

ITAnalysis - More waves breaking for mobile email?

By Rob Bamforth, Principal Analyst, Quocirca Ltd

After so many years of growth in the business use of mobile email through the addictive and apparently ubiquitous BlackBerry, you might have thought the whole issue of the mobile email market opportunity was dead and buried. The market started with the same crowd as for early mobile phones – Quocirca uses the term ‘pink collar’ as these early adopters were the lawyers, accountants and city executives buying their shirts in companies such as Thomas Pink’s in the financial districts of New York and London.

The reality of the statistics however are that even though BlackBerrys run into tens of millions, email accounts number hundreds of millions and there are over three billion mobile phones. As a mechanism of social, personal and commercial connection, the mobile phone transcends cultures, class and age group. Similarly email as a medium for communication provides substantially wide appeal.

A number of technology challenges – the diversity of handsets, and limited scope of the network – coupled with the charges levied by those in the value chain – operators, software companies etc – have slowed mobile email from becoming a universal consumer service, even in the mature mobile telecoms markets. Here the masses will use SMS when on the move, and email, IM or other social networking applications when at a computer, as they generally have access to both.

So is there more life in the mobile email market?

From the Quocirca perspective, we see two areas that despite the challenges in the world economy still have potential to inject new impetus into mobile email: simple mobile email for the masses in emerging markets, and the collision of social networking and messaging in mature markets.

In many emerging economies the availability of computers is more limited than that of mobile phones, and email on the handset appears to be a more interesting proposition for the mass

market. The primary problem remains – how to provide a universal service, no matter the handset, for a reasonable price. Sophisticated synchronisation software has provided part of the solution on smart phones, but the challenge of getting similar functionality onto all devices including lower cost mobile phones has kept the universal solution at bay. Long time synchronisation advocate, Synchronica, with an existing presence in emerging markets has found a way to address the issue, by the acquisition of Axis Mobile.

Together, the combined offerings allow all types of mobile handsets to be used for mobile email, exploiting whatever is available from a wide variety of mechanisms – SMS, WAP and full-blown synchronisation – so that mobile operators can target mobile email products to emerging markets. They might do this to gain additional revenue, or simply build loyalty, depending on the lie of the land in the particular carrier’s market.

With the combination of greater mobile phone adoption over PCs in some markets, a technology solution that covers all handsets combined with an appropriate carrier tariff proposition could make mobile email a mass-market proposition first in less developed economies.

Meanwhile, in the more mature mobile phone and fixed broadband markets, the opportunity for mass adoption might look slightly different as social networking sites and instant messaging tools accessed on the desktop have significant appeal to the mobile user.

The challenge here is no longer simply access to email on the move, but to combine the access of a whole bunch of different communication systems – email, SMS, IM and social network sites, blogs and microblogs – into a coherent and manageable interface.

This is no longer just about coping with email overload, but also dealing with twitter torrents,

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blog bursts and parallel poking – for want of a jargon avalanche.

On the desktop, this is an issue best dealt with by some form of unified communications solution, or at worst through the use of separate windows and overlap control, but on a mobile it is a much more pressing problem due to a thumb jabbing interface and a lack of screen real estate.

New hybrid tools could provide universal interfaces, but that would undermine the look, feel and brand of certain applications, and at this stage it's still impossible to say which applications will survive and thrive long term. Just look at the enduring appeal of texting.

Mobile email specialist and survivor, Visto, has come up with a solution that allows the underlying communication tools to have their own identities, but provides an overarching veneer of control that aggregates updates, alerts and the presence or state indications of each tool into an acceptable mobile screen.

This is another direction that mobile email and mobile email technology providers can legitimately take. Not so much a universal common denominator that appeals to the widest and potentially remotely dispersed group, but a universal aggregator to appeal to the most gregarious group.

The challenge for all mobile services is pricing – too much and subscribers will stay away, too little and the operators or service providers will not be able to justify their investment. Economic downturns make everyone more cautious, so those services with least impact on the infrastructure and user behaviour are the ones most likely to succeed.

Meanwhile, the early pacemakers of mobile email for the business user, predominantly RIM's growing bunch of BlackBerrys and Windows Mobile devices from the likes of HTC, are widening their appeal by building a broader application platform message on top of the solid reliability of push email. The relatively new kid on the corporate block, Apple's iPhone, looks like it is already muscling in on the business email market – and will force others to up their game.

Despite several years of consolidation the mobile email market still has a long way to go. Quocirca will continue to keep a close eye on how the mobile email landscape evolves in 2009, and see how the two different routes for mass market adoption play out.

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Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With world-wide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, O2, T-Mobile, HP, Xerox, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

Details of Quocirca's work and the services it offers can be found at
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