



# Technology Trends...

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## Our Technology Trends for 2011....

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*We present our trends for the next 2-3 years, covering the emerging technologies, products and strategies that will be critical to users and organizations.*

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### **Trend 1:**

Within 2-3 years, 25%-35% of business users will employ a mobile smart phone device exclusively and abandon use of a fixed line phone. That device will be enabled with many of the same productivity enhancing features of current fixed line desktop phones, requiring companies to extend existing PBX/business phone functionality to a wide range of mobile devices.

### **Trend 2:**

Corporate security and governance will struggle to keep up with the proliferation of mobile device use and diversity as IT loosens its control. This will result in high profile data loss/exposures forcing many companies to re-evaluate their evolving "open" mobile device strategy. We expect it will be 2013-2014 before the "more open/more closed" pendulum is stabilized, and therefore significant short term exposure will continue to be the norm in many organizations.

### **Trend 3:**

The cost of business smart phone device acquisition will continue to fall, with the average cost well under \$200. But the accelerating cost of 3G/4G data plans will more than make up for the lower acquisition cost and increase the overall mobile cost per user. By 2013, we expect the average business to evaluate devices not solely on features/functions, but also on Total Cost of Ownership (TCO) much like they currently evaluate other IT assets (e.g., PCs, servers, SW).

### **Trend 4:**

Mobile cost containment will be a major issue as more data ready devices come onboard and companies look to make the most efficient use of tiered data plans. Advantage will go to devices that can prove data efficiency, and by 2013 we expect efficiency ratings to be a key determining factor of corporate purchases (much like security and manageability are currently). Device vendors and carriers will adopt standard efficiency-based benchmarks to rate devices and compete on a comparative basis stressing total cost of ownership (TCO).

**Trend 5:**

Google's Android OS delivered by many vendors (e.g., Motorola, HTC, Samsung, LG) will become a significant portion of the smart phone installed base, but won't become dominant. It will capture a larger overall share than iPhone, BlackBerry or Nokia. However, despite its popularity, Android will remain significantly less secure and manageable than its competitors, and require either specialized business-hardened versions from device vendors (e.g., Motorola, HTC) or SW add-ons (e.g., Sybase, McAfee, MobileIron, Zenprise) through at least 2013.

**Trend 6:**

The mobile "chip wars" will continue, with ARM maintaining its dominant lead over all other architectures. But by 2013, Intel will capture a significant portion of the tablet and larger form-factor mobile device market (>25%), mostly on non-Windows enabled platforms. Nvidia will gain market share in higher end devices against ARM-based rival Qualcomm, as graphics becomes a differentiating capability, while TI gains in the mid-market, and other volume players continue to push capabilities into lower end devices.

**Trend 7:**

Despite an intense short-term push by major carriers to enhance their networks with 4G capability (e.g., LTE, WiMax), it will be at least 2-3 years before the majority of the networks are upgraded to full coverage across all points of presence. During this period, users will need to purchase 3G-enabled backward compatible devices and modems to maintain a reliable connection. Despite slower speeds, the 3G connectivity option will provide a valid way for users to connect and access company assets with limited degradation of user experience. WiFi will be ubiquitous in devices and remain an important access method for the foreseeable future despite increasing availability of 4G.

**Trend 8:**

Internet browsing will evolve from a browser as component of a higher level OS, to a browser as the primary function of the device. This "Glass Browser" model will become increasingly popular as more services move to the cloud and software as a service (SaaS) becomes a larger component of business use. Current PC manufacturers will be required to move to the "Glass Browser" marketplace with product by 2013. While Google's Chrome will represent a significant portion of this market, we expect to see competing "Glass Browser" implementations from Apple, Microsoft, and others, with no dominant player emerging short term.

**Trend 9:**

Laptops will remain a significant force in the business community, with users valuing their ability to work off line and on complex tasks. By 2013, they will increase market share over desktops and represent 65%-75% of corporate PCs. However, by 2014-15, we expect alternatives (e.g.

Tablets and “Glass Browsers” connected to the cloud) to reduce the total number of PC users in businesses by 20%-25%, making it cost effective for companies to deploy “lighter” mobile computing devices to those users/functions who could not justify the cost or complexity of a PC.

***Trend 10:***

Increasing processing power will bring new interface technologies to smart devices, (e.g., voice command and control, biometrics input, motion detection, adaptive response). Within 2-3 years, users should expect to see a completely revamped means of interfacing with personal devices. This will lead to an explosion of new application capabilities as well as new usage scenarios that will require companies to adopt new interaction paradigms.

***Trend 11:***

By 2013, greater than 67% of browsers accessing the internet will be on non-PC devices. Internet Explorer will ultimately become a minor player in the browser market, with WebKit-based rendering engines powering the majority of mobile devices, and Mozilla-based browsers being deployed on Linux (and Meego) based larger form factor products. As a result, Web sites will no longer be optimized for PC-based Internet Explorer, but will standardize on WebKit and HTML5 for broad based browser compatibility.

***Trend 12:***

By 2014 social media will become as important as email to business users. Traditional business IM and presence products from Microsoft and Lotus which extend their email product suites will lose market share as more nimble, cloud based products from non-traditional vendors (e.g., Google, Facebook, Salesforce.com, Oracle, Cisco) become business hardened and accessible by mobile users.

***Trend 13:***

The advent of consumerization of IT, bring your own device to work, and the renewed power of the end user to determine strategy will force corporate IT groups to dramatically alter their function. By 2013-14, those corporate IT departments who have not enabled a diverse population of devices and end user choices through emphasis on manageability, policy enforcement and security evaluations will become hopelessly outmoded and struggle to function. This will cause chaos and substantially raise the TCO of the organization.

***Trend 14:***

By 2012 enterprise application vendors who don't offer a substantial portion of their functionality enabled on mobile smart devices will be unable to sell their solutions to a large portion of businesses. Vendors concentrating on SMB solutions will be required to enable mobile smart devices by 2013 or face obsolescence and shrinking sales.

***Trend 15:***

Solution vendors who do not adapt to the rising tide of cloud computing and software as a service for mobile users will face a significant market disadvantage by 2013-14, as standardized access technology (e.g., HTML5) matures and is widely accepted. Further, the increasing diversity of devices will prevent software vendors from optimizing for each device type, and instead seek ways to universally develop and deploy solutions. Development tools/environments that provide support for the maximum number of mobile ecosystems will be highly valued.

*For further insight, or to discuss any of our current trends, feel free to contact us.*



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