

# Mobile Device Management: From Laptop to Handset



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# Mobile Device Management Market Definition and Core Functionality

- Definition
  - Management software specifically for the support and administration of laptops, handhelds, handsets and other mobile devices for mobile and wireless environments
- Core Functionality Requirements
  - Asset Management
  - Software distribution
  - Back-up and recovery
  - Support for a queued event architecture
  - Online optimization through compression, checkpoint restart, byte-level differencing and bandwidth throttling
  - Mobile Security
  - Broad support of connections and devices
  - Integrated Administration across all management

# MDM Evolution 1990-2002

Traditional LAN Management



Pure Play MDM



Handheld-Centric MDM



Handset-Centric MDM



Networked

Remote & Mobile

Mobile & Wireless

Wireless

1990

1996

2000

2002

# MDM Market: Where's the Competition?

## Traditional LAN Management

CA  
Intel  
Novell  
Tivoli

## Pure-Play MDM

Mobile Automation  
Synchrologic  
XcelleNet

## Handheld-Centric MDM

Aether Systems  
Extended Systems

## Handset-Centric MDM

mFormation  
Starfish Software

# Vendor Migration: The Integrated Solution

## Traditional LAN Management Vendors

- Extending existing solutions into mobile and wireless
  - Intel partnership with XcelleNet
  - Novell purchase of Callisto
- Look to leverage existing customer base adopting mobile
- Strong benefit through partnerships or acquisitions

## Pure-Play MDM

- Moving upstream within market
  - Feature rich in mobile environment
  - Look to be larger mobile infrastructure provider
  - Partner/OEM is critical

# Vendor Migration: The Integrated Solution

## Handheld-Centric

- Strict focus on non-laptop mobile devices, including wireless
- Offer MDM as value-add to core mobile middleware offerings

## Handset-Centric

- Not just handsets, but wireless-oriented handhelds and other converged devices
- Recognizing intersection of large number of handsets and growing complexity
- New customers, new channels

# Key Drivers for Growth in MDM Market

- Organizations recognizing the need to manage mobile devices
  - Mobile workers represent some of the most important employees of a business
  - Mobile devices are no longer the exception in an organization
  - Increased complexity and data residing on devices
  - -Complexity in managing mobile users
- Mobile enablement projects continue to grow
  - Mobile middleware expected to reach \$1.7 billion in 2006
  - Professional services for mobile and wireless deployments to exceed \$30 billion in 2006
- New Opportunities
  - Expand current base from desktop-laptop-handheld-handset

# Learn More

## Mobile Infrastructure Software

- Worldwide Mobile Device Management Forecast and Analysis, 2002-2006: From Laptop to Handset (Forthcoming, October 2002)
- Intel and XcelleNet Add Value to LANDesk Management Suite (IDC #27960, August 2002)
- U.S. Mobile Worker Population Forecast and Analysis, 2002-2006 (IDC #27374, June 2002)
- Worldwide Mobile Middleware Forecast and Competitive Analysis, 2002-2006 (27461, Jun. 2002)



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