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inCode Announces Enterprise Supplement to Top 10 Predictions for 2009
Key Enterprise Trends: SMBs Adopt Enterprise Mobility, Being Green and Mobile, Enterprise iPhone

ATLANTA, GA—Jan. 28, 2009—inCode, Inc. (www.incodetel.com), a trusted, independent advisor to some of the most influential telecommunications companies and leading enterprises in North America, today unveiled its Top 10 *Enterprise* Predictions as a special supplement to the annual Top 10 Telecom Predictions. The 2009 predictions identify emerging economic, technology, and marketing trends affecting enterprise mobility.

Each year, the inCode predictions are eagerly anticipated for their insight and accuracy. inCode is one of world's largest consulting organizations focused on the telecommunications and mobility applications market. The highly experienced consulting team supports premiere participants in the industry including leading wireless, wireline, and cable operators; infrastructure and device suppliers; applications and service developers; private equity and venture capital firms; and enterprises deploying mobility applications to enhance their business. Over the previous five years, inCode annual predictions have proved correct about 80 percent of the time.

1. Mobile Device Management for “BarackBerry”

President Obama's fight to keep his BlackBerry raises the importance of Mobile Device Management (MDM). As it is predicted Obama get a top secret capable device, comprehensive MDM will rise as a top security issue for the White House and likewise, receive the security spotlight in the mobile enterprise. Security aspects, including mobile VPN access to corporate assets, will regain attention from corporate security policy makers as mobile threats and events become more widespread. And, given the small form-factor and portable nature of mobile devices (i.e. easy to lose), combined with the powerful computing and wireless networking capabilities of smart devices, security extends far beyond implementing secure tunnels. Mobile Device Management solutions that provide features such as password enforcement, selective data encryption, rules-based device reset, application and URL white listing, over-the-air application updates, use statistics collection, and remote wipe/kill will become standard components of enterprise solutions. MDM adoption will be driven by security requirements *and* cost reduction from lower support costs, reduced asset leakage, and increased uptime and utilization of mobile devices. And by the way, by keeping his smartphone, Obama will not only bring MDM into fashion, but also the BlackBerry-holster-look.

2. Yes, Mobile Comes in Green, Too

The Green movement will become a top business driver for enterprises to seek out mobility solutions that reduce their carbon footprint and allow them to compete for more business, especially where there is a “green compliance” requirement or to promote a positive eco-friendly image. In 2009, expect to see solutions develop in three areas: wireless monitoring, mobile forms, and fleet telematics.

“Lick and Stick” wireless solutions to detect leaks and fires as well as monitor unburned fuels, temperature, emissions, and overall engine health will lead to cleaner and more efficient factories and plants.

Much of the value proposition for the mobile enterprise is the elimination of manual paperwork. Not only does paperwork reduction improve operational efficiencies for the enterprise, but can also significantly reduce the consumption of paper and other natural resources.

The spike in gasoline prices over the last couple of years has shown how painful fuel expense can be. As prices have come down recently, companies will now invest in technology to reduce their fleet costs before future fuel cost increases. Adoption of enterprise telematics solutions will accelerate to provide route optimization and tracking of driver habits that affect fuel efficiency.

3. M2M Devices in the Multi Ms

Today there are 60 million devices monitored and / or controlled through machine-to-machine (M2M) solutions worldwide. In 2009, we predict a sharp increase in M2M shipments, due to significant price reduction of M2M modules, will drive the total number of monitored/controlled devices to 1 billion by 2012. In 2008, the average price of an M2M module was over \$50 per module (on high volumes). M2M module manufacturers in China are now selling modules at less than \$30 per module on volume. Another important factor in increased adoption is the availability of M2M data plans selling for \$5 per month or lower per device. The increase in shipments will coincide with the majority of the 300 global network carriers who are taking an active role in selling and supporting M2M solutions. The carriers will take greater control of additional functions of the M2M value chain (i.e. software, middleware, integration, support services) directly or working with partners. This will especially be the case for higher volume rollouts of greater than 100,000 units. The highest volume opportunities will be in automotive, water, gas and electrical utilities, and consumer electronics.

4. Wi-Fi Service Level Assurance in High Demand

2009 will see Wireless LANs equal to their wired counterparts in the enterprise. Corporate IT will raise their Wi-Fi enabled application performance expectations to be equal with the current wired infrastructure. And, in some cases, it will exceed expectations as new Wi-Fi-only applications, such as location-based services, RFID, RTLS, and voice-over wireless, are implemented. In 2009, we predict 25% of all new enterprise networks will be all Wi-Fi which will drive the need to refine internal IT processes and implement stronger management and security platforms specifically for Wi-Fi networks.

5. Real-Time Location Services (RTLS) Without Borders

2009 will be the year that RTLS solutions expand beyond the healthcare segment, which has "led the charge" in adoption. The driving force behind adoption is the growing deployment base of WLAN and voice-over-Wi-Fi infrastructure. For the upcoming year, look for strong RTLS uptake within three new segments: manufacturing, military, and retail. For example, fork lifts can quickly find pallets based on actual location rather than on potentially inaccurate information from the

warehouse management system. This uptake in these new segments will be spurred by a need to control rising asset costs and improve operational efficiencies.

6. Large Enterprise Technology for Joe the Plumber

Enterprise mobility technology reserved only for the largest of mobile organizations will be easily available to and greatly adopted by small and medium-sized businesses. New platforms like Google's Android will level the playing field for mom-and-pop organizations. Software developers will develop low-cost and easy-to-implement solutions that allow SMBs to use basic features previously only available to larger organizations with larger budgets. Moreover, software-as-a-service business models will also lower the entry barriers for enterprise-grade solutions, providing minimal upfront investment and repeatable applications allowing cost-effective, easy-to-deploy mobile computing applications. Ford Motor Company has launched Ford Work Solutions which provides such affordable mobile computing solutions for their F-Series truck and E-Series van lineup. 2009 will be the beginning of a "Technology for Joe the SMB" movement that provides specialized mobile solutions to small and medium-sized enterprises.

7. Mobile Location Solutions Move into Safety and Security Markets

Location technology will have a strong presence outside its traditional consumer and enterprise application arenas such as navigation, mobile social networking, and mobile resource management and into the public safety and homeland security arena such as border protection, law enforcement, and anti-terrorist activities. These types of mission-critical applications will not be based on GPS which generally doesn't work well inside buildings or urban jungles, but on location technology such as U-TDOA which can locate accurately and reliably in diverse environments, including indoors, underground and dense metropolitan areas. As protecting citizens, saving lives and combating crimes are global challenges, location-based security solutions will be deployed in five countries in 2009.

8. Portable AVL – Heading in the PND Direction

The state of the global economy has been driving transportation companies and the service industry to move toward a fleet lease model for their vehicles to reduce capital expenditures and to update their fleets with newer vehicles. This will drive the Automatic Vehicle Location (AVL) companies to expand their selection of portable solutions for vehicle tracking devices to replace "Hard Mounted Black Boxes" enabling companies with leased fleets the ability to comply with lease terms that prevent them from modifying vehicles. This also provides portability of AVL devices from vehicle to vehicle as leases evolve. These devices will provide a similar range of capabilities including sensor inputs, vehicle diagnostic interface (JBUS, OBDII, etc.) and a range of communication capabilities.

9. msgN 4 t entrprse (Translation: Messaging for the Enterprise)

Messaging services traditionally used only by consumers for P2P communication will transition to the enterprise, as evidenced by an increased adoption in mobile banking, mobile advertising and mobile couponing. Due to high adoption, low cost, and ease-of-use, businesses will connect and interact with their customers through SMS for technical support, appointment reminders/scheduling, and account management. In addition to customer-facing applications, the large enterprise will TXT or SMS (i.e., send text messages) with employees for corporate communication, meeting schedules, and safety and security announcements as well as mobilize business processes such as alerts for operational action and approvals. In 2009, enterprise SMS traffic will more than double as more mobile enterprises adopt SMS as an enterprise solution.

10. Mobile Social Networking: “Linking in” the Enterprise

Mobile social networking, while expanding frantically in the consumer space with mobile access to Facebook, MySpace, Twitter, etc., – is making its way to the enterprise. Enterprises have successfully tested the waters of social networking and collaboration in the non-mobile space with sites like LinkedIn and Plaxo, and business collaboration tools like Microsoft SharePoint, Jive Software’s Clearspace and Google Apps - and will mobilize with tools such as Yammer. As the business networking and collaboration tools converge more closely, look for the next leap in social networking to the enterprise mobile device as workers are on-the-go more than ever and will need immediate access to information and co-workers, which the broad reach of a corporate social network can provide.

11. Bonus Prediction: iPhone in the Enterprise

Though iPhone continues to be adopted particularly by professionals, it is facing significant barriers in enterprise approval due to concerns of security and compatibility with existing enterprise mobile infrastructures. But even without the official approvals from CIOs and IT Directors, iPhone-enthusiastic employees bring their personal iPhones to their workplaces anyway and have started the integration on their own -- creating and exposing security and policy enforcement holes in enterprise mobile management. In 2009, this trend is likely to accelerate and enterprise CIOs are facing the difficult decision of either banning iPhones completely or getting ready to bear the consequences of having many unmanaged iPhones on their networks.

Due to this pressure from corporations, Apple will increase efforts to facilitate integration of iPhones in the enterprise from a technical and corporate policy perspective. This will include the ability to administer upgrades and reduce the reliance on iTunes for rolling out upgrades. Apple will explore the possibility of a ruggedized version to compete against field-grade Motorola and Intermec devices. With the delay of Windows Mobile 7 until possibly 2010, the opportunity exists for Apple to make inroads in the enterprise space.

About inCode

inCode (www.incodetel.com) is a respected professional services organization providing comprehensive business strategy and technology consulting to telecommunications companies and leading enterprises. inCode clients include some of the most well-known operators and corporate brands in the world. Broadband, wireless, infrastructure, device, and application companies rely on inCode to develop and implement effective strategic plans. The company also provides customized mobility solutions and integration services that help enterprises leverage telecom for competitive advantage. Founded in 1998, inCode is headquartered in Atlanta. The company has additional bases of operation in Washington, DC, Seattle, San Diego, and Toronto.

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