

Mobile Email: Time for Implementation!

Analyst: Lars Vestergaard

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WHITE PAPER

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INTRODUCTION

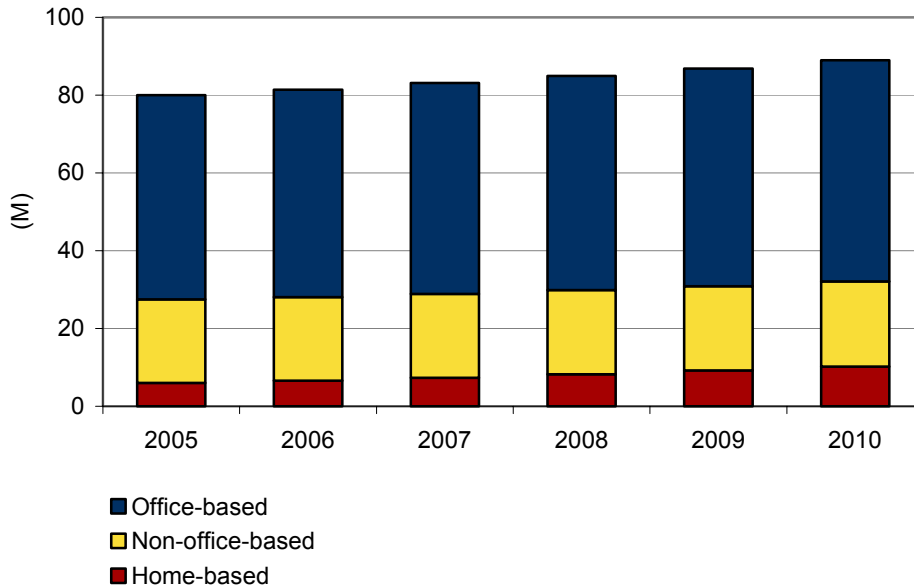
With the large-scale uptake of email at the beginning of this millennium, there was a clear expectation that there was going to be an unprecedented impact on the way business is conducted. The vendor community pushed the story and enterprises hesitantly accepted the potential of enabling their workforce to work more efficiently wherever they were — as long as a network connection was available.

Today, with the extensive rollout of mobile email, enterprises will agree that the business case has been proven, whether it is measured in tangible benefits directly affecting the bottom line or in intangible benefits relating to employee experience and satisfaction. This does not in any way mean, however, that enterprises should rest on their laurels and consider it a "job well done." Human nature is to resist change, and the old adage of "if it's not broken, don't fix it" resonates throughout many organizations. IT implementations are by their nature always "work in progress," and mobility as a concept is an excellent example of one of the most dynamic entities in the enterprise technology environment. This is true for mobility platforms, applications, usage scenarios, and, of course, mobile devices.

The foundation for all the focus on mobility and mobile email is that there is a sizeable workforce out there that will benefit from mobile enablement. Figure 1 shows the number of employees that can be mobilized in Western Europe. Around 80 million employees can be addressed with mobile solutions, which represents close to 50% of all employees. IDC believes large enterprises and multinational corporations (MNCs) have a similar segmentation in their workforce. Half of these organizations' employees are mobile and hence could be considered in the rollout of any mobile solution, which comes as quite a surprise to most enterprises.

FIGURE 1

Western European Mobile Worker Potential, 2005–2010



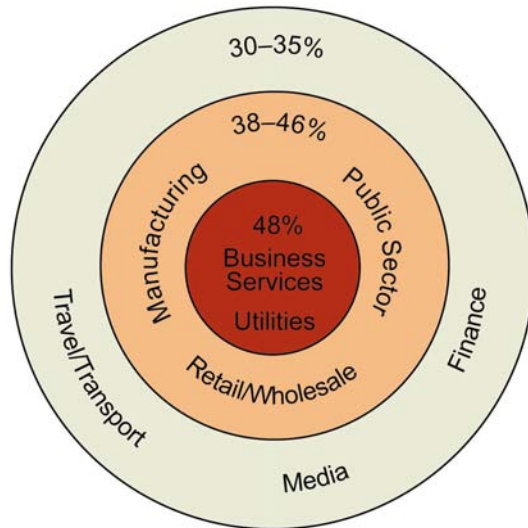
Source: IDC, 2006

BUILDING ON AN ESSENTIAL FOUNDATION — THE MOBILE DATA STRATEGY

Most of the mobile data solutions that are running today are built on a foundation where business management has decided the extent of the mobile email engagement. It will not be surprising to many IT departments that business managers, although fully aware of benefits such as increased productivity, are not always aware of the implications mobility solutions might have for IT setup, the required level of security, etc. IDC cannot emphasize enough the importance of formulating a mobile data strategy. The mobile data strategy will function as the underlying platform on which various modular elements will be built. This can be compared to running applications on an IT-platform. Only by having such a strategy is there some form of certainty that the necessary business elements have been involved in the process. Figure 2 shows that 30%–50% of Western European enterprises say they have a mobile data strategy, with the business services and transportation segments as the mobile data strategy leaders. This still leaves the majority of enterprises exposed and lacking a mobility strategy. Even those enterprises downplaying the role of mobility in their organization and reluctant to extend mobility beyond the select few, cannot possibly have a holistic view of the impact of mobility in their business. How can an organization have a full understanding of the situation without going through the process of developing a mobile data strategy?

FIGURE 2

Western European Enterprises With a Mobile Data Strategy



Source: IDC 2005, European Wireless Enterprise Survey (N=652)

However, enterprises should in no way feel that this is a task they have to undertake alone. IDC believes that enterprises can and should leverage the knowledge and experience of the vendor community. In particular, mobile operators have built an extensive knowledge base of the important elements to cover in such a strategy document. They are able to use best practice and do not have to reinvent the wheel. Operators should be consulted on how a mobile data strategy can be turned into a dynamic working tool, which is needed to create visibility internally.

IDC believes that the following key elements should be considered for inclusion in such a mobile data strategy document:

- Support in formulating customer requirements
- Help to determine expected traffic patterns
- Support in choosing suitable solutions
- Present reference cases
- Supply implementation support
- Provide insight into managed mobility solutions

The mobile data strategy formulation can naturally have various levels of sophistication, and there is no doubt that a thorough approach will provide the best output in the end. IDC believes that a mobile operator is the ideal start, but it is inevitable that a thorough strategy requires inclusion of other supplying vendors such as systems integration, hardware, and software.

SECURITY

IDC believes that the issue of security deserves specific consideration at this point. In the minds of senior management, security worries are the key inhibitors to the widespread adoption and implementation of mobile data solutions. In fact, one organization IDC spoke to recently stated that: "the absence of security is a showstopper." What is remarkable is that so many organizations allow the negative connotations of "lack of security" to inhibit mobile data solutions being rolled out. Security is also potentially the most powerful catalyst for mobile data solutions. IDC research shows that organizations that have a mobile data strategy worry less about security shortcomings for mobile solutions. It is surprising that some enterprises are still uncertain about mobile email security and its scalability with the necessary inclusion of firewall, transport, and end device. For those enterprises that until now have neglected their WiFi usage, especially on laptops, such a strategy will naturally include the WiFi elements and finally include the necessary security in this area.

EVOLUTION OF EMAIL

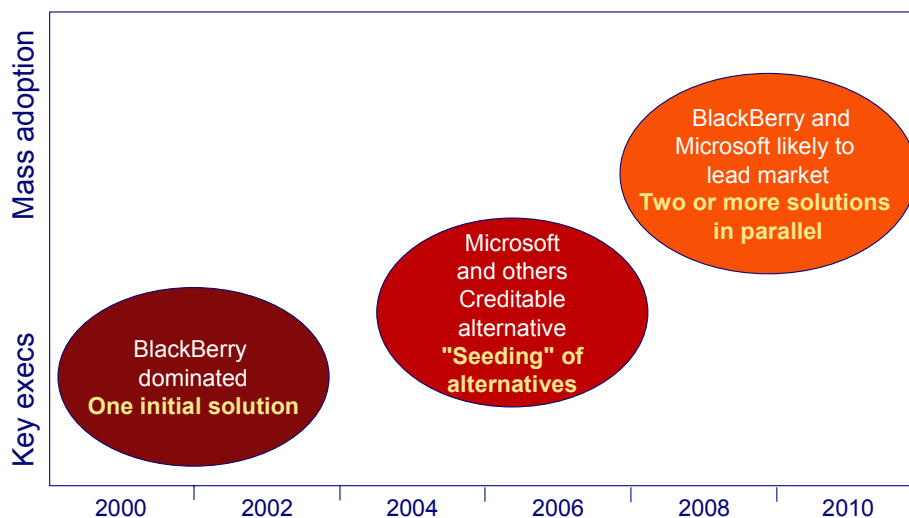
There is no doubt that the market for mobile email really started with Research in Motion (RIM) offering its BlackBerry device in North America and its rapid uptake across Europe. RIM's timing was perfect and the company has benefited from its "first mover" advantage. The solution did exactly what it set out to do: providing a total email solution in a secure and user-friendly manner. This brought email to the masses on dedicated devices with QWERTY keyboards. Whether they like it or not, competitors in the market for mobile email have up until now looked at BlackBerry as some sort of de facto solution for them to relate to and try to catch up with. By 2006, however, the "first mover" advantage has diminished and it is quite obvious that the mobile email market has reached a turning point, with many providers being able to offer attractive solutions that in their own right have advantages, whether it is a solution based on BlackBerry, Microsoft, GoodLink, Visto, SEVEN, Ericsson, or Nokia. But choice often creates confusion in the minds of enterprise decision makers tasked with finding the right solution for their business. There is no quick answer as to what is right for your enterprise, but without a doubt, the following issues need to be examined:

- ☒ Email or PIM. Although mobilizing email might be the first goal, it is important to realize that email goes hand in hand with other personal information management applications such as calendaring, contacts, and tasks. Make sure these items are covered in your mobile email solution and that they can be synchronized wirelessly.
- ☒ Existing corporate email solutions. The majority of enterprises will have Microsoft Exchange, Lotus Notes, or Novell GroupWise as their corporate email solution. Be aware of the fact that wireless synchronization functionality varies across these corporate email solutions depending on device/OS/platform combinations.

- ☒ "Seeding." Vendors typically provide potential customers a free trial implementation of five to ten devices to let them have hands-on experience with the alternative solution. It is important to put procedures in place that allow the enterprise to truly compare the existing and preferred solution with the new solution — who should be involved in a trial and in which situations should it lead to a full implementation?
- ☒ Attachments. You need to consider the importance of being able to work with attachments and realize the possible impact attachments can have on data traffic and on charging.
- ☒ Device/OS. The choice of device and the associated OS (for example Windows Mobile, Symbian, Palm, etc.) is important. Issues such as battery life, model choice, pricing, manageability, functionality, and so forth need to be addressed here.
- ☒ DIY or managed. Managing mobility solutions within an enterprise can be a daunting and complex task. Managed mobility services can take the management burden away so you can focus on other more important matters.
- ☒ Future — beyond PIM. Start looking beyond mobilizing email already. Mobile network functionalities such as presence and location can give you the ability to implement instant messaging and unified messaging applications in the future. Make sure your solution can support this.
- ☒ Geographic reach. Look for services that allow you to scale mobile email availability across all the countries that you are located in and that your mobile workers frequently travel to.
- ☒ Proprietary. Mobile solutions can be based on both proprietary and open standards with a possibility of dedicated terminals. You need to carefully consider your current need and future direction to choose the ideal solution.

FIGURE 3

Enterprise Mobile Email Evolution, 2000–2010



Source: IDC, 2006

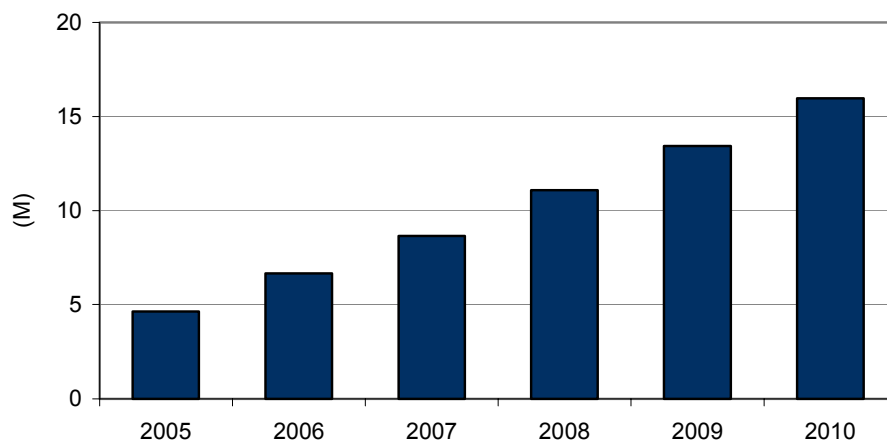
Figure 3 shows how IDC sees mobile email solutions will evolve over time to include two or more solutions running in parallel. The figure shows how 2007 really is the turning point, with the proliferation of more than one email setup. IDC believes that 50% of all enterprises will have two (and for some even more than two) email solutions running by 2010. IDC has spoken to several customers who are looking at combining their current BlackBerry solution with a Microsoft solution or vice versa — there is no doubt that these are the two vendors that dominate the current market. It is evident that some employees will be very passionate about their email solution and will resist any change, which is what brings forward the necessity of evolving the setup to include a second solution, which may be better suited when adopting more vertical-specific applications.

Another important driver for adopting more than one solution is that this will help enterprises keep their unit prices down as vendors can be played off against one another, ensuring that vendors are kept on their toes and forced to provide the best service or risk losing out to competition.

Figure 4 shows how the number of mobile email users on laptops (with mobile connect cards on GPRS, EDGE, 3G), PDAs, smart phones, and general mobile phones is increasing throughout the forecast period, where it is evident that the market will continue its growth and exceed 15 million users by 2010. An increasing number of these users will be using multiple access devices, which emphasizes the importance of "email on the go" and shows that there will be usage situations where some devices are more convenient and provide more functionality than others.

FIGURE 4

Western European Mobile Email Users, 2005–2010



Source: IDC, 2006

When enterprises hold back the development and further penetration of mobile email, it is mainly cost driven — they are concerned about the likely explosion in cost when they increase mobility. Mobile email is by no means the only problem as the cost of the solution, the devices, and the monthly traffic is easily calculated with ROI and TCO studies. The problem of cost really relates to the voice elements. The greatest area of unpredictability in voice is, of course, international calls, which make accurate budgeting an extremely difficult exercise. IDC has analyzed the possibilities of reducing those costs with various convergence solutions where mobile calls made on any campus in any country are routed over the PBX — the savings of such initiatives will likely reduce the costs so much for existing users that it can fully finance a sizeable mobile email and mobile data expansion. IDC strongly recommends that enterprises investigate this possibility, as the technology is proven and the benefits are immediate.

MANAGED SERVICES CAN TIE IT ALL TOGETHER

There is no denying that managing mobility solutions within an enterprise can be a daunting and complex task. It does not necessarily have to be that way. Like other IT-related solutions, mobility can be bought as a managed service rather than as a do-it-yourself proposition. Where mobile operators are chosen to run a managed service in close collaboration with the enterprises, they will still openly provide information on the work they do — their required maintenance effort, the way security is handled, the size of the necessary upfront enterprise investment, and the ongoing operation costs of implemented solutions. IDC believes managed mobility services (including mobile email) are viable alternatives to traditional mobility because:

- They represent an opportunity to manage all mobility communications via a specialized supplier and eliminate costly premise-based equipment.
- They simplify the logistics of introducing and maintaining new technologies and bundle them into one predictable monthly price with consolidated billing.
- IT department constraints do not have to inhibit rollout of an ideal mobile solution with the necessary security level.
- Providers can use experience from similar customers to implement the best possible solution, for example, running more email solutions in parallel.

ENTERPRISE ACTION POINTS

Vendors and operators are naturally driving developments forward and are keen to engage in discussions with enterprises on the ideal approach and roadmap for mobile solutions in general and mobile email specifically. But even in that situation it is important for enterprises to acknowledge their responsibility — even more important than receiving the right advice from the supply side. If the receiving enterprise has not gone through an internal process where it prepares itself in a strategic manner, then there is a risk of applying solutions on a weak foundation with a danger of inefficient utilization.

IDC recommends that enterprises speak to supplying operators and other players about the necessary factors to consider and thus learn from the experiences these players can bring to the table from companies they have helped in similar situations. IDC has formulated an initial list of factors that are necessary to consider once the initial email implementation needs to be updated and expanded. Experience has shown that companies get a noticeable increase in the usability and benefit from their mobile solutions when they followed these basic steps.

- ☒ How is value created in the company and how can mobility help increase this value? **If there is no insight into value creation, value cannot be increased through mobility, hence value creation and mobility should be linked.**
- ☒ What is the history of using IT in a dynamic way as a means of achieving the company's goal? **If there is no history, it is likely that some form of transformation is needed to change the way employees think and work.**
- ☒ What platform is the IT side based on and which platforms are likely to be in place over the next few years? **For example, is there a drive towards open standards or will Microsoft be the preferred platform?**
- ☒ How close should the mobile email solution link to these platforms and which other applications can be mobilized on that platform with benefits? **The platform is a foundation and needs to be closely linked with applications and devices.**
- ☒ What is the timeline for evolving email to other levels in the organization and how do other mobile applications relate to that over time? **Mobile email should not be isolated and different levels of employees need different applications.**
- ☒ If no single mobile email application is ideal when related to the general mobile solution and applications, how should various email solutions evolve? **Some applications are better suited for certain platforms and employees with different application needs should have a choice of related email which invariably will go in different directions.**

CALL TO ACTION

IDC believes that the timing is right to make decisions on mobile adoption for the "second wave" that goes beyond the initial deployment of mobile email. The typical enterprise has now had a limited number of trials running over recent years and is likely to have an implementation consisting of only one of the solutions currently on offer. The task is now to revise the initial implementation and investigate whether the enterprise can utilize the solution more efficiently and whether it is time to expand to more than one solution and therefore ensure that all employees get the solution that is ideal for them and they feel most positive about.

The prerequisites for true workforce mobility are now present with the underlying networks, devices, security levels, solutions, partnerships, player capabilities, and knowledge.

IDC recommends that enterprises engage in necessary discussions with their operators on the best way forward. Mobile operators sit at the center of the supplying value chain and they have the required overview of the benefits of each individual vendor operating in the market of enterprise email. This naturally allows them to distinguish objectively between the different alternatives and recommend exactly what is best in any given situation for any given customer because, as always, customers have different needs and only through far-reaching interaction and strategic discussion is the right solution implemented.

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Tel: +44 (0) 20 8987 7100

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