

# CDW-G State & Local Government Technology Investment Curve

*802.11 Wireless*

*September 5, 2006*



# An True National Barometer



## The CDW-G State & Local Government Technology Investment Curve

*CDW-G's State & Local Government Technology Investment Curve is an assessment of public-sector purchasing behavior based upon CDW-G sales and customer data from 2000 to 2005.\**

*Offering more than 100,000 products from over 1,000 vendors to thousands of State & Local customers, CDW-G is uniquely qualified to provide accurate, vendor-neutral data on the adoption of various technologies throughout the market.*

\* This assessment only includes State, County & City Agencies' investment in indoor wireless IT products; it does not include Higher Education or K-12 investment.

# Profiles vs. Ranking



## The TIC Is:

1. An unbiased, objective assessment of purchasing behavior over five years
2. A measure of how pervasive technology investment is throughout an entire state
3. An enabler for IT leaders – providing relative statistics to compare programs, approaches and best practices from state to state

## The TIC Is NOT:

1. A ranking of IT program success at any level of government
2. A measurement of results for any single program, leader or organization
3. Focused on state-level investment, but rather statewide technology investment at all levels of government

## The Purpose of the TIC

1. Highlight trends in S&L government IT buying
2. Compare technology investment behavior across states
3. Enable S&L IT buyers to identify similar or more progressive investment models
4. Provide an investment roadmap for CDW-G's vendor partners
5. Enhance the market dialogue

## So What? Who Cares?

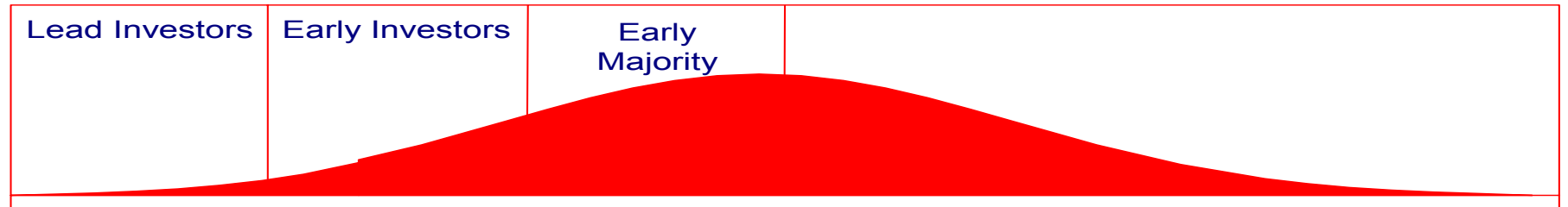
- State & Local governments spent \$48 billion on IT in 2005\*
- State & Local government IT spending will reach \$70 billion by 2010\*
- State & Local governments receive and spend significant Federal dollars
- State & Local governments are largely responsible for the delivery of daily services to citizens

\* Source: INPUT

# Understanding IT Investment



## *Same Technology – Different Investment Approaches*



Lead Investors

Early Investors

Early Majority

### Lead Investors

- State & Local Governments that understand the value of technology and its impact on the business of government
- Cognizant of the risk-reward tradeoff, but tolerant of the risk and capable of managing it
- Legislative &/or political support for IT agenda
- Association or institutional support for IT education
- Prioritizing wireless expenditures across multiple product categories

### Early Investors

- Savvy technology practitioners that readily translate technology to mission value within the context of government
- Constantly scan best practices and readily adopt as appropriate
- Legislative &/or political support for IT agenda
- Association, cross-agency organization or institutional support for IT expenditures

### Early Majority

- Proven technology leaders with a firm grounding in both technology and policy
- Focused on technologies with proven success
- Weigh the quality of the vendor equally with the quality of the technology

## 1 Determine the Universe of Customers

- CDW-G worked with the Center for Digital Government to define the universe of possible customers at the state, county and city levels for every state
- The research was based on a survey of governments and a state-by-state analysis

## 2 Examine CDW-G Customer Data

- CDW-G examined purchase records for its several thousand State & Local customers between 2000 and 2005
- CDW-G customer analysis focused on 802.11 wireless technology investments

## 3 Compare CDW-G Customers to the Universe

- CDW-G mapped its customer information to the universe of State & Local agencies
- CDW-G compared trends in each category between 2000 and 2005 to identify the lead investors, early investors, and early majority in 802.11 wireless technology

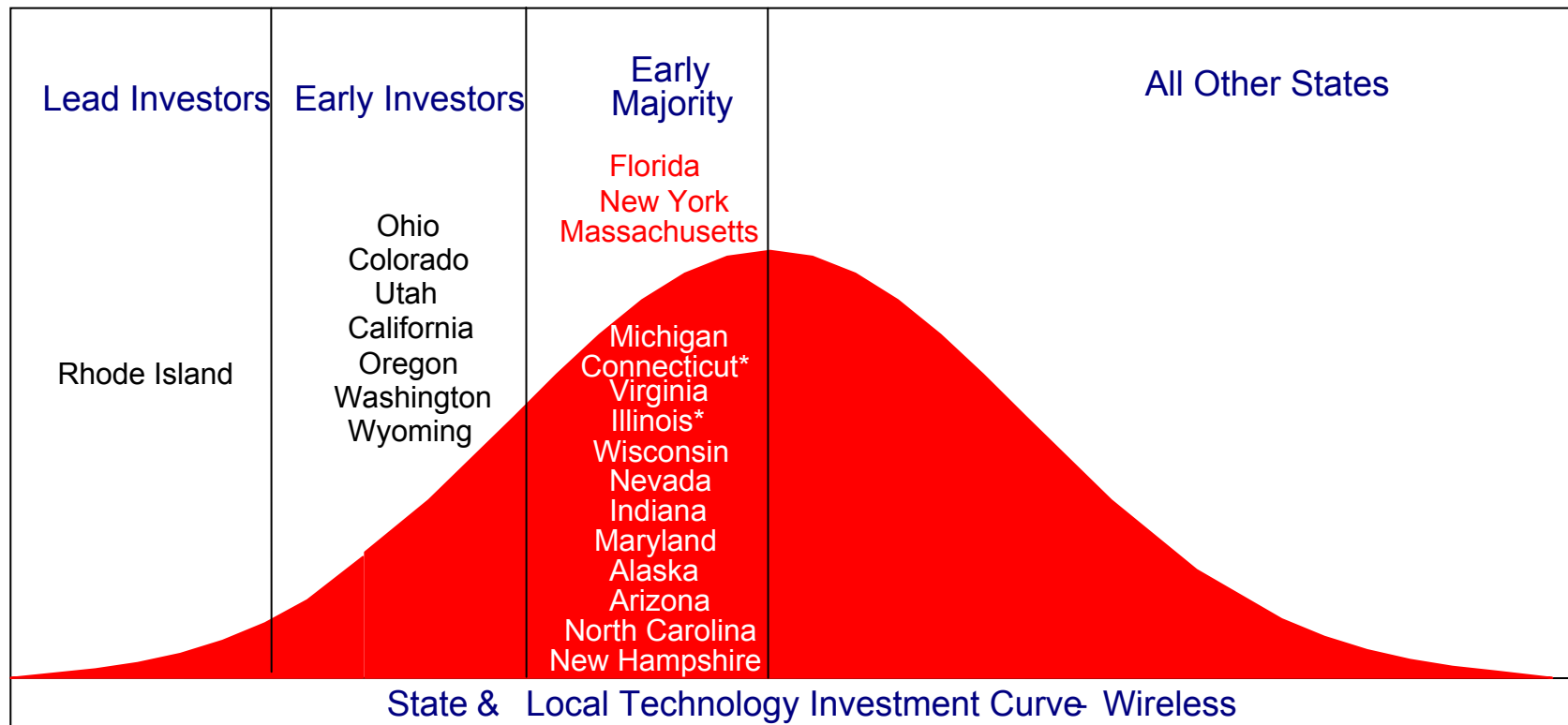
***Wireless is the second in a series of reports***

## Harnessing the Value of Wireless

- Wireless technologies hold significant cost advantages and functionality benefits. The CDW-G TIC for Wireless enables State & Local Government IT leaders to:
  - Understand current investment profiles
  - Determine areas of success and best practices
  - Capture information to influence policy makers

**Investment in wireless technologies is an important step in driving improved collaboration and information sharing while reducing networking costs for State & Local government agencies**

# TIC – Wireless 2006






\* Adjusted for the location of CDW-G State & Local government sales offices

# Wireless Investment Index



State	Index		State	Index
Rhode Island	246.82		Connecticut*	128.03
Ohio	181.97		Virginia	124.07
Colorado	172.70		Illinois*	123.14
Utah	162.67		Wisconsin	119.31
California	154.23		Nevada	118.58
Oregon	149.79		Indiana	115.64
Washington	147.66		Maryland	113.78
Wyoming	143.28		Alaska	112.73
Florida	141.91		Arizona	110.87
New York	140.73		North Carolina	100.22
Massachusetts	139.02		New Hampshire	98.03
Michigan	136.02			

-  Lead Investor
-  Early Investor
-  Early Majority Investor

\* Adjusted for the location of CDW-G State & Local government sales offices

# Common Indicators



## *Lead/Early Investors Share Some Characteristics*

- Strong public-private partnerships
- Public safety often drives initiatives
- Significant private-sector leadership in generating wireless hotspots
- Strong execution at the county and city levels

UNDER EMBARGO UNTIL  
8 A.M. EASTERN, TUESDAY,  
SEPTEMBER 5, 2006

# State Profile: Rhode Island



1. Rhode Island is a national leader in wireless technology, with the Rhode Island Wireless Innovation Networks (RI-WINs) focused on making the state first in the country with mobile border-to-border broadband wireless
2. RI-WINs launched in January 2004 with a feasibility study, driving visibility across the state
3. Foster, Providence and Newport are three of the first RI-WINs pilot communities
4. Providence ranks the top 100 U.S. cities with the greatest wireless Internet accessibility

# State Profile: Ohio



1. Dayton is the first Ohio city to initiate citywide, edge-to-edge Wi-Fi coverage in December 2004. Dayton is also the first U.S. city to offer a public-private partnership Wi-Fi model that is not funded by taxpayers and comes at no charge to the end user
2. Perry County officials brought wireless connectivity to New Straitsville in 2003 through a partnership with the Connecting Rural Ohio Wireless Neighborhood Project, The Ohio State University Office of the Chief Information Officer and OARnet, an Ohio Internet Service Provider
3. The Cincinnati Park Board in 2004 introduced the first Wi-Fi Internet service in a downtown Cincinnati park. The wireless network in Piatt Park was created through a partnership between the Cincinnati Park Board, LPK, Smart Wires and Good News Internet Services. Wi-Fi access points have since been installed in parks throughout the city
4. The City of Cleveland deployed an enterprise e-permitting application that utilizes mobile and wireless technology to integrate the work of 500 employees in 11 departments, giving them the ability to file reports, schedule inspections and issue permits in the field

# State Profile: Colorado



1. The City of Boulder initiated a project to evaluate and implement 802.11 wireless at strategic city buildings. The city is expanding implementation beyond the pilot at main city government offices. The city also completed a pilot wireless installation that allows high-speed data transmission to and from laptop-equipped fire trucks
2. The Denver City Council approved a five-year contract with AT&T Wireless Services to design, install and maintain wireless communications at Denver International Airport
3. The Colorado Springs Police Department deployed a wireless network that supports operations for hundreds of police officers, bringing law enforcement data to the field
4. The Salida police department implemented a digital data-entry solution based on a Vivato 2.4 GHz Wi-Fi switch that creates a city-wide hot zone accessible by specially equipped Panasonic laptops. Officers can enter data on the laptops and submit reports electronically through the secure 802.11 wireless connection

# State Profile: Utah



1. To enhance communications capabilities of law enforcement officers in the field, the City of Logan deployed 802.11 hot spots throughout the city for mobile Internet connectivity in 2004
2. The Utah Department of Administrative Services deployed 802.11 wireless networks in the State Office Building and the Governor's Office in 2003
3. The State of Utah Information Technology Services Agency in 2004 began providing 802.11 wireless connections to state employees and employees of local governments and organizations who travel among state agency facilities, meeting rooms and other common areas

# State Profile: California



1. California dominates Intel's Most Unwired Cities list, with between two and four cities routinely in the top 10
2. The City of Lompoc in 2004 approved the implementation of a Wi-Fi network that provides phone, cable and Internet to residents, businesses and government
3. Hermosa Beach launched the nation's first free high-speed citywide wireless service in 2004
4. Culver City won the top spot in the government category of *InfoWorld's* 2004 Technology Awards for its downtown Wi-Fi implementation that provides free Internet access to shoppers, workers and visitors. The one-mile-square hotspot made Culver City the first community on the west side of Los Angeles with free public Internet access
5. Because state agencies had invested so much in wireless technologies, California felt the requirement to pursue statewide contracts for wireless equipment and services

# Thank You

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