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## **The 451 Group: New Enterprise Mobile Value Chain Is Emerging to Support the Connected Mobile Employee**

### *Technology Gaps Point to Opportunities for Vendors in Four Key Segments – Mobile VPNs, Device Security, Mesh Networking and Wireless Infrastructure*

*New York, January 17, 2005* – The 451 Group believes that a number of simultaneous enterprise IT industry trends point to a major shift away from the desktop-bound worker toward a fully wireless and always-connected mobile knowledge worker. The adoption of mobile-enabled laptops within the enterprise is growing at a substantial rate, wireless networks are becoming faster and more ubiquitous, and the suite of software needed to securely connect the mobile worker with the office is rapidly solidifying. This shift toward a 'mobile laptop as desktop' (MLAD) model represents the next phase of mobility within the enterprise, and 451 analysts believe that the challenges inherent in this new model will result in marketplace opportunities for four specific vendor groups. These findings are contained in a report released today by New York-based The 451 Group, a technology industry analyst company focused on the business of enterprise IT innovation.

“The MLAD evolution is providing enterprises with a platform upon which to build and launch new robust, real-time applications for a distributed, mobile knowledge-worker organization,” said Tony Rizzo, Sector Head, Mobile Software at The 451 Group and principal author of the report. “We are seeing enterprise workplaces where mobile team members are more productive than their deskbound counterparts. The opportunities in an MLAD world for real evolution of business applications, processes and workflow cannot be ignored.”

The 451 Group has found that the underlying value chain of the emerging MLAD model – i.e., wireless infrastructure plus mobile laptops plus new mobile applications plus fully functional mobile desktops – does face some challenges, including:

- Secure wireless connectivity
- Physical security of the laptop itself
- Consistent application functionality where ease of use is completely retained
- Overall mobile user experience that is as good as what a user expects from a desktop.

But these challenges have resulted in new opportunities for distinct market segments. And 451 analysts believe that those vendors that grasp the new value chain early on will end up with a strategic edge over those that do not. The four vendor groups with the most opportunity include:

- Mesh networking (delivery of enterprise and metro Wi-Fi capabilities)
- Mobile VPNs (delivery of mobile software infrastructure)
- Mobile device security (delivery of highly secure mobile laptops)
- Rich Internet applications (delivery of strong mobile applications).

“The vendors in these market segments will find new business opportunities not only vertically within their own distinct segments, but also horizontally across all four segments,” added Rizzo. “Partnership opportunities across these vendor groups will be significant, and a preponderance of pure plays clearly suggests that there will be M&A activity here.”

## **The 451 Group: New Enterprise Mobile Value Chain Is Emerging to Support the Connected Mobile Employee – 2-2-2-2-2**

These findings are contained in a 451 Special Report titled “Enterprise Mobility – The Mobile Laptop As Desktop (MLAD) Opens the Door to New Mobile Vendor Opportunities.” This report was led by Tony Rizzo, with support from Steve Wallage, Director of Research. The 300-page report defines the opportunities and challenges facing mobile vendors, while identifying those companies that are expected to last in the long term and those that will make suitable M&A targets for the stronger players that emerge. It includes competitive assessments of the vendors in this space, complemented by technology gap analyses, market taxonomies and an in-depth look at the role M&A activity may play in the development of the market for technologies that enable the 'enterprise mobile laptop as desktop' trend.

### **Key Companies Covered**

The report includes in-depth competitive assessments of vendors focusing on this space, including the following companies (although this is not a complete list of companies covered in various sections of the report): Adesso Systems, BelAir, Bluefire, Canoo, Citrix, Coco Communications, Columbitech, Credant, Droplets, Ecutel, Firetide, IBM, Intel, ipUnplugged, JackBe, Laszlo, Macromedia, MeshDynamics, Microsoft, Motorola (MeshNetworks), NetMotion Wireless, Nexaweb, Nokia, PacketHop, Padcom, Pointsec, SAP, Sierra Wireless, Strix Systems, Sybase, Tibco (General Interface), Tropos, Trust Digital and Utimaco.

### **Report Orders**

To learn more about this report, or to discuss developing a client relationship with The 451 Group, contact Simon Carruthers, Vice President of Research Services, via phone at 212-505-3030 x-103, or via e-mail at: [simon.carruthers@the451group.com](mailto:simon.carruthers@the451group.com).

### **About 451 Special Reports**

451 Special Reports provide a complete and comprehensive picture of emerging enterprise IT market segments – analyzing the technologies, the competitors, the marketplace opportunities and obstacles, and the implications for a variety of constituencies, including other vendor companies, the investment community and early-adopter IT end users.

### **About The 451 Group**

The 451 Group is an independent technology industry analyst company focused on the business of enterprise IT innovation. The company’s analysts provide critical and timely insight into the market and competitive dynamics of innovation in emerging technology segments. Clients of the company – at vendor, investor, service-provider and end-user organizations – rely on 451 insight to support both strategic and tactical decision-making for competitive advantage.

The 451 Group is headquartered in New York, with offices in key locations, including San Francisco, London and Boston. For additional information on the company or to apply for trial access to its services, go to:

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