

MOBILE TABLETS

A Post-PC Era in the Enterprise?

The mobile tablet will bring significant change in enterprise computing. Early investment in supporting smartphone operating systems by IT will pave the way for companies to build new lines of business on mobile tablets. These devices will reshape how and where employees work, while at the same time increasing their ability to share information with customers, colleagues and partners.

MOBILITY

4 FINDINGS

- As companies have rolled out systems to manage smartphones, the transition to adopting mobile tablets powered by similar OSs is an easy sell to IT. **PAGE 35**
- The reach of the Windows OS on desktops is its Achilles' heel on tablets. The need to be everything to everyone brings too much functionality to a tablet – and it cannot run economically in a resource-constrained environment. **PAGE 4**
- Leveraging OSs that employees are already familiar with, mobile tablets provide a streamlined computing experience. **PAGE 36**
- Mobile tablets will be driven by the mobile apps and services that are available for users in the enterprise. These apps and services will be the basis for building new efficiencies for employees and new offerings for customers. **PAGE 14**

5 IMPLICATIONS

- Enterprises see mobile tablets as tools to speed business. The key benefits are better responsiveness to customers, competition and coworkers. **PAGE 20**
- The enhanced sensors on mobile tablets will reduce the steps and time needed to record and confirm actions taken by employees. **PAGE 19**
- The mobile tablet will initially be used as a companion device. As tablets evolve into more of a primary computing device, they will take share away from desktops and laptops. **PAGE 71**
- As processing moves from the device to the cloud, the tablet becomes the optimal client. At the same time, there is a need to keep some processing on the device itself. **PAGE 71**
- Enterprise employees are now working outside normal business hours and outside the office. Smartphones initiated this expanded work day, but the mobile tablet will solidify it. **PAGE 63**

1 BOTTOM LINE

- This is a unique time for the enterprise, as two major technology trends – the cloud and mobile tablets – are intersecting to create a significant opportunity for change in enterprise computing. The tablet is the perfect window into cloud services: shifting computing from a single device to multiple devices; from local storage of content to the cloud; and eventually from native apps to greater use of Web apps. The cloud enables device-independent computing, accessing content from anywhere, which will drive users to the device of their choice – which will increasingly be a mobile tablet.

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SECTION 1

Executive Summary

1.1 KEY FINDINGS

- As companies have rolled out systems to manage smartphones and applications to further empower smartphones, the transition to adopting and issuing mobile tablets using similar operating systems is a much easier sell to IT and finance staff. Early investments in custom and off-the-shelf mobile applications have paved the way for mobile tablets in the enterprise.
- The strength of the Windows OS on desktops is its Achilles' heel on mobile tablets. The need for Windows to be everything and to meet all computing needs brings too much functionality to a mobile tablet – and it cannot run economically in a resource-constrained environment that is necessary for mobile computing.
- Employees want to use tablets. Mobile tablets run operating systems that are familiar to them, which helps avoid the support nightmare for IT when transitioning to new technology. The mobile tablet provides a streamlined computing experience compared with desktops and laptops.
- Mobile tablets, on the other hand, will be driven largely by the mobile applications and services that are available and provisioned for users in the enterprise. These applications and services will function as the basis for building new efficiencies for employees and new offerings for customers.
- The mobile tablet provides ready access to computing resources that cannot easily be delivered by PCs and smartphones. Enterprises see the mobile tablet as a tool to improve the way they do business. Specifically, the key benefits they see are in better responsiveness to customers, competition and coworkers.
- The combination of cameras and GPS has given rise to 'augmented reality' – displaying points of interest in a camera application's viewfinder, for example. This kind of augmented reality could power quick inventory checks when paired with RFID chips. This would reduce the number of steps and time that users need to record and confirm actions taken by employees – just point the mobile tablet and select the pallets to be shipped, the vehicle damage to be fixed, or the plot of land to be developed.
- As a tool for the enterprise, the mobile tablet will initially be used as a companion device. These devices provide a powerful computing platform for workers on the go to access data locally and in the cloud. As they move beyond the companion role to more of a primary

computing device, tablets will redefine computing and take significant share from desktop and laptop computers.

- As we shift more processing from the device to the cloud, the mobile tablet becomes the optimal thin-client device. But at the same time, there is a need to keep a sufficient level of processing on the device itself. As we continue to ask more from these devices – for them to cater to both our work and personal lives – a significant amount of processing will remain on the device, which will ensure continued evolution of mobile tablets.
- The traditional work day is a thing of the past. Today’s enterprise employees are increasingly working outside of normal business hours and outside of the office. IT support for smartphones initiated the expansion of the work day, but it is the mobile tablet that will solidify it. Users’ voice in IT decision-making is more powerful than ever – they want systems, applications and devices that fit their needs and allow employees to be competitive inside and outside an organization.
- The move from desktop to mobile will open the door wider for cloud services and new technology vendors that will displace incumbents. Local files and folders are giving way to the cloud; the mouse is giving way to touch. In this new computing wave, mobile applications and services will transform how and where organizations do business. The UI on today’s laptops and desktops was essentially designed over 40 years ago; it is time for a change. As the cost of developing mobile applications continues to drop, and interest in building mobile apps exceeds that of desktop apps, it is clear that the future of computing will be focused on mobility. For this reason, the next leap forward in computing will take place on the mobile tablet, not on the desktop.

SECTION 7

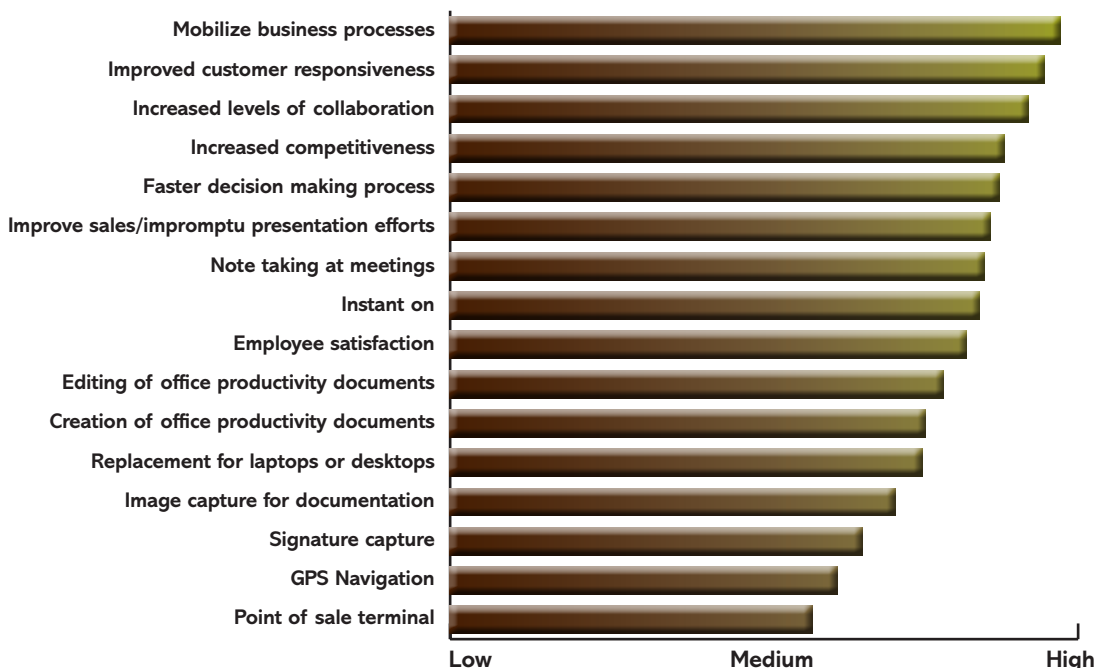
Drivers for Mobile Tablet Use in the Enterprise

Mobile tablets present a new opportunity to empower employees to be more productive, more responsive, and easier to support from an IT standpoint. There are benefits to the hardware form factor, as we've discussed, but the key drivers for mobile tablets will be mobile applications. These applications will be both horizontally and vertically focused tools. It will be the targeted and internally developed applications that will best deliver on the promise of the mobile tablet.

The tablet provides ready access to computing resources that cannot easily be delivered by PCs and smartphones. Enterprises see the mobile tablet as a tool to improve the way they do businesses. Specifically, the key benefits they see are better responsiveness to their customers, competition and coworkers. Tablets give employees instant access to critical information, allowing them to move the ball forward from virtually anywhere. Tablets mean that processes are less likely to be interrupted by one or more employees who are temporarily out of touch.

In Figure 6, we see a ranking of drivers for the use of mobile tablets, where customer responsiveness ranks highest. This points to mobile tablets being used as tools for profit, and not cost control. Significant adoption of mobile phones and early smartphone applications were driven largely by asset and employee tracking. The mobile tablet ranks low in these areas – companies investing in mobile tablets are doing so to be more competitive and drive new business.

FIGURE 6: MAIN DRIVERS FOR MOBILE TABLET ADOPTION



Source: 451 Enterprise Mobility Survey, March 2011 (n: 514)

Also highly relevant here is employee satisfaction. In environments where employees need ready access to messaging and enterprise data, giving them a ‘cool looking’ and ‘fun to use’ device goes a long way toward keeping up morale (particularly important when they’re responding to a customer email at 9pm). Lastly, even in the early days of mobile tablet adoption, a few enterprises are already looking to them to replace laptops and desktops. Where possible, employees are much more likely to carry a mobile tablet with them, versus a laptop, if given the choice.

14.7 GROUPLAGIC

GroupLogic allows companies to integrate Apple devices with Microsoft Windows Server environments. Founded in 1988, the company has 6,000 customers, and states that it is profitable and growing revenue. Its ExtremeZ-IP connects Mac OS devices to printers and file servers, in addition to preventing file corruption and incompatibility with files created on Macs and stored on Windows servers.

In May of 2011, GroupLogic launched its first iOS application, mobilEcho, which provides iPad access to files stored on corporate file servers. Files are encrypted during transport and storage on iPads. IT can effectively manage and control the application. It can remotely wipe data stored in mobilEcho in the case of a lost or stolen iPad. MobilEcho can be configured to prevent users from emailing files stored on an iPad, as well as opening those files with untrusted applications or moving files outside of the mobilEcho sandbox. Access to files can be controlled by integration with Microsoft's Active Directory.

Strengths: GroupLogic has a history of integrating disparate devices with Windows Server, and has added management capabilities to centralize files on iPad.

Weaknesses: MobilEcho is focused only on iPad; for future-proofing, GroupLogic should look to support other operating systems, including Android.

Opportunities: There is strong interest from the enterprise to use iPad, and lack of native file management on Apple's tablet means mobilEcho does not need to compete with preinstalled software.

Threats: MobilEcho is facing competition from low-cost, consumer-focused cloud storage providers, but GroupLogic's management capabilities will serve to differentiate it in larger deals.

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New York

20 West 37th Street, 6th Floor
New York, NY 10018
Phone: 212.505.3030
Fax: 212.505.2630

San Francisco

140 Geary Street, 9th Floor
San Francisco, CA 94108
Phone: 415.989.1555
Fax: 415.989.1558

London

37-41 Gower Street
London, UK WC1E 6HH
Phone: +44 (0)20.7299.7765
Fax: +44 (0)20.7299.7799

Boston

125 Broad Street, 4th Floor
Boston, MA 02109
Phone: 617.261.0699
Fax: 617.261.0688