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# SHARE AND GUIDE SHARE EUROPE MOBILE COMPUTING SURVEY

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## INTRODUCTION & RESEARCH OBJECTIVES

Mobile devices including BYOD, corporate-provided smart phones, and now media tablets are rapidly becoming a primary device for access to more than just email and texting. Mobile application users are presenting new challenges to in-house IT departments, as they demand access to business-critical data and processes from mobile devices. Mobile device proliferation and application development and management, represents a paradigm shift in both enterprise and personal computing. Information technology departments are struggling to provide comprehensive enterprise security, mobile device management, and access for employees, consultants, and partners to business-critical enterprise information.

The primary objective of this research is not so much to ascertain what current mobile devices are in use, but how they will impact the data center and the state of integration with mobile applications and business-critical back-end data sources. Additionally, we explore the current state of the organizational mobile application development environment, its challenges to IT, and how organizations are managing and deploying mobile devices and applications. According to recent market research studies, more than 90% of organizations have already deployed smart phones, and a growing tsunami of media tablet use is on the horizon.

This study, conducted among the members of the SHARE users group and GUIDE SHARE EUROPE, was fielded during November and December, 2012. SHARE is an independent, volunteer-run association, providing enterprise technology professionals with a community delivering continuous education and training, valuable professional networking and effective industry influence. GUIDE SHARE EUROPE is a non-profit association of companies, organizations and individuals who are involved in information and communication technology solutions based on IBM architectures. The research was sponsored by IBM and conducted by Unisphere Research, a division of Information Today, Inc. All respondents were volunteers and none were paid to take the survey.

The first section of the survey instrument (questions 1–18) is more general in nature and relates directly to internal issues, including mobile device use, security, management, organizational policies and the impact of mobile device and application deployment on organization/enterprise IT departments and infrastructure. The second section of the survey instrument is focused on mobile applications, and profiles the primary mobile application development platforms, the challenges in extending mobile applications, the testing, development, and management of mobile applications, along with how IT organizations are addressing management of mobile applications.

## EXECUTIVE SUMMARY

The majority of survey respondents are IT professionals with knowledge of their organization's mobile device management and mobile application development plans. Of the 537 survey respondents, only 100 indicated that they were directly involved in the management and development of mobile applications, the remainder are assumed to be mobile device and application users that are aware of or are involved in the management of mobile devices.

Organizations are just now beginning to develop and integrate mobile applications with back-end data sources, and therefore many of the issues associated with this integration outside of traditional application management such as security and lifecycle management are not yet well known. A broad spectrum of industries participated in the survey, with financial services, professional services, high tech, and the public sector being the most prominently represented. There was a good response from small medium and large organizations with nearly equal distribution.

### Section One: Corporate Use of Mobile Devices for Anytime, Anyplace Access

- Most organizations provide mobile devices, support BYOD and reimburse users for mobile device use.
- Apple and Google smart phones and tablets are heavily used (especially tablets) although the Blackberry smart phone is the most widely used.
- Organizations are more concerned about the security and management of BYOD and mobile devices overall. However, many mobile device users did not know which security model was in place or know about policies such as mobile device encryption or locking/wiping of devices if lost.
- Security, especially user authentication and back-end data access, was of significant concern to many organizations and cited as having the most impact on IT departments. Nearly half of the respondents indicated that their organization supplied mobile application encryption.
- Organizational mobile application access is in an early stage of development as most users cited email, VPN, and text messaging as their most important applications. Business intelligence and CRM application were cited as the second most important mobile applications.
- Security, mobile device management tools, and application management, along with application interface design, will have the most impact on data centers.
- Mobile is about anytime, anywhere access and increasing productivity, as quicker access to customer data, improved

customer satisfaction and support, customer access to business functionality, and the ability to respond to customer demand were cited as the most important business functions.

- Customer feedback on products, support, and service was the most vital information followed by customer interests and habits.
- Organizational plans to deploy location- or context-based mobile services to consumers were largely unknown to the sample base.

### Section Two: Developing Applications for Consumer Use

- The majority (34%) of the organizations indicated that they had 1–25 developers working on mobile application development and budgets for application software development ranged widely.
- Windows is the primary mobile application development environment followed by UNIX/Linux.
- Browser-based access is the primary mobile application delivery model.
- Security, deployment, and UI deployment/management represent the greatest challenges in extending mobile devices and applications to the organization.
- User experience and security testing were ranked as the most important in mobile application testing.
- Distributed environment developers are the primary developers involved in mobile application management.
- Speed to development, cost reduction, and integration are the most important priorities in mobile application development.
- Top mobile application lifecycle management challenges:
  - Complex back-end integration
  - Managing changing requirements
  - Version control of OS
  - Consistent, reliable build processing
- Lowering costs, standardization, and improved application quality are the biggest benefits in leveraging existing applications for mobile applications.
- IDEs are the number-one platform for building, deploying, and testing application changes.
- Lack of tool integration and process control were cited as a challenge to coordinating development teams.
- Separate, dedicated LPARs are used for development and this addresses CPU balancing issues.
- Notifying teams about automated testing and build errors are the top parameters used to provide quicker feedback to development teams.



**EMEA Insights:**

There was no significant difference in responses from EMEA and ROW participants (EMEA had <100 respondents) and the data trended very closely to the overall findings. In fact, the statistical similarity between the overall data set and EMEA data further reinforces that organizations are just at the beginning of

deploying and managing mobile applications with integration to business-critical back-end data sources such as CRM or ERP transactional data. IT departments, in general, are primarily concerned with security and management of mobile devices and re-writing mobile user interfaces for existing enterprise applications.

## Does the presence of mobile devices significantly impact your organization's IT department in the following areas?

