For: Sourcing & Vendor Management Professionals

The Global BYOD Management Services Ecosystem

by Brownlee Thomas, Ph.D., September 3, 2013

KEY TAKEAWAYS

Ad Hockery Threatens Enterprise Mobility Cost-Control Balance

Mobile BYOD is more complex than it first appears. What does your firm mean by it? Companies need a clear definition and strategy to ensure a balance between outsourcing mobility costs to employees, ensuring appropriate IT control for security management, and cost visibility and management.

Outsourcing Helps Enterprises Achieve A Good Control-Cost Balance

Enterprise mobility management is a growing challenge for companies with many iWorkers who want to use personal mobile devices for work. Third-party mobile BYOD management services will help user firms achieve their goals related to BYOD faster and also optimize cost and security management.

Partnerships Will Play A Big Role In BYOD Management Outsourcing

Technology vendor and service provider partnerships will play a big role in developing and delivering global mobile BYOD management services to support very large user organizations that have thousands or tens of thousands of workers in an untethered workplace.

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The Global BYOD Management Services Ecosystem

Mobile BYOD Outsourcing Can Help You Ensure A Proper Control-Cost Balance

by Brownlee Thomas, Ph.D.
with Chris Andrews, Christian Kane, and Ben Jennings

WHY READ THIS REPORT

Enterprises with distributed operations and a large or fast-growing population of information workers (iWorkers) need to accelerate their readiness for the "untethered" workplace. In an increasingly mobile world, these companies need to lighten IT's control over technologies — including personal mobile devices — that iWorkers will expect to use as part of their everyday work lives. To do this, companies will need to dramatically change how mobile devices, connectivity services, and applications are provisioned and paid for. The growing urgency to adapt to and optimize mobility opportunities is pushing sourcing decision-makers to take a closer look at how third-party management services might help their organization support mobile bring-your-own-device (BYOD) initiatives. This report discusses some of the major challenges — and opportunities — of mobile BYOD, and how the emerging ecosystem for BYOD management services can help distributed enterprises achieve the right balance between control and cost in the untethered workplace.

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Notes & Resources

Forrester interviewed 11 vendor and user companies: Anatole, AT&T, BT Global Services, Cass Information Systems, Dimension Data, IBM, MDSL, Orange, Tangoe, Telefónica, and Verizon.

Related Research Documents

Benchmarking Mobile Engagement: Consumers And Employees Outpace CIOs' Readiness
May 9, 2013

Show Me The Loot!
February 15, 2013

Building The Business Case For A Bring-Your-Own-Device (BYOD) Program
October 23, 2012

AD HOCKERY THREATENS ENTERPRISE MOBILITY COST-CONTROL BALANCE

BYOD is more complex than it first appears. Is it about providing IT support to employees who wouldn't qualify for a company-paid mobile device? Is it about paying workers who do qualify for a corporate-liable device some or all the cost for their work-related usage? Does it also refer to connectivity (cellular) services — including reimbursement and employee purchase programs with preferred suppliers? Does it extend to allowing connected employees to access a corporate app store and download business apps?

All of these questions are relevant when considering the implications of mobile BYOD in your own environment. Yet clarifying your BYOD focus and managing the complexity of BYOD programs will only get harder due the following trends:

- **A growing portion of iWorkers want to use personal mobile devices for work.** North American and European information workers are ready to share the cost for mobile devices used for work. A recent Forrester survey of iWorkers within companies with 1,000-plus employees found that 31% of iWorkers in the US, 29% in Canada, and 21% in Europe are ready to pay some or all the cost of a mobile phone or smartphone used for work. Additionally, 27% of US iWorkers, 21% of Canadians, and 18% of Europeans are ready to pay for a tablet PC used for work.[1]

- **Large enterprises will soon reach a BYOD tipping point.** By 2015, most very large enterprises will have to provide more structured and formalized support for employees who elect to use personal mobile devices for work — including smartphones and tablet PCs. In a recent Forrester survey, we learned that supporting more types of mobile devices and platforms will be a critical or high priority during the next 12 months for 73% of firms with 5,000-plus employees, and also for 67% of firms with 1,000 to 4,999 employees.[2]

- **BYOD best practices will mature as organizations align policies with iWorker needs.** Organizations need to move away from outright prohibition or casual approaches to mobile BYOD in favor of a formalized strategy that will satisfy line-of-business (LOB) and user expectations. Sourcing decision-makers need to work alongside business managers, human resources, and IT to ensure a BYOD strategy that meets iWorkers' needs. How to start? Segment workers by the apps used to do their jobs, and how much of the time they could do their job away from a fixed work station.

- **Very large companies will realize that BYOD will not return immediate cost savings.** Surprise — many BYOD cost-saving goals will not be realized immediately (if ever). Why? Organizations need to make considerable upfront investments to define application architecture for device agnosticism, upgrade infrastructure (like private Wi-Fi and network and endpoint device security), and establish guidelines for help desk support for different user types and mobile operating systems.

BYOD MANAGEMENT SERVICES CAN HELP ENSURE A CONTROL-COST BALANCE

Enterprise mobility management is a growing challenge for many companies. Half (50%) of the 891 mobility decision-makers we surveyed working in North American and European firms with 1,000 or more employees told Forrester that implementing a mobile BYOD policy and program for employees will be a high or critical priority for their firm during H2 2013 and H1 2014.[3] Additionally, 48% of the respondents in the same survey said that using some or more third-party services for mobility management will be a high or critical priority during the next year.[4]

Amid these trends, the biggest worries we're hearing from SVM and IT executives during client inquiry conversations are how-tos — how to get and how to maintain the right balance between "control" and "cost." We frequently propose that clients apply a business-case approach to BYOD management that could incorporate elements of our Total Economic Impact™ (TEI) methodology to help them achieve the desired outcome.[5]

The Rise Of Mobile BYOD Management Services

BYOD management outsourcing can help organizations realize their BYOD goals faster and more effectively than by relying on internal resources.[6] Possible major benefits of mobile BYOD management outsourcing include:[7]

- **Improved workplace flexibility and productivity.** Flexible work remains a hot topic, and it won't go away — despite shortsighted decisions like the one taken last year by Yahoo's CEO to curtail telecommuting at that high-profile technology company.[8] But many IT organizations struggle to respond to this growing business requirement by offering meaningful support to a majority of iWorkers (52%) who work from two or more locations a few or several times each month. This requirement for IT support for remote work — and BYOD along with it — will keep growing in importance.[9]

  How mobile BYOD management services can help: An outsourced mobile BYOD program would allow large distributed enterprises' IT organizations to provide more locally specific and also larger-scale "anytime, anywhere, any device" device configuration and delivery, connectivity service activation, and ongoing help desk support and mobile depot services. A recent study commissioned by IBM with Forrester estimates effective working hours and an associated increase in each user's productivity of 45 to 60 minutes per week.[10]

- **Growth in sales with mobile BYOD enablement of business-generating apps.** By adopting mobile BYOD, companies with large and mostly on-the-road sales forces can dramatically reduce response times and improve "reachability" by customers and prospects. Equipping these sales forces with cloud-based packaged apps like salesforce.com, and also with mobile-enabled software clients for a packaged customer relationship management (CRM) app or a homebuilt purchase-order/transaction app installable on their personal smartphone or tablet, enables sales transactions in real time.

How mobile BYOD management services can help: An outsourced BYOD program could provide support to develop or modify existing transaction apps for different mobile operating systems (OSes) and screen real estate, as well as to manage user device registration or provisioning, configuration, and automated device and apps troubleshooting and maintenance.

- **Reduced cost to acquire, provision, and replace mobile devices.** Sourcing and vendor management organizations spend a lot of time negotiating device subsidies and credits for baseline smartphones and tablets purchased together with corporate-liable connectivity service plans. A big challenge as companies move thousands of corporate-liable users (CLUs) to individual-liable user (ILU) subscriptions is how to still benefit from those subsidies and device credits.

  How mobile BYOD management services can help: BYOD management outsourcing can help by providing guidance to sourcing and vendor management (SVM) pros based on the provider's experience with other customers of similar size and type, or by acting as their agent to negotiate "almost as good as corporate-liable" mobile plans and device subsidies for individual-liable users.

- **Reduced complexity and IT costs to maintain — and secure — BYOD-specific infrastructure.** Securing the new untethered, anytime-anywhere-any-device workplace will be a major challenge for IT. Mobile enablement of homegrown, custom-built, and vertical industry apps, along with managing different versions of packaged apps, adds a great deal of complexity for IT to manage in-house.

  How mobile BYOD management services can help: BYOD outsourcing initiatives related to securing the new untethered and mobile workplace could include managed firewall and encryption of systems and data stored and transmitted using a BYOD mobile device, and biometrics for mobile devices. Additional opportunities include reducing the complexity and costs to maintain BYOD-specific infrastructure by implementing third-party-managed/hosted or cloud-based desktop virtualization.

- **Lower help desk support costs for many device models and operating systems.** Another major challenge associated with mobile BYOD is an expected increased burden on already shorthanded IT organizations, along with additional user support and help desk costs. That's because to achieve user satisfaction and optimize productivity payback, IT will need to support several mobile OSes: Apple iOS and BlackBerry are currently the most common ones for CLU users, but Windows Phone also is picking up traction, especially among consumers (your BYOD population). Moreover, IT support for different device manufacturers' versions of the Android OS is a must for wide-scale BYOD programs.

How mobile BYOD management services can help: With an outsourced BYOD program, companies can reduce IT service desk support costs by diverting BYOD inbound calls to the outsourcer. Another cost-saving measure associated with help desk support is outsourcing cellular network and public Wi-Fi support and also mobile device problem resolution to the preferred mobile operator, which includes employee ePortal click-through and click-to-call consumer-grade support.

THE EMERGING GLOBAL BYOD MANAGEMENT SERVICES ECOSYSTEM

Forrester predicts that the global BYOD management services ecosystem will expand dramatically during the next three to five years. The emerging BYOD management services ecosystem is targeting, first and foremost, very large organizations with thousands of employees wanting to use personal mobile devices like smartphones and tablet PCs for work. Today, it comprises five vendor types — global systems integrators and IT outsourcers, network operators, independent or specialist mobile telecommunications expense management (TEM) providers, independent or specialist managed mobile services (MMS) providers, and mobile device management (MDM) technology vendors. Partnerships across these vendor categories will play a big role in determining business growth and successful global mobility management delivery among these players as this ecosystem evolves and matures (see Figure 1):

- **Systems integrators/IT outsourcers.** They include global systems integrators and IT outsourcers like Accenture, CSC, Dimension Data, and IBM. They possess a very wide and deep range of technology expertise for enterprise mobility management, and also have local resources nearly anywhere that a very large user organization might want them. BYOD-related solutions typically are extensions of large IT outsourcing (ITO) deals that include mobile app development, mobile apps management, managed security, mobile TEM, and full mobile lifecycle management/business process outsourcing (BPO) services. This group will rely on technology partnerships with MDM technology vendors to provide endpoint security, independent MMS provider's automation platforms, and leading workplace technology vendors like Cisco Systems and Avaya, Microsoft, Citrix, EMC, and VMware.

- **Network operators.** They include large network operators that operate extensive wireline and/or mobile networks. Examples are AT&T, BT Global Services, Orange, Sprint, Telefónica, T-Systems, Vodafone Group, and Verizon. This group has the most experience providing managed wireline and/or mobile connectivity and managed communications services to very large and distributed enterprises as their core business. They cannot afford to lag behind regarding mobile BYOD management, and will court very large user organizations with mobile BYOD-specific outsourcing offerings. They will focus mainly on promoting their proven capabilities as secure convergence network and communications apps integrators, and will white-label, resell, or formalize partnerships with independent TEM providers and MDM technology vendors.

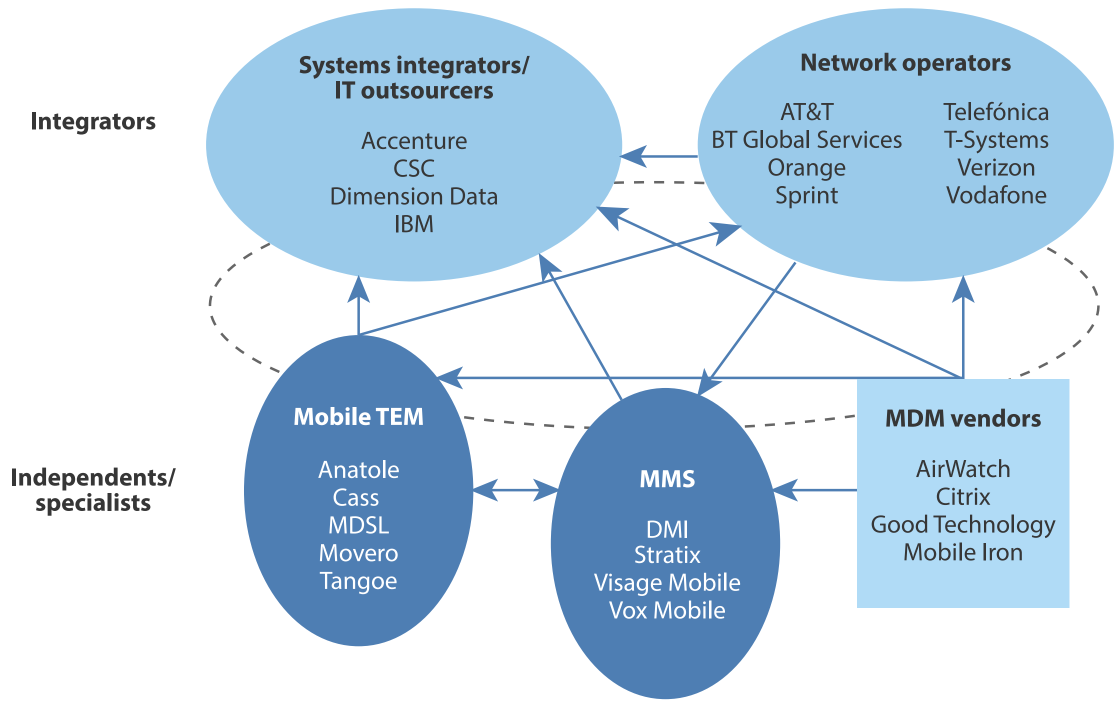
- **Independent telecom expense management providers.** This group comprises mostly privately held companies whose origins were as invoice processing software companies. The largest ones are Cass Information Systems and Tangoe, which report annual revenues above $100 million. Most of the others in this category have a modest number of anchor global enterprise customers, and annual sales below $20 million. Examples are Anatole, MDSL, and Movero. The named vendors in this category offer global mobile TEM and other managed mobility services that can be delivered as hosted/cloud-based SaaS and also as managed services/BPO, with some level of support for BYOD.

- **Independent managed mobility services providers.** The vendors in this group are professional services consultancies that offer implementation and management of large-scale mobile deployments and upgrades (e.g., BlackBerry Enterprise Server (BES) to BES10). Examples are DMI, which reports $250 million revenues, Stratix, Visage Mobile, and Vox Mobile.[11] These firms also help large user organizations define mobility strategies for infrastructure and security management. Some of them provide full mobile life-cycle management/BPO employing automation tools that extend to BYOD devices — for example, for mobile policy enforcement (usage and security), device connectivity and mobile apps management, and also for invoice processing and chargeback.

- **Mobile device management technology vendors.** They include a rapidly consolidating and also morphing group of global MDM technology vendors. Examples are AirWatch, Citrix, Good Technology, and Mobile Iron.[12] This group is moving ahead into broader security suite market opportunities such as automation tools for mobile app management, mobile support management, and mobile content management, etc. They want to extend their intellectual property to secure application and data management for BYOD. The major global players in other vendor categories in the BYOD management ecosystem will white-label or resell their MDM solutions.

Figure 1 The Emerging Global BYOD Management Services Ecosystem

1-1 Partnerships will play a major role*



*Companies listed in each category are included as examples only.

102081 Source: Forrester Research, Inc.

Figure 1 The Emerging Global BYOD Management Services Ecosystem (Cont.)

1-2 BYOD management players and strategies, 2013 to 2016

Type	Players*	Expected BYOD mid-term strategies
Systems integrators/ ITOs	Accenture, CSC, Dimension Data, IBM	They will place BYOD at the center of their workplace solution portfolios that also will include virtualization, converged cloud, customized desktop, and help desk outsourcing. BYOD will be offered as a bolt-on, and gradually will become embedded (APIs) — to deliver a highly secure and consistent user experience for productivity tools and other business apps, regardless of connectivity source or place.
Network operators	AT&T, BT Global Services, Orange, Sprint, T-Systems, Telefónica, Verizon, Vodafone	They will target Global 2000 firms that have thousands of employees. Their BYOD portfolios will evolve during the next two years to include a broad range of consulting and managed services for BYOD, together with full life-cycle management/business process outsourcing (BPO) services — mostly to large multinational enterprises headquartered in their home market. BYOD management also will be sold as part of their workplace offers that also will include unified communications, security services, public Wi-Fi and 4G remote access, and remote-access VPNs.
Independent mobile TEM providers	Anatole, Cass, MDSL, Movero, Tangoe	They will focus on expanding internal capabilities and partnerships to deliver a comprehensive portfolio of hosted/cloud-type mobile life-cycle management/BPO services sold directly and also through partnerships with operators, system integrator (SIs), and MMS providers to extend their global reach. BYOD management will be a big part of their strategies due to potential erosion of revenues and even marginalization without it. They'll also boost security management for BYOD capabilities, by adding resold MDM and mobile application management (MAM) to their portfolios.
Independent MMS providers	DMI, Stratix, Visage Mobile, Vox Mobile	They will focus on expanding their global capabilities to achieve broader scope and deeper capabilities, including BYOD management. In-place and new relationships with operators, MDM vendors, and TEM specialists will be key to their future success. The bulk of their BYOD-related revenues will come from a combination of professional services including infrastructure design and integration to support untethered workplace initiatives where BYOD is a major part of the enterprise mobility strategy. The largest ones will emphasize mobile IT (e.g., mobile app development and management, and mobility big data/BI analytics).
MDM technology vendors	AirWatch, Citrix, Good Technology, Mobile Iron	They will focus on: 1) direct sales and boosting internal capabilities for security management with a strategic focus on BYOD as a big-lift opportunity; and 2) indirect sales including joint-sales partnerships with operators and SIs, and also with MMS and mobile TEM specialists who will resell their technology. The larger ones will move into secure mobile apps management. By 2016, most of their MDM revenues will come from indirect sales channels due to MDM commoditization; direct sales revenues will be mostly from secure mobile apps management. At least one of these vendors will morph into a major MMS provider.

*Companies listed in each category are included as examples only.

102081 Source: Forrester Research, Inc.

RECOMMENDATIONS

INVESTIGATE OUTSOURCING TO OPTIMIZE BYOD MANAGEMENT OUTCOMES

Complexity associated with managing thousands or tens of thousands of employees' use of personal mobile devices to do their job — e.g., access corporate productivity, personal information management, etc. — will drive many large organizations to consider outsourcing BYOD management. Take advantage of the emerging ecosystem for BYOD management services by doing the following:

- **Ask about SVM customers' interest in and expectations regarding managing BYOD.** You might be surprised to learn how widely BYOD is happening already. If that's the case, speed up your investigation of how this will affect your ability to meet any existing revenue commitments with mobile operators. Also ask internal customers already doing BYOD, or planning to soon, about their expectations related to SVM support and IT support for BYOD users. This will help you identify key success factors for incorporating BYOD into your telecom and mobility sourcing activities.

- **Ask architects and suppliers about how cloud apps will help or hinder BYOD plans.** Ask your IT architects to explain their road map and strategy related to cloud-hosted and connected apps for mobile users, as well as their impact on BYOD support management. Also seek guidance from your main business and productivity apps suppliers about how to discover cloud-delivery return on investment (ROI) with mobile BYOD. For example, what is the payback timeline to mobile-enable personal tablets for your sales force?

- **Investigate mobility management outsourcing with BYOD in mind.** If you have a very large and growing mobile workforce and many iWorkers, you need to understand what options are available to help your LOBs effectively manage the untethered workplace, which inevitably will include mobile BYOD. If you're in catch-up mode because your LOBs are already doing BYOD or you want to learn quickly about the capabilities of existing telecom and mobility suppliers related to BYOD management, ask LOBs to come in and make a presentation about their capabilities and experience. For a broader understanding of this emerging market, issue a request for information (RFI) specific to BYOD management outsourcing.

WHAT IT MEANS

BYOD WILL BE HIGH ON SVM'S AGENDA FOR MOBILITY PURCHASES

BYOD has arrived and it can't be avoided — or delayed. That means that BYOD also will be on SVM pros' action lists when doing contract reviews and (re)negotiations for any third-party services associated with implementing and supporting the untethered workplace. Additionally, BYOD will be near the top of their list "to identify vendor capabilities and opportunities" for every request for proposals (RFP) project related to mobility — connectivity services, mobile TEM, mobile apps store, MDM, etc.

SUPPLEMENTAL MATERIAL

Methodology

Forrester's Forrsights Networks And Telecommunications Survey, Q1 2013, was fielded to 2,487 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from January 2013 to March 2013. Research Now fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by question basis.

Forrester's Forrsights Telecom And Mobility Workforce Survey, Q1 2013, was fielded to 2,258 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from March 2013 to May 2013. Research Now fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

Companies Interviewed For This Report

Anatole

AT&T

BT Global Services

Cass Information Systems

Dimension Data

IBM

MDSL

Orange

Tangoe

Telefónica

Verizon

ENDNOTES

[1] Forrester recently asked 855 US, 388 Canadian, and 1,048 European information workers, "What is your level of interest in being allowed to bring your own mobile phone/smartphone as your work mobile/smartphone?" Twenty percent of Americans, 21% of Canadians, and 17% or Europeans at firms with 1,000 or more employees responded, "I'd be willing to contribute some of my own money," and 11% of Americans, 8% of Canadians, and 4% of Europeans responded, "I'd be willing to pay the entire cost if I could get the mobile/smartphone of my choice." We asked the same group of iWorkers, "What is your level of interest in being allowed to bring your own tablet as a work device?" We learned that 17% of Americans and 15% of Canadians and European iWorkers would "be willing to contribute some of my own money to get the tablet of my choice," while 10% of Americans, 6% of Canadians, and 3% of European iWorkers would "be willing to pay the entire cost." Source: Forrsights Telecom And Mobility Workforce Survey, Q2 2013.

[2] In Q1 2013, we asked 380 mobility decision-makers at North American and European firms with 1,000 to 4,999 employees, and 511 decision-makers at firms with 5,000 or more employees, "How important are each of the following initiatives in your firm's mobility strategy for supporting your employees over the next 12 months? — Support a wider variety of mobile devices and platforms (e.g., tablets, iOS, Android)." Thirty percent of the 511 respondents working at very large enterprises (5,000 or more employees) identified this as a critical priority for their firm, and 45% said it will be a high priority during H2 2013 and H1 2014. This compares with 18% of respondents at firms with 1,000 to 4,999 employees who identified this as a critical priority, and 48% who said it's a high priority for their firm. Manufacturing is the industry with the highest portion of firms that consider this a critical or high priority: 83% of the 134 respondents in that industry said it will be a critical (43%) or high (40%) priority for their company during the next 12 months. Source: Forrsights Telecom And Mobility Workforce Survey, Q1 2013.

[3] Forrester asked 891 mobility decision-makers at North American and European companies with 1,000 or more employees, "How important are each of the following initiatives in your firm's mobility strategy for supporting your employees over the next 12 months? — Implement a bring-your-own-device policy and program for employees." BYOD was identified as a critical priority by 18% of the respondents, and as a high priority by 32%. For large multinational enterprises, BYOD is an even bigger priority: 59% of respondents from the 477 respondents who are responsible for international (regional and global) mobility decisions identified BYOD as a critical priority (25%) or a high priority (34%) for during the next 12 months. Source: Forrsights Telecom And Mobility Workforce Survey, Q1 2013.

[4] Forrester asked the same 891 mobility decision-makers, "How important are each of the following initiatives in your firm's mobility strategy for supporting your employees over the next 12 months? — Use some/more third-party services for mobility management." Source: Forrsights Telecom And Mobility Workforce Survey, Q1 2013.

[5] There are many expected benefits from implementing a companywide BYOD program, including employee satisfaction, and improved productivity. But there also are costs that need to be taken into consideration such as those for upgrading infrastructure and expanding IT help desk capabilities. Additionally there are risks associated with not getting it right, which could result in user frustration, etc. Finally, the total cost of ownership calculations need to include flexibility quantification that adjust benefits and costs in order to decide how far to take these programs, and at what pace to implement them in order to achieve the optimal balance between control and cost. For Forrester's Total Economic Impact (TEI), please visit the following link: http://www.forrester.com/marketing/product/consulting/tei.html.

IBM recently commissioned Forrester Consulting to examine the TEI and potential return on investment that companies realized by implementing an IBM bring-your-own-device program. See the April 2013 study, "The Total Impact Of IBM Managed Mobility For BYOD," A Forrester Total Economic Impact Study Prepared For IBM.

[6] We asked 624 North American and European telecom decision-makers, "Why is your firm interested in using more third-party-managed or as-a-service network and telecommunication services?" The top reason for decision-makers in both regions was to reduce capital outlay for hardware and software (identified by 50% of the 339 US respondents, and 44% of the 245 European respondents. Additionally, 41% of the Europeans also identified getting access to specialized skills and expertise as a reason for using managed and SaaS services. Nearly half (49%) of US respondents and 48% of Canadians surveyed said they were interested in outsourcing to provide more flexibility to their businesses and IT; this compared with 38% of Europeans. Over half (55%) of Canadians, 46% of Americans, and 36% of Europeans said they're interested in using managed/outsourced telecom services to get better performance and improved service than could be achieved in-house. Source: Forrsights Networks And Telecommunications Survey, Q1 2013.

[7] For a discussion about finding the value in BYOD programs, including (in Figure 5) a summary of examples of costs, benefits, and Forrester client rationales for BYOD adoption related to infrastructure, devices, mobile services, apps and software, training and education, and regulatory compliance and governance, see the October 23, 2012, "Building The Business Case For A Bring-Your-Own-Device (BYOD) Program" report.

[8] In February 2012, Yahoo CEO Marissa Mayer ordered remote workers back into centralized offices. The act was controversial and received much discussion in the business press. Mayer positioned the move as essential to innovation and collaboration because employees did these things more often when colocated. Source: Christopher Tkaczyk, "Marissa Mayer breaks her silence on Yahoo's telecommuting policy," CNNMoney, April 19, 2013 (http://tech.fortune.cnn.com/2013/04/19/marissa-mayer-telecommuting/).

[9] Source: Forrsights Workforce Employee Survey, Q4 2012.

Additionally, in our Forrsights Networks And Telecommunications Survey, Q1 2013, we asked 954 networks and telecoms decision-makers: "Using your best estimate, what percentage of your firm's employees does the following as part of their job? Work from home or a remote location part-time or occasionally (up to five days per month)" or "Primarily work from home or a remote location full-time (five days per week, 20 days per month)." We learned that at nearly a quarter of large US (24%) and Canadian (23%) enterprises, and 18% of European large enterprises, 26% or more of employees are now working from home or a remote location part-time or occasionally. At 19% of Canadian, 16% of European, and 14% of US large enterprises, 26% or more of employees are working primarily (full-time) from home or a remote. We also asked: "How important are your firm's network and telecommunications technologies in enabling the following business initiatives? Become a more attractive employer with collaborative and flexibility working environment," which more than three quarters of European (N = 301; 79%) and US (N = 578; 76%), and 72% of Canadian respondents (N = 75) rated a 4 or 5 (where 5 is very important). Additionally, "support overall employee productivity" received 4 or 5 ratings from 86% of US respondents and 83% of Canadian and European decision-makers. For more discussion on how business leaders are looking to create differentiated workforce experiences, see the July 18, 2013, "Customer Experience Methods Guide Workforce Experience Design" report.

[10] See the IBM Flexible Workplace CIO Study, May 2012, IBM Center for Applied Insights, Executive Report, "Achieving success with a Flexible Workplace" (2012) (http://www-935.ibm.com/services/us/en/it-services/mobility-services.html). Also see Forrester Consulting's June 2012, A Custom Technology Adoption Profile Commissioned By IBM, "Provisioning A Flexible Workplace Pushes The Boundaries of IT And Drives A Search For Outside Help."

[11] Vox Mobile is the founding partner in the Global Enterprise Mobility Alliance, an independent Swiss-based joint venture whose members include Vox Mobile (USA), Navita (Brazil), Beijing Nation Sky Network Technology (China), Schiffl (Germany), EMS (UAE), and MSC Mobility Solutions (Australia). DMI recently won a contract from the US Defense Information Systems Agency (DISA), worth up to $16 million over three years, to build the Defense Department's MDM system (hybrid Mobile Iron MDM and Fixmo container technology for email and web browsing protection), and also a mobile apps store. In May, DISA expanded its list of acceptable devices for military and government employees, approving Apple iOS 6, BlackBerry Z10 and Q10, and Samsung Galaxy S4. Source: Aliya Sternstein, "Pentagon Denies Inadequately Vetting Defensewide Smartphone Security Service," Nextgov, July 18, 2013 (http://www.nextgov.com/mobile/2013/07/pentagon-denies-inadequately-vetting-defensewide-smartphone-security-service/66938/); Bob Brewin, "DISA Awards $16 Million Contract to Manage Mobile Devices," Nextgov, June 28, 2013 (http://www.nextgov.com/mobile/2013/06/disa-awards-16-million-contract-manage-mobile-devices/65762/?oref=ng-HPtopstory).

In July 2013, GEMA entered into a partnership arrangement exclusive to MDSL that applies worldwide. Under the terms of the partnership, any global agreement negotiated by GEMA will use MDSL's TEM software platform and global procurement capability. Source: "GEMA Forms Partnership With Telecom Expense Management Provider MDSL To Boost Global Managed Mobility Offering," GEMA press release, July 9, 2013 (http://thegema.com/mdsl-forges-mobile-partnership-with-gema-global-enterprise-mobility-alliance/).

[12] Forrester's survey of global software decision-makers in Q4 2012 shows that 43% of global software decision-makers have purchased or developed one to five mobile app for employees during the past two years, and 16% purchased or developed six or more apps for employees. Source: Forrsights Hardware Survey, Q3 2012.

Employees also are downloading mobile apps used for work onto their smartphones or tablets via consumer channels. As a result, apps used for work are coming from a variety of sources, including cloud offerings, consumer app stores, independent software vendors (ISV), and in-house development. Given the increasing diversity of mobile apps (and devices in companies with a mobile BYOD program), IT needs to provide a baseline level of security across a wide range of devices, platforms, and development architectures. Issues to address include: 1) determining which apps each employee can access; 2) determining how employees get access to specific data; and 3) establishing the process to secure data while in transit to the application or while it is at rest on the device. For a discussion about why it's important for enterprises to develop their corporate mobile app management strategy to include five core components, one of which is protection, see the May 30, 2013, "Apps Everywhere: Understanding The Need For Mobile Application Management" report.

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