Welcome!
Thank you for joining us on today’s Gartner webinar.

- 5,500 Benchmarks
- 60,000 Clients
- 10,000 IT End-User Inquiries
- 2.7 Million IT End-User Searches
- 10,800 Client Enterprises
- 100,000 Media Inquiries
- 55 Conferences
- 70% of Fortune 1000
- 80% of Global 500
- 4,000 CIOs
- 750 Analysts Serving Clients in 85 Countries
- 10,000 CIOs
- 40,000 CIOs
- 60,000 CIOs
- 10,000 CIOs
- 40,000 CIOs
It Starts With the iPad

Media tablets join smartphones and laptops as common tools in business.

Over 200 new tablets will be announced globally in 2011. Many new devices and hybrids will emerge.
Key Issues

1. What are the most impactful and interesting business uses of tablets?
2. How should you deliver applications for tablets within the enterprise?
3. How do you manage and secure tablets in the workforce?
New Devices and New Business Uses

"Ready at Hand"
- Instant-on
- Day-long battery life
- Lightweight
- Connected
- Simple

Top Uses
- Documents and video
- Sales
- Field service
- Business analytics

Verticals
- Health care
- Public safety
- Insurance
- Manufacturing
- Legal
- Retail

Challenges
- Fragmentation of applications, platforms, app stores, features, support
- Functional limitations (e.g., removable storage, PC dependency, browser plug-ins)
- Not better laptops
- Not better smartphones
- Weaker security and manageability
- Rapidly evolving
The Dawn of Business Apps for Tablets

- Vertical Apps
- Business Intelligence
- Sales Support
- Group Collaboration
- Collaboration
- Desktop Extension
- Personal Productivity

Impact vs. Cost

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# The First Wave of Tablet Business Apps

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Office Automation</strong></td>
<td>Documents, Spreadsheet</td>
<td>iWork, iAnnotate, Evernote, Bento, FMTouch, OneNote</td>
</tr>
<tr>
<td><strong>Presentation</strong></td>
<td></td>
<td>Keynote, QuickOffice Connect</td>
</tr>
<tr>
<td><strong>Note Taking</strong></td>
<td></td>
<td>Many</td>
</tr>
<tr>
<td><strong>Task Management</strong></td>
<td>Personal tasks, project management</td>
<td>Things, OmniFocus, Time Master</td>
</tr>
<tr>
<td><strong>File Management</strong></td>
<td></td>
<td>Airsharing, GoodReader</td>
</tr>
<tr>
<td><strong>Dictation</strong></td>
<td></td>
<td>Dragon, Quickvoice Recorder</td>
</tr>
<tr>
<td><strong>IT Admin Utilities</strong></td>
<td>Telnet, VNC, RDP, FTP, etc.</td>
<td>VNC Viewer, FTP on the Go, iSSH, Wyse PocketCloud</td>
</tr>
</tbody>
</table>
## Top Business Apps for Tablets

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Corporate/Government</strong></td>
<td>CRM, ERP, SCM, Messaging</td>
<td>Salesforce Mobile, SAP Business One, Mobile Edge</td>
</tr>
<tr>
<td><strong>Enterprise Applications</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Business Intelligence</strong></td>
<td>Analytical and Performance Management dashboards</td>
<td>MicroStrategy Mobile, Roambi, QlikView, Tibco Spotfire, Actuate BIRT Mobile, ActiveStrategy iRound</td>
</tr>
<tr>
<td><strong>Collaboration</strong></td>
<td>Meeting applications</td>
<td>GoToMeeting, WebEx, SyncPad, Huddle</td>
</tr>
<tr>
<td><strong>File Utilities</strong></td>
<td>Systems for sharing and doc distribution</td>
<td>box.net, Dropbox, Vablet</td>
</tr>
<tr>
<td><strong>Utilities to Extend Corporate</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Environments</strong></td>
<td>User-friendly viewers, HVD clients</td>
<td>Citrix Receiver, LogMeIn</td>
</tr>
<tr>
<td><strong>Sandboxed Environments</strong></td>
<td>Separation of corporate environments from personal apps</td>
<td>Good for iPad</td>
</tr>
<tr>
<td><strong>Social Networking</strong></td>
<td>Social network apps with business insight</td>
<td>Yammer</td>
</tr>
<tr>
<td><strong>Board Books</strong></td>
<td>Secure document and report distribution</td>
<td>Aprio, BOARDVantage, Diligent</td>
</tr>
<tr>
<td><strong>IT Management Systems</strong></td>
<td>Mobile device management</td>
<td>AirWatch, Good, MobileIron, SAP Sybase</td>
</tr>
</tbody>
</table>
Balancing Security vs. Flexibility

Secure

Less

Online viewing

Download to secure container/store using data protection APIs

More

Flexible

Allow downloading to device.

“Open In” 3rd party apps

Email to local device.

“Open In” 3rd party apps

Online viewing only

From “Secure Low-Cost Data Sharing and Collaboration With iPad” (G00211286)
Key Issues

1. What are the most impactful and interesting business uses of tablets?

2. How should you deliver applications for tablets within the enterprise?

3. How do you manage and secure tablets in the workforce?
End Users and Business Leaders Drive Rapid Tablet Adoption

Strategic Planning Assumption: By 2013, 80% of businesses will support a workforce using tablets.

Reasons why SPA will be true:
- Nearly unstoppable user demand
- Interest among C-level executives
- Explosion of new business apps
- Compelling for B2C
- Similarities to smartphone support
- Many MDM tools are available
- Development and delivery tools are maturing

Reasons why SPA will be false:
- Weaknesses in security, support and application infrastructure
- Tablets not a replacement for existing smartphones and notebooks
- IT may be slow to revise policies
Common Target Devices

Pocketable
- 2-4"
- 320 x 480
- Keyboard and touch

At Hand
- 7-10"
- 1024 x 768
- Touch

Portable
- 11-15"
- 1280 x 1024
- Mouse and Keyboard

Desk
- 15-27"
- 1920 x 1080
- Mouse and Keyboard

Shared Areas
- 30-60"
- HD and beyond
- Natural interfaces
Tablets in the Larger Scheme

But Numbers Only Tell Part of the Story…
How Computing Behavior Changes

An example:

<table>
<thead>
<tr>
<th>Device</th>
<th>Sessions</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop</td>
<td>7</td>
<td>24.0 mins.</td>
</tr>
<tr>
<td>Smartphone</td>
<td>26</td>
<td>1.5 mins.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Device</th>
<th>Sessions</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop</td>
<td>4</td>
<td>36.0 mins.</td>
</tr>
<tr>
<td>Tablet</td>
<td>12</td>
<td>7.0 mins.</td>
</tr>
<tr>
<td>Smartphone</td>
<td>19</td>
<td>1.2 mins.</td>
</tr>
</tbody>
</table>

As reported by mobile salesforce workers
Tablets and Smartphones Will Be Elements of Other Products and Systems
Tablet Operating Systems

**ios The Benchmark**
- Consumer first, enterprise second
- Third Party Management Tools
- Weak in integrated collaboration, social application support, cloud services

*Consider to meet user demand and for near-term projects*

**Momentum**
- Fast innovator; not afraid to experiment
- Surpasses Apple in overall features
- Fragmentation is major threat
- Weak app validation

*Consider with enterprise-aware supplier*

**QNX Enterprise Focus**
- QNX stable OS but with new UI
- Catch-up on apps and ecosystem

*Consider if already a Blackberry shop; Watch app availability, Android support*

**Win 7 Legacy**
- "Heavy" OS in cost and resource requirements
- Tablet OS on ARM not due until 2012

*Consider for traditional tablet PC hardware refresh, hardened legacy apps and meeting endpoint security demands*

**WebOS Coming from Behind**
- Focus on sync across platforms
- Potential as strong enterprise player
- Major work required to build apps store and ecosystem

*Watch ecosystem and apps*
HTML 5 Gets Strong Support

• APIs include:
  - Offline Web applications
  - Canvas tag for 2D drawing
  - Offline storage database
  - Document editing
  - Drag and drop

• Will the OS be relevant in the future?
  - Backing from Apple, Google, RIM, Nokia and others

• JavaScript performance becomes important

• Expect HTML extension and browser incompatibilities; Mobile Enterprise Application Platforms can help
Key Issues

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## Multi-platform Development and Delivery Technology Architecture

<table>
<thead>
<tr>
<th>Application Development</th>
<th>Sample Vendors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Native Development</td>
<td>Syclo</td>
</tr>
<tr>
<td>Web Development</td>
<td>Antenna Software</td>
</tr>
<tr>
<td>Mobile Enterprise Application Platforms*</td>
<td>Sybase (SAP)</td>
</tr>
<tr>
<td>Mobile Consumer Application Platforms*</td>
<td>Kony</td>
</tr>
<tr>
<td>Application Delivery</td>
<td></td>
</tr>
<tr>
<td>Enterprise Application Stores</td>
<td></td>
</tr>
<tr>
<td>Application Management and Security</td>
<td>Sybase (SAP)</td>
</tr>
<tr>
<td>Mobile Device Management*</td>
<td>Good Technologies</td>
</tr>
<tr>
<td>Device Management and Security</td>
<td>MobileIron</td>
</tr>
<tr>
<td></td>
<td>AirWatch</td>
</tr>
</tbody>
</table>

*Gartner Magic Quadrants are available in May 2011
New Delivery Model: App Stores

The most important approach to mobile application delivery at scale

Billions are at stake:
Commercial players will invest heavily (e.g., Amazon)

For volume, commercial App Store curation is critical

Enterprise app stores accelerate 2012-15

Predicted downloads from commercial app stores
Will Apple Retain Its App Store Lead?

By 2015, Apple will not be the largest app store.

**Supporting the SPA:**
- Android will have a much larger installed base and will be more attractive to developers
- Google, Amazon and RIM will act aggressively to increase app usage among their user bases
- Mobile OS platforms will mature, reducing Apple's advantages
- Apple's control will alienate some developers
- Multiplatform development tools will erode Apple's unique position and app portfolio

**Alternate position to the SPA:**
- Although Apple will be #3 in device shipments, the average Apple user will be very profitable for developers
- Apple will retain developer mind share
- Apple will continue to introduce new devices and services to create profitable opportunities for developers

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## Mobile Application Development Tools Will Proliferate Through 2012

<table>
<thead>
<tr>
<th>Consumer Target</th>
<th>Cross-platform tools: e.g., Flash, Qt, Kony, Appcelerator, Rhomobile, M2Active, ...</th>
<th>On-device portals: e.g., modomodo</th>
<th>Template generators: e.g., AppBreeder</th>
<th>End-user tools: e.g., App Inventor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer or Enterprise Target</td>
<td>Platform SDK: e.g., Apple, Android</td>
<td>Mobile Web tools: e.g., Volantis, Usablenet</td>
<td>Mobile Consumer App Platform</td>
<td></td>
</tr>
<tr>
<td>Enterprise Target</td>
<td>Enterprise B2E tools: e.g., Antenna, Syclo</td>
<td>Off-the-shelf solutions: e.g., BlueDot, Cognito</td>
<td>Packaged Mobile Applications</td>
<td></td>
</tr>
</tbody>
</table>

### Typical cross-platform capability:
- **Strong**: typically higher productivity
- **Some**: typically lower productivity
- **Weak/None**:

Typical cross-platform capability: 🟢 strong  🟠 some  🔴 weak/none
Where Policy Meets Implementation

Management Styles
- Hands-off (Low corporate involvement)
- Innovation-oriented
- Choice-oriented
- Control-oriented (High corporate involvement)

Management Tools and Techniques
- Telco usage monitoring
- Virtual hosted desktop
- Paper policy
- Thinner architectures
- Multiplatform MDM-Lite
- Network access control
- Sandbox e-mail
- Heavyweight MDM
- Enterprise need not own device
- Enterprise owns devices

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Recommendations

✓ Develop an explicit strategy with tablets for information consumption and sharing, esp. in "away from the desk" settings.

✓ Look for quick wins: sales documents, board books, performance dashboards.

✓ Adapt mobile device management policies and tools.

✓ Use remote hosting as a stop gap, but move toward native or web apps for tablets.

✓ Decide application strategy: Web, Native, MEAP/MCAP.

✓ Decide an enterprise app store strategy.
Related Gartner Research

- CEO Advisory: Seize the iPad Opportunity Now (G00206555)
- New Approaches to Managing Mobile Users and Smartphones (G00200750)
- Four Architectural Approaches to Limit Business Risk on Consumer Smartphones and Tablets (G00209145)
- Guide for Mobile Application Development, Sourcing, and Support (G00169449)
- Magic Quadrant for Mobile Device Management (May 2011)
- Magic Quadrant for Mobile Enterprise Applications Platforms (May 2011)
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