



Technology Brief...

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Tablet Fragmentation – The Coming Wave

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Clearly, Apple's iPad is the market share king at the moment, both in the consumer and business space. But that doesn't mean there isn't a need for other devices. In fact, the tablet market is fragmenting. Many targeted specialty devices are being created for specific needs beyond the current crop of consumer-focused devices, with virtually all of them running on Android. So as tablets diversify the need for specific capabilities (e.g., bar code scanners, VoIP, video conferencing, remote access, IM) will be included and offer a potential to enhance user productivity and ROI.

For example, Cisco created the Android-based Cius tablet to be an extension/replacement for their venerable VoIP desktop device with the added features of easily integrating into Cisco's suite of social networking tools. Avaya similarly created a tablets to fit into its strengths in communications. Motorola solutions created a tablet for its installed base of rugged and semi-rugged users with enhanced I/O capabilities and extended batteries and hardened cases. Lenovo ThinkPad tablets are squarely aimed at enterprise users with its Android OS enhanced for corporate manageability and security and its hardware enhanced to fit into the well respected ThinkPad family. And RIM's PlayBook with FIPS certification is targeted specifically at companies that are most security conscious.

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We believe that the diversification trend will continue. We further believe those that predict the Apple's iPad will remain the dominant long-term tablet choice in the enterprise are mistaken. We expect Android tablets to become the market share leader within the next 2-3 years, just as Android phones have overtaken iPhone for market share leadership. Further, we expect the diversity (e.g., screen size, wireless options, processing power, price points) to continue and in fact accelerate over the next 1-2 years.

It is important for companies to deal with the Bring Your Own Device phenomenon when looking at deploying this class of device. While BYOD may mean low cost to the organization on a procurement basis, it has a high cost from a productivity perspective (or lack of productivity). BYOD means a general purpose device. Applications-Specific tablets means optimization for business needs and efficiencies. Accommodation of sub-optimum devices versus optimization for the needed purpose required is a productivity, ROI

and TCO deterrent. The acquisition cost generally is 15%-25% of the total cost of ownership (indeed, the TCO of a smart device can be \$3K-\$5K or more, not even including 3G/4G wireless costs). And ROI and TCO are not really procurement related as much as productivity related. Saving money on acquisition cost is a false economy. Finding the best device to suit the needs of both the business user primarily and the personal user needs secondarily is the best approach.

Bottom line: Not all tablets can be (or should be) compared to the popularity of the iPad. There are differing needs and different use models. And there is enough application diversity to require multiple versions of devices (just as there are in PCs, cars, LCD TVs, etc.). Companies must focus on the end solution and overall capabilities, and not simply respond to the popularity contest if they are to achieve the best ROI and lowest TCO.

MDM – RIP

MDM (mobile device management is dead! If your company was looking to implement it (or perhaps already has) forget it. Don't bother. Its old hat. There's a new sheriff in town.

The new MDM is Mobile DIVERSITY Management and it very different. Old-time MDM was about asset management. New Age MDM is about managing a plethora of mobile devices and making them conform to corporate standards and norms especially around security and compliance. The number of companies that allow BYOD is already 35%+ and we expect it to be 75%-85% in the next 1-2 years. One-device-only shops are soon to be a minority (except in some special circumstances/industries). And the majority of vendors (MDM and otherwise) realize this. Even stalwart vertically integrated players like RIM and MSFT understand their management infrastructures can't be tied to just one device anymore. To its credit, RIM is extending BES to include management for Android and iPhone/iPad devices (with its Ubitexx acquisition and incorporation into BES). And MSFT has said it will include Android and iOS support in its future management suites.

So why is this change taking place? New Age MDM is more about making sure that any device a user may bring into the organization can be safely and securely connected so that no corporate data is exposed, the corporate network is not compromised and the user only gets access to what s/he is entitled to and the device can accommodate. All the major MDM vendors have already started the transition to the next generation MDM (e.g., RIM, Zenprise, Sybase, Boxtone, Good, AirWatch). Those that haven't (or can't transition) won't survive long term.

If your organization doesn't look at new age MDM (vs. old age MDM) you won't be able to successfully deploy and securely manage your mobile workers and their growing mobile diversity. It is Imperative that any organization deploying MDM evaluate it based on the new-age criteria, not

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the old way of thinking.

So what are some of those criteria? Here are some key points to look at:

- Policies – must be available for individual classes of users as well as classes of devices
- Enforceable, tiered security specific to device capabilities that take into account OS and device characteristics
- Access control based on user case and device abilities (not just VPN)
- Partitioning of access to apps based on users and devices – the next wave of security capability that builds a dual persona device
- Mitigation of threats and weaknesses of the devices and platforms – not everything can be done on-device and must include cloud-based protective services
- Creation of an effective heuristic approach to discovery, management and enforcement of threats – fixed-format security is no longer an acceptable way to protect mobile devices

Bottom Line: MDM is changing dramatically and companies must formulate a mobile strategy based on the new requirements. Enterprises must deploy next generation MDM solutions within 12-18 months or be left unprotected in a changing mobile device world, and facing corporate liability and data exposure breaches that could cost millions to rectify.

The Great Sysmark Controversy

Recently, AMD resigned from BapCo, joining a protest that also includes Nvidia. BAPCo was established by a wide array of industry players to provide a consistent test suite for PCs. Sysmark has been the standard for testing PC hardware for a number of years.

So what's AMD's beef? According to AMD, it's that Sysmark does not accurately reflect the way machines are being used today and the test suite is being driven by Intel which tends to derive more benefit and has undue influence on the standard. Well, like most things, there is some truth to the argument. But a limited truth is often in the eye of the beholder.

It's true that Sysmark is weighted heavily towards standard office functions like spreadsheets and word processing (where CPU performance is key). It's also true that we're moving to more graphics-oriented HW assisted browsing and multi-media (where GPUs show their prowess). And clearly AMD (and NVidia) believe if the benchmark was more graphically oriented, their overall scores would be much higher than the currently CPU weighted scores where Intel generally wins.

The industry is generally moving to a more graphics oriented approach to the OS and apps. But like all shifts, it will take some time for the users to catch up. The truth is, for the majority of business users, the GPU still plays a relatively minor role compared to the CPU. And in the overall scheme of things most companies would rather have a highly performing CPU than extra GPU capability coupled to a weaker CPU. This will likely change over

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the next 2-3 years as we see more use of GPU enabled programs (coupled to a need for stronger CPU performance as well). But for the next year or two at least, the current Sysmark direction represents a more realistic approach to testing real world usage. After all most business users spend most of their day in Microsoft Office, and often versions 2-3 generations behind.

So what should happen now? Having AMD (and Nvidia) outside of the organization is not a good thing. It is always better to have wide representation and dissenting voices within a standards body. But there needs to be a balance between current needs and future capabilities, and the next version of Sysmark, which we believe should be completed for a 2012-13 launch, should have significantly more GPU weighting than the current one. If AMD is not involved to influence this, it's likely that there will be less emphasis to do this, although the PC vendors themselves may drive in that direction. AMD should rescind its decision and rejoin BAPco (as should NVidia). And the organization should seriously consider implementing some of AMD's graphics testing preferences for the next version test suite.

Bottom Line: It may be time to segment Sysmark into clearly defined test suites oriented towards specific user models. That way enterprises can utilize the appropriate testing mechanisms/schemas, and gamers and other high performance users can do likewise. This would be the ideal way to satisfy an increasingly diverse set of users and keep the industry focused on providing the best value to the end user community. However, vendors should not abandon the industry standards simply to protest lack of advantage for their products.



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**Research, Analysis,
Insight, Strategy**

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