

# ARC Group

## Enabling the Mobile Workplace

**Rupert Reid**

**Publications and Consultant Manager**

[rupert.reid@arcgroup.com](mailto:rupert.reid@arcgroup.com)

ARC Group - Walton on Thames - Surrey - UK

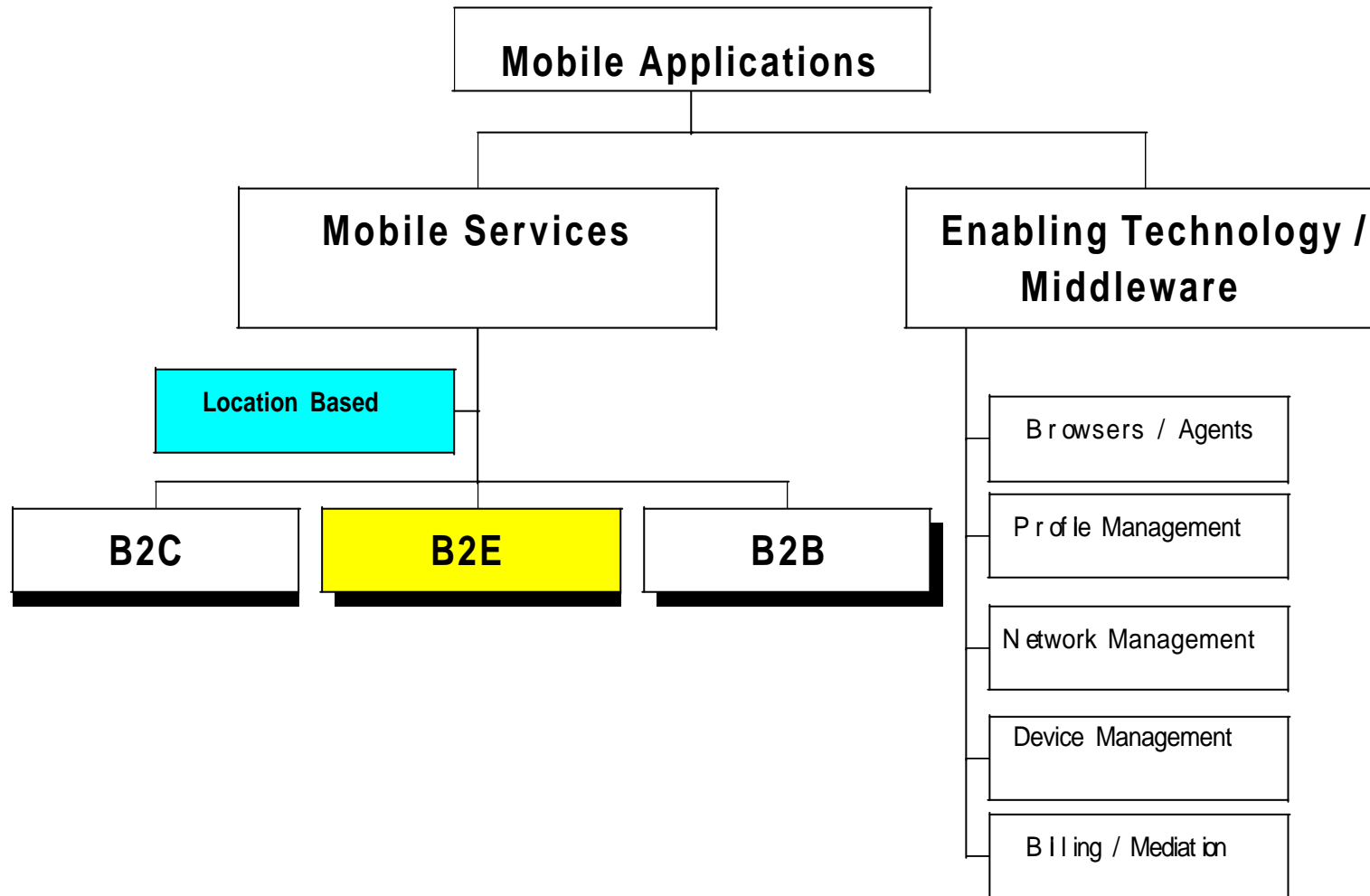
Tel +44 (0)1932 266940 Fax +44 (0)1932 266941



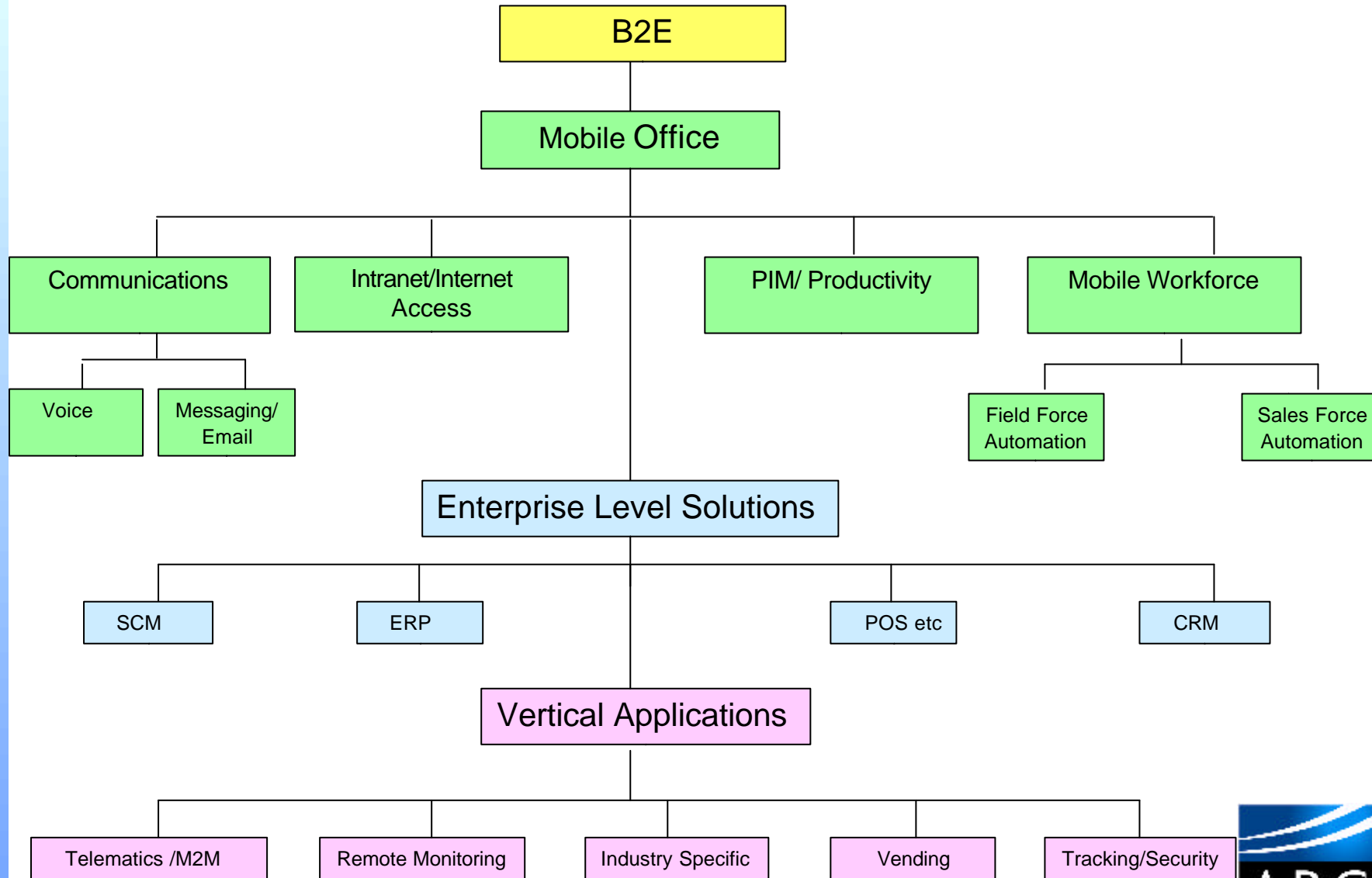
# Agenda

- Enabling infrastructure and devices
- The future mobile workplace
- Vertical applications, including the wider mobile world of telematics
- Scenarios for the wireless data market

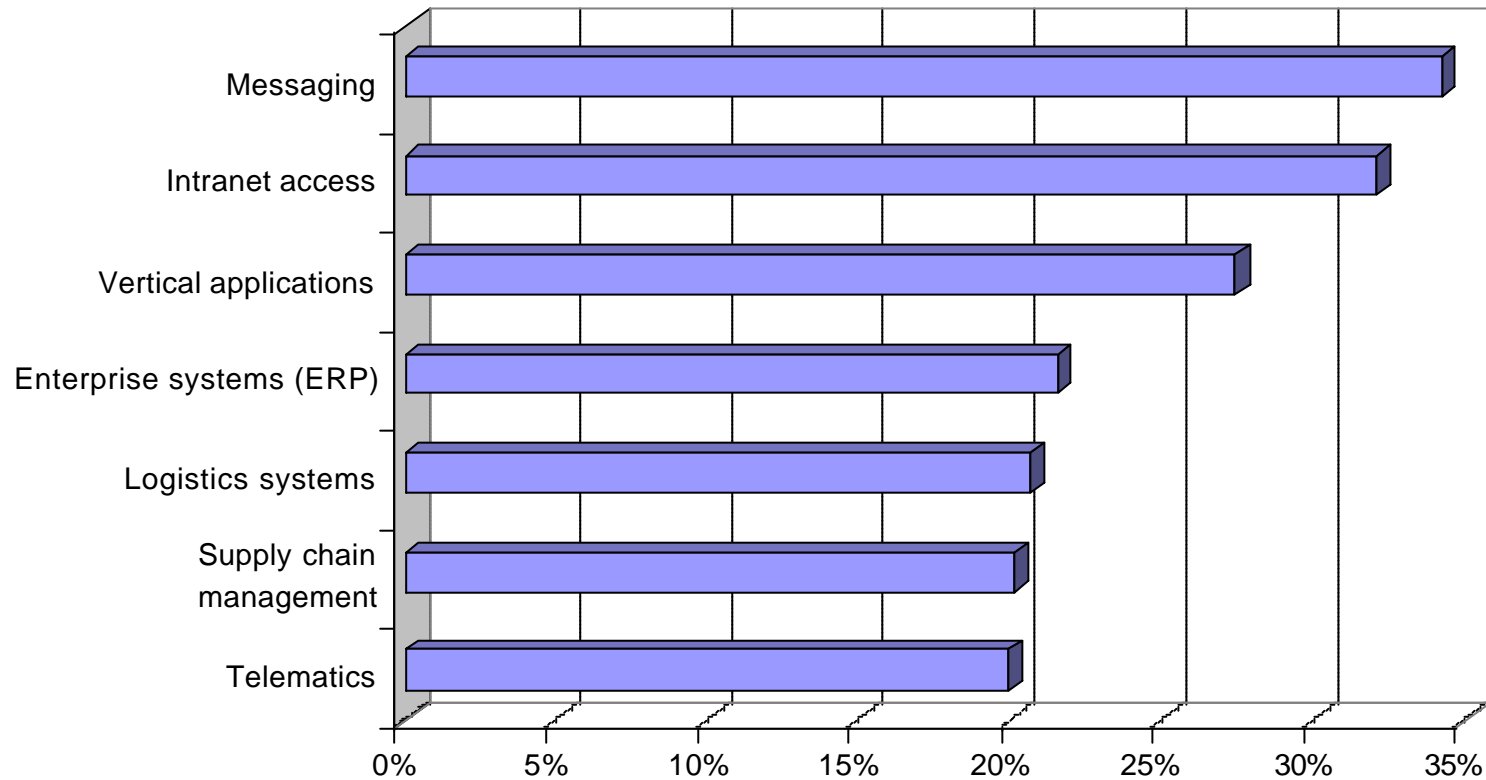
# Mobile Applications & Services



# MOBILE Enterprise Applications

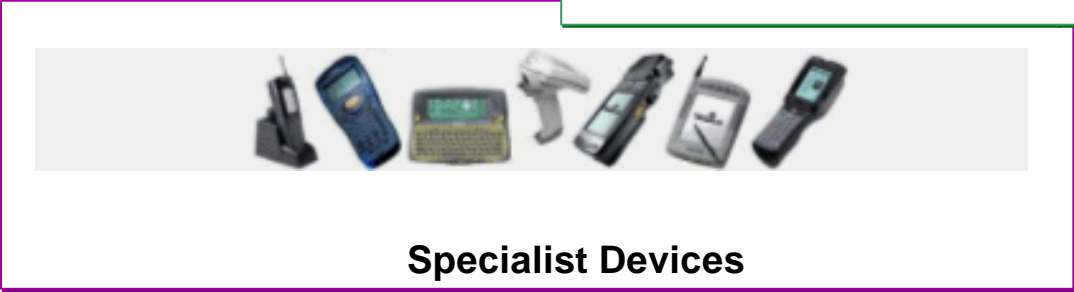


# Key Applications by Revenue Potential, 2007

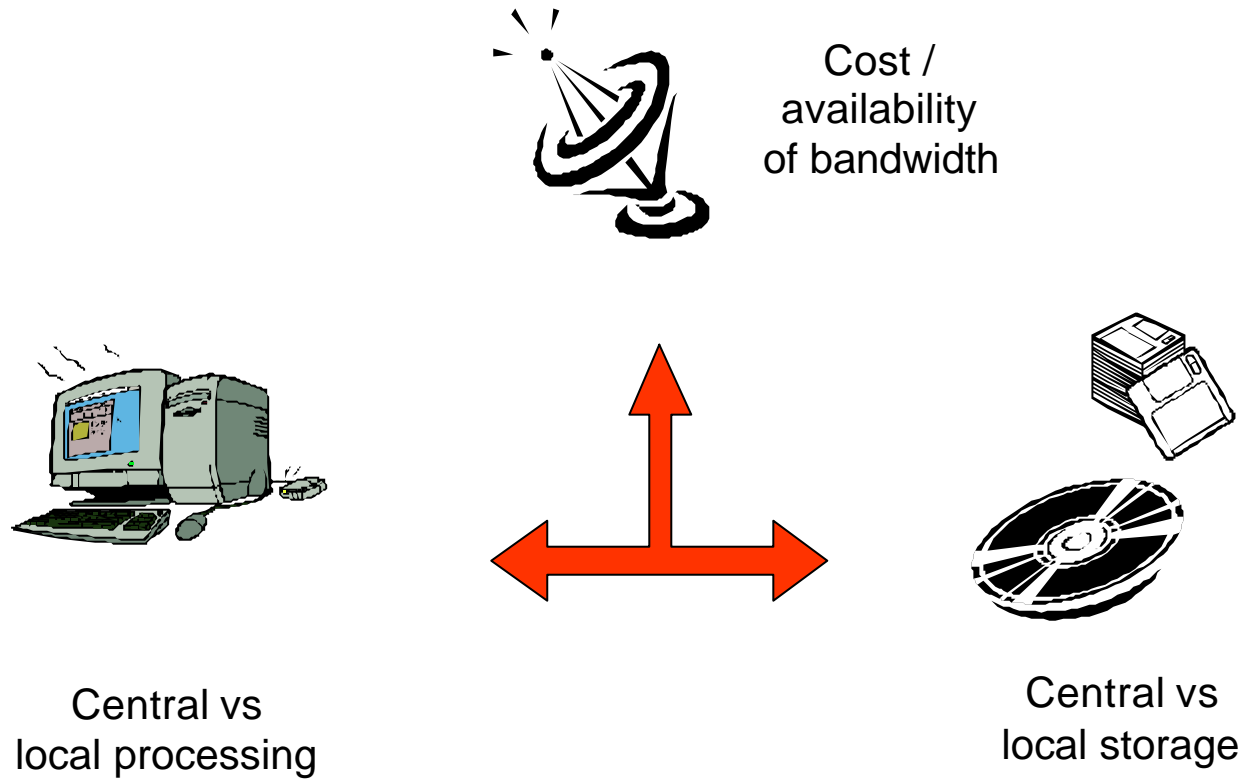


Source: ARC Group

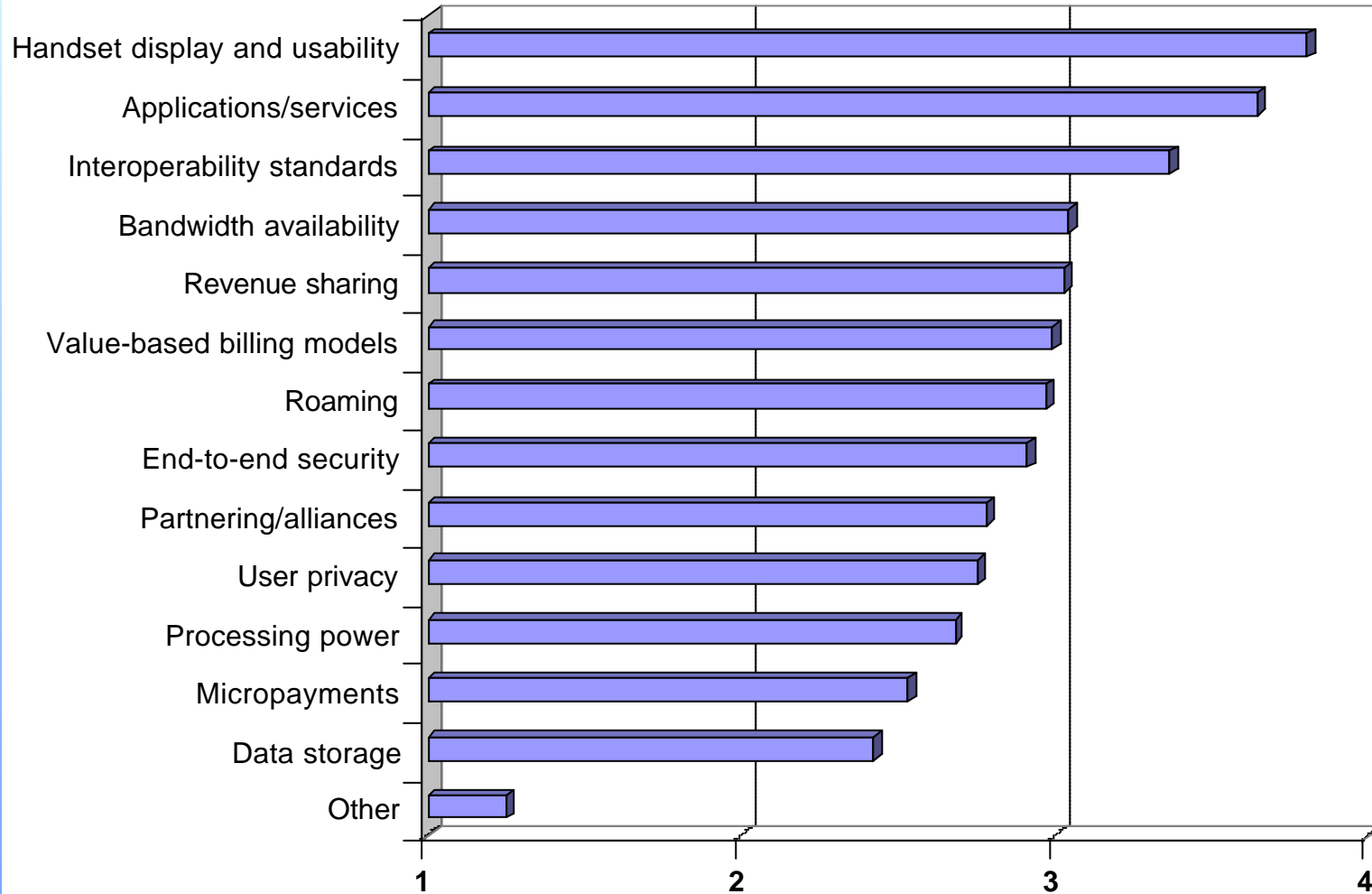
# Mobile Devices



# Key Strategic Issues



# Market Drivers & Inhibitors

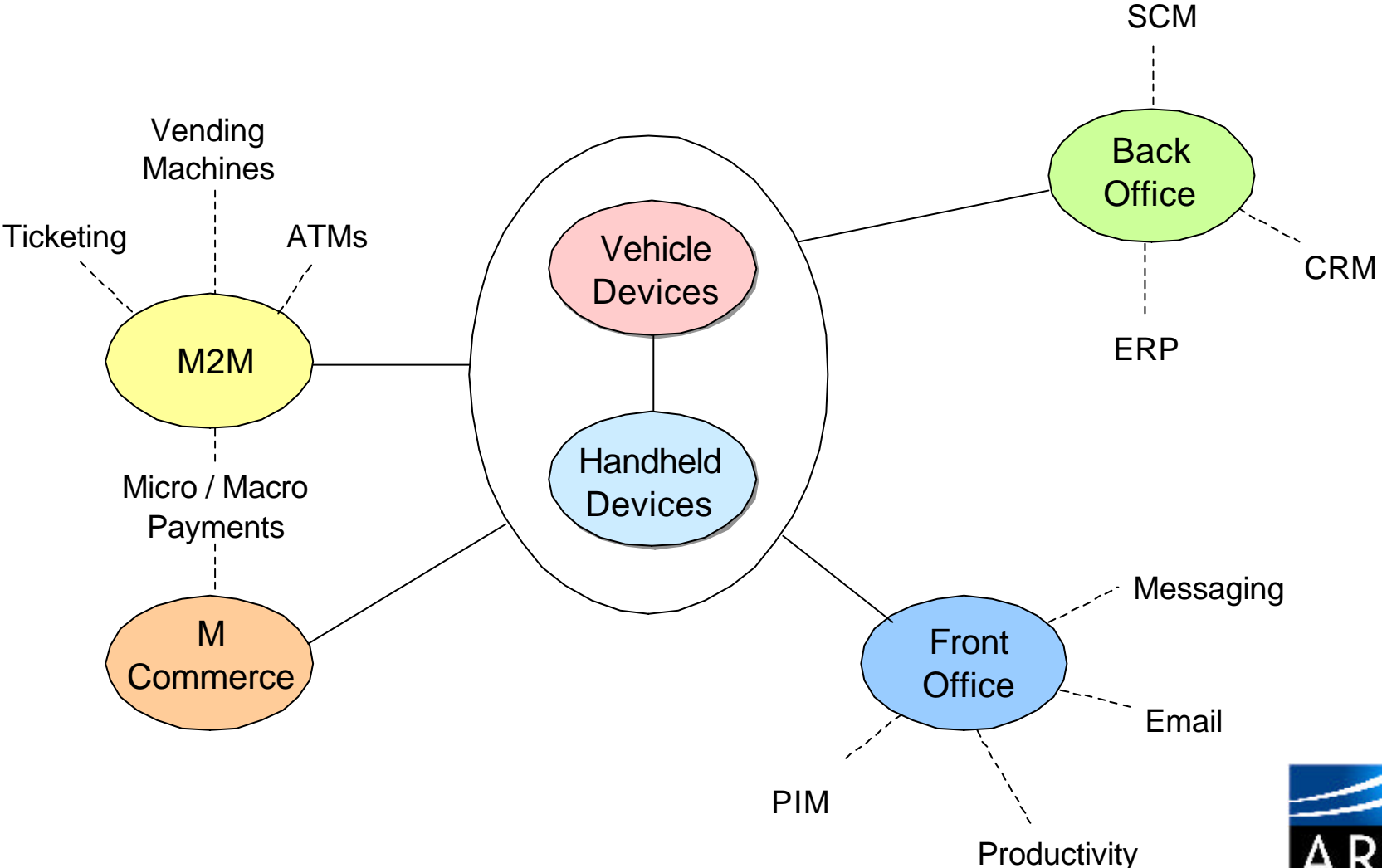


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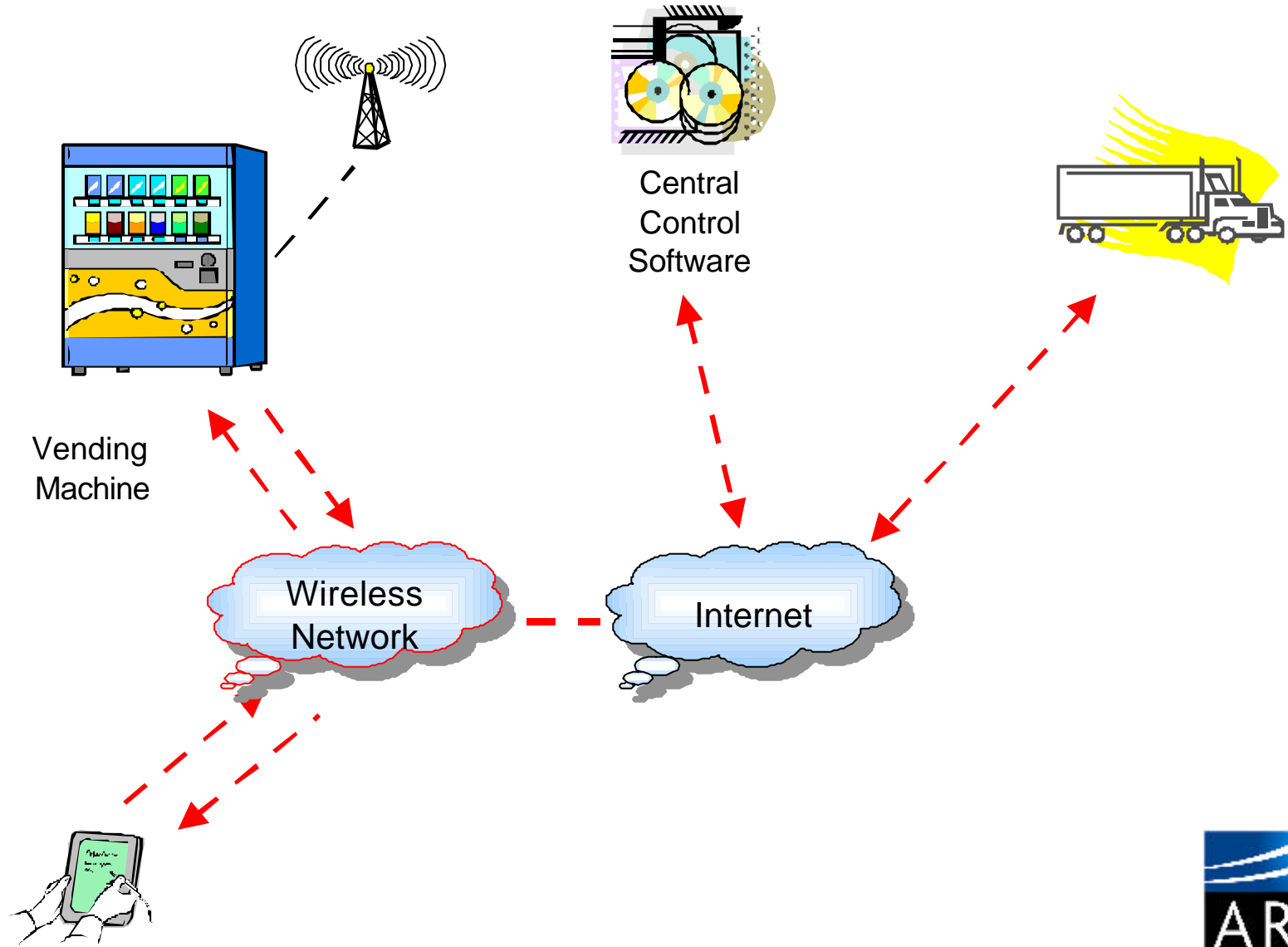
# The Wider World of Mobiles



Source: ARC Group

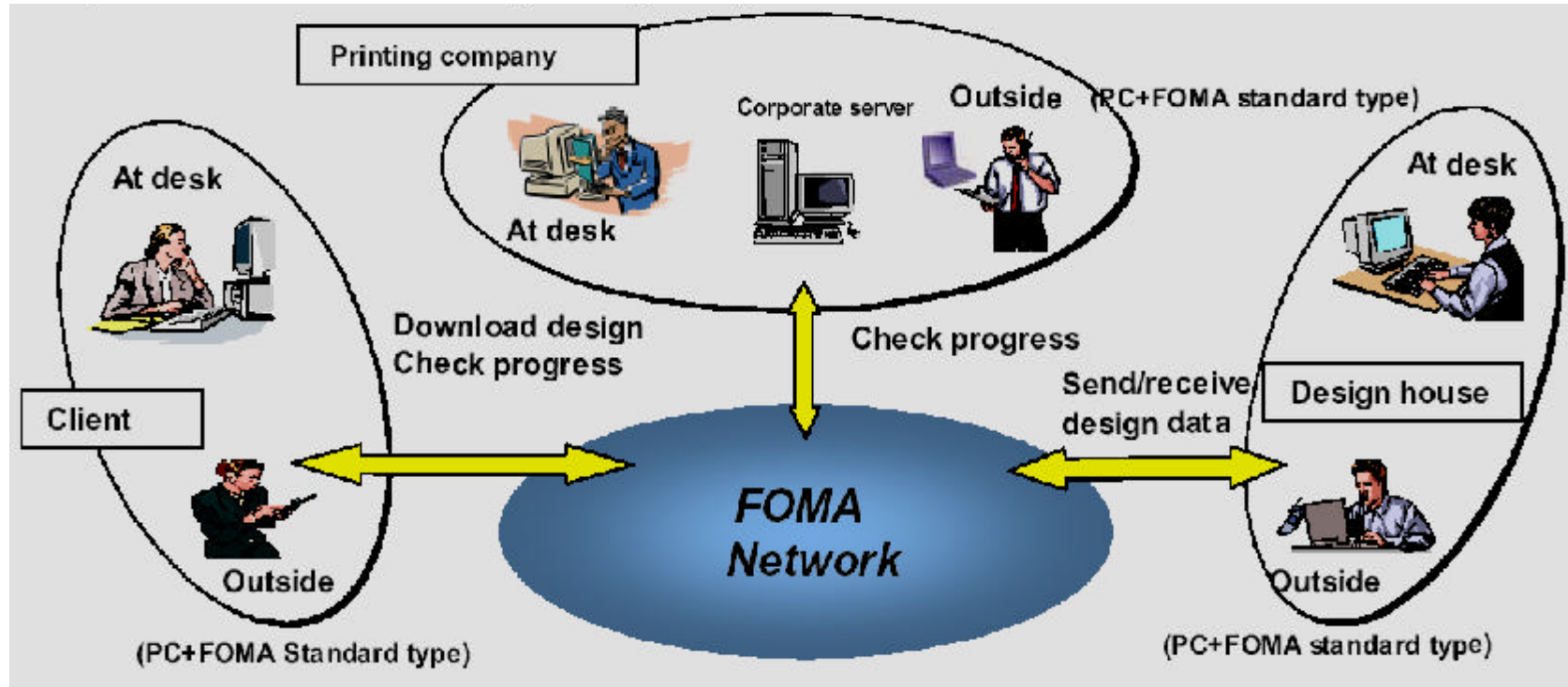


# Vending & Mobile SCM



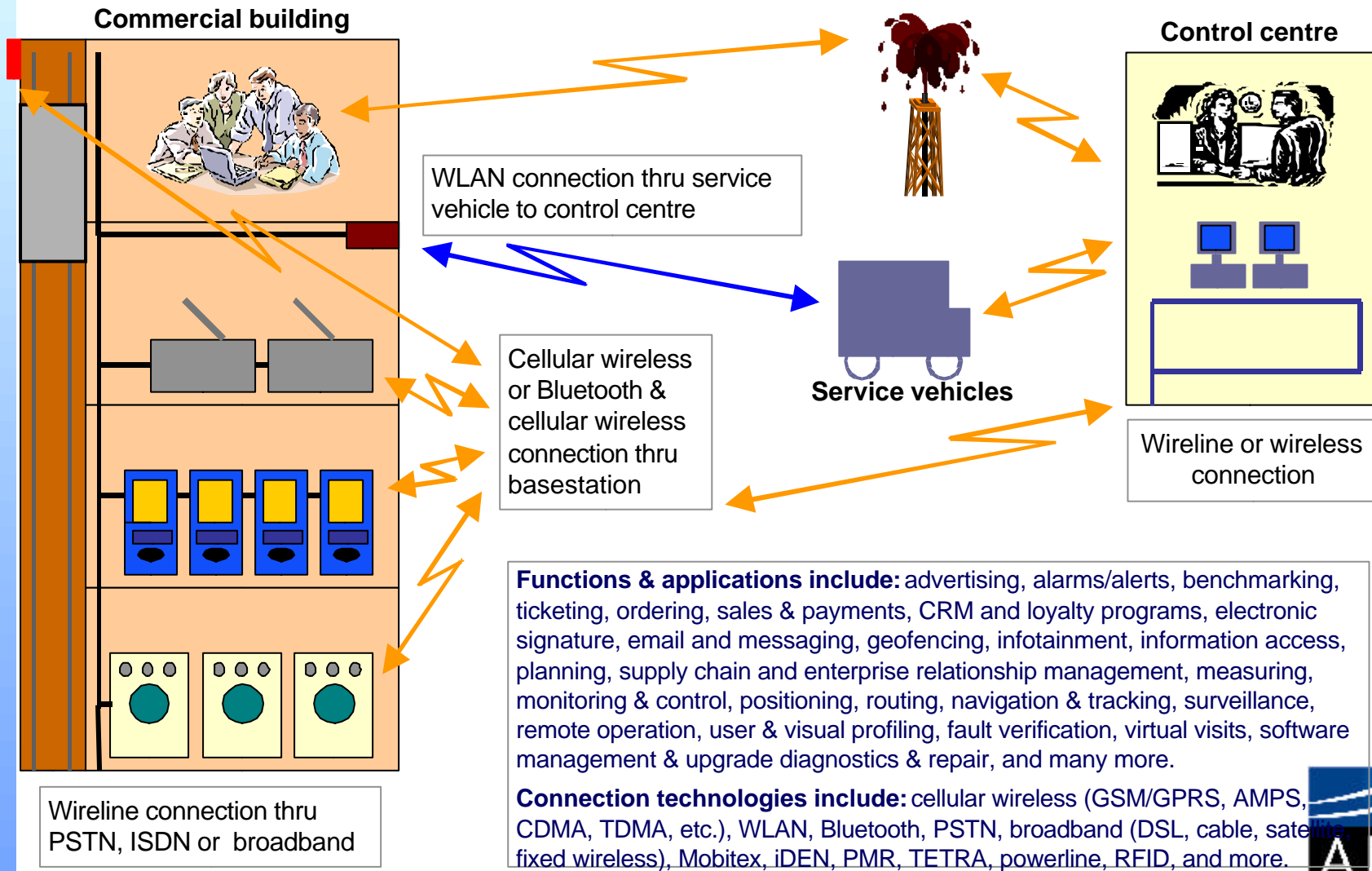
Source: ARC Group

# The Mobile Office

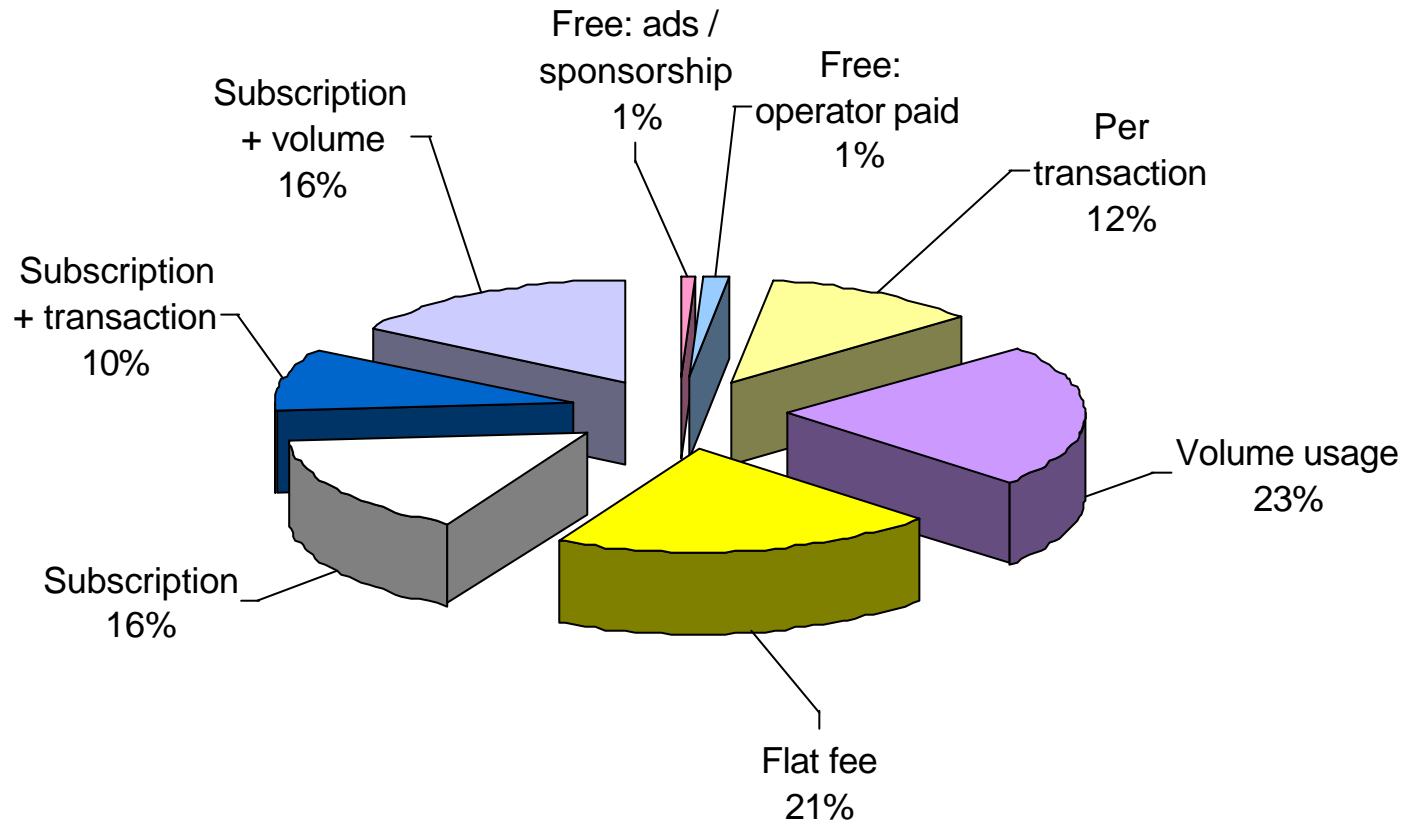


Source: NTT Docomo

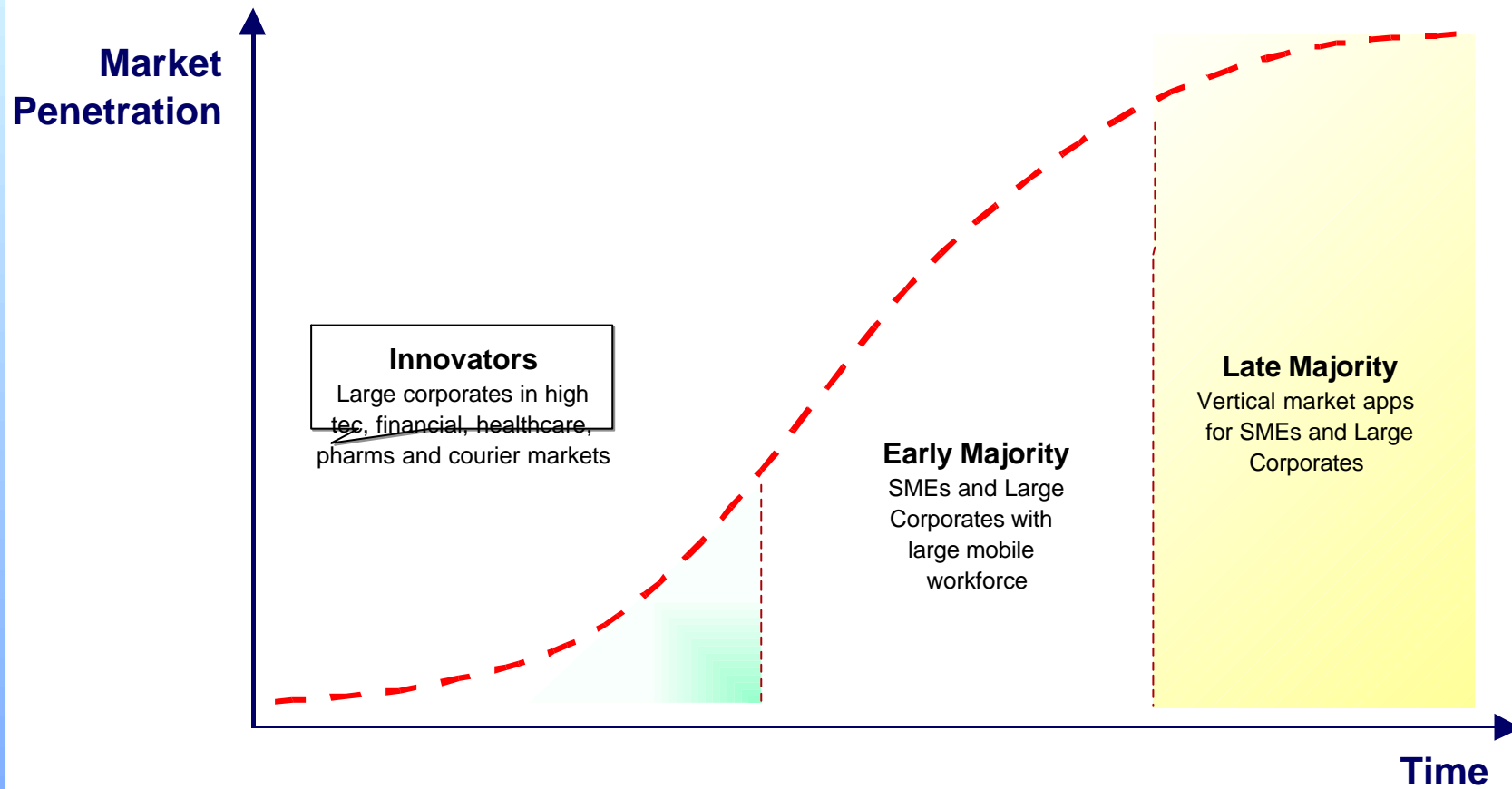
# Endless Functions & Applications via a Choice of Technologies



# Future Revenue Models

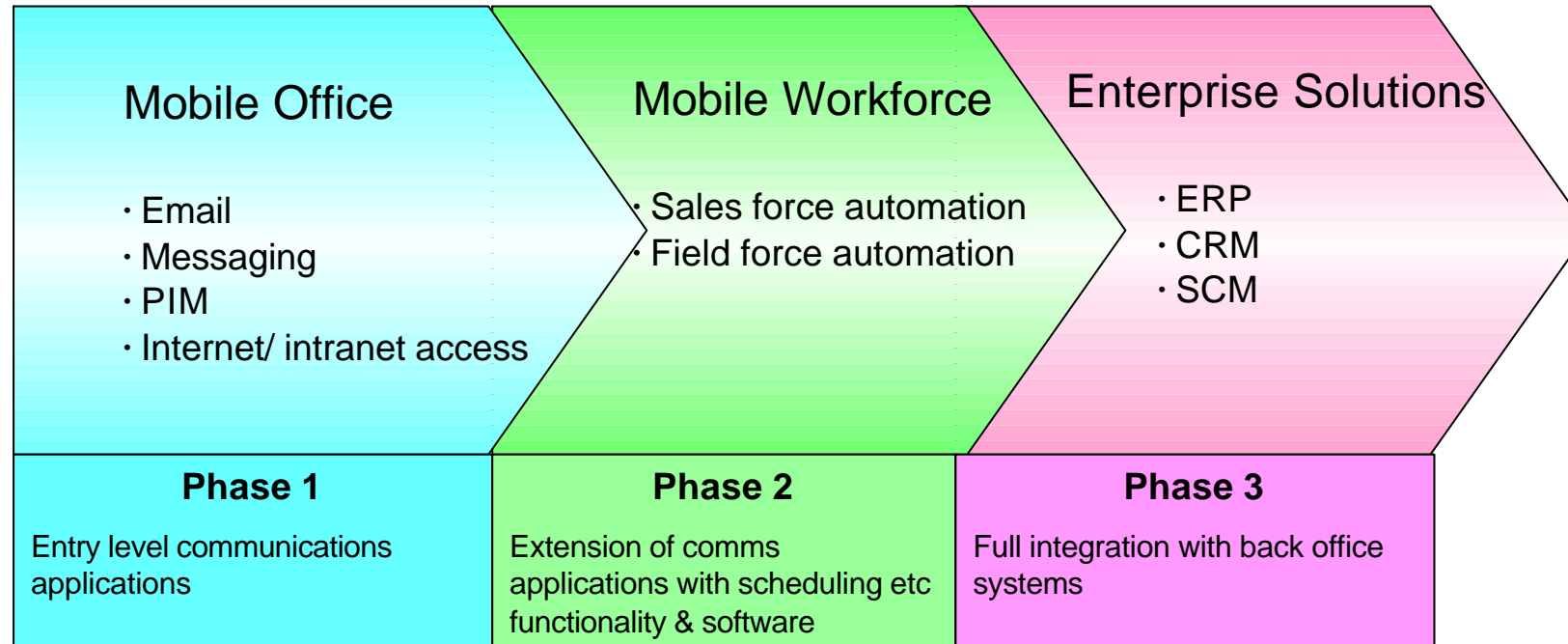


# Mobile Enterprise Roadmap - 1

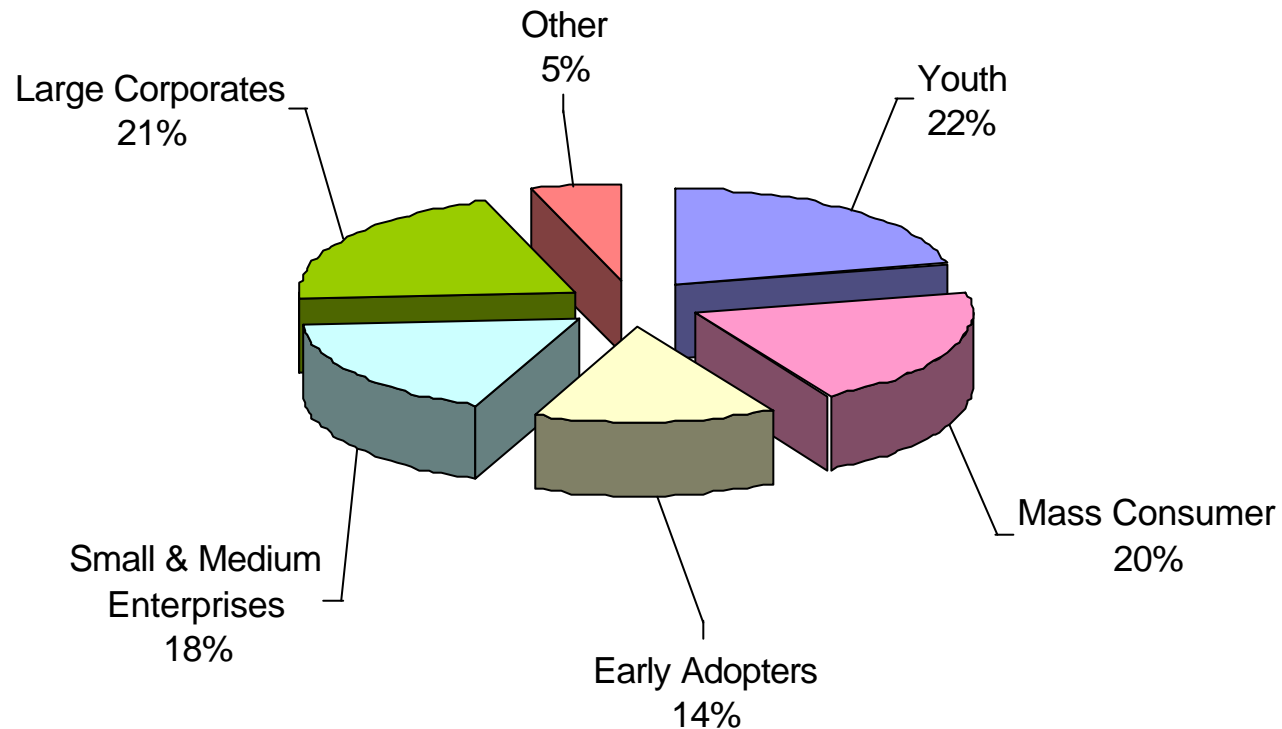


Source: ARC Group

# Mobile Enterprise Roadmap - 2

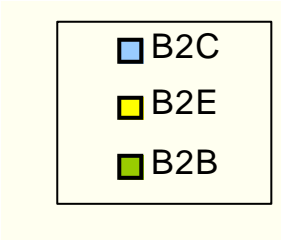
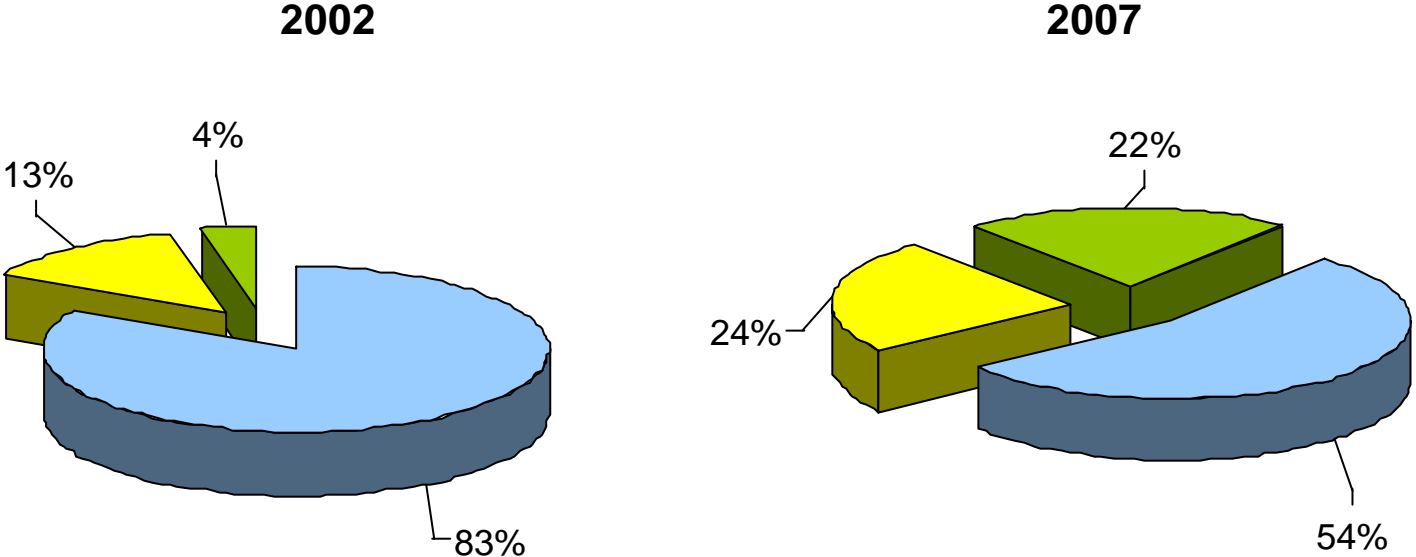


# Share of Total Mobile Revenues by Market Segment, 2007





# Mobile Services Revenues



# Summary

## Critical success factors for realising the mobile enterprise opportunity

- Optimise sales channels through partnerships along the value web that leverage each members strengths and existing routes to market
- Educating enterprises and increasing market awareness
- Transparent business cases and pricing plans
- Use of basic messaging and communications related solutions as the first step on the ladder to creating incremental revenues by migrating customers along the mobile enterprise evolution path

## Key implementation issues

- Scalability
- End-to-end security
- Reliability and consistency of service