

## I D C V E N D O R S P O T L I G H T

### **Business On The Go: Core Business Needs Driving Mobility Adoption**

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*Enterprise mobility is radically transforming work style, work environments and business processes. The industry has relentlessly invested in innovations around improving the functionality of mobile devices. The devices have seen a convergence of wireless technologies, data capture technologies, computing capabilities, and business applications. With so many flavors of mobile phones, laptops, tablet PCs and rugged mobile computers available today, mobile workers are spoilt for choice. The mobility vendors have also invested in making network infrastructure more reliable and intelligent. The progression of enterprise mobility technologies along the maturity curve, coupled with the industry's recognition of enterprise mobility's strategic business value, is motivating enterprises to mobilize their core processes. Today, the industry is sitting on a wealth of learning and best practices from early adopters, and is poised to transform businesses through the use of appropriate mobility tools and applications.*

*This IDC Vendor Spotlight analyses emerging trends related to business drivers and technology evolution of enterprise mobility. The study takes a look at how specific industry verticals have empowered their mobile workers to build operational efficiencies. We also discuss the role of Motorola's portfolio of products in this market segment.*

#### **What is Enterprise Mobility?**

Enterprise mobility is about mobilizing the business organization. It involves the provisioning of tools, resources, and processes by the organization to allow its employees to effectively perform their tasks while on the road or away from their workstations. Typically, this involves an extension of business applications/solutions through the use of portable and mobile devices.

Enterprise mobility is also mobilizing the organization within and beyond its four walls, integrating business critical processes in a seamless and transparent manner over a manageable platform so that information is available to decision makers in near real time, anywhere over devices. Resource optimization, real-time and more effective decision making as well as process optimization can be achieved to gain cost and competitive advantages.

Enterprise mobility is now focused on mobilization of core processes of the enterprise. Enterprise mobility solutions have a holistic approach towards mobility, leveraging a range of devices with form factors, functionalities, wireless radio and applications suited to the workforce type. A range of technologies such as auto-identification and data capture, voice, GPS/RTLS, WLAN and WWAN, payment as well as enterprise applications to offer end-to-end solutions for a truly realtime enterprise.

#### **What is Spurring Enterprise Mobility Adoption?**

The unflagging proliferation of enterprise mobility during the economic crisis is not a mere coincidence but a result of an intersection of market needs and technology evolution. The most fundamental driver is the need to work from anywhere, anytime, under any environmental conditions. IDC's Asia/Pacific Unified Communications & Enterprise x.0 survey 2008 shows that

54% of enterprises in the Asia Pacific excluding Japan region (APeJ) (n=762) allow telecommuting, of which nearly half the responding enterprises implemented it in 2008.

### ***Business Compulsions***

The need for enterprise mobility is growing at many levels of corporate functions. Senior management want to use enterprise mobility for rapid decision making. In any line of business function, timing is a key factor in effective selling. Today, line of business wants to use mission critical tools while on the go for greater responsiveness and multitasking capabilities. IDC's Asia/Pacific Business Users Survey 2008 results show that 47% of business users (n=655) in Asia/Pacific want to use mobile sales force automation. In general, line of business wants to use enterprise mobility for productivity, avoiding missed revenue opportunities and capturing data at the point of activity.

Furthermore, the need to mobilize mission critical applications is far more pronounced among enterprises that have placed competitive advantage high on their corporate agenda. Mobility empowers the enterprises' frontline troops who are battling it out in the field. Armed with appropriate mobile devices and applications, the field force can effectively manage customer experience. CIOs want to garner maximum value from mobile technologies by dovetailing mobile solutions with the companies' business processes. CIOs today are more receptive towards mobilizing mission critical applications to gain a competitive edge. Mobile and data capture technologies are being employed in several processes to eradicate manual tasks and minimize human errors and latencies.

The drivers behind enterprise mobility adoption vary depending on the industry vertical. For instance, an enterprise from the retail industry vertical could be driven by the need to improve inventory management, while government agencies use mobility tools for law enforcement, and human and high value asset tracking. For many industries, government regulation requires 'end-to-end product traceability', which is possible through the use of data capture technologies such as RFID and barcodes.

Regardless of the industry vertical, enterprises want to collect data from the field and shop floors for getting real time information on sales, operations, customer service, and resource utilization. Managers are able to incorporate real-time facts into sound business decisions. A courier service operations manager's mobile business dashboard could alert him/her of unusually poor service delivery metrics in a particular zone, based on which he/she could make a timely decision to direct more resources to the affected area..

### ***Technology Comes of Age***

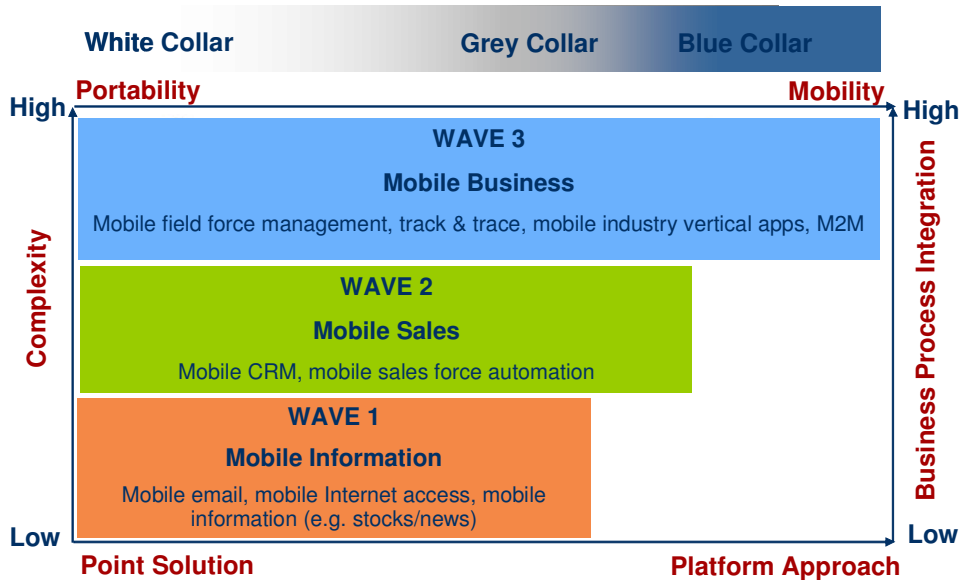
The wireless broadband networks have become more pervasive. The newer WWAN technologies such as 3G, WiMAX and WLAN 802.11n are pushing the boundaries of mobile coverage and speed. The network is becoming more intelligent and robust to deliver a reliable and widespread mobile coverage. Advanced mobility technologies such as auto-identification (auto-ID) have moved up the maturity curve. In addition, mobile devices are available in a variety of form factors. They have become versatile enough to support a range of wireless technologies, data capture technologies, computing capabilities, and business applications. Mobile phones, laptops, tablet PCs and rugged mobile computers available today in many varieties. As a result, white collar, grey collar and blue collar workers can avail of mobile devices that meet the specific needs and rigors of their role and work environment. The evolution of mobile and portable devices is opening up a host of possibilities to empower different types of mobile workers such as business decision makers, sales force, delivery personnel, field service engineer, delivery truck drivers, law enforcement personnel, nurses and so forth.

## Evolving Scope of Enterprise Mobility

IDC views the advancement of enterprise mobility in three waves of adoption (refer to Figure 1).

**FIGURE 1**

Enterprise Mobility Evolution



Source: IDC, 2009

### Enterprise Mobility in Wave 1

In the first wave of enterprise mobility technology adoption, enterprises were largely focused on 'Mobile Information'. This involved mobile access to basic messaging applications (e.g. email) and information such as news and stock prices. During this wave of adoption in Asia/Pacific, enterprise mobility was largely synonymous with portable mobility, powered by laptops with WLAN connectivity. Wave 1 largely involved point solutions for white collar mobile workers.

### Enterprise Mobility in Wave 2

The second wave of enterprise mobility adoption could be described as 'Mobile Sales'. This wave of enterprise mobility adoption involved a drive towards more complex solutions such as mobile sales force automation or mobile CRM, for both white collar and grey collar mobile workers. The industry saw traction for both point solutions and mobile platforms that performed data synchronization for connected smart phones as well as disconnected PDAs.

### Enterprise Mobility in Wave 3

The industry is now in its third wave of adoption, which is focused on mobilizing an enterprise's core processes. Admittedly, some forward looking enterprises have already leapfrogged to Wave 3. However, only in recent times a critical mass of enterprises are adopting or evaluating 'Mobile Business'. Need for greater visibility of processes, assets and overall business performance is driving companies to adopt solutions that allow status updates in real-time. Hence, enterprises are providing the field force and on location mobile workers with connected devices.

In the third wave, added complexities of mission-critical enterprise applications, business processes, diverse mobile worker profiles demand an advanced level of expertise from the technology provider. 'Mobile Business' requires a broad range of mobile devices particularly mobile computers, which are progressively growing compact, powerful and looking less

intimidating. They are packed with many more functionalities, wireless radios, and applications tailored for a business. The third wave is seeing a convergence of auto-identification and data capture, GPS/RTLS, WLAN and WWAN technologies as well as enterprise applications to offer end-to-end solutions for a truly real-time enterprise. These enterprise mobility solutions intend to unfetter white collar, grey collar and blue collar mobile workers in a holistic manner.

The industry is witnessing the adoption of fleet management, mobile field service and mobile supply chain management solutions. Horizontal mobile solutions have evolved to include a whole family of point solutions that can be offered in isolation or as an integrated whole. For instance, direct store delivery /route accounting includes just-in-time inventory and stocking, pre-sales and merchandising solutions, and fleet management includes yard management, fleet maintenance, and mobile dispatch pickup and delivery solutions. 'Mobile Business' also brings into play the need to manage a variety of mobile devices, wireless networks, software and data through remote device control and management, remote software updates and prioritised data synchronization.

The third wave is also witnessing the usage of advanced auto-identification (or auto-ID) technologies. The need to capture more information via barcodes (for example manufacturing and expiry date) is seeing a growing demand for 2-D bar codes. While 1-D bar codes are still the technology of choice for mobile retail applications, 2-D bar code technologies are seeing a higher integration in track and trace applications for manufacturing and healthcare verticals. The key debate in the industry is whether RFID will replace bar code technology. While RFID is adopted for tracking more valuable enterprise assets, bar code is used for assets of relatively lower value. RFID tags are typically used in totes and tugs which pass through gates or doors fitted with RFID readers and antennas, allowing for automatic tracking and documentation of goods. The reusability of RFID tags offsets the challenges around the cost of RFID tags. Industry is coming to a common understanding that RFID and bar codes have a complementary play in enterprise mobility.

## **Industries Leading the Mobility Adoption Charge**

IDC notes a variety of industries in the region adopting highly customized enterprise mobility solutions to meet their specific industry demands. These industries include retail, transport and logistics, manufacturing, healthcare, government/public sector and hospitality.

### ***Retail***

Stiff competition in the retail industry, prompts department stores and mass merchandisers to constantly reinvent themselves to provide exceptional customer experience and maintain or improve margins. They want the store staff to avoid getting bogged down by inventory management issues and have maximum face time with customers. Mobile retail solutions include store and stock room applications for accurate stock/inventory management and in-store placement of products. This would ensure fewer stock outs, improved pricing accuracy, and faster sales transactions. A range of data capture handhelds are available for the retail industry. They have a small form factor and a rugged design to handle drops on concrete and moving in and out of cold environments. In addition, customers could use portable scanners and micro kiosks for self service, which will ensure faster sales transactions and enhanced customer experience.

### ***Transportation & Logistics***

For the transportation and logistics industry, enterprise mobility is critical for gaining better visibility into movement of merchandize. The industry leverages ubiquitous WWAN and WLAN networks for in-field data transmission and back end synchronization for real time inventory updates and revenue recognition. Vehicle applications, distribution center and dispatch service solutions are relevant for transportation and logistics companies. Delivery trucks can be installed

with mobile gateways for data transmission via cellular networks to a central repository. Proof of delivery solution allows drivers to use mobile devices to scan bar codes upon goods delivery, capture signature and print a delivery receipt at customer sites. Other highly targeted solutions include route accounting/direct store delivery system, which adds more efficiencies such as adding more stops to the delivery route, shorter invoicing cycles, real-time inventory check, and last-minute order inclusion.

### ***Manufacturing***

The manufacturing industry is constantly challenged to improve operational efficiencies and cost. This industry is now investing in enterprise mobility, particularly for asset management, inventory management, process-oriented applications such as work-in-progress tracking, human machine interface (HMI), and supply chain applications. There is a clear focus on ROI and security in any mobility implementation. Most of the automation and mobilization is done to reduce human errors and latency on the shop floor and warehouse. Rugged handheld devices supporting advanced data capture and wireless technologies, and mobile enterprise asset management application, are used for physical asset maintenance on the shop floor. In the warehouse, wireless wearable devices allow workers to be hands free. These rugged terminals can withstand drop on concrete and wide ranging temperatures. IDC's Asia/Pacific UC & Enterprise x.0 2008 survey reveals that the highest share (45%) of Asia/Pacific enterprises from manufacturing industry vertical (n=84) currently use rugged handhelds or notebooks. Manufacturers are also streamlining the order-to-delivery process by equipping their sales force with mobile sales force automation application for sending the order wirelessly to the warehouse and getting an immediate confirmation.

### ***Healthcare***

Around the world, national governments are looking at ICT as a major change agent for improving access to quality healthcare service, and hospital staff productivity while reducing the cost of care. Hospitals are faced with mounting challenges such as escalating costs due to medical errors, staff inefficiencies and mismanagement of medical equipment and medicines. Healthcare workers extremely mobile on and off campus, and therefore mobility tools can improve caregivers' productivity. Hospitals in Asia/Pacific are increasingly adopting WLAN for delivering critical patient and medical information to medical professionals. A variety of mobile and data capture technologies could be employed for telemedicine, chronic disease management, medical equipment management, critical care, and ePrescribing. A combination of mobile technologies and real-time location services could help track the nearest relevant doctor during an emergency. Current enterprise mobility solutions for the healthcare industry include nursing applications such as identity management, medication/transfusion administration solutions, and physician applications such as medical rounds solutions.

### ***Government/Public Sector***

Government agencies tend to adopt mobile technologies for law enforcement, asset management and maintenance. They implement mobile solutions such as parking tickets and eCitation, which are self sustained projects as the fines pay for the CAPEX and OPEX linked to these projects. Therefore, such mobility solutions have a clear business case. Department of defence and government agencies have been adopting auto-ID technologies for inventory management, asset tracking, warehousing, and depot management. In Australia, government agencies use mobility to track moving assets during emergencies such as bush fires. Department of defence typically requires more flexibility in terms of application development and deployment. Needless to say, secured network and mobile devices is a major consideration for defence departments and law enforcement agencies. Law enforcement agencies have a preference for small form factor devices that fit in the officer's pocket, but at the same time support GPS and bar code scanning.

## **Hospitality**

In Asia/Pacific, the hospitality industry, particularly global hotel chains are adopting enterprise mobility to offer consistent customer experience and improve revenue generating opportunities. Resorts and hotels are driven by the need to streamline communication between front desk and back office to provide exceptional customer service. IDC's Asia/Pacific UC and Enterprise x.0 2008 survey reveals that the highest share (13%) of Asia/Pacific enterprises from hospitality industry vertical (n=69) reported that they plan to use mobile CRM in the next 1-2 years. In Singapore, restaurants equip their serving staff with mobile devices that communicates with the kitchen and point of sale system for fast and accurate tableside order processing and invoicing. Busy food outlets make use of mobile ordering solutions for managing long customer queues.

## **Profile of Motorola**

Motorola has a broad portfolio of communications product offerings spanning broadband communications infrastructure, enterprise mobility, public safety solutions, high definition video and mobile devices. Its three business units include enterprise mobility solutions, home and networks mobility and mobile devices. Motorola had US\$30.1 billion in revenues in 2008. Despite the group's overall financial challenges, its Enterprise Mobility Solutions (EMS) division has been a bright spot for the company.

Motorola's EMS division has completed integration of Symbol Technologies from an organizational and product standpoint. Symbol brought to the table its deep industry vertical focus particularly in retail, supply chain, and field mobility, and a compelling portfolio of RFID and WLAN products. Symbol's device centric approach has been combined with Motorola's horizontal communications technology offering, solutioning approach and VARs network. Motorola historically has had a strong presence in the government and public sectors. This merger has resulted in an extensive enterprise mobility portfolio of wireless broadband and data capture equipment, voice and data communications products and systems, analog and digital 2-way radios, micro kiosks, and mobile computing devices. Motorola offers a choice of technology suited to different geographies. It has localized and ergonomically designed devices specifically for Asian markets such as India and China.

## **Mobile Computers**

Within the mobile computers segment, Motorola is addressing a broad range of enterprise mobility needs. On one end of the spectrum, industrial class mobile computers are designed for durability, task-orientation and severe industrial environment conditions, while at the other end, enterprise class mobile computers balance durability, task orientation, with smartphone capabilities in varying degrees. Motorola combines an extensive range of mobile devices with end-to-end industrial and enterprise class mobility solutions for horizontal and industry vertical needs.

## **Industrial Class Solutions**

Motorola's industrial class mobile computers are designed to meet the needs of extremely demanding environments. The solutions use rugged handheld mobile computers or vehicle and fixed mount devices on heavy equipment. These devices are fit for reliable operation — outdoors in severe weather; in dusty and hot warehouses; on manufacturing floors; on the road in delivery vehicles; in the aisle of retail stores, and more. These are integrated voice and data devices that eliminate the need to purchase both mobile phones and computers for mobile workers. This product line offers advanced data capture options (1D and 2D bar code scanning and imaging), a range of communication options such as WLAN connectivity for workers inside the enterprise, WWAN for workers outside the four walls, batch for off-line processing, and WPAN for connectivity to peripherals, such as printers and headsets. These solutions are clearly focused on

blue collar workers who may be mobile in a non-office location such as a warehouse, or outdoor in harsh or semi harsh conditions.

## **Enterprise Class Solutions**

Motorola's enterprise class mobile computers combine small and lightweight EDA (enterprise digital assistant) styling with an enterprise build. Customers can choose models that best meet their needs and budget, from pure play EDA-style devices with synchronization cradles for workers inside the office, to rugged integrated voice and data devices that offer wireless communications for workers inside or out in the field. Motorola's enterprise class of solutions is addressing two mobile worker segments. The first segment includes grey collar workers who spend part of their time in non-office-based environments such as warehouses, large retail spaces, etc. and need a device that is equally well suited for the shop floor and the meeting room. The second segment is field service workers such as police officers, delivery and service repair personnel.

## **Challenges and Opportunities**

### **Challenges**

- **Employee Liable Devices Trend** - Enterprises are faced with the dilemma of either buying mobile devices for employees or extending mobility solutions on smartphones purchased by employees or prosumers. With a growing trend among enterprises to allow knowledge workers to choose their own mobile devices for corporate, Motorola has challenges in pushing its rugged centric enterprise.
- **Preference for entry level devices** - In markets such as India, enterprises with limited ICT budgets are asking for mobility applications to be ported on low end devices as opposed to smart phones or rugged mobile computers. Motorola is focused on providing localized solutions for these markets, and enterprises need to understand the long term value of enterprise or industrial grade devices.
- **Market Readiness** – A large share of enterprises in emerging markets do not have a basic ICT infrastructure and digitization. For example, in hospitals the implementation of enterprise mobility must be preceded or at least accompanied by the overall digitization of the hospital, which includes strong fundamentals such as EMR (electronic medical records). For many industry verticals in these markets, automation of processes is still a nascent concept because they have access to a large pool of cheap manpower to perform manual tasks. Motorola has to wait for these enterprises to have basic prerequisites for rolling out an enterprise mobility solution.

### **Opportunities**

- **End-to-end portfolio of solutions** - The rugged mobile computer market space has a large number of players. Notably, Motorola differentiates itself from many of its rugged mobile computer competitors by offering an extensive portfolio of solutions such as wireless local area networking, wireless broadband, voice and data communication devices, auto-ID products. Motorola, therefore has a strong opportunity among enterprises wanting an end to end enterprise mobility solution. To deliver an end-to-end solution, Motorola can leverage its extensive distribution reach of over 10,000 partners consisting of distributors, system integrators and value added resellers
- **Strong Industry Vertical Play** - Motorola offers mobility solutions to a range of industry verticals such as government and public safety agencies, retail, energy and utilities, transportation, manufacturing and so forth. Notably, Motorola has a strong presence in some of the world's largest retailers, manufacturers, transportation and logistics companies, field sales and service functions, and healthcare providers.

■ **Rugged end of smart phones market** - With a dominant presence in the rugged mobile devices market, Motorola has set its sights on the rugged end of the smart phones market. It embarked on this strategic path in early 2007 with the release of the MC35 and connectivity upgrades to the MC70. While this strategy pits the company against smart phones players such as RIM, Palm, Nokia, Samsung, HP, and even the mobile devices division of Motorola, it opens up one of the largest and most lucrative markets for Motorola to plough through.

■ **Consulting led opportunities** - Motorola has a strong opportunity within enterprises wanting to leverage enterprise mobility for business transformation, particularly where business process optimization is involved. Motorola can draw on its broad portfolio and customer best practices to deliver a holistic enterprise mobility solution.

## Key Considerations When Selecting A Mobility Solution

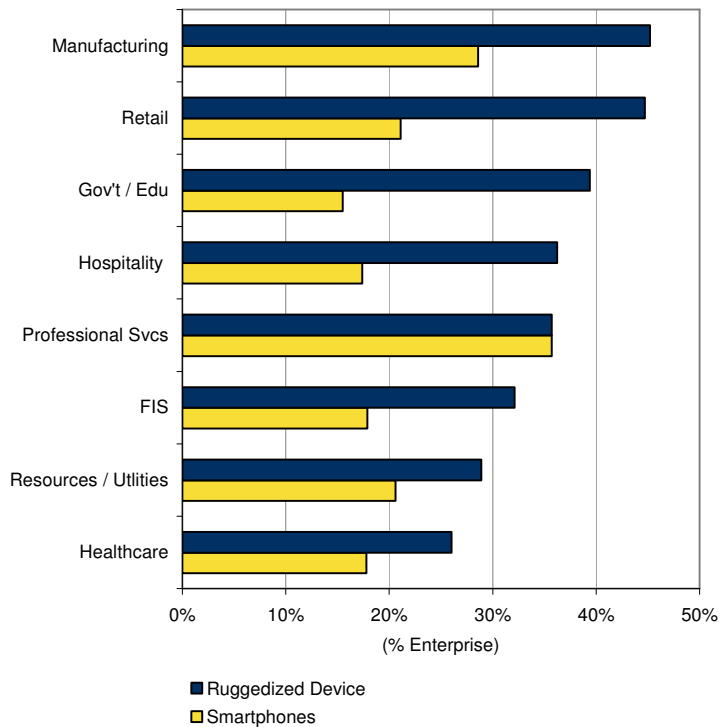
Attention to details is the secret sauce of sound enterprise mobility solution implementation and management. IDC recommends some key considerations when selecting a mobility solution are:

■ **Rugged vs. Smart Phones:** A key decision for enterprises seeking to implement enterprise mobility is to make a choice between commercial grade or ruggedized devices. Between the sleek and light-weight smartphone and the fully rugged industrial design mobile computer, there is a wide range of devices that meet enterprises' diverse needs related to work environment conditions, heavy vs. light usage, computing power, semi vs. fully rugged and data capture specifications, ergonomics, power management for battery life and memory, and application support. Each specification has deeper implications when put into practice. For instance, devices used for scanning bar codes should accurately capture of even damaged or hard-to-read bar codes.

**FIGURE 2**

**APeJ Adoption of Ruggedized Devices & Smart Phones by Key Industry Verticals, 2008**

*Q. Which of the following communication devices does your organization currently use?*



Notes:

Multiple responses were allowed. N=762

Source: IDC's Asia/Pacific UC & Enterprise x.0 Survey, 2008

More importantly, CIOs need to investigate the TCO of mobile devices in terms of acquisition, support and usage costs over a medium-term. For instance, a high procurement cost of rugged mobile computers could be offset by low maintenance and usage costs over a 5 years period. There are other discrete costs such as those related to software, implementation, training and peripherals. Lastly enterprises need to consider ease of configuration, simplicity of interface and a standard operating environment of devices, which has implications on the TCO when doing a phased global rollout. CIOs need to avoid mobile devices with a short life cycle, which would potentially become a major stumbling block in maintaining a standard operating environment.

■ **Device and Application Management:** A critical part of a successful enterprise mobility offering is using a flexible mobile device management platform that can manage a diverse range of mobile devices. Enterprises should have the flexibility to provision, secure, update and troubleshoot mobile devices as well as other elements of the mobility solution from a central location. This would ensure a significant reduction in the complexity, time and cost associated with managing mobility solutions. IT managers want the ability to enforce a large number of usage and security policies for efficient remote management of a large number of devices.

■ **Environment:** The fundamental purpose of enterprise mobility is to empower mobile workers in their work environment. Therefore the mobile tools offered by enterprises should meet the rigors of the work environment. Industrial grade devices are tested to endure the impact of drops on concrete from a maximum specified height of 3-4 feet or even higher. Absence of such device

durability specifications for harsh outdoor conditions, could throw an enterprise's mobile devices budget into complete disarray because of device break issues. The added issue would be productivity loss or downtime. Mobile computer's IP rating (Ingress Protection rating) indicates a device's ability to withstand dust and liquid exposure, which is critical for many work environments. For instance, hospitals and clinics use mobile rugged computers that are designed to look sleek but are able to withstand exposure to liquid spills and frequent wipe downs.

■ **Best Fit Solution:** An enterprise mobility solution that is geared for 'Mobile Business' (see Figure 1) needs to have an end-to-end approach towards network and solution design. The solution should allow an enterprise to closely align its mobility strategy with its ICT strategy. For instance, the corporate database should be integrated with databases running on mobile devices with limited memory footprint. Before embarking on an enterprise mobility journey, CIOs need to be clear about the mission-critical applications that need to be mobilized. To enable enterprise mobility at the application level, the roll out should be driven by business needs, identifying lines of business that stand to gain most from enterprise mobility.

Enterprises with legacy infrastructure, may need to upgrade their current infrastructure before they can mobile enable their mission critical applications. The private network needs to be designed carefully to support different types of applications and manage scale, reliability, and security. The solution needs to have security features geared towards wireless networks. Security risks of stolen or lost devices need to be minimized by enforcing security measures such remote data wipe, remote device lock down or even device kill.

■ **Technology Partner:** Some enterprises in markets such as Australia, initially burned their fingers trying to develop enterprise mobility solutions in-house. Realizing the complexities associated with a do-it-yourself approach, enterprises are now hiring an external IT provider. The technology partner should demonstrate technical expertise in business applications, mobile computing, wireless security, management and networking. The technology provider should have domain knowledge of the enterprise's industry vertical particularly from business process optimization standpoint. For an MNC, partnering with a technology partner with a large global footprint of VARs is key to a successful global roll out of the mobility solution.

■ **Service:** The service should ensure maximum feasible uptime for the application, network and mobile devices. It should include training of current and new users, especially where task oriented mobile rugged computers are involved. More importantly, service support for mobile devices should extend well beyond the life cycle of the mobile devices.

## Conclusion

In the past, many enterprises with complex requirements felt tempted to use internal resources to implement their solution, which led them into many pitfalls. Now as the enterprise mobility supplier ecosystem is reaching a level of maturity, enterprises are moving away from build-it-yourself approach. For a global rollout, enterprises can expect a level of consistency from technology partners that have an extended channel partner base.

Enterprises with a clear mobility strategy will be able to chart a smooth enterprise mobility journey. They need to do a cost benefit analysis, taking a mid-to-long term view of how the company is evolving and growing. At the current stage of enterprise mobility adoption, the mobile workforce in many enterprises represent a vast untapped opportunity to improve business processes. In the past, enterprise mobility was either associated with senior management accessing mobile email on smartphones, or with blue collar workers using highly specialized and rather intimidating rugged mobile computers. Now the range of mobile applications and devices has broadened to meet the needs of various types of white collar, blue collar and grey collar workers.

Whether it is missed revenue opportunities in departmental stores, or wrongly administered medicines in a hospital, the revenue implications of not using enterprise mobility are significant. In

verticals such as retail and logistics, mobility is a fundamental requirement for gaining a competitive advantage or even staying in the game. As competition intensifies and customers demand better, cheaper and faster service, enterprise mobility becomes a survival tool for many enterprises.

#### ABOUT THE ANALYSTS

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