

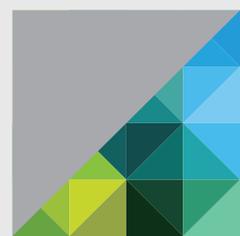


VMware: Mobile Rebels

Executive Summary June 2013

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Contents

About the research	3
Objectives	4
Overview	4
Key findings	5
The demand for ‘mobile’ reaches new heights	5
Mobile rebels with a cause	6
IT departments are out of sync with employee requirements, and they know it	7
Action is starting to take place	8
The data danger of IT not getting involved	10
Summary: Action needs to be taken	12
About VMware	13
About Vanson Bourne	13

About the research

- The VMware Mobile Rebels study was conducted on behalf of VMware by Vanson Bourne
- 250 IT decision makers (ITDM) and 500 office workers were interviewed in each of the following regions: UK, France, Germany, The Netherlands, Italy and the Nordics (Sweden, Norway, Denmark and Finland)
- In total, 1,500 IT decision makers (ITDMs) and 3,000 office workers were polled during March and April, 2013
- Respondents came from organisations with employee numbers ranging from 100 to 5,000+. The sample was split evenly across the following employee number ranges: 100 - 249, 250 - 499, 500 - 999, 1000 - 4999 and 5000+



Objectives

VMware commissioned the study to provide a better understanding of the pressures European businesses are facing managing mobile devices and applications in the workplace. It reveals just how dependent employees have become on their mobile devices, the motivations behind using them for work and exactly how these are driving new, smarter ways of working.

The Mobile Rebels study highlights how equipped (or otherwise) organisations are to respond to the increasing adoption of mobile technology and the complexities of introducing formal strategies in support of this. Finally, the study identifies and outlines those measures that are being put in place to boost business productivity and employee satisfaction.

Overview

The study revealed that across Europe there is an emerging class of mobile rebels with a cause, a new wave of office workers using their mobile devices to their own advantage and for the benefit of the business. These workers are taking it upon themselves to harness the power of mobile tools and applications to drive innovation and more effective ways of working.

What also becomes clear is the strong desire of workers to access and use these mobile devices, often to deliver more personalised working styles. In fact, more than a third would consider leaving their organisation if told they couldn't use their device for work, suggesting that the ubiquity of smartphones and tablets has truly extended to every aspect of business life – even talent retention.

Crucially, the Mobile Rebels study highlights that IT departments are out of sync with employee requirements - and they know it. Both office workers and IT decision makers agree that organisations and IT departments throughout Europe cannot meet the mobility needs of today's workforces. And with the dependency on mobile tools only set to escalate, it's an increasing management issue and security challenge that IT departments are facing.

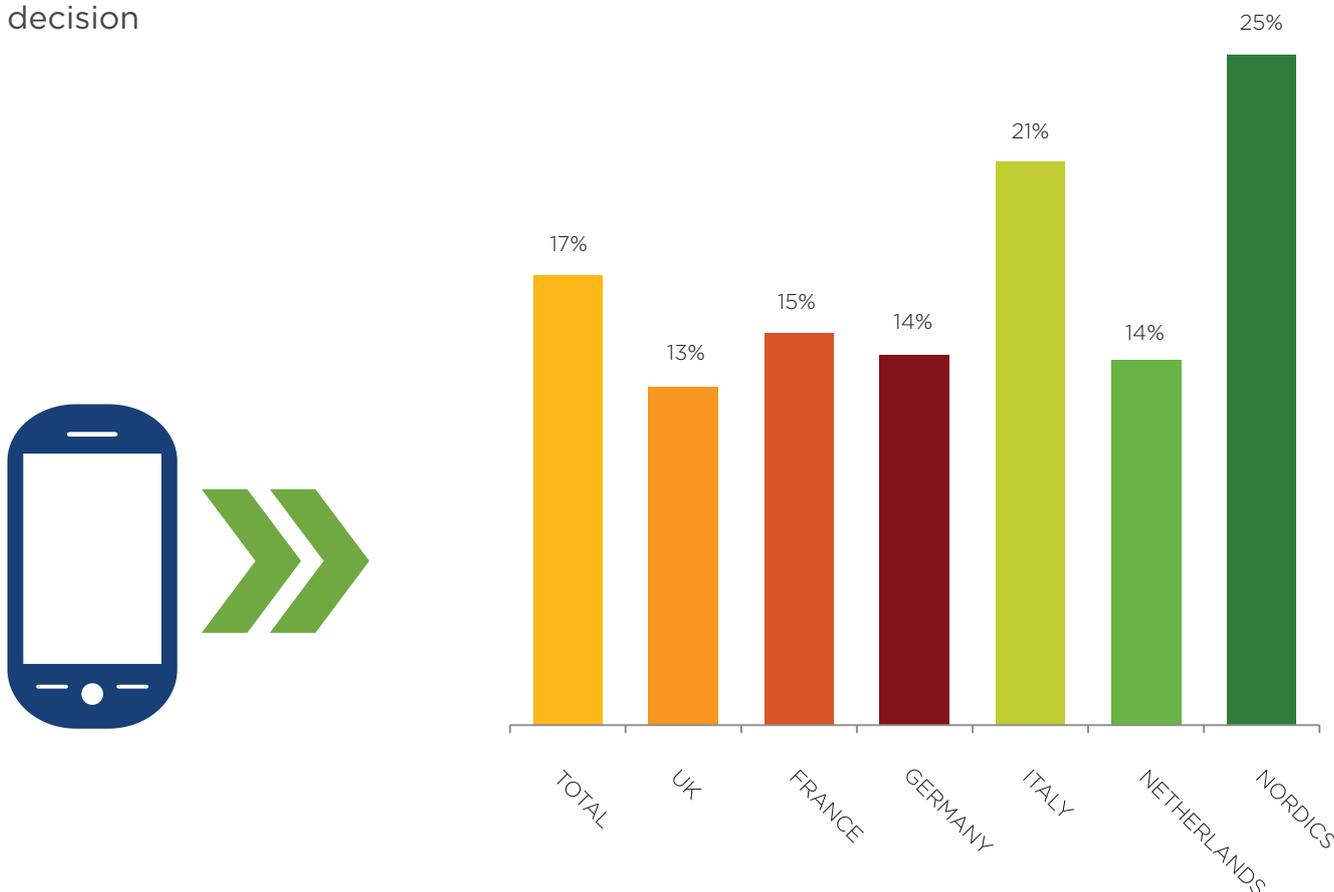
Key findings

The demand for 'mobile' reaches new heights

Mobile technology provides a mechanism to improve how we do business on a daily basis, promising increased flexibility, new ways of working and better responsiveness - something office workers in Europe are capitalising on. Such is the strength of their connection to their personal devices, 39% said they would consider leaving their current job if they couldn't use their smartphone or tablet for work. This rose to 46% for knowledge workers and 53% for those office workers who have already used their device for work.

It's clear that once employees have experienced the benefits of mobile tools it's difficult to let go. Delving deeper into this, almost a fifth of employees (17%) admitted that if they were thinking of moving to a new organisation but this organisation did not support BYOD (Bring Your Own Device), this would factor in their decision to change companies. This rises to 28% when accounting for those who have already used a device for work. The takeaway for businesses here is that the significance attached to mobile tools and applications has reached a point where it's now a factor in attracting and retaining talent and ensuring a content workforce.

The percentage of workers that, when considering moving to a new organisation, declare BYOD support as a factor in their decision

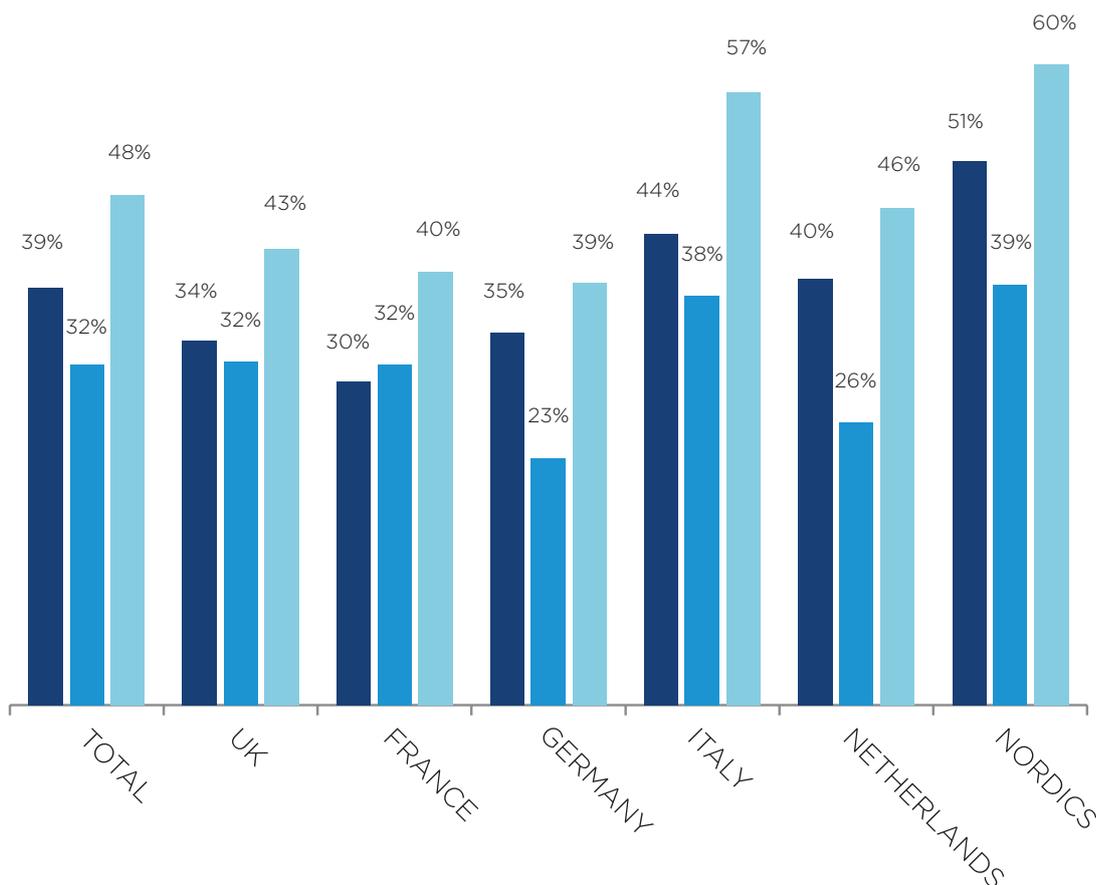


Mobile rebels with a cause

The research reveals that European office workers are rebelling, but rebelling with good intentions, as they strive for smarter ways of working. More than a third (39%) have used a personal device to access, store, forward, receive or edit a work document or data and 32% would be willing to circumvent the IT department to obtain the mobile tools or mobile applications they need to get the job done.

What's key is that this 32% of workers are not 'mobile rebels' looking to break the rules so they can show off their new smartphones and tablets. This is a new tranche of employees who know how powerful their mobile devices and applications can be to their work and are determined to make this a reality, for the good of their companies.

The ways in which office workers are using mobile technology



- Q1** Those who have ever accessed, stored, forwarded, received or edited a work document or data using a personal mobile device
- Q2** Those who would be willing to circumvent the IT department to obtain mobile tools or mobile applications you need to get the job done
- Said yes to either Q1 or Q2

IT departments are out of sync with employee requirements, and they know it

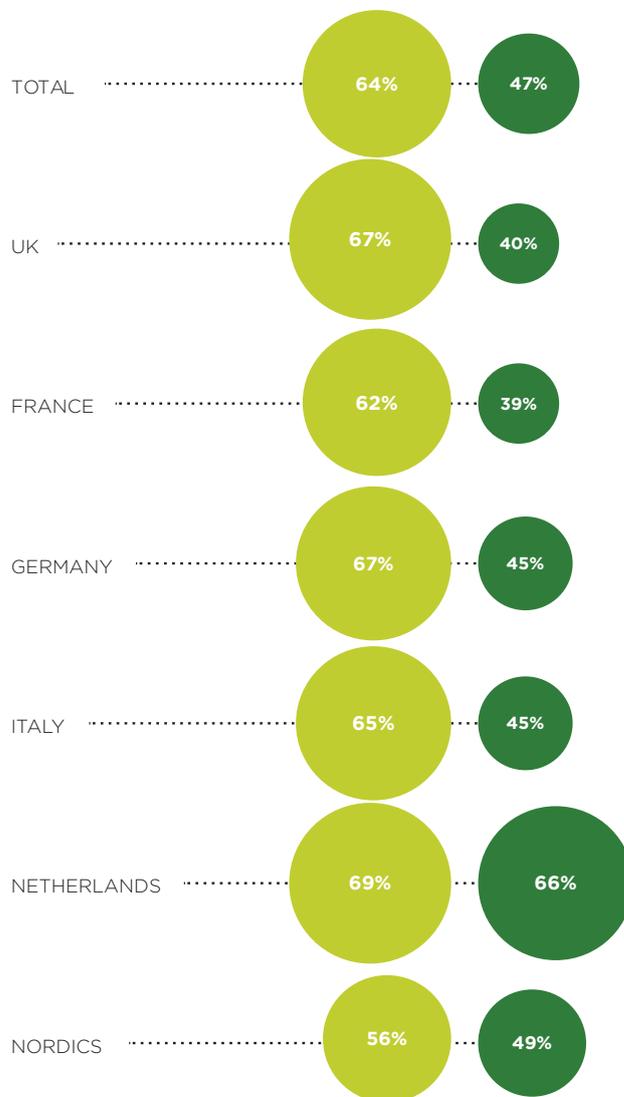
The Mobile Rebels study revealed alignment between office workers and IT decision makers on the issue of staff support for mobile tools and applications. Office workers might be striving for innovation and using mobile technology to support smarter ways of working but two thirds (64%) do not think their organisation provides them with the right tools to be productive and effective.

This lack of support is confirmed by IT decision makers in Europe, almost half (47%) of which admitted they do not agree that the IT department can meet the mobility demands of employees across the business.

There are numerous potential factors behind this. A major one is that, until recently, there has not been the technology available to allow the IT department to successfully embrace the latest mobile tools and applications, while bringing them under the umbrella of governance, security and control. Other possible reasons range from resourcing issues, security concerns, skill shortages or the need for more widespread education on the benefits of mobile working.

It's not that the IT department and workers are after different end results. The marriage of flexibility and resilience is sought after by both, but the IT department needs to get back on the front foot, to deliver the benefits of mobile technology within the appropriate management infrastructure and policy framework.

An inability to match the mobility demands of employees



■ Percentage of office workers who do not agree that their organisation provides them with the tools and applications to be productive and efficient

■ Percentage of ITDMs who do not agree that the IT department is able to meet the mobility demands of employees

Action is starting to take place

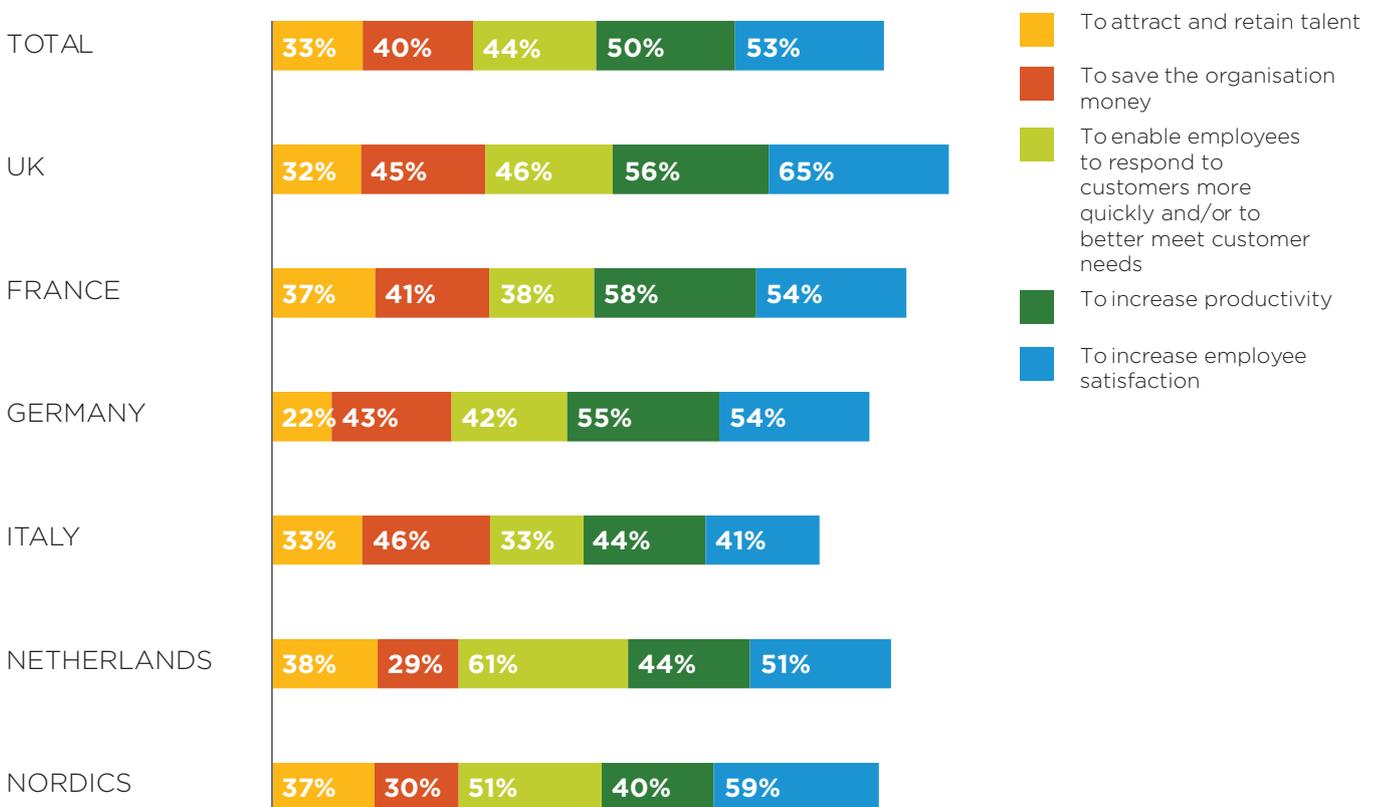
Fortunately, companies are responding to the situation and embracing BYOD, recognising its importance for the wellbeing, productivity and happiness of staff. Three quarters (72%) of European businesses said they have or plan to implement BYOD, with Italy and Germany being particularly proactive nations (81% and 80% respectively) either currently have a BYOD policy or intend to introduce one.

Breaking down the driving factors behind this further; more than half (53%) of ITDMs said they would implement a BYOD policy to increase employee satisfaction, half (50%)

said it was to boost productivity and a third (33%) said it was to attract and retain talent.

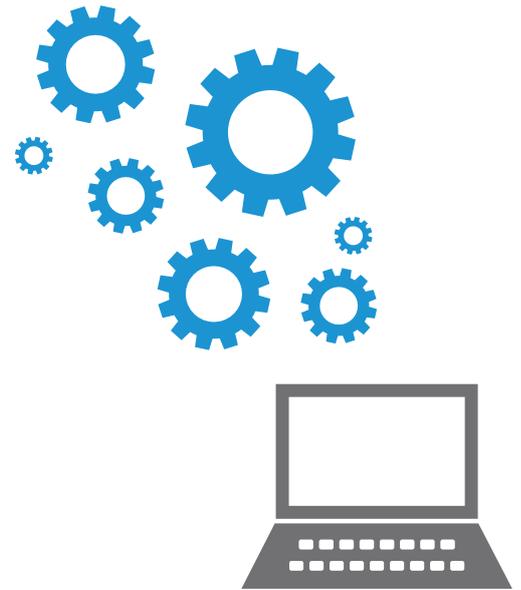
Within this there are some geographical variations in motives which help shed some light on the challenges and priorities of companies in each region. For example, the top explanation for implementing BYOD in Italy was to save money (46%), whereas in the UK the number one reason was to increase employee satisfaction (65%) and in the Netherlands it was to enable employees to respond to customers more quickly or better meet their needs (61%).

Motivations for implementing a BYOD policy

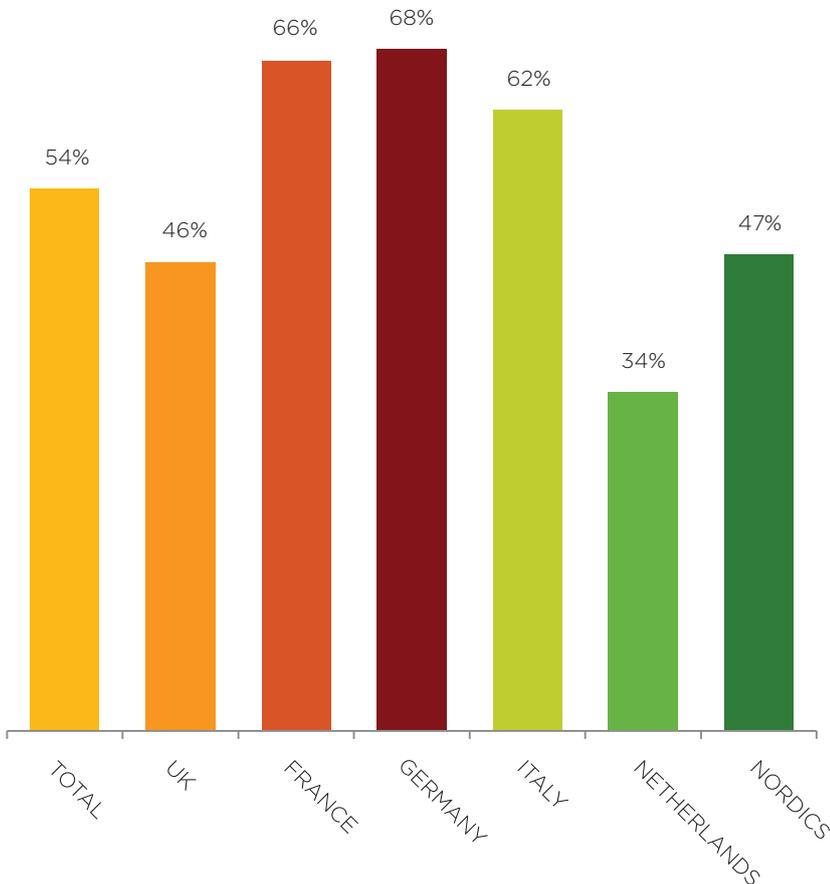


Above and beyond the BYOD adoption, it's encouraging to note that more than half (54%) of IT decision makers are or will be designing systems and policies that assume employees are mobile and working remotely by the end of 2013. This will help to improve employee productivity regardless of their location.

While we don't have a completely consistent European picture (68% of IT decision makers in Germany will be designing policies assuming mobile working but just 34% will be doing the same in the Netherlands), the vast majority of businesses evidently consider this a priority area of focus.



The proportion of companies designing systems and policies assuming employees are mobile and accessing data remotely as the norm rather than the exception



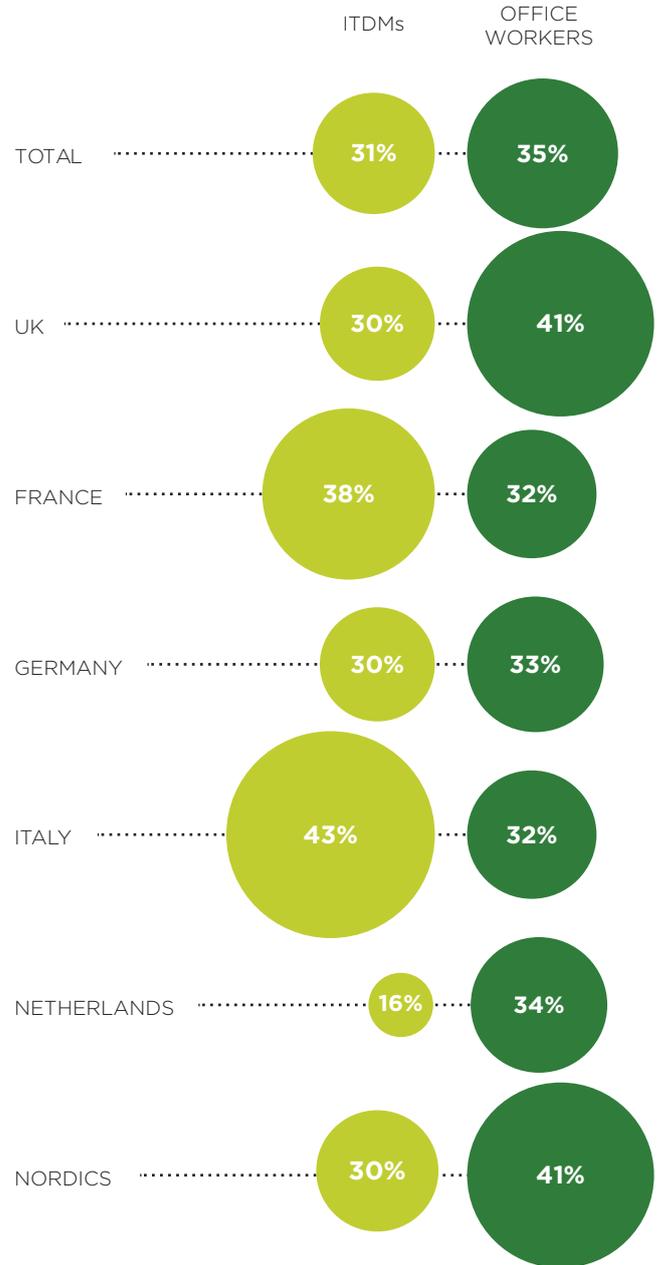
The data danger of IT not getting involved

The study revealed that as many as 39% of employees have accessed, stored, forwarded, received or edited a work document on a personal device – varying from 30% in France to 51% in the Nordic countries. IT decision makers are aware of this; almost two thirds (62%) of IT decision makers in EMEA believe that company data is being stored on employee personal devices, a trend most prevalent in UK organisations (69%).

Of those that do suspect this, only 51% are confident that the information is not commercially sensitive, implying that there is a substantial risk to company data which needs addressing. Worryingly, 45% of senior management who are aware of the issue are not concerned or don't believe it is a priority.

The proportion of IT decision makers lacking confidence in the sensitivity of the data their employees store varies drastically by country; with confidence as high as 73% in Italy and as low as 29% in the Netherlands. And there's justification for such confusion and uncertainty – only 35% of office workers themselves are confident that the data they store on personal devices is not commercially sensitive, with the vast majority unable to say either way.

How confident are businesses that information stored on personal devices is NOT commercially sensitive



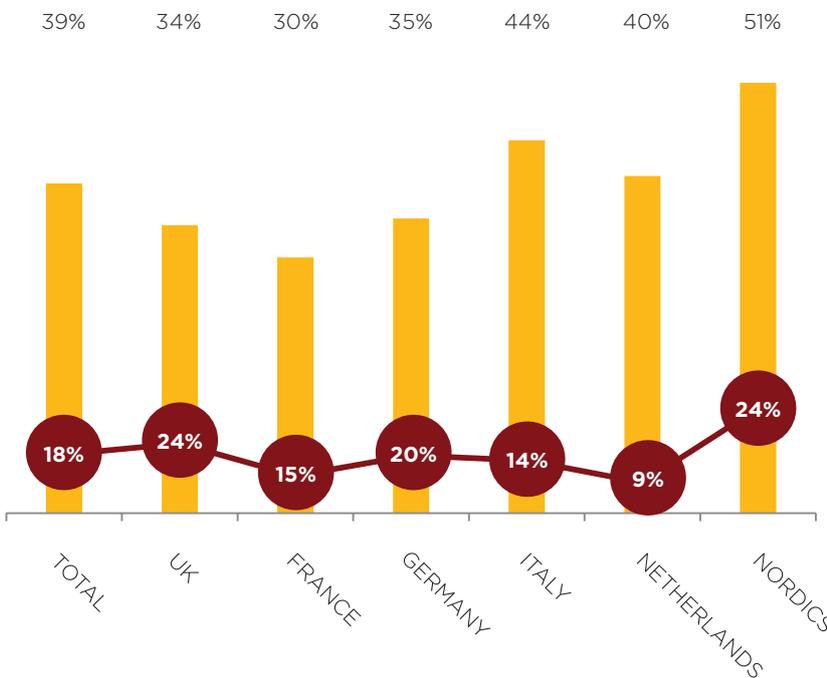
Percentage of all ITDMs that are confident that company data being stored on personal devices is NOT commercially sensitive

Percentage of all office workers that are confident the company data stored on their personal mobile devices is NOT commercially sensitive

However, crucially, of those that have done this, less than a fifth (18%) have been disciplined over it. This is likely to be because companies do recognise that there are business benefits to its employees working remotely, as they are able to respond to client needs and remain productive on the move. There are also grey areas around mobile policies, making it difficult to discipline staff.



Have you ever accessed, stored, forwarded, received or edited a work document or data using your personal mobile device?



The bottom line is that there's a significant amount of data and information being processed on personal devices without formal mobility policies supporting this and without action being taken to rectify it. Open communication and dialogue between office workers and IT departments is vital to ensure sensitive information is not compromised by being accessed on a personal device when the measures are not in place to maintain resilience.

- Percentage of office workers who have accessed, stored, forwarded, received or edited a work document or data using your personal mobile device
- Percentage of these office workers who were disciplined for it

Summary: Action needs to be taken

Throughout Europe, the ubiquity of personal smartphones and tablets, and employee reliance on these, is helping to boost productivity, drive innovation and deliver growth for companies through new and improved ways of working. There might be a perceived mobile rebellion going on, but these are rebels with a real cause.

Within this context, a significant proportion of IT departments are not able to meet the growing mobility requirements of their employees, and productivity and efficiency gains are becoming missed opportunities because formalised mobile policies and infrastructure have not been put in place.

The accompanying security and management issues are also very real. Where workers aren't provided with the required mobile resources, they will take the initiative and instigate change themselves. They are the driving force pushing for faster adoption of technology within companies. However, without the formal mobility strategies to protect data and boost staff productivity in a resilient way, a competitive edge risks becoming a data danger.

It's down to businesses and IT departments to consider implementing solutions such as BYOD, using an integrated workforce mobility approach. From a management perspective, this will allow the IT department to embrace the new technology landscape without compromising information security or business resilience. From a company perspective, this will help improve workforce productivity, gain faster access to new innovation, achieve differentiation and remain competitive.



About VMware

VMware is the leader in virtualization and cloud infrastructure solutions that enable businesses to thrive in the Cloud Era. Customers rely on VMware to help them transform the way they build, deliver and consume Information Technology resources in a manner that is evolutionary and based on their specific needs. With 2012 revenues of \$4.61 billion, VMware has more than 500,000 customers and 55,000 partners. The company is headquartered in Silicon Valley with offices throughout the world and can be found online at www.vmware.com

About Vanson Bourne

Vanson Bourne, a specialist research-led consultancy, carries out user research within a technology context. The company interviews senior decision makers from a variety of functions, across a whole range of industries, in organisations from the smallest to the largest, in markets around the globe. Vanson Bourne's clients range from start-ups to well-known companies that need expert guidance, delivering robust and credible research-based analysis.



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