Asia/Pacific Enterprise Mobility 2015: 
Building a Mobile First Enterprise

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Research Director, Telecommunications Australia
### 2015 Mobility Highlights

| $22B | APeJ 2015 Mobility Spend |
| 1 BILLION | Smartphones & Tablets ship in APeJ |
| 9.2hrs | Monthly Mobile Internet Access per User |
| 23% | OF Advertising Spend is Mobile |
| 650M | Mobile Only Internet Users |

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USERS
(Workers, Partners, Customers)

WANT

MOBILE ACCESS
to everything
SO WHAT?
ENTERPRISE MOBILITY IS NO LONGER ABOUT DELIVERING SOLUTIONS TO THE FEW.

RATHER, IT DELIVERS AGILITY, FLEXIBILITY, ENGAGEMENT TO THE MANY - CUSTOMERS, PARTNERS AND EMPLOYEES ALIKE.
# The Five Stages of Maturity

<table>
<thead>
<tr>
<th>Stage</th>
<th>Maturity Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ad-hoc</td>
<td>BYOD, Corporate-liaible devices, Hosted MDM</td>
</tr>
<tr>
<td>2</td>
<td>Opportunistic</td>
<td>Defined mobile strategy, Security focus, Mobile enterprise mgmt (EMM), CYOD</td>
</tr>
<tr>
<td>3</td>
<td>Repeatable</td>
<td>Mobile enterprise app platforms (MEAP), Mobile UC, Horizontal apps, Consumer apps</td>
</tr>
<tr>
<td>4</td>
<td>Managed</td>
<td>Line of business apps, mCommerce/mPayments, Mobile application lifecycle mgmt, Wearables</td>
</tr>
<tr>
<td>5</td>
<td>Optimized</td>
<td>Mobile first strategy, Applications per user profile, Rapid application development</td>
</tr>
</tbody>
</table>
Enterprise Mobility MaturityScape Methodology

Objective
To assess Asia/Pacific Enterprise Mobility industry’s *level of maturity* by *country* and *vertical*

Sample Size
2,000+ companies across 11 countries

Evaluation Criteria
- Current mobile deployments
- Mobile strategy
- Security
- Funding
- Physical resources
- Infrastructure & platforms

Source: IDC Mobile MaturityScape, Nov 2014
Enterprise Mobility MaturityScape 2013 Results

- Stage 1: Ad Hoc
- Stage 2: Opportunistic
- Stage 3: Repeatable
- Stage 4: Managed
- Stage 5: Optimized

Source: IDC Enterprise Mobility MaturityScape, July 2013
Enterprise Mobility MaturityScape 2014 Results

Source: IDC Enterprise Mobility MaturityScape, September 2014
## Enterprise Mobility MaturityScape 2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Stage 1 Ad Hoc</th>
<th>Stage 2 Opportunistic</th>
<th>Stage 3 Repeatable</th>
<th>Stage 4 Managed</th>
<th>Stage 5 Optimized</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>57.3%</td>
<td>11.4%</td>
<td>3.8%</td>
<td>3.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>2014</td>
<td>14.5%</td>
<td>36.6%</td>
<td>30.9%</td>
<td>9.6%</td>
<td>0.5%</td>
</tr>
</tbody>
</table>

### A CHANGING MARKET

Source: IDC Enterprise Mobility MaturityScape, September 2014
Enterprise Mobility MaturityScape Conclusions

1. Enterprises are finally moving beyond the device and focusing on the apps

2. Large vendor’s focus on Enterprise Mobility is driving market maturity

3. It is still early days - the true opportunities for vendors and customers lie ahead of us

Source: IDC Enterprise Mobility Practice, 2015
The 3rd Platform creates a hyper-disruptive era

“Born in the 3rd platform” companies cause significant market disruption
Who are the Disruptors?

1. Identify “underserved” customer segments
2. Leverage the 3rd Platform to deliver a better service
3. Traditional industry boundaries don’t matter
The 3rd Platform will transform your business

70% of global organizations are already transforming, but…

80% of Asia/Pacific-based organizations are not equipped to harness 3rd platform technologies to compete in the new marketplace

Source: IDC Asia/Pacific C-Suite Barometer 2014, Feb-April 2014 (N=483 CIO, 563 CEO/LoB)
IDC Asia/Pacific MaturityScapes

<table>
<thead>
<tr>
<th>Stage of Maturity</th>
<th>Traditional Companies</th>
<th>Market Disruptors</th>
</tr>
</thead>
<tbody>
<tr>
<td>No/unclear strategy</td>
<td>11% 33% 55%</td>
<td>12% 31% 22% 32% 2% 0% 0%</td>
</tr>
<tr>
<td>Stage 1 Ad Hoc</td>
<td>8% 15% 37% 31%</td>
<td></td>
</tr>
<tr>
<td>Stage 2 Opportunistic</td>
<td>2% 27% 26% 20%</td>
<td></td>
</tr>
<tr>
<td>Stage 3 Repeatable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stage 4 Managed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stage 5 Optimized</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>

Source: IDC Asia/Pacific 4-Pillar Maturity Models, 2013/2014
Deeper look at Australia
## Top 5 Mobile Initiatives

### Australia
- Mobile network security, access and identity management solutions
- Implement a **BYOD** management solution
- Integrate mobility into existing IT infrastructure
- Moving **EXTERNAL** operations, services & apps to mobile
- Moving **INTERNAL** operations, services & apps to mobile

### APeJ
- Integrate mobility with existing IT infrastructure
- Mobile network security, access and identity management solutions
- Defining a mobility strategy
- Moving **INTERNAL** operations, services & apps to mobile
- Moving **EXTERNAL** operations, services & apps to mobile

Australia beats APeJ mobility mgmt average

Does your company use a mobility management solution?

<table>
<thead>
<tr>
<th></th>
<th>Yes, Mobile Device Management (MDM)</th>
<th>Yes, Mobile Device and Application Management (MEM)</th>
<th>MEM and mobile networking security solution</th>
<th>No, but where are current evaluating or testing solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Australia</strong></td>
<td>25%</td>
<td>27%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>APeJ</strong></td>
<td>19%</td>
<td>18%</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Australia scores strongly for advanced strategies

For which areas do you have a Mobile Strategy?

- BYOD: 47% (APeJ), 49% (Australia)
- Mobile apps: 52% (APeJ), 56% (Australia)
- Mobile security: 46% (APeJ), 57% (Australia)
- Mobilizing internal ops: 39% (APeJ), 43% (Australia)
- Mobilizing external ops: 33% (APeJ), 35% (Australia)
- Drive bus growth through mobility: 35% (APeJ), 36% (Australia)
- Improve customer experience: 51% (APeJ), 68% (Australia)
- We have no mobility strategy: 10% (APeJ), 7% (Australia)

The Enterprise Mobility Ecosystem

Source: IDC Mobility Practice, February 2014
## Top 5 Challenges with Mobile Solution Implementations

### Australia

1. Lack of roadmap
2. Security & compliance
3. Integration of mobile applications
4. Lack of mobile strategy/business case
5. Too long to implement

### APeJ

1. Security & compliance
2. Cost overruns
3. Integration of mobile applications
4. Concerns over ROI
5. IT infrastructure not in place

The Australian Enterprise Mobility Ecosystem

Application strategies designed to accommodate business needs and drive growth

Devices ecosystem less fragmented, thus facilitating holistic management

End user strategies tend to be well defined and executed

Security, management and infrastructure integration on par with leading countries

Service providers, Telcos and SIs offer integrated services

Source: IDC Mobility Practice, February 2015
Emerging Trends in Enterprise Mobility
#1

CONTAINERS

are the new MDM
Percent of respondents looking for a container or sandbox mobile security solution

- APeJ: 50%
- Australia: 65%
#2

PC TABLETS

drive next wave BYOD
2-in-1 convertibles show a 20% CAGR through 2018
WEARABLES
enter the Enterprise
Solution use cases include lone worker protection, job scheduling and time monitoring.

### EMPLOYEE TRACKING

- **39%** China
- **34%** Worldwide
- **31%** Singapore
- **30%** South Korea

Source: IDC Worldwide Internet of Things Survey, Sept 2014 WW=949

Percent of companies that have deployed or plan to deploy employee tracking solutions.
Corporate Wellness Initiatives

1. Founded on the belief that healthy workers = happy workers
2. Assist in increasing employee retention
3. Realise reductions in insurance rates
Changing the customer relationship

By creating, improving or enhancing business models
The Future Band/Watch Solution Provider

Sports Retailer: equipment and clothing

Sports Nutrition: vitamins and supplements

Mobile Advertisers: free service for data

Hospitals: remote patient diagnostics

Pharma Firms: trials or impact measurement

Insurance Companies: “usage-based” medical insurance

Source: IDC Asia/Pacific Mobility Practice, 2015
Essential Guidance
The basics remain the same

- Identify your strategic partners
- Build the business case
- Perform a skills gap assessment
- Assess the security risks

Source: IDC Asia/Pacific Mobility Practice, 2015
Align your strategies

Make mobility a part of your overall 3rd Platform strategy. Avoid siloed strategies as they tend to fail.
It’s all about the users

1. Who are they?
2. What devices do they use?
3. How do they interact and transact?
4. How does this impact internal processes?
5. What risk does this create?
Prepare for the future

1. It will only get more complex
2. Use 3rd platform technologies to drive growth
3. Beware the disruptors