management's satisfaction with IT (78%) and increase the productivity of the mobile workers (72%) and efficiency of IT (67%). This is not strange taking into consideration that mobile devices are so central in people their business and personal life. Managed mobility creates a threat and opportunity for Enterprise IT as mobile devices are very close to workers their heart, head, hands and wallet.

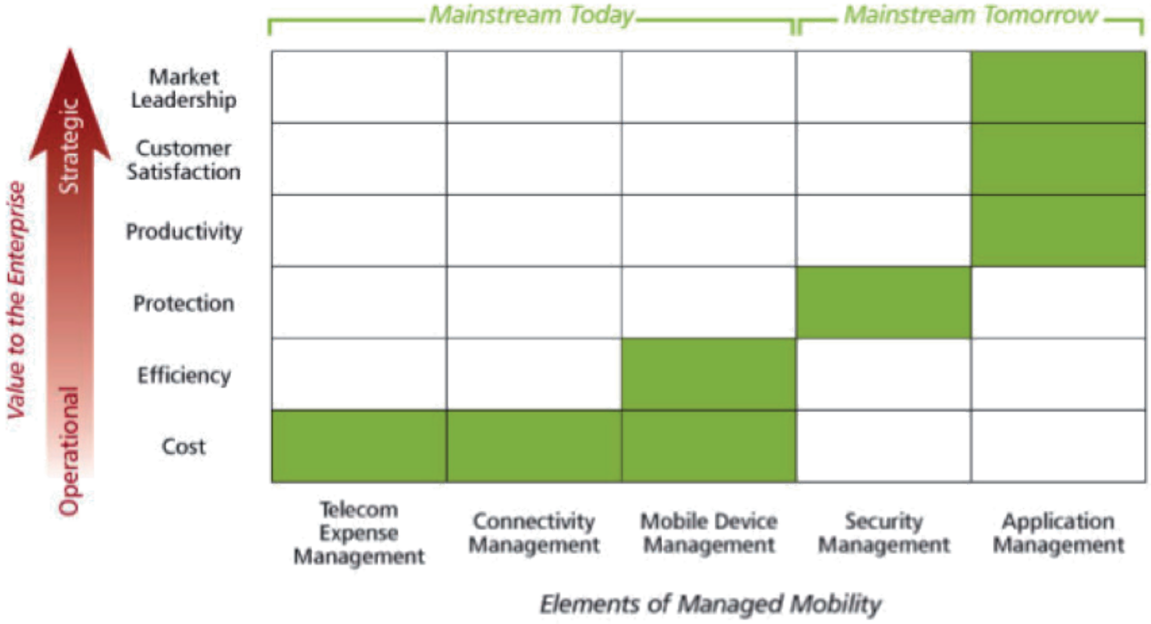
Mobility Momentum

The overall view is that the mobile worker and enterprise IT is underserved across all regions and will benefit from enterprise managed mobility services. This even more so if the services are offered with a clear price and simple delivery model in the cloud. The market developments show that the growth potential for enterprise mobility is enormous, but that enterprise adoption remains slow if managed mobility deployments remain complex and behind the fire-wall. The pressure for enterprises to pick up managed mobility will further grow over time as both mobile populations and the number of users expecting support on mobile devices and operating systems continues to grow.

Enterprise IT is longing for well-orchestrated end-to-end solutions with maximum ease of use in order to regain control. A 2010 study of Yankee Group, supports the MobiDM vision that enterprises will migrate to managed mobility services that offer strategic, not only simply operational benefits. The MobiDM road-map is well aligned with this vision.

EXHIBIT 1: ENTERPRISES WILL MIGRATE TO MANAGED MOBILITY SERVICES THAT OFFER STRATEGIC, NOT SIMPLY OPERATIONAL, BENEFITS

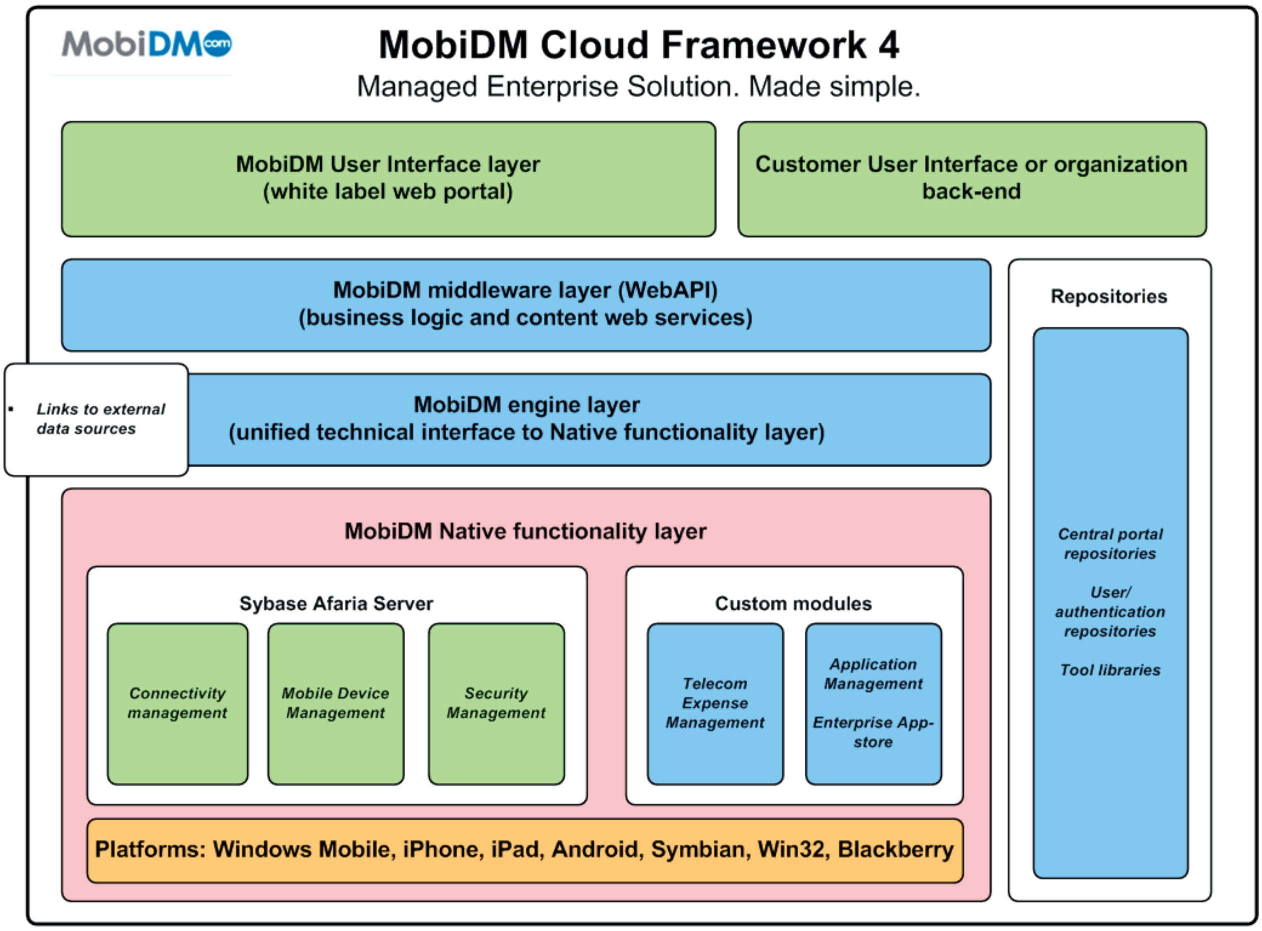
SOURCE: YANKEE GROUP, 2010



MobiDM is well positioned in the enterprise managed mobility segments and has a near-and long-term platform service roadmap that provides the following MobiDM cloud framework (exhibit 2):

- **White Labeled Representation Layer**
- **Functionality Layer (including Mobile Enterprise: Connectivity, Devices, Security, App Store, plug-in for TEM and Mobile Media**
- **Middleware Layer**
- **SDK's Layer**

EXHIBIT 2: MobiDM Cloud Framework 4



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