



Technology Brief...

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Research, Analysis, Strategy, Insight

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EMM: What are Enterprises Actually Using?

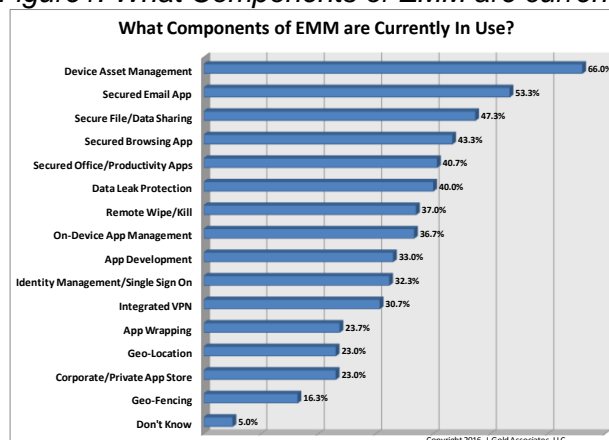
There has been lots of discussion about the role of Enterprise Mobile management in keeping mobile-centric companies (and which companies aren't today) secure and managed. And there are a large number of vendors that provide EMM tools: from complete suites (e.g., BlackBerry, Citrix, IBM/MaaS360, MobileIron, VMWare/AirWatch), to smaller niche-oriented players (e.g., Apperian, Mocanna, Kony). And while we consider EMM to be a very important tool in the enterprise IT management toolkit, there seems to be a mixed bag as to how these tools are getting used.

To get a better idea of what functions/components of EMM suites companies are actually deploying, we surveyed approximately 300 mostly large enterprises. We asked a wide ranging series of qualifying questions about demographics, industry, budgets, decision makers, types of apps deployed, etc. For purposes of this discussion, we will concentrate on what components of a complete EMM solution they have deployed, as well as what they plan to deploy in the future.

Figure 1 is an indication, sorted by most popular, of the components our respondents said they had deployed. And despite all the vendor hype about needed a full suite of capabilities, the majority of organizations still go for the high value, easiest to deploy components. Indeed many components of full suite EMM have only marginal deployment.

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Figure 1: What Components of EMM are currently in use?



Let's examine why. First, MDM is the most basic capability that everyone needs, and is also relatively easy to deploy. Asset management is the primary goal of MDM, and also what most organizations desire first. In our experience, many

organizations never move beyond MDM even if they have other components available. The second most popular capability deployed is secured email. Email was one of the key drivers of mobility to begin with, and with the advent of BYOD and move away from universal BlackBerry deployments, organizations had to find a way to deal with keeping corporate communications safe across all platforms. Indeed Good Technologies (now part of BlackBerry) was founded on this premise, and many of the other EMM vendors made their early mark in the industry on email security (e.g., MobileIron).

The third most popular component, secure file/data sharing is critical now that most mobile devices have moved well beyond simple messaging platforms. Indeed, with some much applications running on these devices, securing the data transported to and from the device is critical. Fourth on the preference list is secured browsing followed closely by secured productivity/office apps. Again, this is a reflection of the move towards mobile devices becoming a competent client in the mobile worker arsenal, with more of them using mobile devices as the primary device for an increasingly large share of their work day.

Bottom Line: The most popularly deployed components of EMM suites are those that directly affect the day to day operations of the mobile device and the user experience. There are many “nice to have” components as well (e.g., geo location, geo fencing, single sign on) but these are generally higher order derivatives that don’t often get priority deployments when management and user experience are primary concerns. Organizations should continue to focus on the components that add the most value to their IT management and user productivity capabilities, and worry less about whether they have a complete EMM suite deployed.

The Battle for the End User Workspace

Enterprises have been struggling with how best to enable the myriad of mobile workers with varying work styles and a plethora of device choices. Indeed, equipping the workforce with apps across many platforms, including some individual workers who have adopted a multi-platform approach, has been tremendously difficult and often costly. Technology moves much faster than companies do, but companies that want to stay in business need a bridge to integrate old legacy apps with new ways of employees doing business. Few companies have done it well.

However a new paradigm is beginning to emerge for a diverse mobile workforce with a focus not on empowering individual devices, but on building a universal workspace that can function on virtually any device for any worker or workflow. This stands the traditional computing model of “mega-apps” tailored for individual devices doing specific tasks on its head.

This new model is being made possible as a function of the confluence of mobile, VDI, cloud and virtualized back office services. And it is changing the way enterprises deliver workspaces to their employees. It is being driven by BYOD and the need for security, enabled by technology, and heavily influenced by cost savings (hopefully). But this is not an easy transition in work style, and will likely take several years before it fully emerges.

The two primary vendors delivering this new “workspaces as a service” paradigm are Citrix and VMWare. But indications are that Google, BlackBerry, IBM and potentially Microsoft could adopt a similar model in the future. And while this is an attempt by the vendors to extend their current VDI market positions, it requires a

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major upgrade of enterprise infrastructure to pull off effectively.

What's required is a "disaggregation" of the typical app into components that can be connected together as needed to create a user workplace, similar to a Lego set that can create unique things with interchangeable components. It's about working toward a fully policy driven and managed workspace with customized, solutions through aggregated sources of data and information flow. The engine currently driving this solution is VDI and componentized cloud services, with a significant dose of device and app management, combined with an advanced amount of data sync and share capability. Citrix and VMWare's strengths in driving this market lie in the VDI capability they possess, along with the "bulking up" of device management they have been doing over the past couple of years, and a heavy focus on file sync and share technology. Without being able to integrate the various components effectively, the new app model doesn't work.

The primary benefit to enterprises using this approach is a capability to provide universal access to any user, on any device, in a secured and configurable workspace. But most companies do not have the infrastructure components in place to fully enable this. Further, many don't yet understand the benefits of this approach, as it goes well beyond the traditional VDI approach that many have been using for years. We do believe that this universal approach will catch on, but that adoption will be slow and enterprises will need to add significant infrastructure to make it happen. If done correctly, it adds a compelling ability to support almost any device from a centralized, secured and fully controlled infrastructure, thus reducing cost and complexity. But it also means that user experience, overall performance and latency, and policy/procedure refinements will have to be carefully considered to make this acceptable.

Bottom Line: Many enterprises would benefit from such an approach, but should move carefully as it requires a major commitment to infrastructure, IT management processes and education of the workforce. Current implementations also require vendor lock-in as integrated universal components are not available. Although the vendors say the staff and cost impact of their solutions is minimal, our experience in talking to customers does not bear this out. Although long term cost and security benefits can be great, the initial investments should not be underestimated. We expect that neither of the two major current vendors will have an easy time of extending the market in the short term.

IBM InterConnect - Courting Corporate Cloud

At its recent InterConnect conference, IBM made several announcements around extending its cloud infrastructure to enable enterprise app development, deployment and management. It extended the Bluemix cloud based app development environment with OpenWhisk to enable software built around event-driven microservices. It defined a cloud based environment to build mobile-centric Swift based apps as a extension of the work it is already doing to create mobile apps targeted at its collaboration with Apple to deploy iOS apps on smartphones and tablets. It created a cloud based enterprise GitHub software development service to leverage increased interest in the GitHub development ecosystem by corporate entities. And it moved to let enterprises implement a hybrid cloud by extending the IBM cloud to embrace existing VMWare virtual environments.

With these announcements and Bluemix and Watson as anchor points, IBM is moving to a leadership position in the emerging area of advanced cloud-based apps for new technologies, and in particular the growing world of IoT. IBM is tying

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its services directly to its Watson cognitive cloud-based services, as it rightly understands that the future of enterprise apps will require a cognitive component for actionable intelligence to supplement simple client app coding. And it is using its compelling Bluemix app creation ecosystem as the entry point to all things cloud, and particularly IBM cloud, as organizations try to solve the host of legacy application integration issues they face.

With Bluemix as a core app focus and Watson as a cognitive backend for informational requirements, IBM is betting heavily on a hybrid cloud architecture of internal enterprise and public cloud systems connected together that it believes will soon be the prevalent model in most companies. And while we agree that this is a preferred approach in the long term, in the shorter to midterm, IBM may have some difficulties getting companies to quickly make the move. Many companies that are not at the forefront of adopting new technologies are hesitant to make big moves quickly. But IBM does offer a way forward for those companies eventually.

IBM's growing reliance on its Apple partnership, including its commitment to offering a focus on Swift app development, may in the longer term be problematic. While there is considerable use of Apple's Swift technology in the market, it is much less prevalent in corporate development environments where more traditional cross-platform tools are embedded.

Nevertheless, IBM's continued push to be a leader in cloud based deployments, coupled with a growing range of cognitive services will serve it well in the emerging cloud-based wars, especially as it looks over its shoulder at competitors such as Amazon AWS, Google and Microsoft.

Bottom Line: IBM wants to establish a clear differentiated position from its primary cloud competitors. Watson is currently ahead of cognitive offerings from Google and Microsoft, and Bluemix, now with extensions to GitHub put it ahead of the pack for enterprise apps. But its bet on Swift may not materialize as a big advantage, as the other players are more aligned to traditional dev environments, and Microsoft's dominance in this position will likely remain. Nevertheless, we see IBM's moves as making it a leader in this space.

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J. Gold Associates provides advisory services, syndicated research, strategic consulting and in-context analysis to help its clients make important technology choices and to enable improved product deployment decisions and go to market strategies. We work with our clients to produce successful new product strategies and deployments through workshops and reviews, business and strategic plan coaching and reviews, assistance in product selection and vendor evaluations, needs analysis, competitive analysis, and ongoing expertise transfer.

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