

computer
BUSINESS
review

CBR Research Paper



MOST INFLUENTIAL VENDORS

MOST INFLUENTIAL PEOPLE

50 SHOOTING STARS

50 IT GIANTS

Wireless

The Top Ten in mobile is always a challenge. First, because this market covers everything from mobile phone operators to manufacturers of wireless LAN equipment, and laptops to PDAs. There are no pure-play WLAN vendors such as Aruba, Trapeze or Colubris on this year's list. There are so many key players in this very diversified market that we could do a Top 100 and still leave important companies out.

Cisco

The networking heavyweight tends to grow by acquisition, and when it buys a company, the technology it gets is 'vindicated' or about to go mainstream. In 1999 it jumped into the WLAN market with both feet with the acquisition of Aironet and today it has a half-billion-dollar business in wireless access points (APs) from that purchase.

Even so, in January this year Cisco spent another \$450m on the most successful WLAN switch vendor Airespace, in overt recognition that the market had moved on from Aironet's 'fat' APs to 'thin' ones, made possible by holding the network intelligence centrally on a switch.

Expect to see Cisco transition the Aironet APs into the SME market while letting its arms-length subsidiary Linksys make APs for the residential space, and position Airespace as a high-end enterprise product.

Hewlett-Packard

Hewlett-Packard has had very high-profile problems in other major

areas of its business, but its handheld business is actually doing rather well. The iPAQ PDA brand is a strong one and, since late last year, HP has added phone capabilities. Summer will see the launch of a GSM/GPRS version called the 6500, with Bluetooth, WLAN and the TomTom Navigator software for GPS. This will be the company's first serious attempt to pick up a European mobile operator, and if it is successful, it should boost sales of the device dramatically.

iAnywhere/Sybase

iAnywhere, a Sybase majority-owned company, has emerged as a leader in the mobile middleware space. Thanks to Sybase's acquisition of Excellenet some years back and with its excellent Afaria mobile management software suite, iAnywhere remains the company to turn to for the management of heterogeneous mobile devices and data.

The company is also emerging at the forefront of the RFID revolution, its RFID Anywhere middleware platform a firm stake in the ground that proves the company is taking RFID extremely seriously. Offering the ability to automate the development and deployment of RFID applications, as well as simulating and troubleshooting RFID environments, we will be hearing a lot more from iAnywhere as RFID gathers pace.

Intel

According to IDC, Intel was only number three in WLAN semiconductors in 2003 to 2004, behind

Texas Instruments and Atheros. Nonetheless, its brainwave of developing the Centrino to automatically detect any WLAN networks available in the vicinity of the laptop it powers, then advertising the hell out of it, probably did more to promote wireless data networking in recent years than any other development in the market.

Its rivals look on jealously as "Intel inside" marketing guarantees mind-share way beyond theirs, yet Intel freely admits it was late to wake up to the potential of WLAN. It does not intend to make the same mistake twice, however, so it is pushing the wireless WAN standard WiMAX, unveiling the Rosedale chipset to serve what is not even a market yet.

iPass

Executives on the move may have a data card in their laptop for cellular as well as WLAN connections to the Internet, but if their operator does not have a business in a country, they will be facing roaming charges. On the WLAN side, they will need to buy time on a network wherever they are staying or working, as well as being able to read whatever sign-in page is offered them.

In the forefront of simplifying the process of WLAN access is iPass, which via partners in the network operator market offers access around the globe, always with the iPass log-in page appearing when the subscriber clicks to go onto the Net. The model has been successful with business customers, to such an extent that US mobile and long-dis-

tance player Sprint is using an identical model with its Extended Workplace offering.

Microsoft

Microsoft is not the clear leader, and coming from behind is not a role the company is used to, at least not in mass markets (although Windows has not yet killed off Unix). Still, Windows Mobile is progressing, particularly among ODM players in Asia such as HNC.

Moreover, the latest version of the OS, v5.0, gets closer to the goal of a single platform for smart phones, PDAs, PDA phones and portable media players than Nokia, which is still working on collapsing its Series 60, 80 and 90 versions of Symbian into one OS. There are a host of other improvements from previous efforts, including a raft of APIs for adding new functionality quickly, support for hard drives and closer integration with Visual Studio and SQL Server 2005 Community Technology Preview: all good news for prospective developers.

Motorola

Motorola spent some time adrift in the mobile market, but under Ed Zander the company has gained focus. In the general handset market its Razr V3 phone dispelled its rather tired corporate image, giving it street cred: PC magazine described the Razr as “the ultimate see-and-been phone for style mavens,” even though it added that the screen attracted grease and the in-built camera was rather poor.

Rather than tying its colours to the mast of one particular mobile OS as both Microsoft and Nokia have done, Motorola is backing several horses, which is an interesting, if potentially expensive, strategy. It talks up .Net as a development environment for back-end integration and Symbian as the best OS for multimedia applications, yet it also delivers Linux phones. It is also looking at VoIP on mobile handsets (it already has a voice-over-WLAN phone) and seamless roaming between VoIP and GSM.

Nokia

The Asian handset manufacturers have invaded Western markets in force and Samsung is now vying for the number two spot in the ranking with Motorola. Nokia is still the market leader in mobile phones and demonstrates a clear understanding of where mobility is going. It has just launched a software tool for centrally managing its smart phones, in recognition of the fact that the next phase of enterprise mobility will entail corporate rather than individual purchasing and require manageability and policy enforcement by enterprise IT departments.

Nokia’s championing of the Symbian operating system, of which it is 47.9% owner, is a big reason why Microsoft does not dominate the mobile OS market the way it does in desktop and laptop.

Like Research in Motion, Nokia has its app developer programme to guarantee users have plenty of things that will run on their Symbian smart phones. And without too much fanfare, it has just dipped its toe in the water of CDMA, the air interface technology that, while running a distant second behind GSM (236 million subscribers at the end of 2004 compared to GSM’s 1.26 billion), has the lion’s share of the US and a few other key markets. For example, it launched the first Symbian-based smart phone for the CDMA market.

RIM

Canada’s Research in Motion (RIM) deserves inclusion this year because its success with its end-to-end, hardware-and-software push email offering has been so great, it has provoked major developments in the market.

By signing up three million subscribers to the BlackBerry service, the last million in the previous six months, it has put mobile data on the map and shown that a certain type of executive is prepared to pay significant money to access emails on the move, carrying a second device besides a mobile phone.

RIM’s business imposes on mobile operators – normally so zealous of

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their own brands – the BlackBerry name, but the market is fighting back. Big carriers are now signing up with developers of software-only push email, with a guarantee that it will work on all the smart and even some feature phones in their catalogue. And the ISVs are happy to strike white-box deals whereby their brand does not appear.

The gauntlet is cast, and it now behoves RIM to license its software to other players for use on their hardware, and to get developers out there in the market to produce applications to run on its devices. This would ensure that a BlackBerry remains worth investing in when operators start offering things like sales and field force automation, as well as push email, on smart phones.

Vodafone

Vodafone continues to grow, currently adding the Czech Republic and Romania to its list of countries with a Vodafone network. Aside from its empire-building, however, the world’s second largest mobile operator in subscriber numbers (behind China Mobile, all of whose customers are in China) is also executing a strategy of moving subscribers from 2G, through 2.5G and on to 3G, without at any stage running a serious risk of losing them to competitors.

For the enterprise user, this means offering first data cards with GPRS, then GPRS and 3G, and now GPRS, 3G and WLAN connectivity, the last for use in hotspots as well as out on the road. Now it has also launched 3G handsets, while in the consumer market its Vodafone live! portal offering enables it to sell customers on the idea of buying content services in GPRS, so for them 3G is just sold as a speed upgrade.

In its most recent financials the company said it was coming under increased pressure from rivals such as 3 in Western Europe and faced a margin squeeze as a result. The US is a question mark for its future strategy and Japan is floundering. Still, what it does directly influences how competitors operate.