



Russia

BYOD: A Global Perspective

Harnessing Employee-Led Innovation

August 2012



Cisco IBSG
Horizons

Cisco IBSG Horizons Program

- Ongoing program of research and analysis to examine key technology innovations that will impact our customers over the next 24 months
- Other areas of investigation include video, collaboration, cloud, and mobility
- Focus on customer behavior and economics: adoption patterns, use cases, drivers, inhibitors, perceived benefits, delivery models

Source: Cisco IBSG, 2012

IBSG Horizons BYOD Study Waves: Global State of BYOD and Its Implications

Current Wave

IBSG Horizons: BYOD U.S. Trends

- Spring 2012
- 600 IT leaders
- U.S. enterprises

IBSG Horizons: BYOD Global Trends

- Summer 2012
- 4,892 IT leaders
- Midsize + enterprise
- 8 countries + U.S.
(original survey
+ 312 midsize)

IBSG Horizons: BYOD Financial Impact

- Fall 2012
- Financial impact of
BYOD on companies
- Maximizing ROI of
BYOD

Source: Cisco IBSG, 2012

IBSG Horizons BYOD Study: Global Results



4,892

IT Leaders

- Expansion of original U.S. study from spring 2012
- Nine total countries
- 70% enterprise (1,000+ employees), 30% midsize (500-999 employees)
- 69% director or above (29% CXO), 31% manager
- Decision makers or influencers for mobile solutions

Source: Cisco IBSG, 2012



18

Industries

IBSG Horizons BYOD Study: Regional Breakdown

United States

912*
Respondents



600 enterprises
(original study) +
312 midsize

Latin America:

- Brazil
- Mexico

681
Respondents



Asia:

- China
- India

1,493
Respondents



3 major regions;
2,805 enterprises +
1,175 midsize

Europe:

- U.K.
- France
- Germany
- Russia

1,806
Respondents



* Please note: The U.S. results in this study differ slightly from the results of the original U.S. study because of the addition of 312 respondents from midsize companies.

Source: Cisco IBSG, 2012

IBSG Horizons BYOD Study: Top Research Findings

- BYOD is a global phenomenon: strong evidence of employees everywhere using own devices for work
- Transformative potential of BYOD is employee-driven innovation, empowering employees to decide **how**, **when**, and with **which tools** work is done
- Few differences between midsize companies and enterprises
- BYOD has regional flavor: Asia and Latin America see and encourage extensive BYOD, while Europe is more restrictive
- U.S. leads in BYOD and virtualization, with most comprehensive usage and policy
- BYOD increases mobile cost and complexity, and companies quickly develop robust mobile policy, cost-reduction strategies
- Global IT leaders are aware of desktop virtualization, but do not feel it applies to most knowledge workers, so implementation is low

Source: Cisco IBSG, 2012

Around the World, Mobility Is Pervasive



60%

Knowledge workers who use a mobile device for work

47%



White-collar roles that require mobility

41%



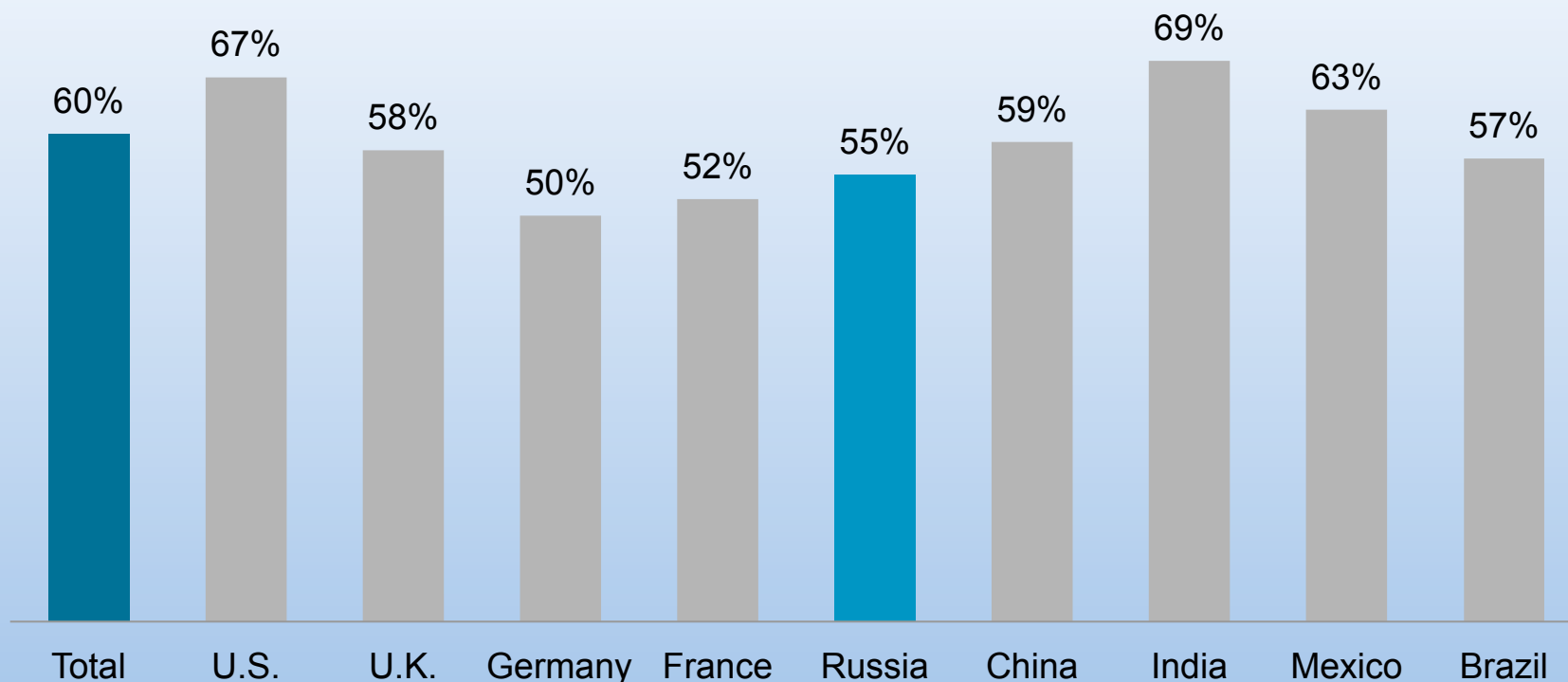
Employees who telecommute at least once per week

Source: Cisco IBSG, 2012

N = 4,892

More than Half of Russian Employees Use a Mobile Device for Work

Percentage of Knowledge Workers Who Use a Mobile Device at Work



Source: Cisco IBSG, 2012

N = 4,892

Growth of Mobility Is Having a Global Impact on IT



2.8

Average number of connected devices per knowledge worker in 2014, up from 2.3 in 2012

23%

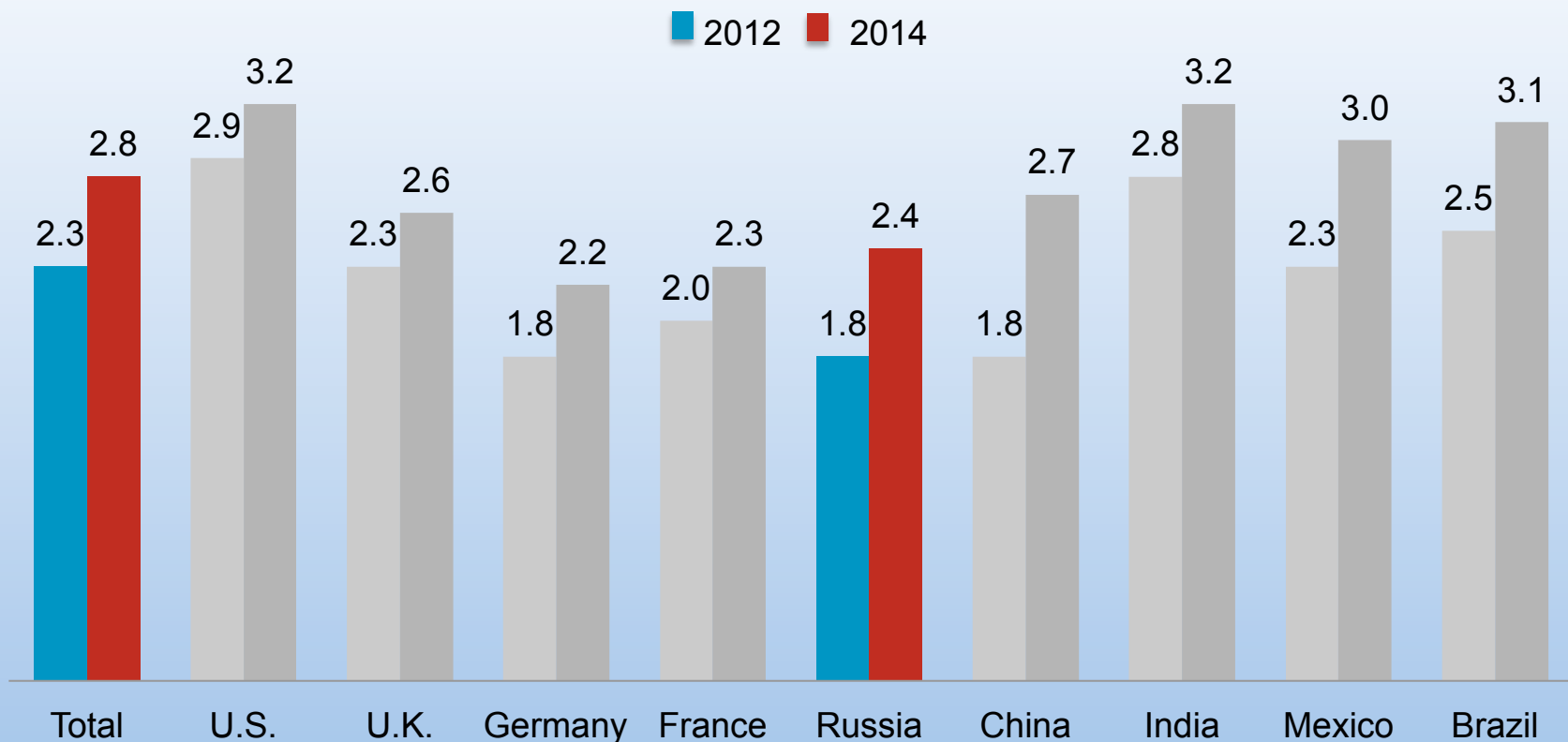
Average share of IT spending devoted to mobility initiatives in 2014—up from 18% in 2012

Source: Cisco IBSG, 2012

N = 4,892

Russian IT Leaders Estimate 33% Growth in Connected Devices Over Two Years

Average Number of Connected Devices per Knowledge Worker

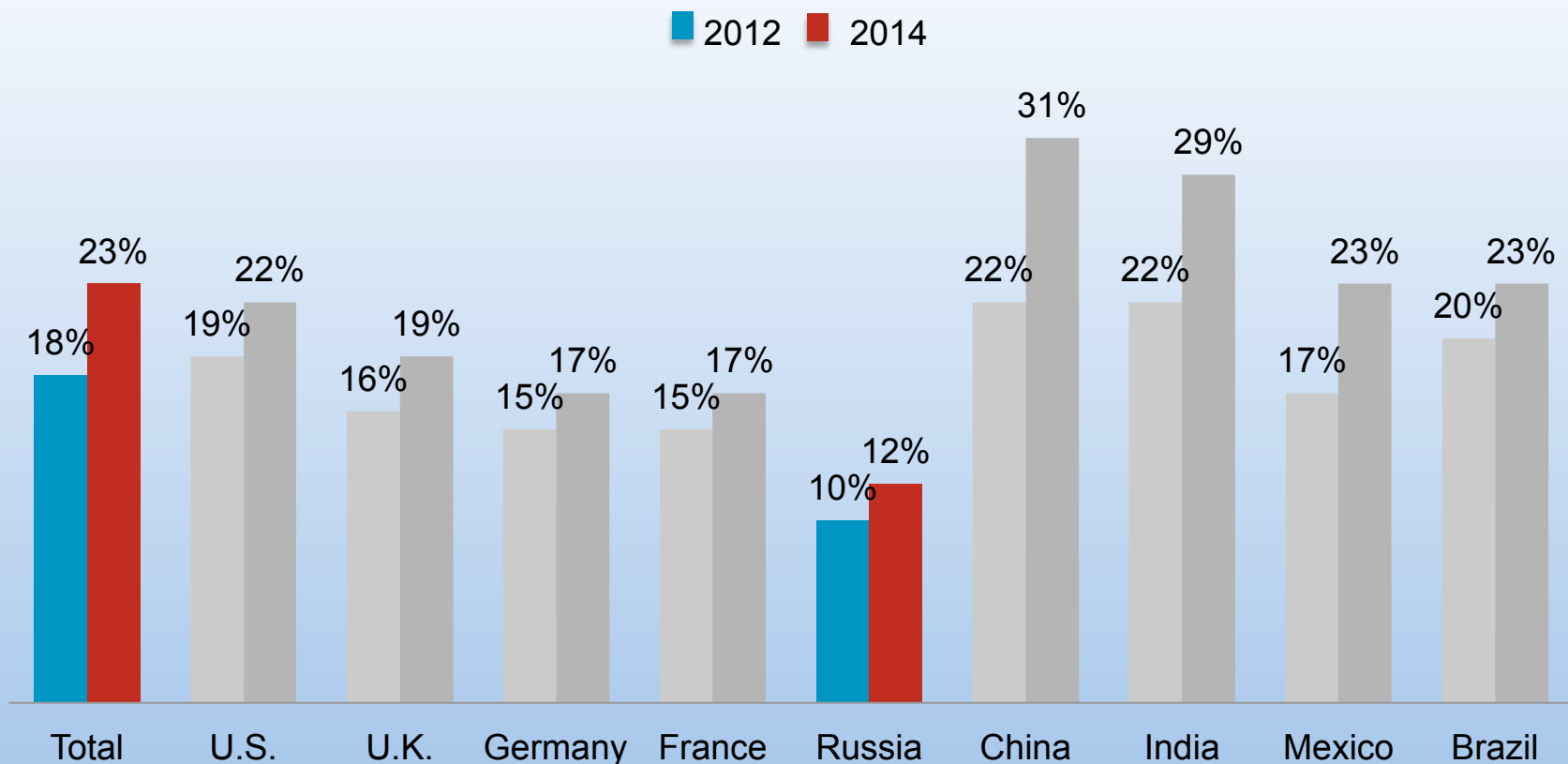


Source: Cisco IBSG, 2012

N = 4,892

..And They Expect To Manage Within a Small Budget for Mobility Initiatives

Percent of IT Budget Spent on Mobility Initiatives



Source: Cisco IBSG, 2012

N = 4,892

BYOD Is Here, Now

A man in a dark suit and white shirt is standing in a modern office hallway, looking at a smartphone. The hallway has large white columns and a curved ceiling with exposed pipes. In the background, other people are blurred, suggesting movement. The overall tone is professional and tech-oriented.

42%

Employees who own the smartphones they use for work

63%

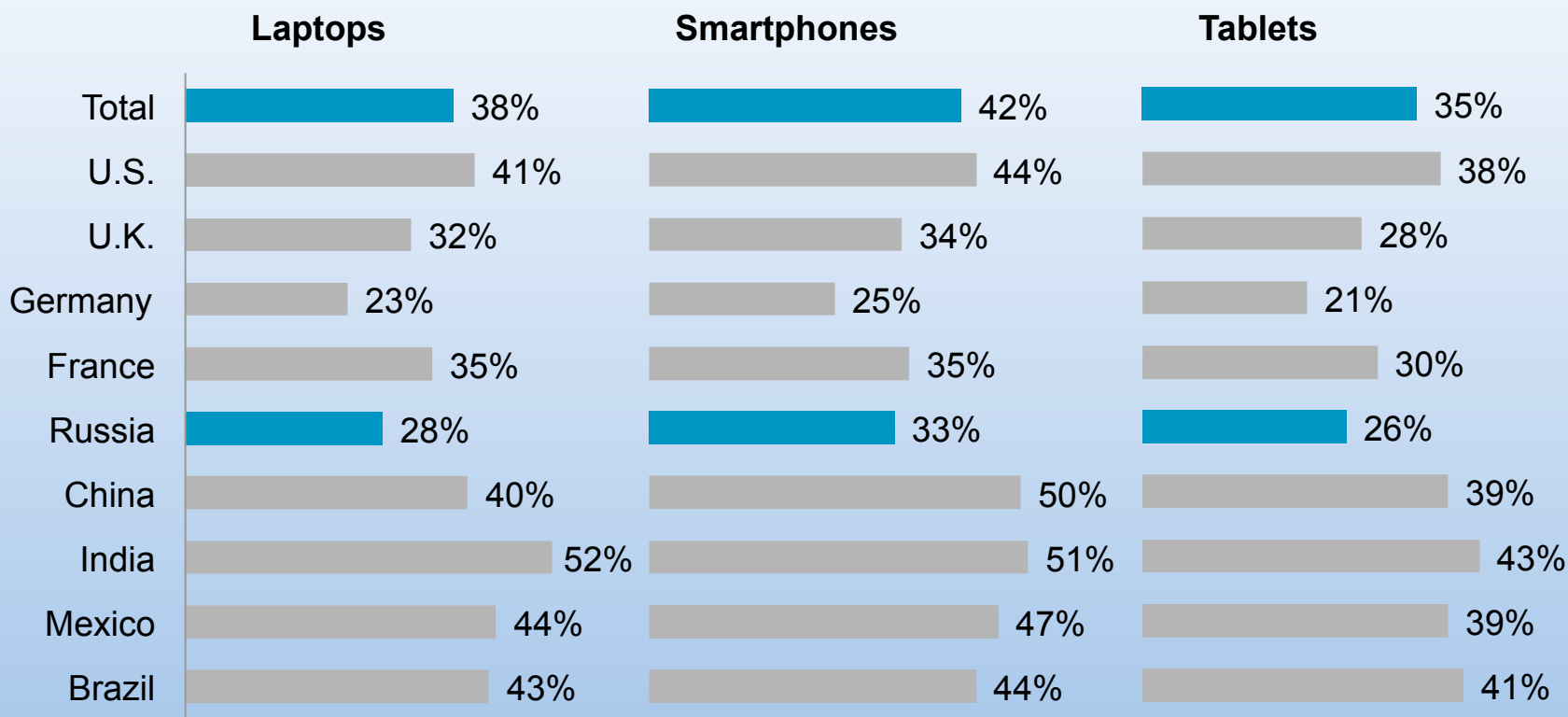
Companies that expect the share of employee-owned devices connecting to company networks to increase somewhat to significantly over the next two years

Source: Cisco IBSG, 2012

N = 4,892

Russian Companies Provide Two-Thirds or More of Employees' Mobile Devices

Percentage of the Following Devices Owned by Employees,
Rather than by Company



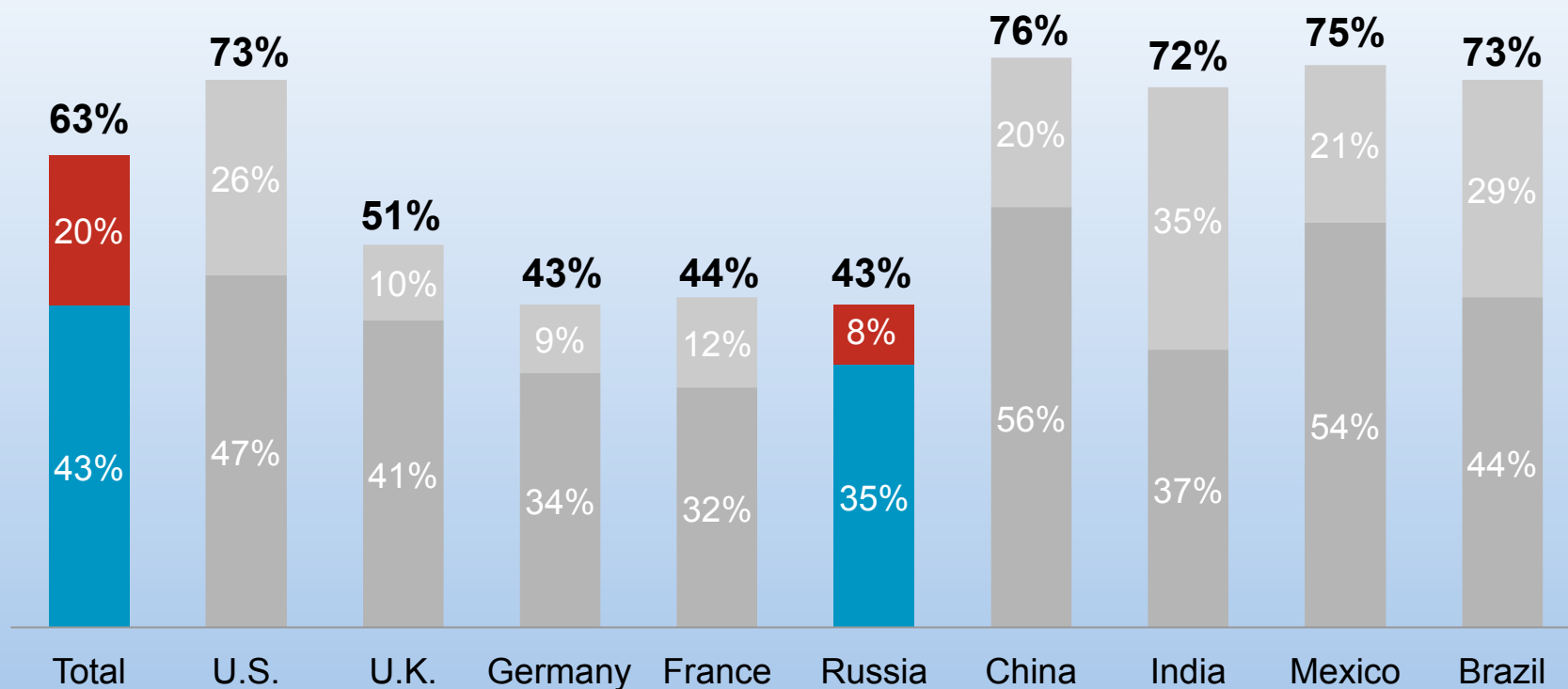
Source: Cisco IBSG, 2012

N = 4,892

And Less than Half Expect the Share of Employee-Owned Devices To Increase

Percent of Companies That Expect Share of Employee-Owned Devices To Increase in Next Two Years

■ Increase somewhat ■ Increase significantly



Source: Cisco IBSG, 2012

N = 4,892

IT Leaders Acknowledge and Embrace BYOD

A man in a white shirt is sitting in a chair, holding a tablet computer. The background is a light blue gradient.

84%

IT leaders who are seeing BYOD growth in the enterprise

69%

Consider BYOD somewhat or extremely positive

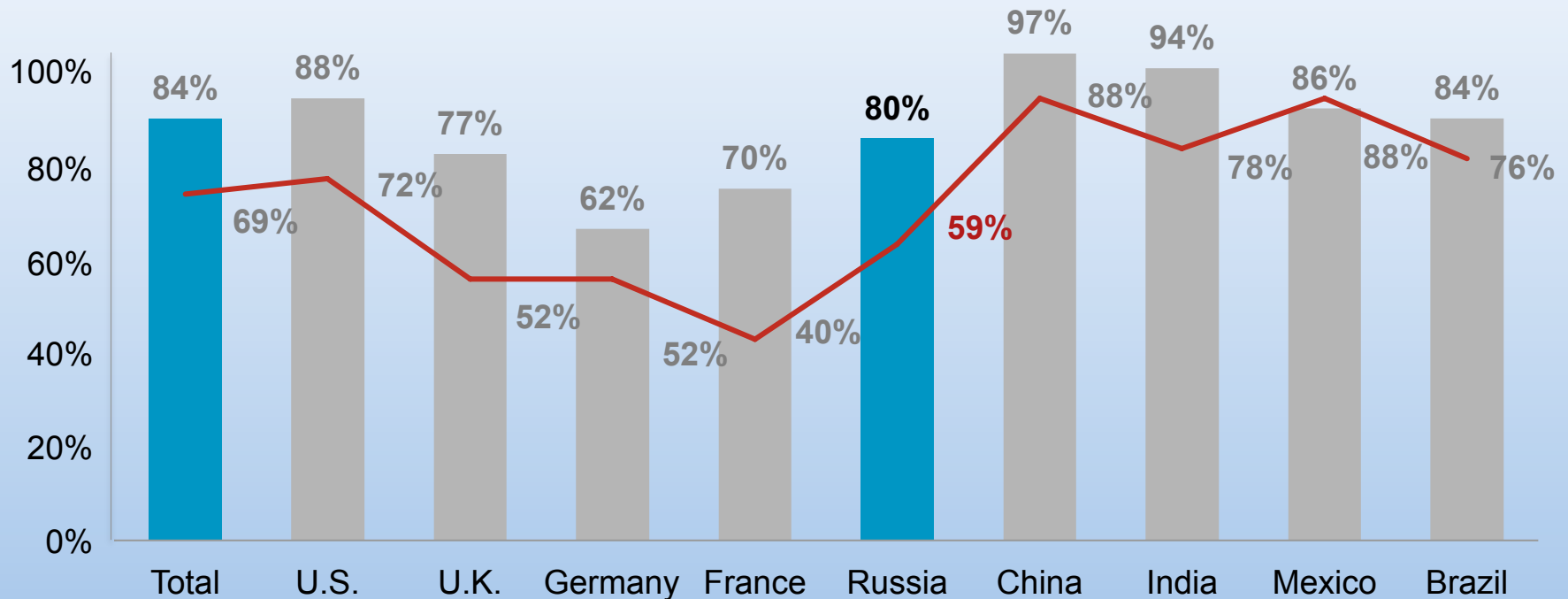
Source: Cisco IBSG, 2012

N = 4,892

BYOD Is Global, and Russian Companies More Positive than Others in Europe

Percentage of IT Leaders Who Are Seeing Growth of BYOD, and Percentage Who Are Positive About the Trend

■ Seeing growth of BYOD — Positive about BYOD



Source: Cisco IBSG, 2012

N = 4,892

Benefits BYOD Brings to Companies



#1

Improved employee productivity,
more opportunities to collaborate

#2

Preferred device means greater
job satisfaction

#3

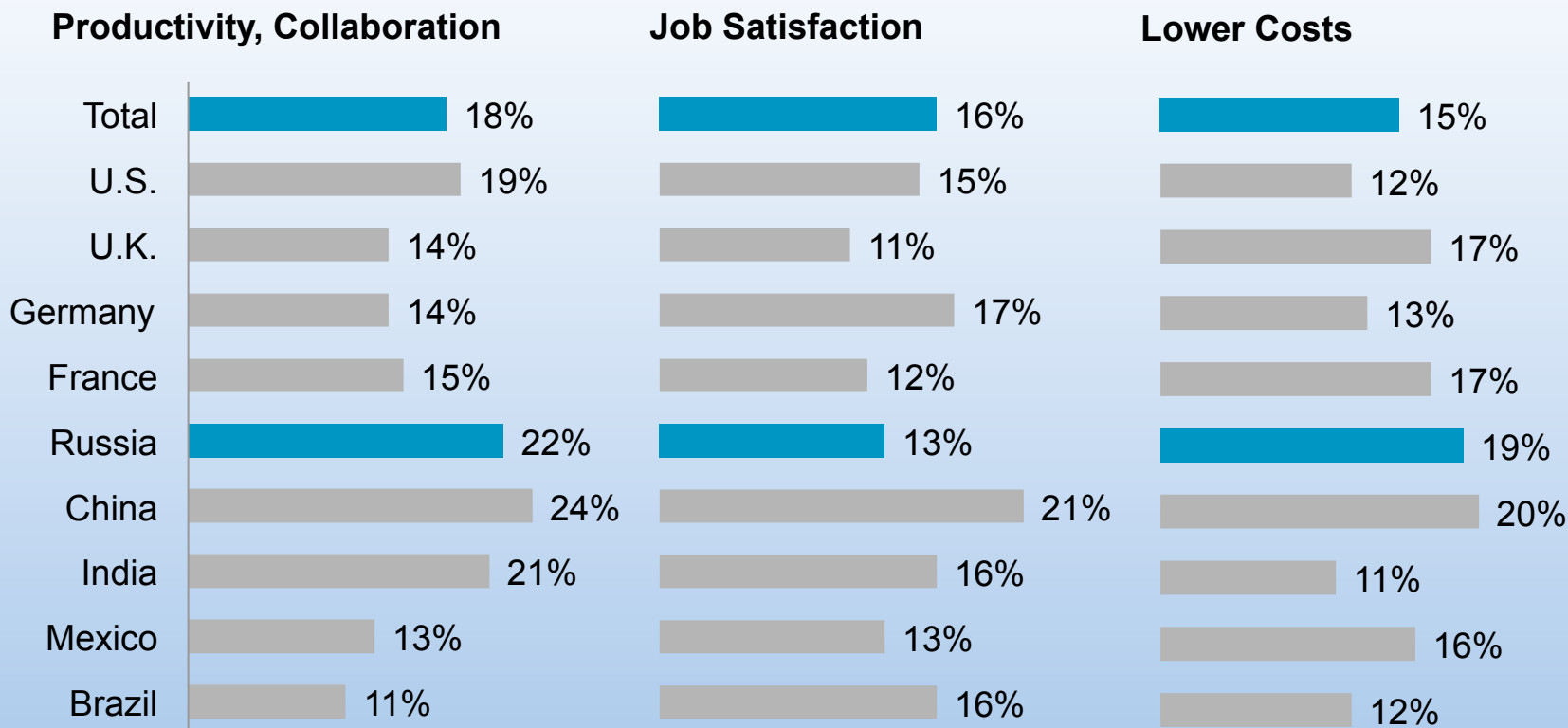
Lower costs

Source: Cisco IBSG, 2012

N = 4,892

IT Leaders See Increased Employee Productivity Through BYOD

Top Benefits BYOD Brings to the Company



Source: Cisco IBSG, 2012

N = 4,892

BYOD Does Bring Complexity: Top Concerns



#1

New threats to security /
privacy of company data

#2

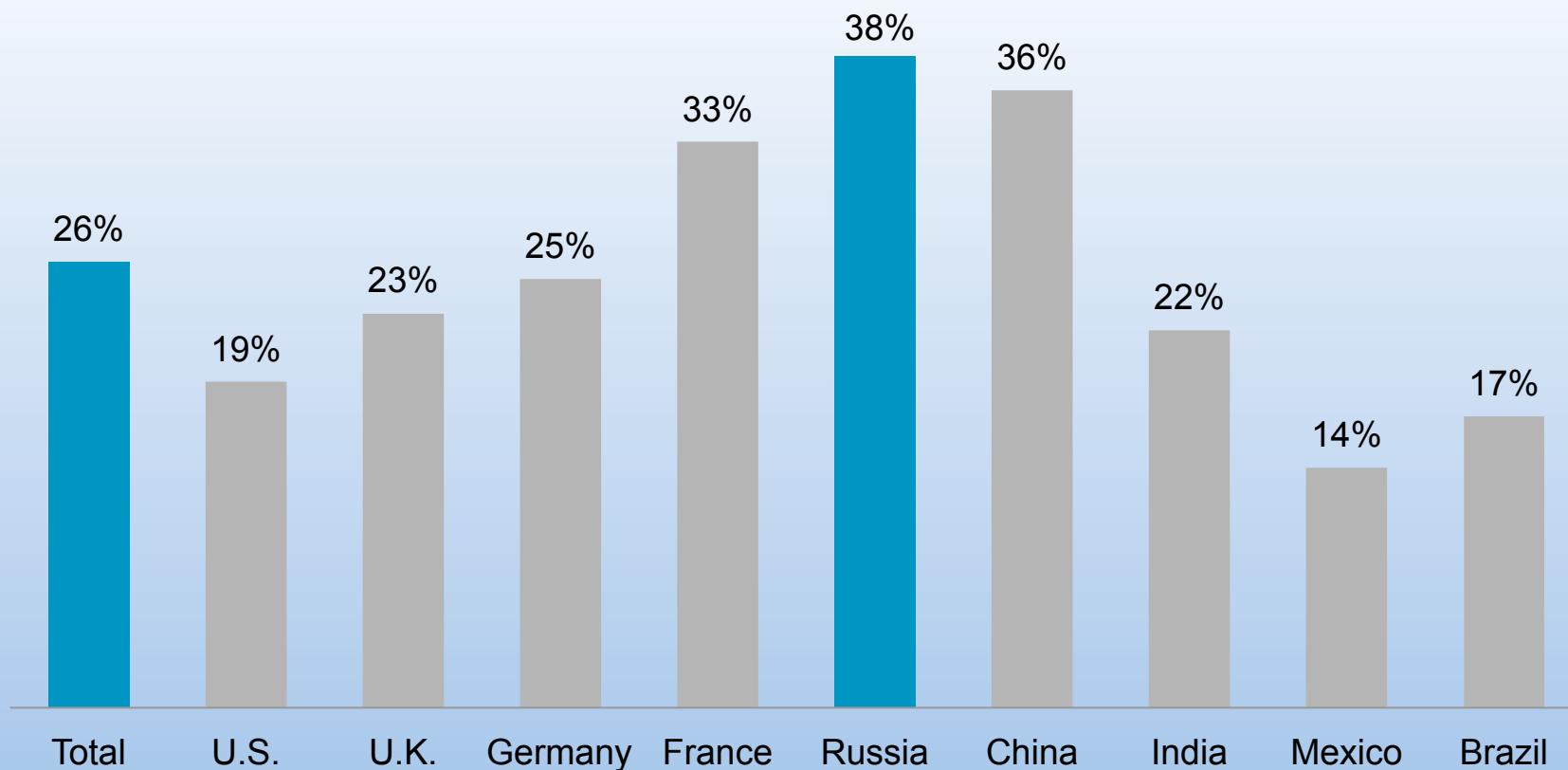
Providing IT support for
multiple mobile platforms

Source: Cisco IBSG, 2012

N = 4,892

Security Threats Are a Major Concern in Russia

Percentage of Companies That Find Security a Top BYOD Challenge



Source: Cisco IBSG, 2012

N = 4,892

IT Support: Most Companies Enable BYOD, but Europe Hesitant



89%

Companies that enable BYOD in some form, from allowing employees to connect their own devices to company network, to full support for all employee-owned devices

71%

Companies that provide IT support for either select employee-owned devices or all devices

19%

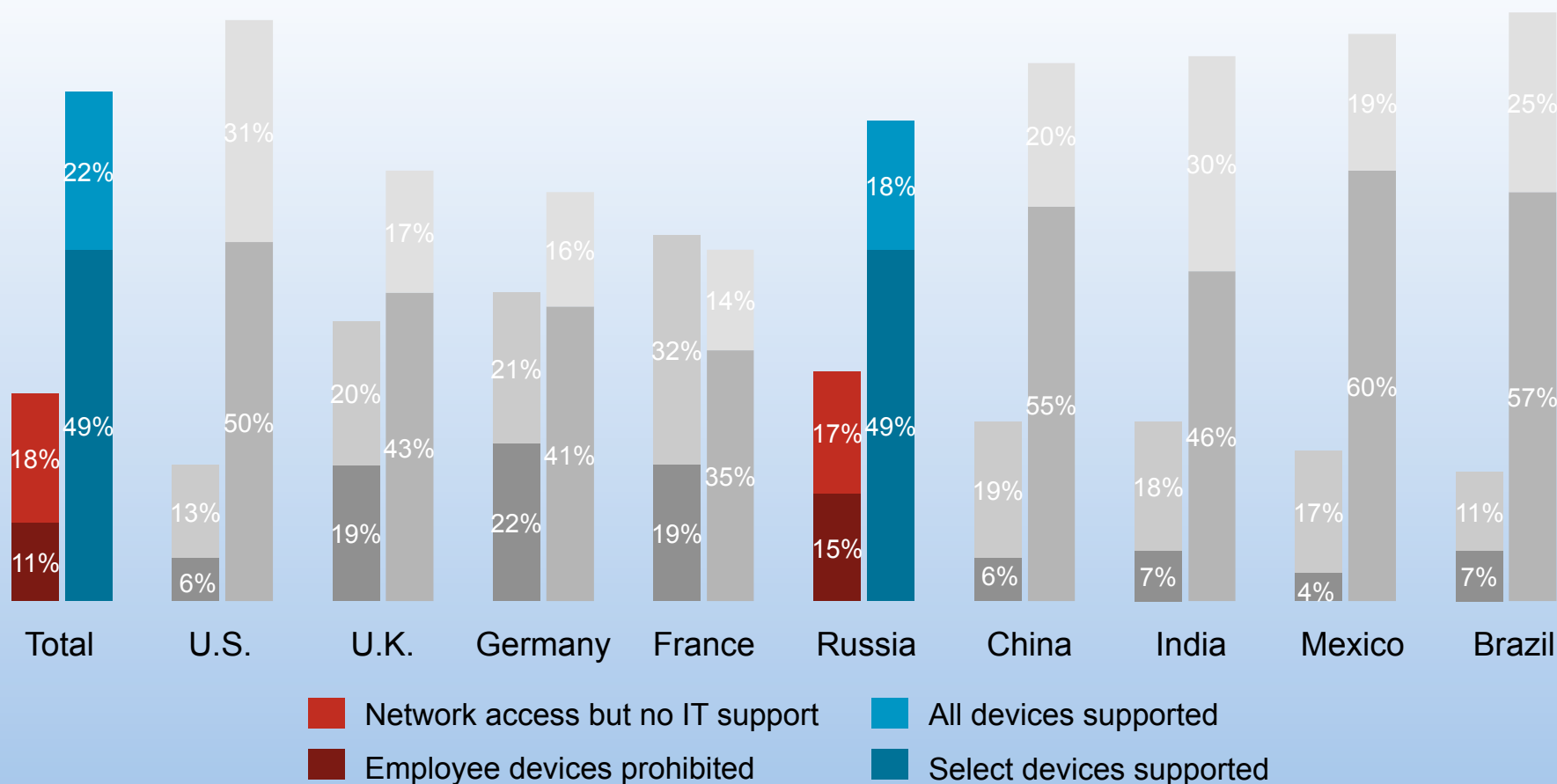
European companies that prohibit BYOD, compared to 6% for non-European countries

Source: Cisco IBSG, 2012

N = 4,892

Russian Companies Largely Supportive of BYOD

Company IT Support for Employee-Owned Devices



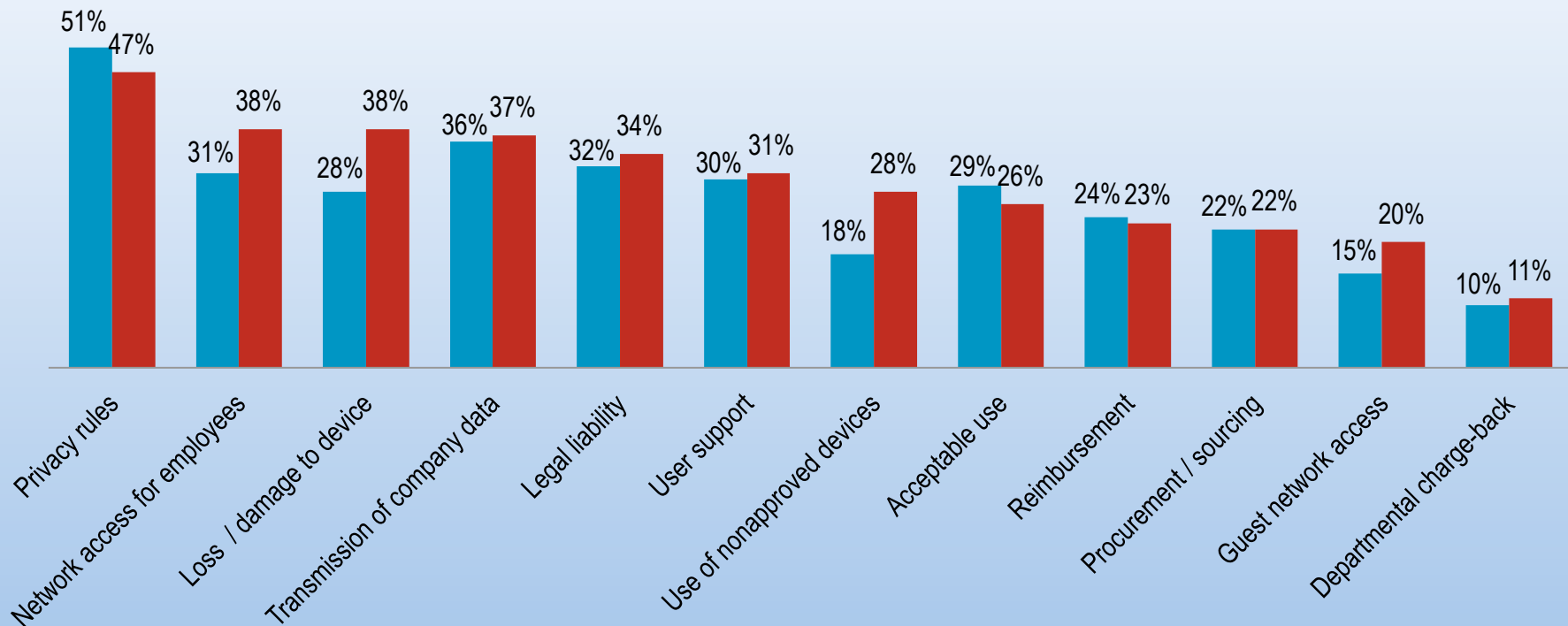
Source: Cisco IBSG, 2012

N = 4,892

Mobile Policy: Plenty of Work To Do for Russian Enterprises, Midsize Firms

Areas Covered by Company Mobile and Mobile Device Policy

■ Midsize companies ■ Enterprises



Source: Cisco IBSG, 2012

N = 476

Employees Want Freedom To Reinvent Their Work Style Through BYOD...



#1

Employees want an any-device, anywhere work style (37%)

#2

Employees want to do personal activities during work and work activities during personal time (35%)

#3

Avoid usage restrictions of company-owned devices (31%)

Source: Cisco IBSG, 2012

N = 4,892

...Which Can Foster Employee-Led Innovation

- BYOD enables employees to deliver consistent, bottom-up innovation by transforming how they work, and what they do
- By giving employees freedom to choose the devices, applications, and cloud services they use, companies help employees find the best ways to get the job done and add more value, such as:
 - Using cloud-based services to analyze and visualize data on mobile devices
 - Discovering the perfect tool for managing complex workflows
 - Recording video meetings to improve execution when decisions are made
- The tools for employee-led innovation are ready at hand: inexpensive, enterprise-grade applications; easy customization; and powerful devices
- Companies that embrace BYOD as a source of innovation could unlock a latent – and potent – source of competitive advantage

Source: Cisco IBSG, 2012

N = 4,892

Employees Also Want To Bring Their Own Applications

A man in a grey suit and white shirt is sitting in a light-colored, modern armchair. He is looking down at a laptop on his lap, with his hands on the keyboard. The background is a blurred office setting with a patterned rug.

52%

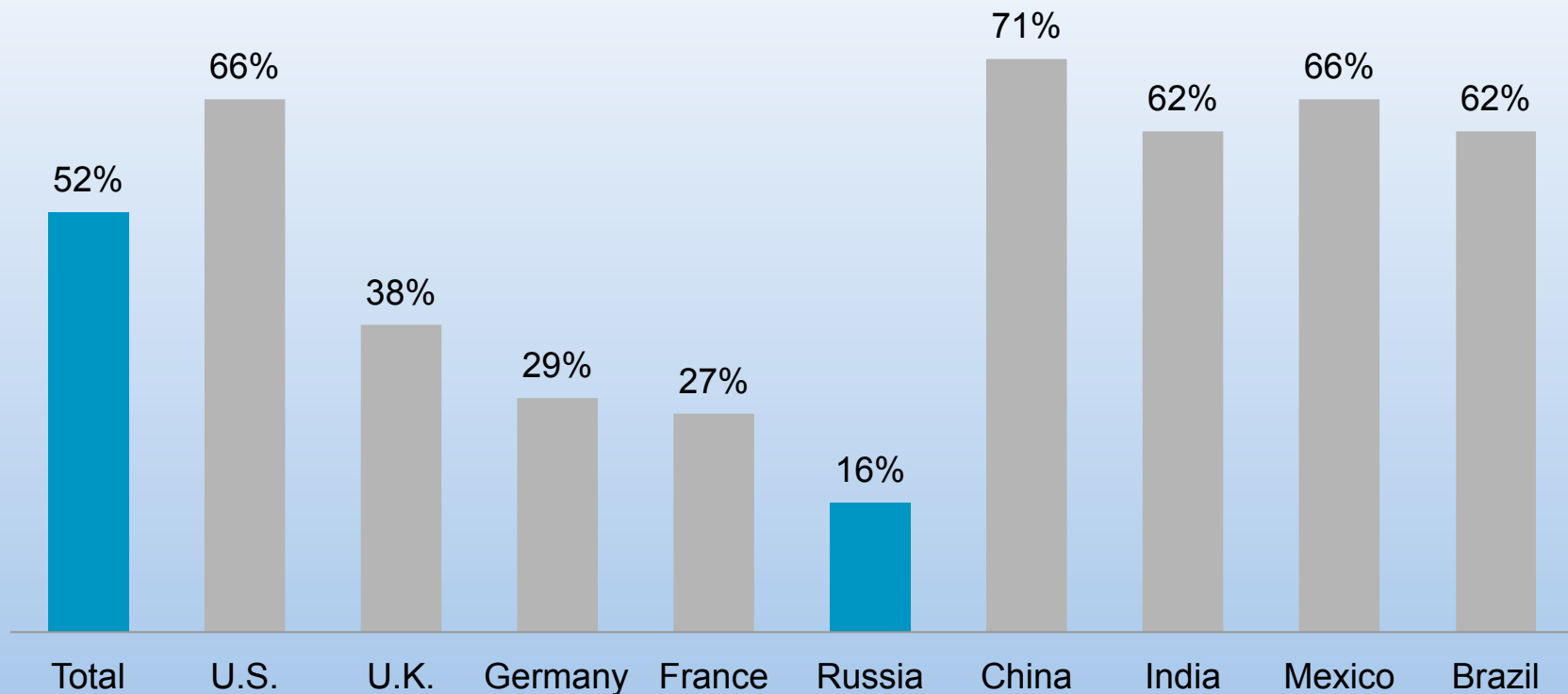
IT leaders who say nonapproved applications are somewhat to much more prevalent today than two years ago—a huge difference between Europe, rest of world

Source: Cisco IBSG, 2012

N = 4,892

Nonapproved Applications Less Prevalent in Europe, Especially Russia

Percentage of Companies Saying Number of Nonapproved Applications “Somewhat” or “Much More” Prevalent



Source: Cisco IBSG, 2012

N = 4,892

Desktop Virtualization Is on the Rise — In Some Countries



91%

IT leaders who are somewhat or very aware of desktop virtualization

44%

Agree that a majority of knowledge-worker roles are suitable for desktop virtualization, with U.S. much higher at 64%

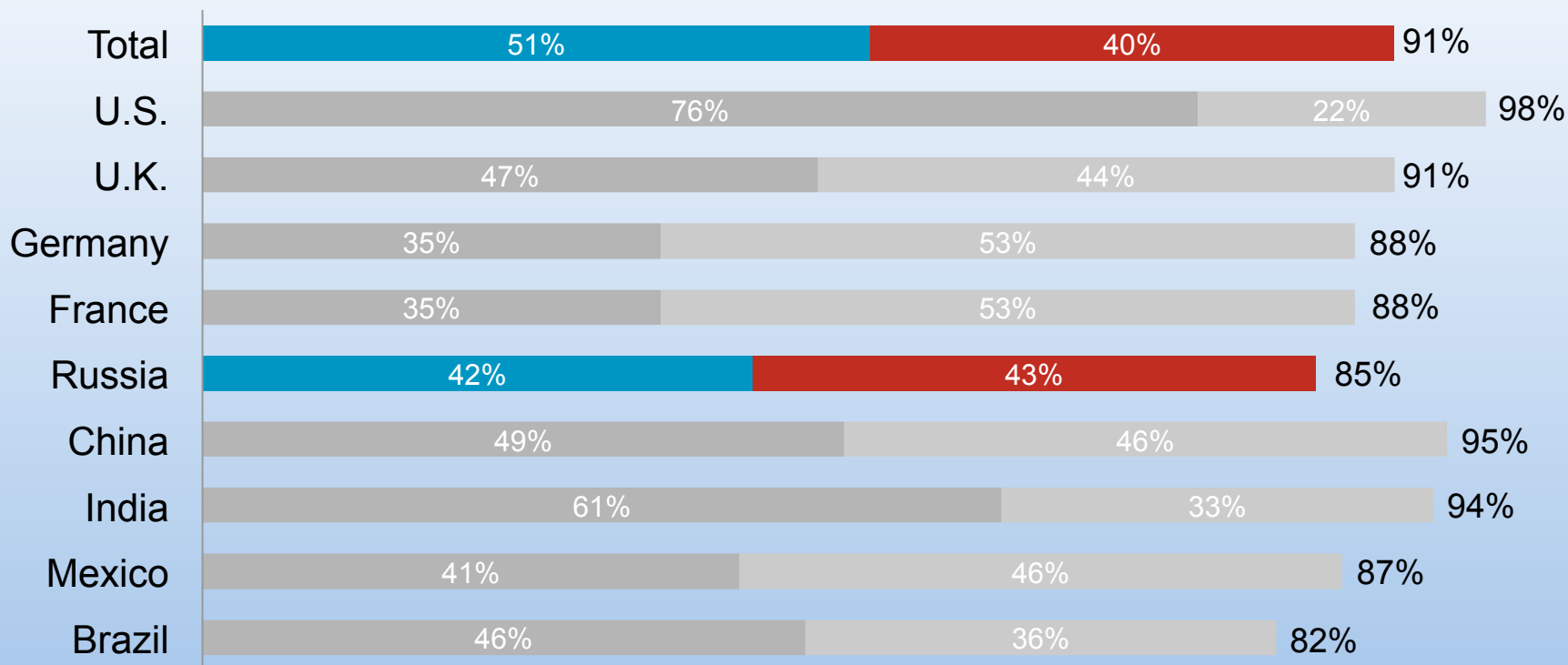
Source: Cisco IBSG, 2012

N = 4,892

IT Leaders Well Aware of Desktop Virtualization...

Awareness of Desktop Virtualization

Very aware Somewhat aware

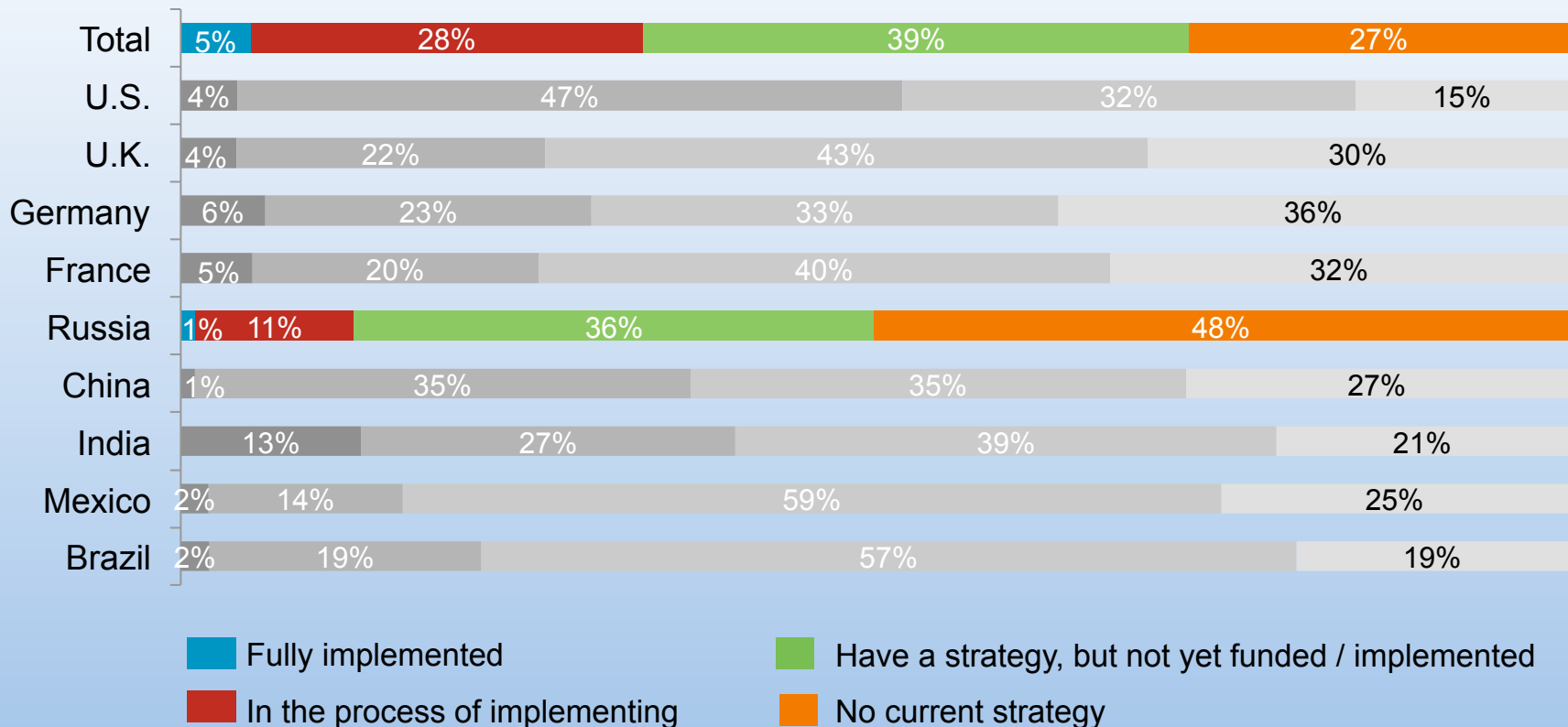


Source: Cisco IBSG, 2012

N = 4,892

...But Implementation Is Lagging Awareness

Desktop Virtualization Strategy

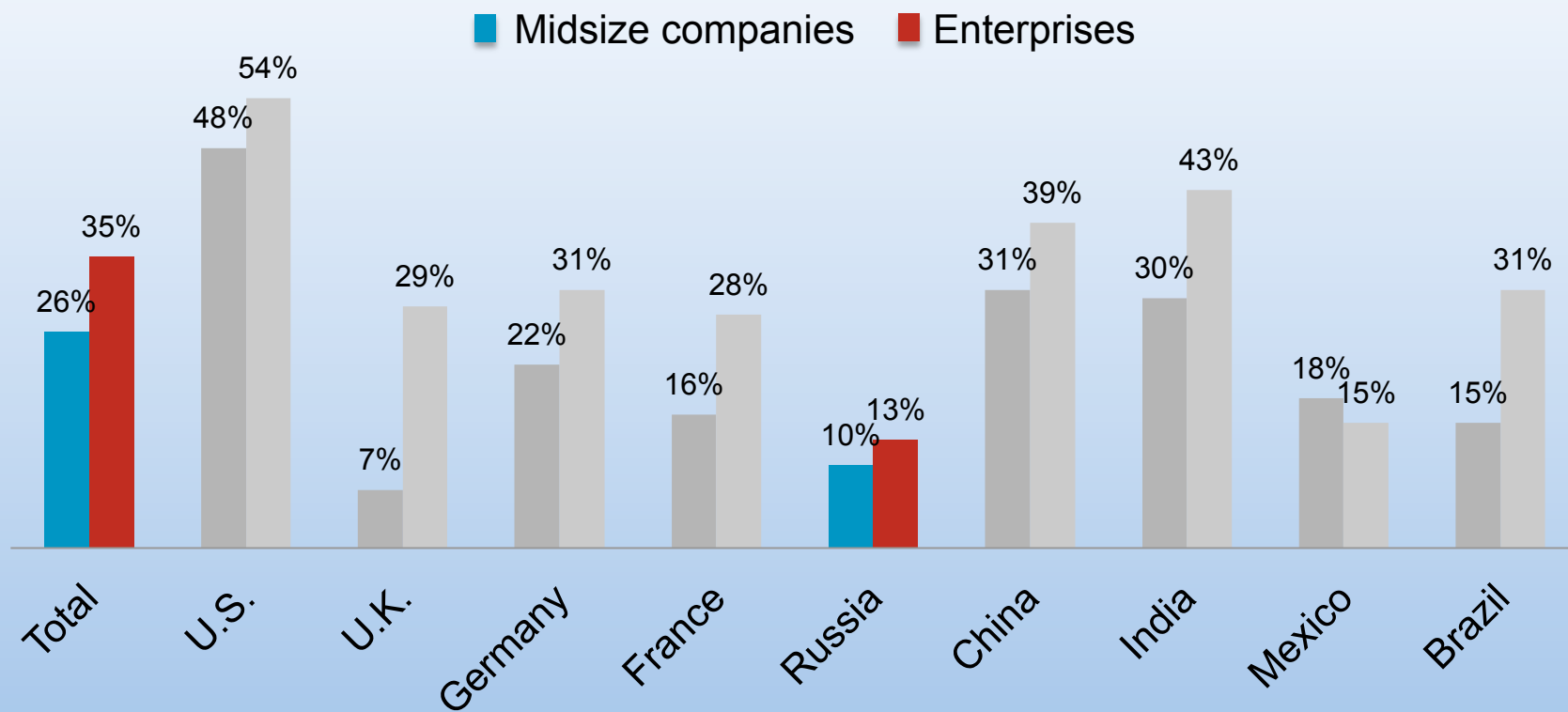


Source: Cisco IBSG, 2012

N = 4,892

U.S. Leads in Implementing Virtualization; Russia Farthest Behind

Percentage of Companies in the Process of Implementing — or that Have Already Completed — Their Virtualization Strategy

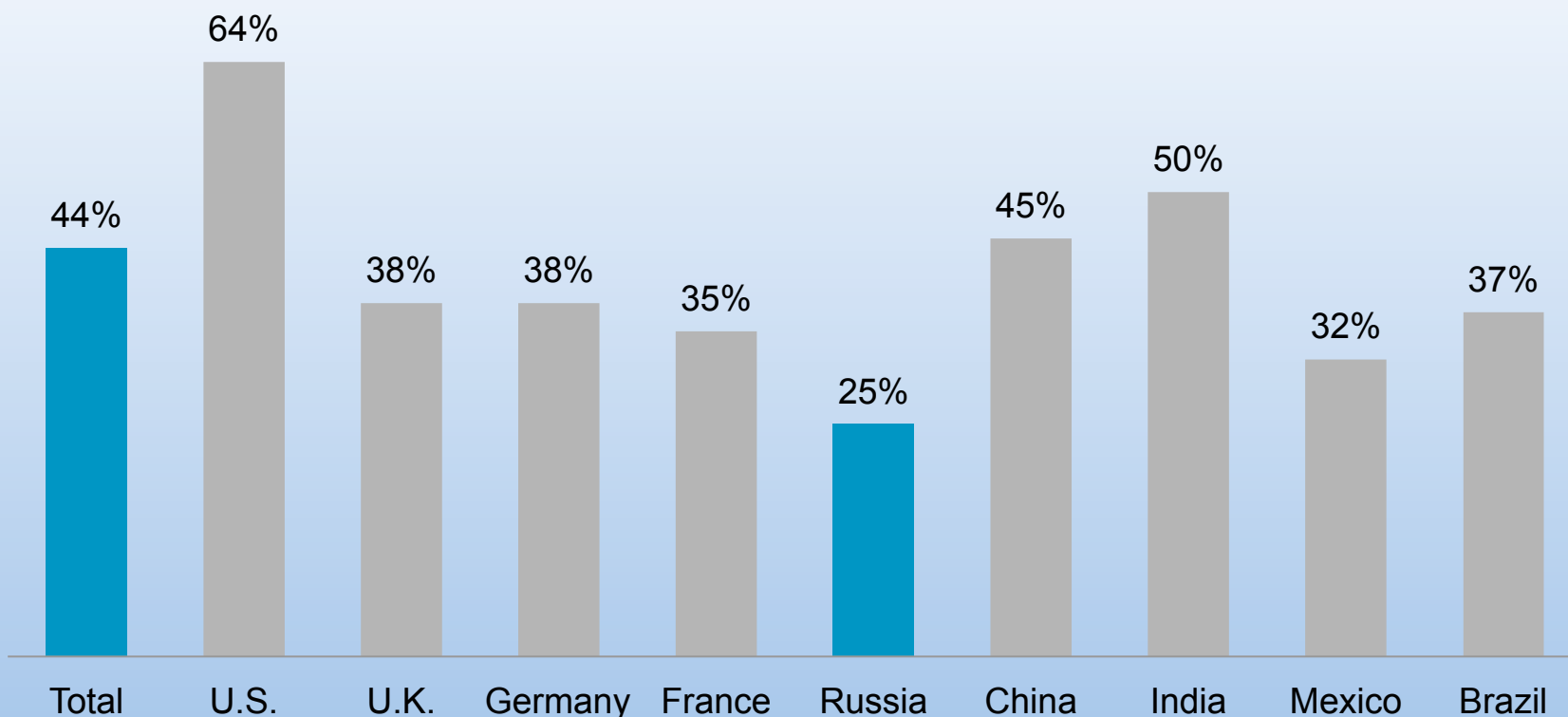


Source: Cisco IBSG, 2012

N = 4,892

IT Leaders in Russia Not Sold on Virtualization for Knowledge Workers

Percentage of Respondents Who Believe a Majority of Knowledge Workers Are Suitable for Desktop Virtualization



Source: Cisco IBSG, 2012

N = 4,892

Top Desktop Virtualization Drivers

#1: Data Protection—31%

#2: Mobility for Employees—28%

#3: Business Agility—27%

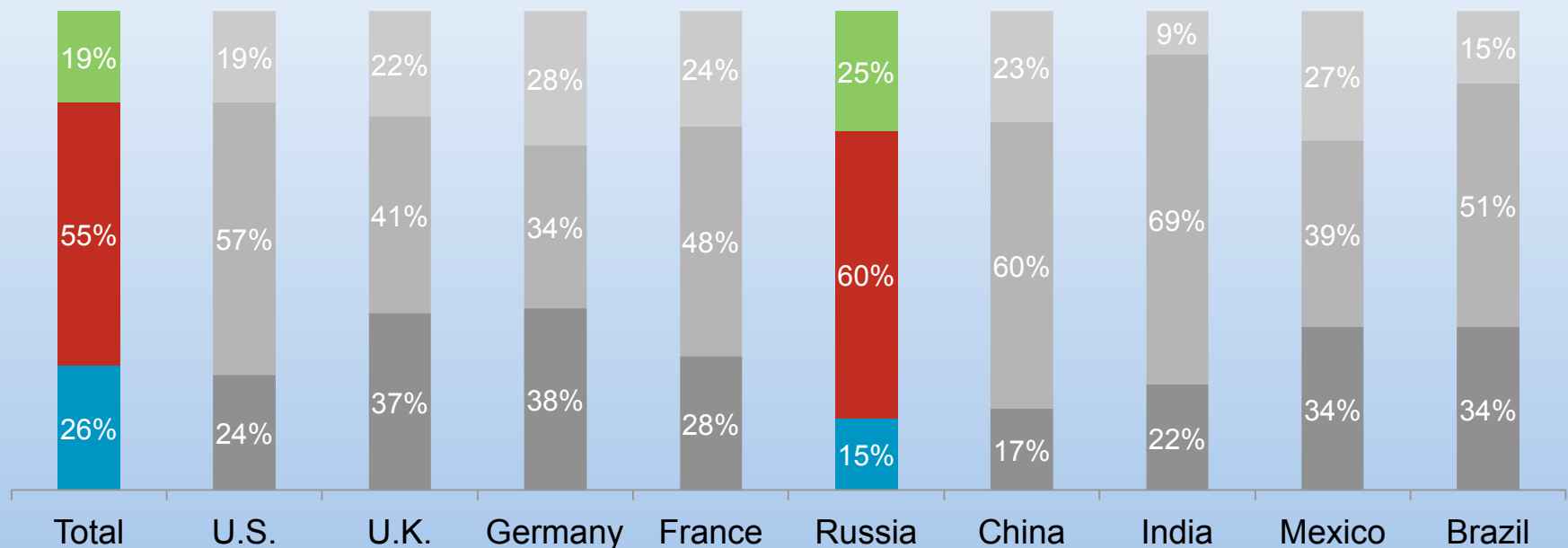
Source: Cisco IBSG, 2012

N = 4,892

From Push to Pull—Is Traditional IT Provisioning on Its Way Out?

Primary Application Provisioning and Management with Current Approaches to Desktop Virtualization

■ Standard desktop “image” to all devices ■ Company “app store” ■ Other approaches



Source: Cisco IBSG, 2012

N = 4,892

Key Takeaways

- BYOD is not an emerging trend but a *fact* across geographies, different company sizes
- The United States, Asia, and Latin America are most enthusiastic about BYOD, and there is an opportunity for employees to **innovate** how and where they work. This, rather than cost containment, is the real BYOD opportunity
- European companies are less supportive of BYOD, see benefits more in terms of cost containment than employee-led innovation, and could miss the next wave of employee effectiveness
- Mobility budgets are rising quickly, and firms may be missing opportunities to optimize spending — without restricting access
- BYOD also implies new challenges in security and support
- Better mobile policy can help deliver security, support, and lower costs
- Desktop virtualization is top of mind for U.S. IT leaders, but seen as less applicable to knowledge workers in other countries

Source: Cisco IBSG, 2012

For more information...

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