Shoreline Research

Consulting, Strategic Marketing, Editorial and Ideas

The Wireless "WAN-Scape"

Wild and Wooly or ROI Ready?

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Technology: Pushing the Mobile Metaphor

Why Go Mobile Or Wireless?

- Increases enterprise effectiveness & productivity

- Mobile access to email & contact info

- Mobile access to enterprise systems

- Extends 'collaborative' efforts (among field force,   sales force, and executives)

- Allows for more up-to-date 'business
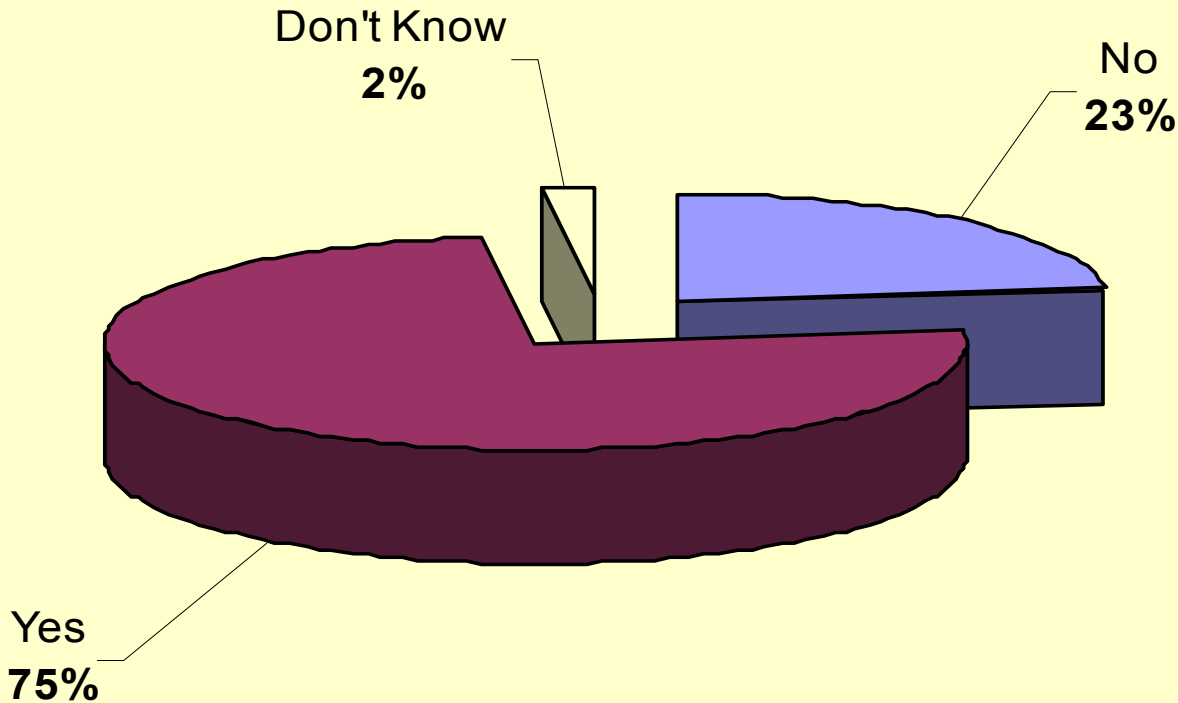
How Are Devices Updated with New Information?

- Most users synchronize once or twice a day

- The majority of applications rely on one-way push technology

- Most applications do not communicate or interact with each other

- Poor collaborative abilities make for mobile 'Islands in the Scream'

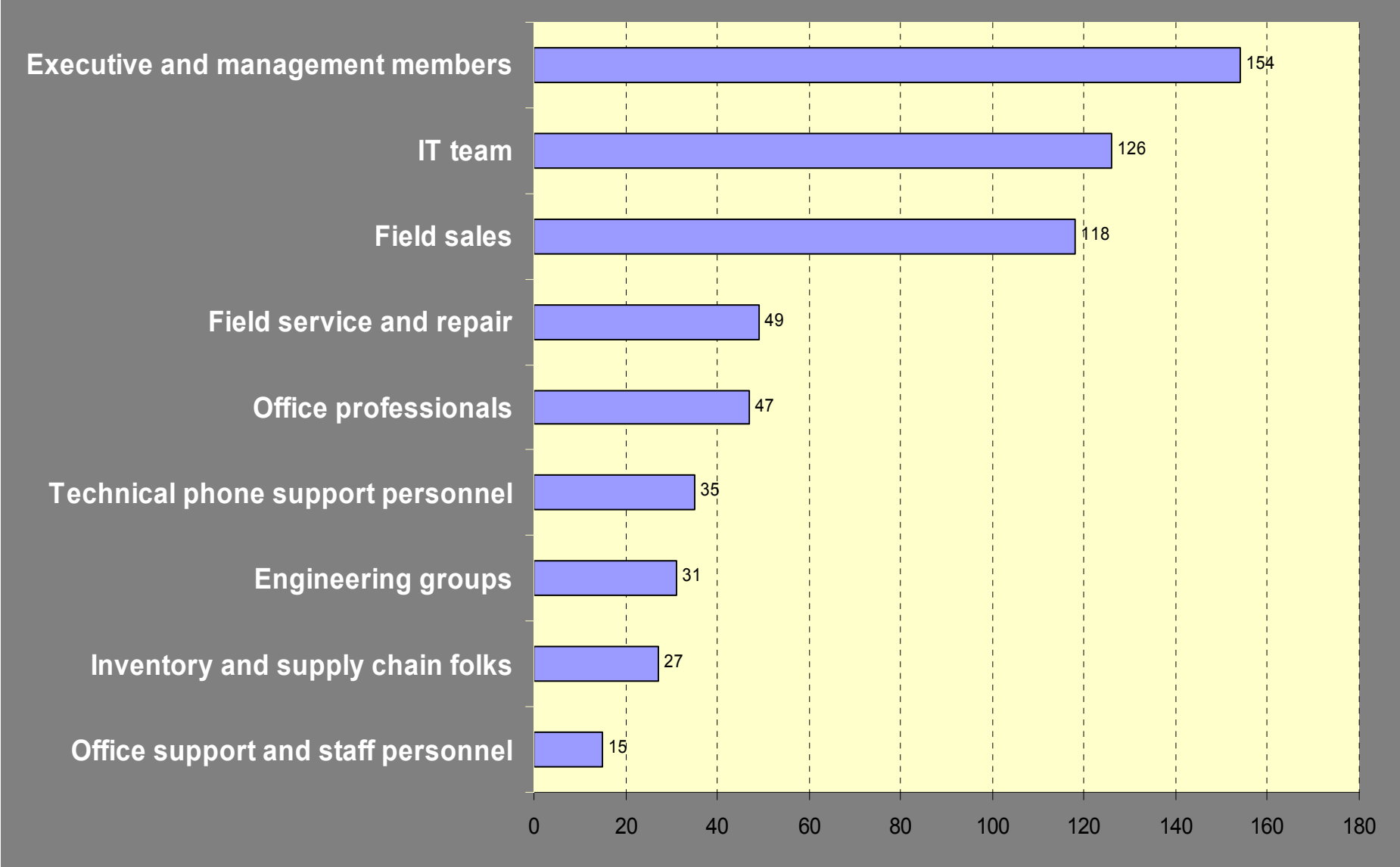Based on Survey of Enterprise IT Users

Percent Of Mobile Workers In Company
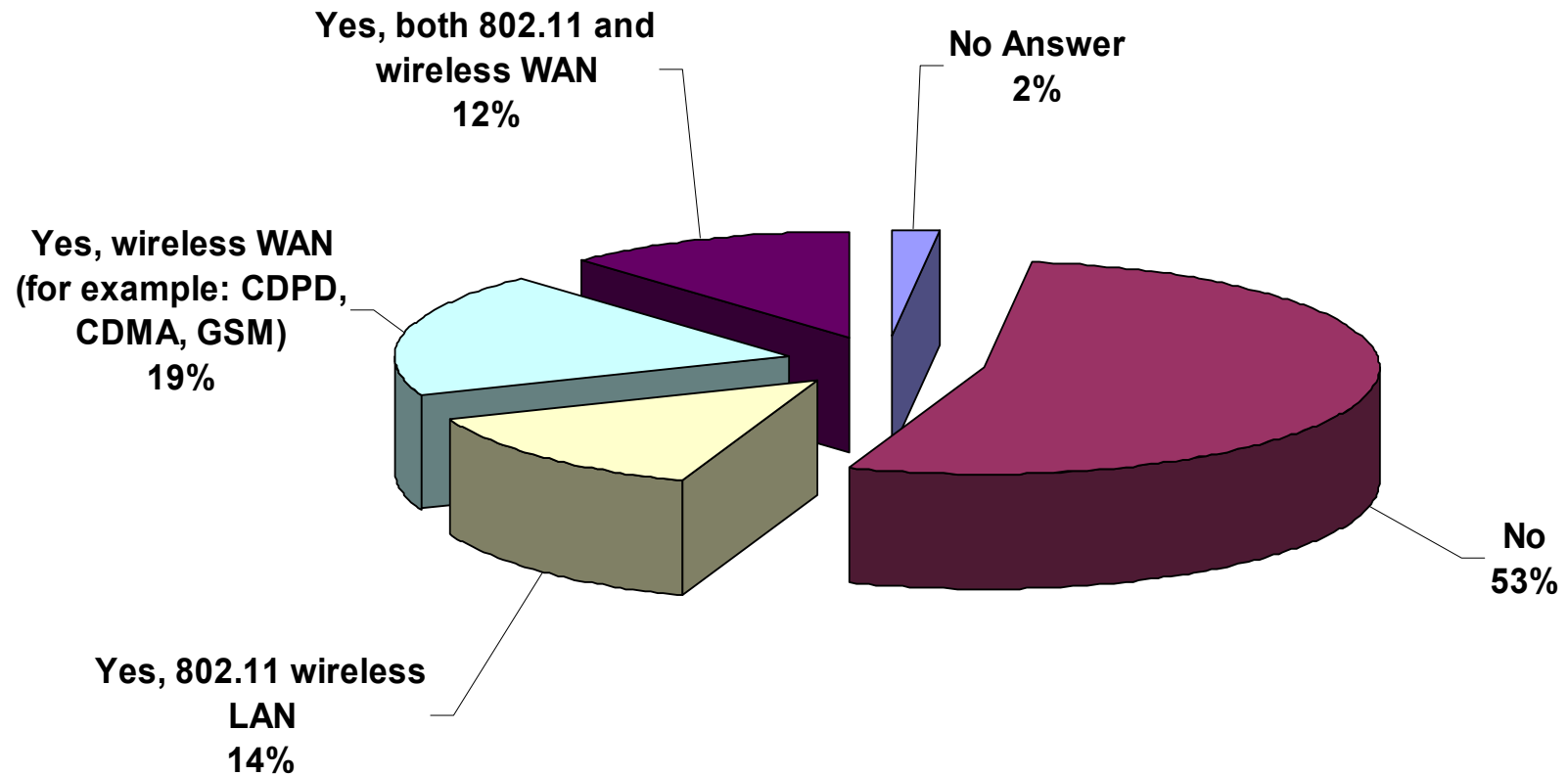

More than 50%
16%

Less than 10%
29%

26-50%
19%

11-25%
36%
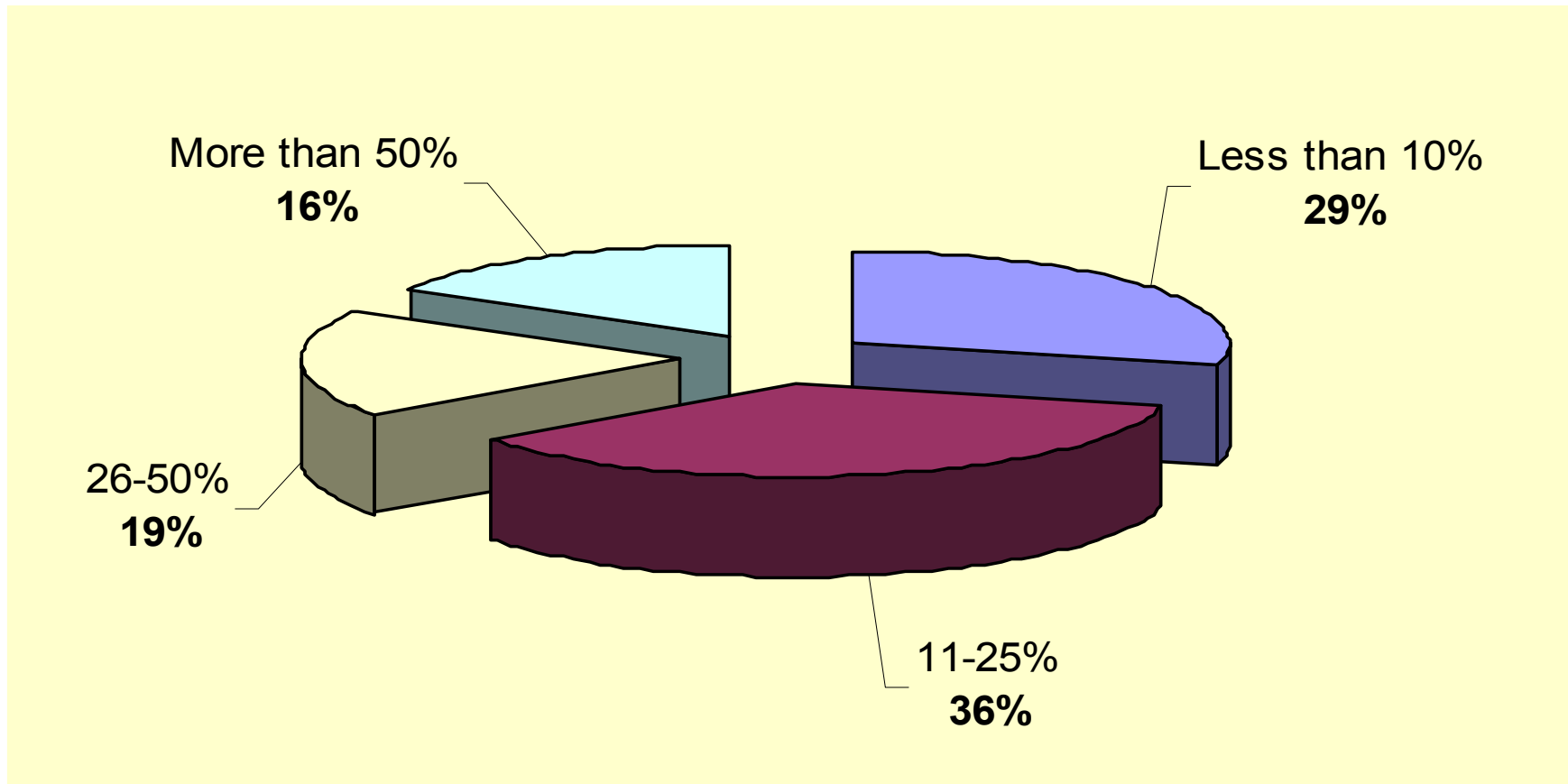
Mobile Devices Used As Part Of
SFA, FFA, and Mobile Worker Efforts

Don't Know
2%

No
23%

Yes
75%

Who is Holding the Handhelds?

Wireless Use Within the Enterprise

Yes, both 802.11 and wireless WAN
12%

No Answer
2%

Yes, wireless WAN (for example: CDPD, CDMA, GSM)
19%

No
53%

Yes, 802.11 wireless LAN
14%

Where will wireless most immediately occur?

Warehouses
15%

Corporate
Office
44%

Field
Workers
17%

Branch
Offices
24%
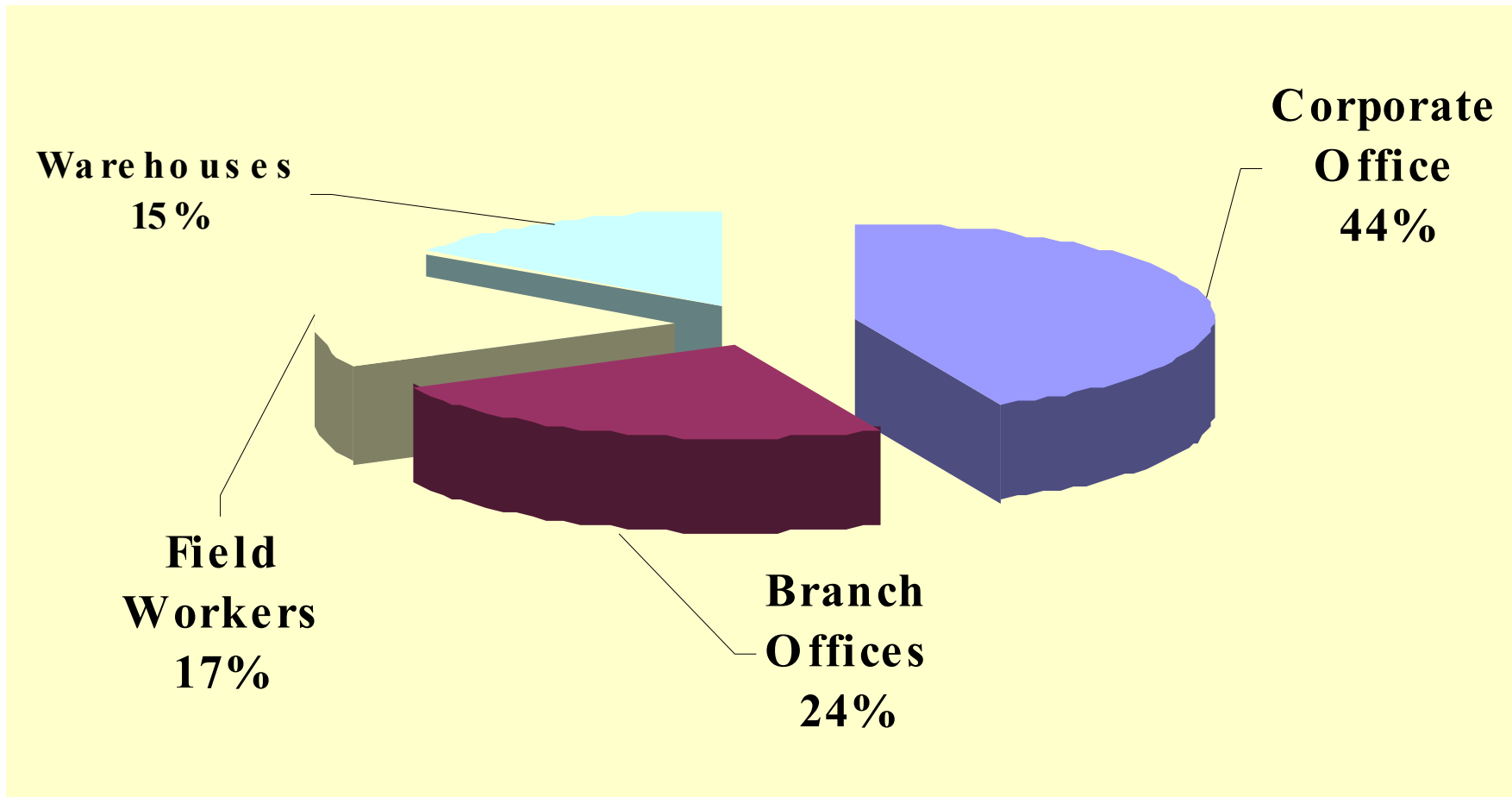
Is Your Company Presently Focusing More Attention On Messaging As a Business Tool?

22% Yes, to a great extent

22% - No plans at all

16% No, but will increase efforts next year

6% No, but will increase efforts within six months

34% Yes, to some extent

Shoreline Research Data: MMB 2002
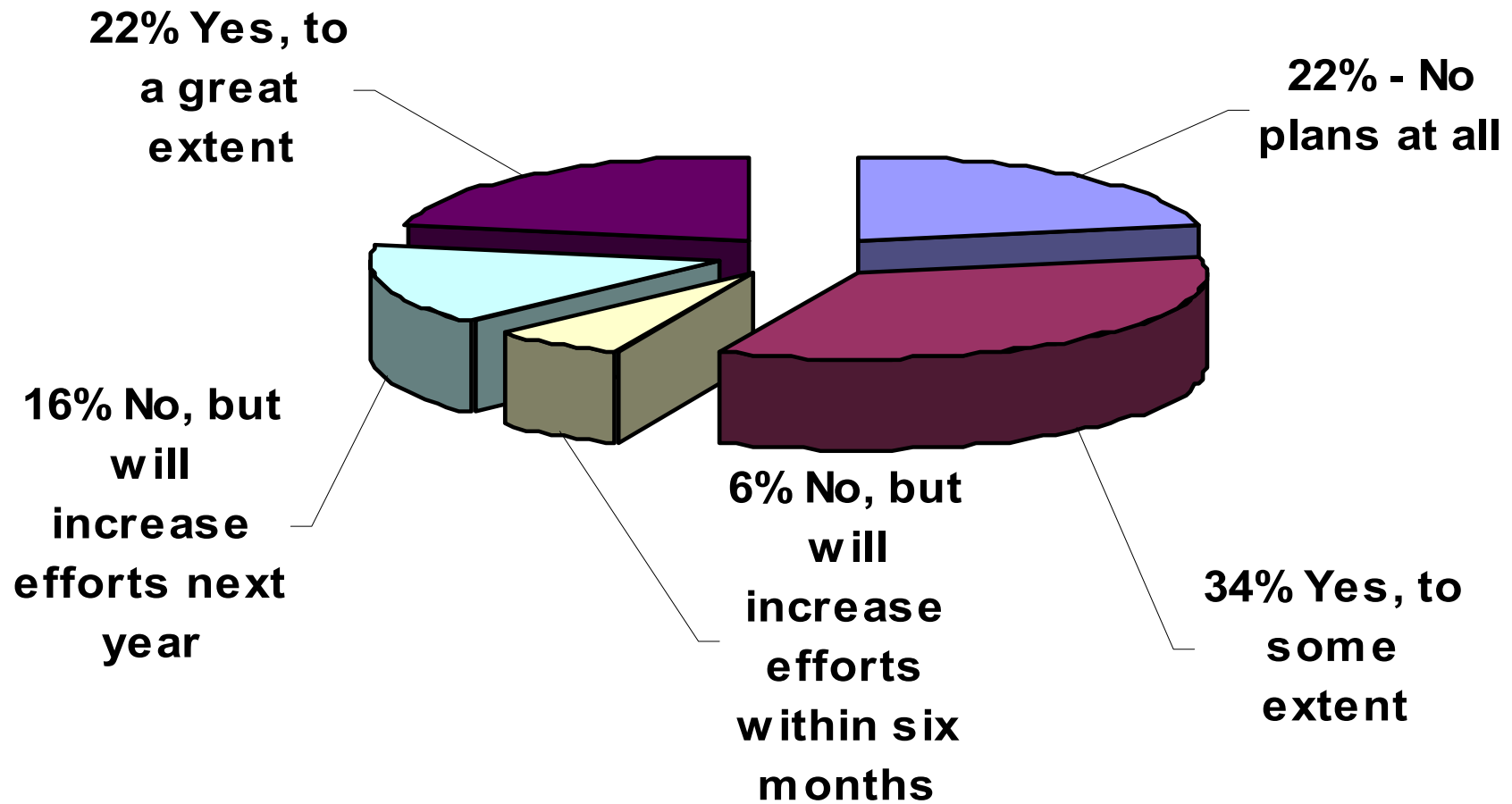
Mobile And Wireless IT Services
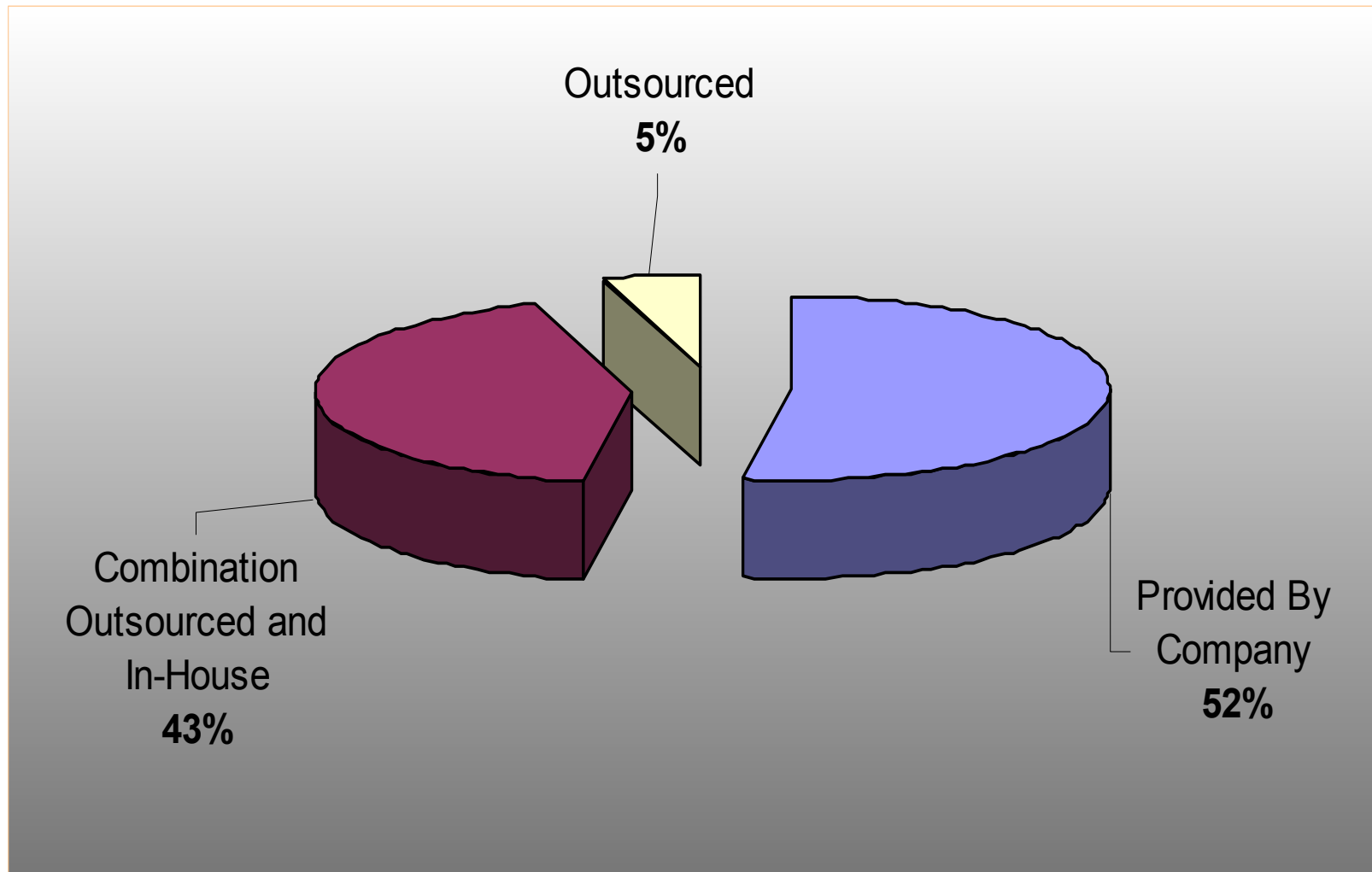
Wireless Future:
Always On, Always Available Devices

- Devices that maintain almost continuous connections to remote resources and hosts

- Rapid and multiple synchronizations

- Improved 'mission critical' information delivery capabilities

- Applications that are designed for pervasive connections and constant information and applications exchanges
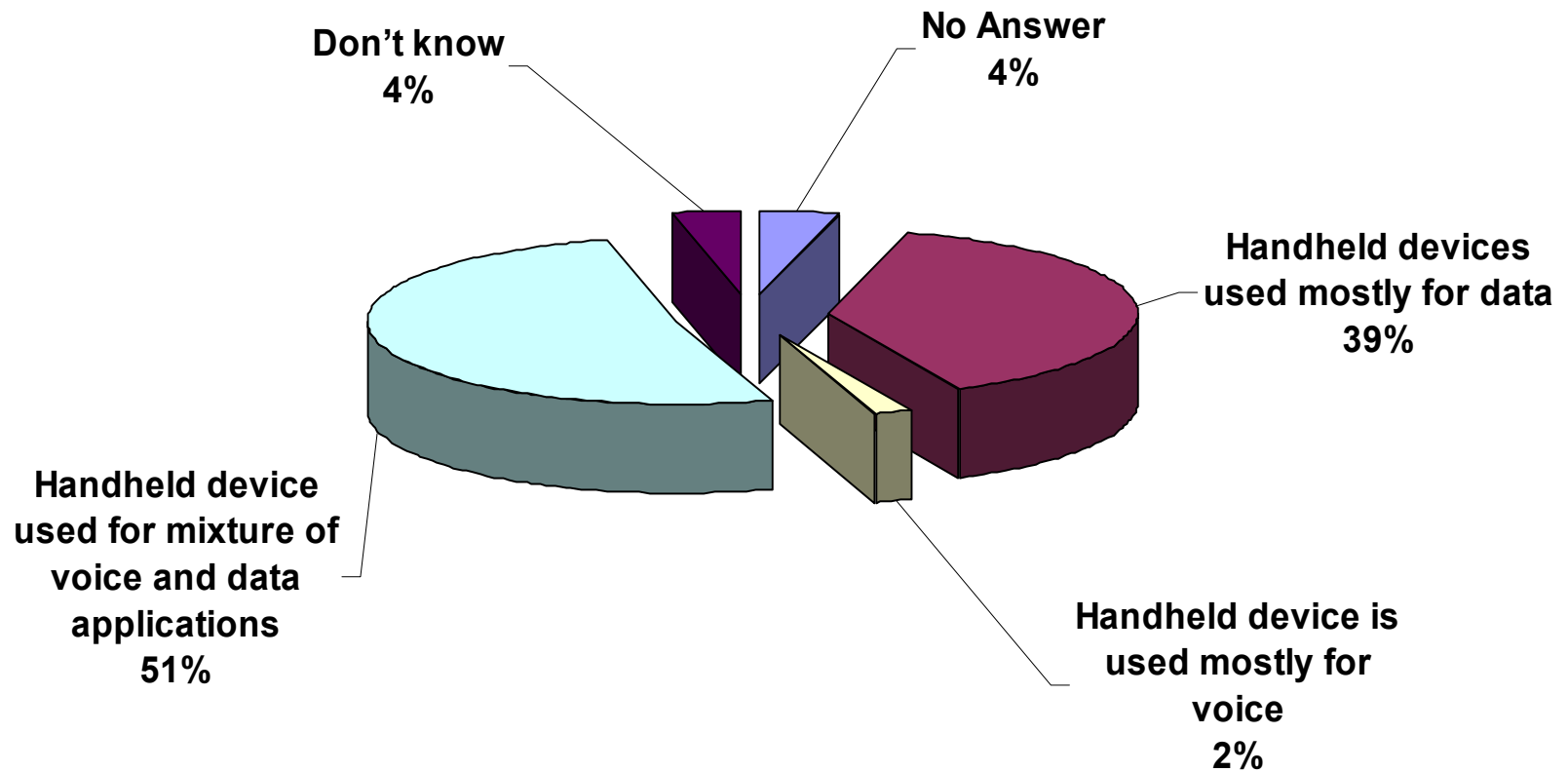
The Importance of Underlying Technologies

•Reliable and pervasive services

•Ability for rapid and multiple synchronizations

•Automatic roaming and user authentication

•'Just-in-time security techniques

•Location-based capabilities

•Personalization

•Support for multiple networks

Evolution of New Types of 'Application-Centric' Devices

- 'Larger Glass' Tablet PC Systems

- Wireless-enabled 'Wearable' PCs

- Voice/Data Wireless Devices

- Portable Video Conferencing Systems

- Mobile 'eLearning' Systems

- Flexible '*Transformers*'

Handheld Usage in the Future

Don't know
4%

No Answer
4%

Handheld devices
used mostly for data
39%

Handheld device
used for mixture of
voice and data
applications
51%

Handheld device is
used mostly for
voice
2%

A Wireless Black Cloud

- Enterprises are reluctant to make significant investments and deployments
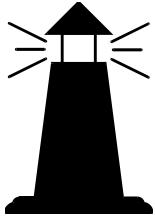
- Technology does not sell

- Wireless is caught up in the telecommunications vortex

    Slow roll-out of more aggressive wireless infrastructures

- Impact of Homeland Security on deployments

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<u>Panelists</u>

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