Latest IT Trends For Secure Mobile Collaboration

September 2013

Corporate Mobility Momentum Accelerates Among Enterprises

The pace of enterprises deploying corporate mobility initiatives has accelerated. Enterprise IT executives are focused on supporting a fragmented array of mobile devices, applications, and operating systems to address the needs of employees. Corporate mobility momentum will continue as a growing number of employees purchase and use their personal smartphones and tablets for work-related activities. In addition, many firms are establishing bring-your-own-device (BYOD) programs to provide workers with flexibility to use their personal devices at work.

Our study of IT mobility decision-makers revealed that employees access a variety of work-related mobile applications on smartphones and tablets. It's no surprise that email, calendar, web browsers, and access to company portals are the leading mobile applications deployed to enhance workforce productivity. However, there are some differences in applications deployed over specific devices. For example, to improve productivity, firms are more likely to implement or plan to implement presentation tools, business applications specific to their jobs, and video storage or streaming services for tablets than for smartphones. New types of cloud-based, software-as-a-service (SaaS) delivery models enable firms to cost-effectively and efficiently support the diverse array of corporate mobility initiatives.

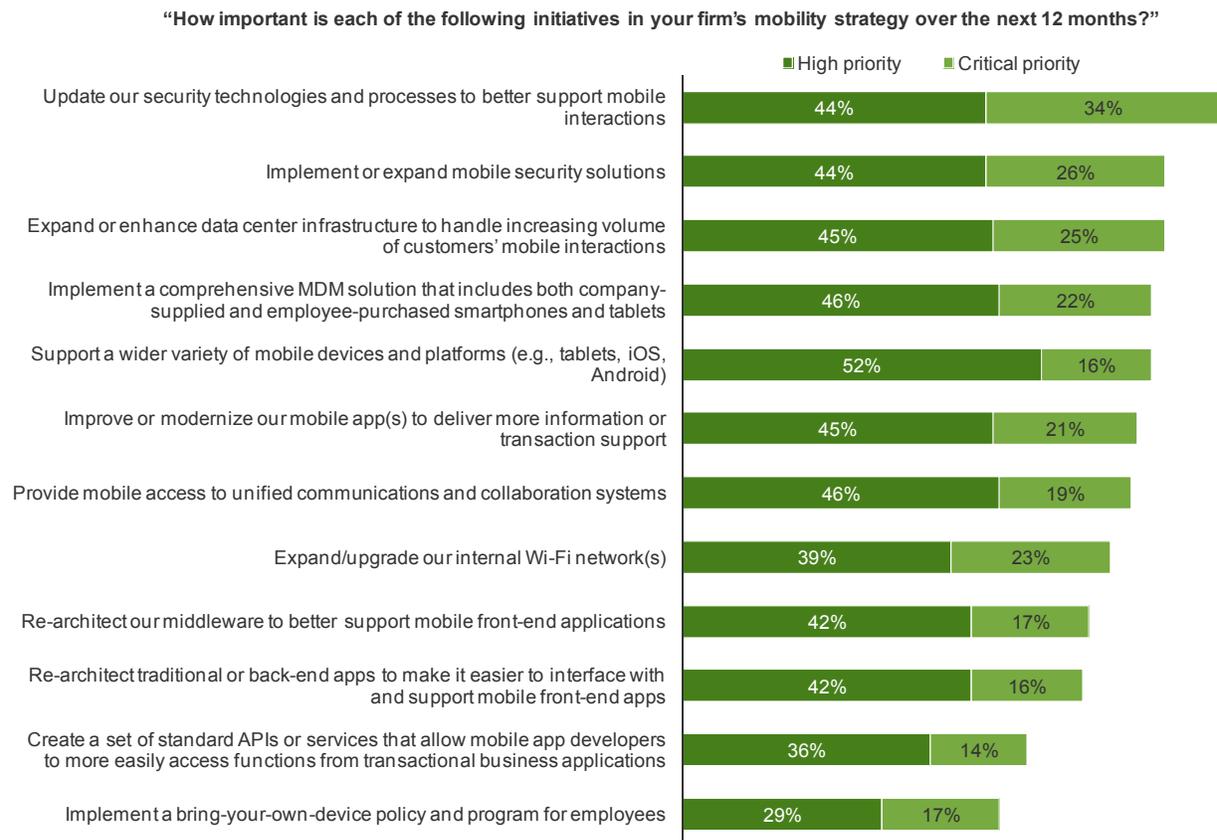## Enterprises Bolster Support For A Wide Range Of Mobility Initiatives

Enterprises are stepping up to the challenge of supporting a variety of mobile devices and a diverse array of work-related mobile applications to address the needs of employees. Results from Forrester's survey of North American and European IT decision-makers who participate in corporate mobility decisions highlight that enterprises are prioritizing a wide range of mobile initiatives (see Figure 1).

- **Mobile security initiatives are the top priority for most firms.** Whether mandated by company executives or as a reaction to the high number of unmanaged mobile devices used by employees, mobile security initiatives are the top priority for most firms. In fact, 78% of enterprises in North America and Europe identify updating their security technologies and processes to support mobile interactions as a critical or high priority. Seventy percent of surveyed firms identify implementing or expanding a mobile security solution as a critical or high priority. Device-level security is often addressed using password and encryption policies and ensuring that lost or stolen mobile devices can be locked and wiped remotely through mobile device management solutions. In fact, 68% of firms identify implementing a mobile device management solution as a critical or high priority in the coming year.

- **Many firms are expanding the pervasiveness of mobility initiatives throughout the organization.** IT executives must prepare to support the significant increase in the number of smartphones and tablets used by the workforce. In fact, 68% of firms place a critical or high priority on supporting a wider variety of mobile devices and platforms, and 65% prioritize providing mobile access to unified communications and collaboration systems. Mobile application initiatives are also key priorities for many firms, as nearly 60% of enterprises are re-architecting traditional or back-end applications to interface with mobile front-end apps.

- **BYOD program implementation gains momentum.** Survey results show 46% of firms identify implementing a BYOD program as a critical or high priority in the coming year. In addition, our custom survey of 60 IT executives shows 55% of enterprises provide some support for some or all personal mobile devices (see Figure 2). We expect BYOD momentum to continue in the future, as 63% of workers are interested in selecting their own smartphone and 60% are interested in selecting their own tablets for work (see Figure 3). Creating a comprehensive BYOD strategy requires firms to identify which mobile devices, applications, and services to support, and to provide policies and procedures to guide help-desk and customer-service support for employees. It's also critical to address security issues for networks, corporate data, customer data, and mobile devices (see Figure 4).

Figure 1

Enterprises Are Prioritizing A Wide Variety Of Mobility Initiatives To Address Corporate Requirements

"How important is each of the following initiatives in your firm's mobility strategy over the next 12 months?"

■ High priority   ■ Critical priority

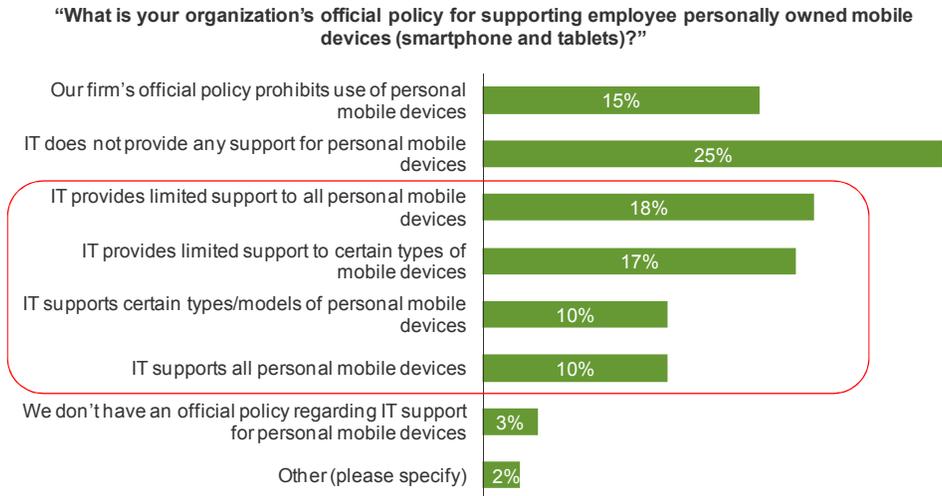| Initiative	High priority	Critical priority
Update our security technologies and processes to better support mobile interactions	44%	34%
Implement or expand mobile security solutions	44%	26%
Expand or enhance data center infrastructure to handle increasing volume of customers' mobile interactions	45%	25%
Implement a comprehensive MDM solution that includes both company-supplied and employee-purchased smartphones and tablets	46%	22%
Support a wider variety of mobile devices and platforms (e.g., tablets, iOS, Android)	52%	16%
Improve or modernize our mobile app(s) to deliver more information or transaction support	45%	21%
Provide mobile access to unified communications and collaboration systems	46%	19%
Expand/upgrade our internal Wi-Fi network(s)	39%	23%
Re-architect our middleware to better support mobile front-end applications	42%	17%
Re-architect traditional or back-end apps to make it easier to interface with and support mobile front-end apps	42%	16%
Create a set of standard APIs or services that allow mobile app developers to more easily access functions from transactional business applications	36%	14%
Implement a bring-your-own-device policy and program for employees	29%	17%

Base: 1,534 North American and European IT executives from firms with 250 or more employees

Source: Forrsights Mobility Survey, Q2 2013, Forrester Research, Inc.

Figure 2

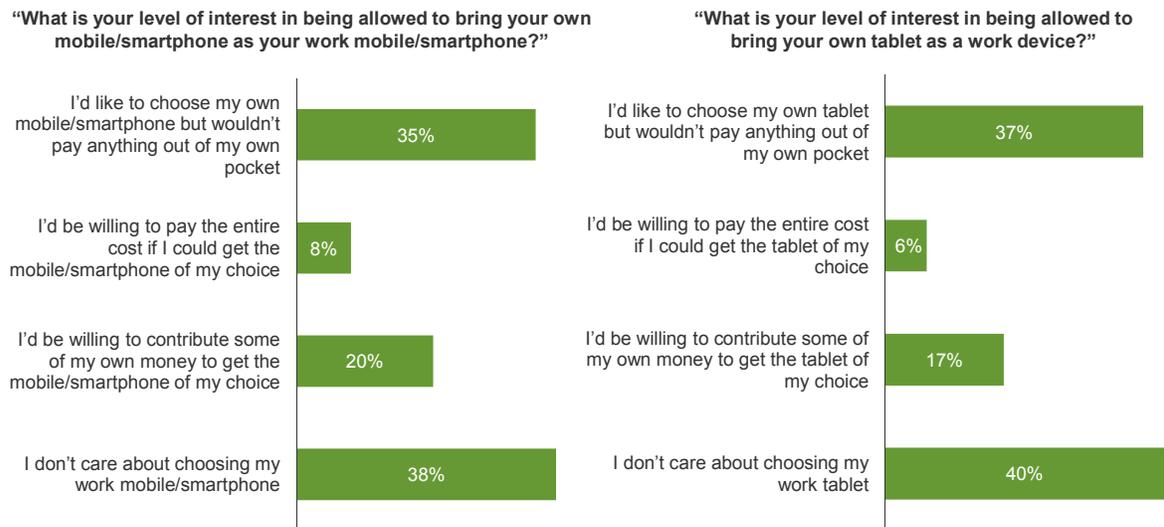Fifty-Five Percent Of Enterprises Provide At Least Some Support For Some Personally Owned Mobile Devices

"What is your organization's official policy for supporting employee personally owned mobile devices (smartphone and tablets)?"

Our firm's official policy prohibits use of personal mobile devices	15%
IT does not provide any support for personal mobile devices	25%
IT provides limited support to all personal mobile devices	18%
IT provides limited support to certain types of mobile devices	17%
IT supports certain types/models of personal mobile devices	10%
IT supports all personal mobile devices	10%
We don't have an official policy regarding IT support for personal mobile devices	3%
Other (please specify)	2%

Base: 60 North American and European IT mobility decision-makers from firms with 250 or more employees

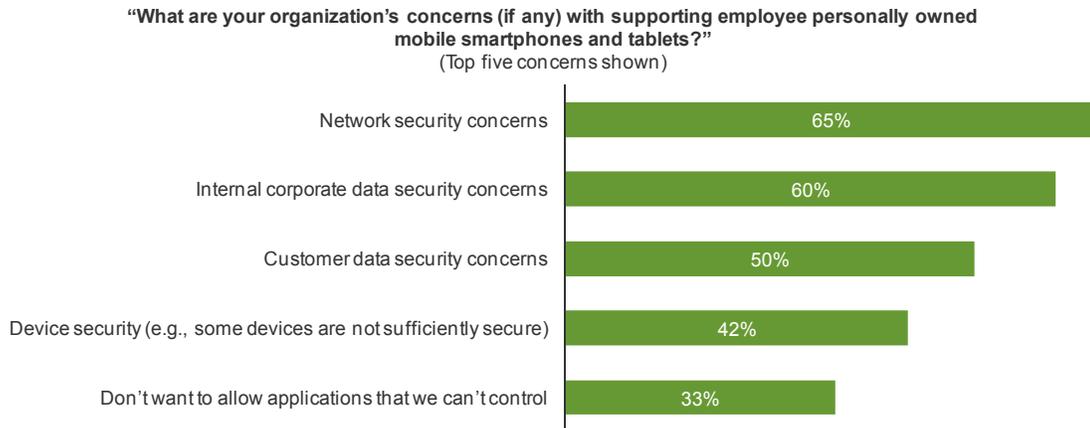Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, August 2013

Figure 3

Many Employees Are Willing To Select And Purchase Mobile Devices Used For Work

"What is your level of interest in being allowed to bring your own mobile/smartphone as your work mobile/smartphone?"

I'd like to choose my own mobile/smartphone but wouldn't pay anything out of my own pocket	35%
I'd be willing to pay the entire cost if I could get the mobile/smartphone of my choice	8%
I'd be willing to contribute some of my own money to get the mobile/smartphone of my choice	20%
I don't care about choosing my work mobile/smartphone	38%

"What is your level of interest in being allowed to bring your own tablet as a work device?"

I'd like to choose my own tablet but wouldn't pay anything out of my own pocket	37%
I'd be willing to pay the entire cost if I could get the tablet of my choice	6%
I'd be willing to contribute some of my own money to get the tablet of my choice	17%
I don't care about choosing my work tablet	40%

Base: 3,086 North American and European information workers from firms with 250 or more employees

Source: Forrsights Telecom And Mobility Workforce Survey, Q2 2013, Forrester Research, Inc.

Figure 4

Supporting Personal Mobile Devices Requires Firms To Address Various Security Issues

"What are your organization's concerns (if any) with supporting employee personally owned mobile smartphones and tablets?"
(Top five concerns shown)

Network security concerns	65%
Internal corporate data security concerns	60%
Customer data security concerns	50%
Device security (e.g., some devices are not sufficiently secure)	42%
Don't want to allow applications that we can't control	33%

Base: 60 North American and European IT mobility decision-makers from firms with 250 or more employees

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, August 2013

Enterprises Are Deploying Mobility And Collaboration Apps To Enhance Productivity

Companies are deploying or planning to deploy a wide range of mobile applications and services to enhance workforce productivity. These applications and services are prioritized differently for smartphone and tablet device form factors (see Figure 5).

- **Email, calendar, and web browser access are leading productivity applications for both . . .** It's no surprise that email, calendar, and web browser access are the top applications to enhance employee productivity over both smartphones and tablets. These mobile applications have broad applicability to employees in many different roles throughout the organization. Between 68% and 80% of firms in our custom survey have implemented or are expanding implementation of these applications over smartphones and tablets. In addition, between 17% and 23% of surveyed firms are planning to deploy these applications in the future.

- **. . . but there are clear differences in applications deployed over tablets versus smartphones.** Surveyed firms are more likely to implement or plan to implement some applications on tablets. More specifically, 45% of firms have deployed presentation tools over tablets, and only 38% have done the same over smartphones. Spreadsheet applications have been implemented by 52% of firms over tablets, compared with only 44% deploying spreadsheet applications on smartphones. These application deployment differences highlight the fact that the larger screen size of tablets provides a more user-friendly experience for employees who use these applications.

- **There is an emerging demand for video, streaming, and webconferencing applications.** Deployment of video, streaming, and webconferencing applications are gaining momentum. Voice/video chat services are deployed by 43% of surveyed firms on smartphones and tablets. In addition, 27% of firms are planning to implement these applications on smartphones and 20% have made these plans for tablets. Mobile webconferencing is deployed by 40% of organizations on tablets, and 37% on smartphones. Other notable applications are data dashboard or business intelligence apps, which have been deployed by 40% of firms on

smartphones and 42% of firms on tablets. In addition, 30% of enterprises are in the planning stages for these applications over smartphones and tablet devices.

- **SaaS delivery models enable firms to address various mobility initiatives.** New types of cloud-based, SaaS delivery models give firms the flexibility to cost-effectively and efficiently support a variety of corporate mobility initiatives (see Figure 6). And 33% of surveyed firms adopt SaaS to flexibly deploy collaboration apps or to provide the workforce with the flexibility to use the same apps on multiple devices. In addition, 25% of firms are using SaaS to accelerate mobile device usage. In addition, 62% of enterprises adopted SaaS services to enable at least one of the previously mentioned mobility initiatives, which demonstrates the strong demand for these mobility-related SaaS initiatives.

Figure 5

Firms Are Implementing Many Different Types Of Collaborative Applications To Drive Productivity

"In regards to the following types of collaborative applications that can be used on your mobile devices, how interested is your organization in providing or supporting the following mobile applications to drive workforce productivity?"
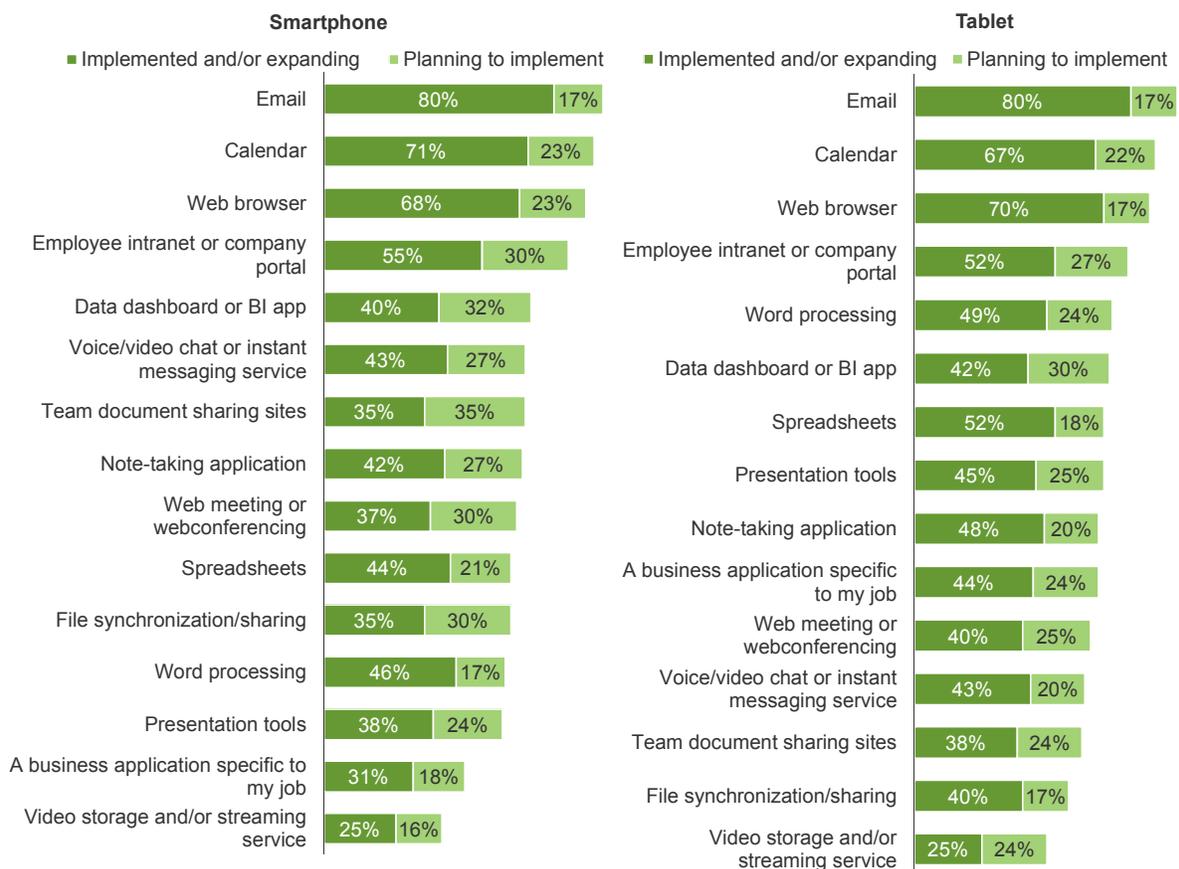
Base: 60 North American and European IT mobility decision-makers from firms with 250 or more employees

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, August 2013

Figure 6

SaaS Drives Workforce Mobility

"Why is your firm using SaaS?"

To improve the support and service experience for our workforce	43%
To enable IT to address business requirements quicker	40%
To flexibly deploy collaboration applications (e.g., webconferencing, presence, instant messaging, voice and video)	33%
To provide the workforce with the flexibility to utilize the same applications on multiple devices	32%
To improve the support and service experience for our line-of-business managers	28%
To accelerate use on mobile devices	25%
IT has insufficient resources or skills to support all of our applications	20%
To improve collaboration with business partners using the same SaaS application(s)	13%

62% of enterprises adopted SaaS to facilitate these mobile initiatives

Base: 60 North American and European IT mobility decision-makers from firms with 250 or more employees

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, August 2013

Corporate Mobility Initiatives Drive Demand For Secure Mobile Collaboration

Many enterprises are expanding their mobility initiatives to include deploying and supporting a variety of mobile devices, mobile applications, and collaboration services. The fragmented corporate mobility environment is further complicated by BYOD programs, which enable employees to use their personal smartphones and tablets at work. Successfully addressing the wide range of mobility initiatives requires firms to:

- **Expand mobile application deployment to enhance employee productivity.** Many firms are broadening the array of mobile applications deployed to enhance employee productivity. Mobile application implementation plans often vary for different types of devices. For example, enterprises are more likely to deploy presentation tools and spreadsheet applications over tablets. In addition, there is emerging demand for video, streaming, and webconferencing applications to facilitate employee collaboration and communication capabilities over these mobile devices.

- **Address a variety of mobile security issues.** As firms expand the breadth and depth of mobile devices and applications deployed to employees, many security issues become a concern. Particular issues to address include network security, corporate data security, and mobile device security. Device-level security is often the initial security concern because BYOD program momentum accelerates the variety of mobile devices and operating systems employees use to complete work-related activities.

- **Consider software-as-a-service delivery models to enhance mobility support.** Many firms are using cloud-based, SaaS delivery models to help them cost-effectively and flexibly deploy collaboration- and productivity-enhancing mobile services and applications. These delivery models also enable workers to use applications on multiple devices and accelerate employee use of mobile devices and applications.

Methodology

This Technology Adoption Profile was commissioned by Cisco Systems. To create this profile, Forrester leveraged its Forrsights Telecom And Mobility Workforce Survey, Q2 2013 and Forrsights Mobility Survey, Q2 2013. Forrester Consulting supplemented this data with custom survey questions asked of 60 North American and European IT enterprise mobility decision-makers at firms with 250 or more employees. The auxiliary custom survey was conducted in August 2013. For more information on Forrester's data panel and tech industry consulting services, visit www.forrester.com.