

## IT Analysis - Mobility – waving not drowning in 2009

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Mobile deployments may well be affected by economic recession, but the commercial reasons that underlie the strong arguments for investing in mobile have not gone away. In many ways the need for even greater cost controls, efficiency and resistance to external shocks tends to increase the value of location flexibility that individual mobility offers.

Remote, mobile and more flexible access to IT, at whatever point a business process demands it, still adds considerable value both to organisations and individuals whatever the economic climate.

However, this value varies across different operational processes and different categories of employees, and even in economic boom times the right approach needs to be taken to reap rewards. In more challenging times it is far more important to understand the impact of mobility in terms of where best to invest and to target specific operational procedures to obtain the most worthwhile and tangible benefits.

Based on several years of mobile research and wide-ranging investigation of vendor propositions, Quocirca defines several phases of business process mobility, based on the broad groupings of workers involved. Each phase has its own identifiable distinct needs and commercial drivers.

These phases exhibit a degree of overlap, but also build from one to the next as a series of waves of adoption for mobile technology. With each wave, the opportunity increases in size, but so too does the complexity, level of investment, integration demands and business impact.

The waves can be defined rather prosaically by extending the long established terms white collar and blue collar into a set of four mobile worker groups:

- **"Pink collar"** refers to mobilising email, and is characterised by those in the financial districts of London and New York, buying their shirts at outlets such

as Thomas Pink's – lawyers, accountants and bankers – and by the success of the BlackBerry.

The initial intention was to extend the contact-ability of busy executives who were liberated from their desks by mobile phones, but have become increasingly reliant on email. Now email is a tool many others depend upon – both the wider workforce and consumers in all parts of the world – yet its use at a desktop computer is not always possible or desirable.

- **"White collar"** is about mobilising the personal productivity tools of the knowledge worker and the well-equipped consumer or 'prosumer'. This involves more than providing mobile access to email, but still uses a set of largely off the shelf applications, some perhaps already on the device such as those for personal productivity and others, for example CRM applications, which are unlikely to be supplied with the device when purchased.

The diverse and changing needs of knowledge workers is creating a market for a wide range of readymade applications, tailored to different industry verticals or fixing common needs for those on the move. This places higher demands on the mobile device as a platform to encourage the building of a developer community and ecosystem, and provide the additional material and programs to support them.

- **"Blue collar"** means mobilising the business process, and putting tools in the hands of those engaged in specific and often repetitive tasks, for example in logistics, transportation, utilities and field service. While the technology used may be capable of performing many functions, it is deployed in a controlled and managed fashion to support certain tasks and individuals.

This means locked down, optimised and dedicated to making the business process more efficient, and measurably so. For the business this should make the process of justification more straightforward, and for the employee it should appear as a useful and positive tool to simplify and streamline their working tasks, reducing unnecessary bureaucracy and complexity.

- **"Steel collar"** reflects a move deeper into the business, mobilising operational aspects and core functions by automating the communications between objects, namely machine to machine. Where at one time this type of systems integration was only possible between fixed objects, new technologies such as radio frequency identification (RFID) tagging, low power radio transmission such as Bluetooth, low cost unlicensed wireless like Wi-Fi and

massive improvements in cellular data rates, cost and coverage means that almost anything can be connected to a wider network.

At a business level this brings significant changes as it may require major business process re-engineering, affect personnel and other aspects of the business. The rewards could be equally significant, as it could reduce the dependence on physical movement – goods or people – and with it dependence on fuel and provide a degree of insulation from energy shocks in availability and price.

Each of these areas has the opportunity for significant growth, even in the face of economic uncertainty, and so over the coming year, Quocirca plans to explore each in more depth, and we will outline our initial thoughts for each area in a series of articles over the coming weeks.

## About Quocirca

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, Dell, T-Mobile, Vodafone, 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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