The Evolution of the Mobile Workforce

Business mobility trends, technologies, and outlook

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Mobile workforce evolution: How did we get here?

The current state of workforce mobility

Results from the Omdia 2023 Future of Work survey paint a clear picture of how changing employee demands, economic pressures, a diverse threat and security landscape, and continued technological disruption continue to bring about business change. Evolving end-user computing, enhancing employee productivity and experiences, facilitating better communication and collaboration, and supporting more mobile-centric work styles and approaches have all jumped to the top of the digital transformation priority list, and businesses need the support of experienced partners and capable technologies to overcome challenges. As **Figure 1** shows, work has become increasingly mobile over recent years.
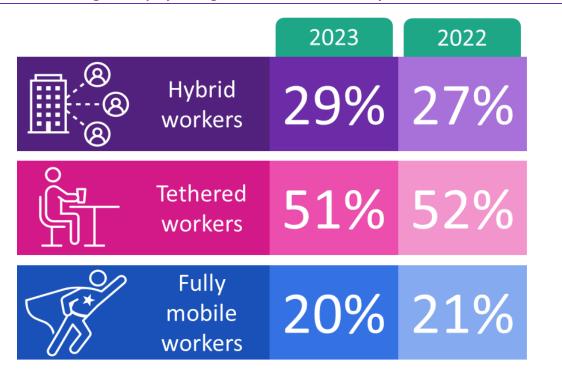
Figure 1: Percentage of employees aligned with different work styles

	2023	2022
Hybrid workers	29%	27%
Tethered workers	51%	52%
Fully mobile workers	20%	21%

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Source: Omdia

Omdia recommends that organizations not fall into the trap of overly focusing on work locations. Instead, a focus on developing resilient and digitally enabled organizations is key. Independent of the work location associated with a role, the challenge here for organizations is twofold:

- Invest in a secure and enabling digital infrastructure that supports all employees in doing their best work, independent of their physical location.

- Forge a culture that is inclusive of all employees. There should be no location-based compromises regarding people's practices and culture. Recognize the traits and values associated with different hybrid, fully remote, and in-office work styles and support all experiences.

Businesses are prioritizing digital infrastructure investments that help them better support and secure more diverse work styles. Investment in tools that help improve employee experience (EX) and productivity by providing seamless and secure access to the devices, data, applications, and collaborative channels have emerged as invaluable business assets. In this era of hybrid work, where the corporate headquarters is no longer exclusively represented by a brick-and-mortar office, digital workspace solutions have become crucial for businesses to manage their workforce effectively.

Evolving mobile infrastructure in line with changing employee needs

Mobile infrastructure can be complex to manage and secure because it often comprises many different elements and capabilities that extend across different teams and business units, as shown in **Figure 2**.
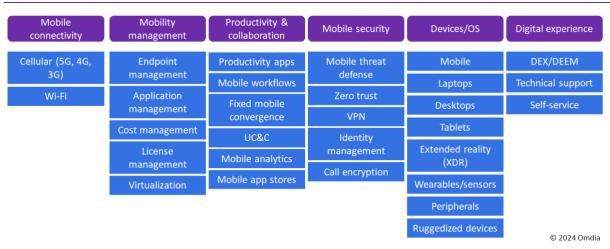
Figure 2: Business mobile ecosystems can be vast and complex

Mobile connectivity	Mobility management	Productivity & collaboration	Mobile security	Devices/OS	Digital experience
Cellular (5G, 4G, 3G)	Endpoint management	Productivity apps	Mobile threat defense	Mobile	DEX/DEEM
Wi-Fi	Application management	Mobile workflows	Zero trust	Laptops	Technical support
	Cost management	Fixed mobile convergence	VPN	Desktops	Self-service
	License management	UC&C	Identity management	Tablets	
	Virtualization	Mobile analytics	Call encryption	Extended reality (XDR)	
		Mobile app stores		Wearables/sensors	
				Peripherals	
				Ruggedized devices	

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Source: Omdia

As employees and their work move beyond the four walls of the office, organizations must prioritize investment in new digital tools and services that help enable and secure a more diverse, mobile-centric set of work styles. Businesses need to have a technology and support infrastructure that enables every worker across any location. Mobile has become an important and overarching theme central to the way that work is changing for many. We can see evidence of this when we explore the strategic goals for the future of work that are prioritized by businesses. According to Omdia IT Enterprise Insights survey data, the main future of work priority for digital IT leaders is to enable employees to work securely in a more mobile and hybrid fashion.

Becoming a more mobile-centric organization involves mobile becoming more richly and natively embedded in the collaboration, productivity, and security activities and processes that support how people work. Mobile is becoming a more important communication and collaboration modality in addition to becoming a more important means of business content curation and creation. Mobile also influences productivity, notably in how people consume important business data and information and in how mobile apps help improve people's interactions with business systems and workflows.

Mobility and the digital capabilities that help secure and enable it have become business critical and an important foundation of the broader digital infrastructures that organizations are building to optimally support a more mobile and hybrid workforce.

Enhancing mobile connectivity and collaboration for the entire workforce with mobile

In light of the often complex and siloed mobile ecosystems that organizations are reliant on, business mobile convergence, where the mobile device serves as a convergence point for employees to connect with others and access work resources securely and productively from any location, is becoming increasingly important. Managing mobile connectivity, productivity, devices, and apps in the same way as any other IT asset is imperative if businesses are to meet employees' evolved expectations while also optimizing adherence to regulations and security practices. Securing and enabling mobile-first collaboration has become a key business mobile trend. A more integrated and mobile-centric approach to employee collaboration is essential to enable the delivery of optimal employee experiences. Mobile work experiences are undergoing a significant transformation with the introduction of employee-focused communication and collaboration capabilities. Innovative solutions such as Teams Phone Mobile, Cisco Webex Go, and Tango Extend by Tango Networks will not only enhance employee productivity and collaboration but will also boost communication security. Improving connectivity and collaboration for frontline workers will be one of the most significant use cases for new mobile capabilities. According to Omdia estimates, frontline workers make up 60% of the total workforce. The opportunity to digitize and connect their work is immense, and mobile will play a crucial role in enabling this transformation.

Capabilities to empower and secure a mobile workforce

Building resilient and mobile-centric workplaces

To adapt to changing workplace trends such as hybrid work, cloud migration, digitization of frontline workers, and increased virtual communication, businesses must invest in new tools and services to secure and enable a more diverse and digital-first workforce. To build resilient workplaces that support business goals, organizations must navigate challenges and capitalize on opportunities. Resilient businesses are in a constant state of evolution, recognizing and responding to internal and external factors, improving operations, and enhancing customer outcomes. The focus for IT leaders going forward will be on developing workplaces that can help businesses become more resilient. When businesses invest in new digital capabilities, their primary goal is to improve overall employee productivity, enhance employee experiences, and better support a broader environmental, social, and governance (ESG) corporate agenda. Omdia's research shows that HR and IT leaders share this aspiration, so any investment in mobile capabilities must support these broader business objectives.
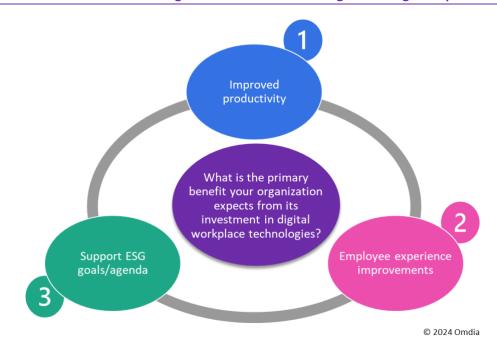
Figure 3: What businesses are looking to achieve when investing in new digital capabilities

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Source: Omdia

Creating a digital business infrastructure that supports more modern, mobile, and flexible ways of working requires businesses to invest in several important technologies and capabilities:

- **Connectivity:** the more dispersed nature of modern work requires businesses to invest in the appropriate wireless and fixed connectivity services that enable people to work from any location, across any device, and in a way that is secure and compliant.

- **Collaboration:** employees must be able to communicate and collaborate in a seamless and integrated fashion with voice, video, and text. Communications are increasingly being surfaced across mobile devices, so investment in tools that converge native communication capability (phone dialer and SMS) with in-app options (Microsoft Teams, Zoom, etc.) becomes more important.

- **Device management:** providing admins with visibility, management, and security controls over the mobile devices and apps used by employees is a core capability of a more mobile-centric workplace. Investment in these capabilities should enable businesses to support both personally owned (bring your device, BYOD) and corporate-owned mobile device management approaches.

- **Security and data privacy:** in addition to device management solutions, businesses should also explore other mobile security management technologies such as mobile threat defense solutions. It is also important to look beyond just the technology and ensure that mobile security is integrated with broader business cybersecurity practices. Finally, having the appropriate security skills and expertise is vital to ensure strong security and compliance.

- **Support systems and practices:** having the correct technical and employee support structures and technologies is important to ensure maximum value from investment in business mobile programs and capabilities. These capabilities should also help in managing change and in promoting continuous improvement of mobile initiatives.

- **Workflow automation and optimization:** richly integrating mobility into modern work requires businesses to leverage mobile apps, devices, and services in advancing work tasks and processes. Improving how people work through mobility is key, and workflow automation and process digitization capabilities are an important element in achieving this.

Improving mobile visibility and security with UEM/DWM tools

As work styles become more remote and mobile-centric, digital workspace management (DWM) platforms will be a foundational management and security capability on which modern technology infrastructures will be built. These tools will no longer be a "nice to have" or a convenient complement to other infrastructure solutions: they will become a vital piece of the enterprise architecture. Unified endpoint management (UEM) is the traditional and widely recognized terminology associated with the DWM product category. However, the reality is that these solutions now offer so much more than just mobile endpoint management capabilities. UEM solutions have

undergone an interesting evolution, especially since 2020. Vendors in this category continue to expand their solutions to deliver capabilities that move well beyond the endpoint management foundation. This is in line with changing business priorities around enterprise mobility. Businesses are looking at enterprise mobility in a more strategic and broader sense. In addition to unifying how the mobile app and device ecosystems are managed and secured, businesses are increasingly focusing on new areas. These include enabling the transformation to mobile work styles, investing in new 5G connectivity capabilities, and supporting more employees with mobile services. These enhanced capabilities are evolving UEM solutions into more comprehensive DWM platforms that support broader end-user compute, digital experience, security, and mobile workforce management use cases. DWM platforms are built on top of a strong UEM foundation; however, they extend on these core capabilities with additional productivity, app, and endpoint management features that help businesses better empower and secure a more mobile-first workforce.

How enterprise mobile capabilities help employees and improve business operations

Enabling people to work in a more mobile fashion delivers both individual and businesswide benefits. First, it affords employees greater flexibility, not only in where they work but also in how they work thanks to the broad support of different apps and devices. This helps improve employee satisfaction and productivity and can also help businesses operate more effectively and efficiently because of process improvements and potential cost savings. Collaboration can also benefit by aiding better decision-making because there is more real-time communication. Continuity is vital for modern businesses, and mobility helps here. The flexibility and the security delivered by workplace mobility programs ensure that business communications and employee productivity can be maintained during times of crisis. Data and digital democratization are other important areas that are supported by workplace mobility. For many employees, especially a large share of the near 60% of the workforce classed as frontline workers, the mobile device will be the primary compute endpoint from which they will collaborate and interact with business data and insights. Democratizing mobility by providing more employees with access to the technology can also help improve customer experiences by providing staff with customer data in real time.

Emerging and disruptive technologies

Innovations in UEM/DWM

Employee experience takes center stage

Having the ability to better measure and improve employee experiences has become a priority business objective. However, understanding and reporting on EX has historically been challenging, because there are various digital and sentiment-based factors it is essential to consider. New tools and capabilities are coming to the market that are helping, and UEM/DWM solutions are an important element of these emerging digital ecosystems. New digital experience capabilities offered by UEM/DWM solutions are helping businesses to better understand what the EX with using mobile technologies looks like, and where it could be improved. They are also enabling organizations to take proactive actions based on this data and insights. It is important to remember, however, that true success in optimizing EX will come from combining these technology-driven improvements with new management practices and a people-centric focus. Sentiment-based perspectives can be difficult to distill into a single metric, hence the need for effective management and communication mechanisms.

Mobile workflows can transform work and improve productivity

Mobile devices and apps are not just for content consumption; they are becoming more important in how employees create new content and interact with business services and data. When the processes and workflows that guide how people get work done are being digitized and automated, mobile must be a factor in the process. Designing workflows and EX around mobile use cases with workflow digitization and automation capabilities can help businesses realize new operational and financial efficiencies. This is especially true for frontline workers, where many legacy processes and workflows are still paper based and ripe for transformation with mobile technology.

DWM solutions can help the business deliver against its broader ESG objectives

DWM platforms deliver a unified and granular view across all endpoints, providing businesses with better insights into the health of the device estate. This allows better decisions to be made about when new hardware may be required and provides visibility into old hardware that may need to be recycled or retired. The advanced capabilities these solutions offer also deliver safer BYOD enablement, which could benefit employee experiences—because computing hardware will be more aligned to people's personal preferences—while helping businesses reduce costs associated with new hardware provisions.

Artificial intelligence will have a significant impact on devices and mobility management

Most UEM vendors are still in the investigative stage of developing artificial intelligence (AI) capabilities into their platforms. AI will evolve UEM solutions and the value they deliver in various ways:

- **Security:** mobility management solutions house a wealth of device, network, and behavioral data that can be leveraged to improve security practices. AI can detect anomalies and potential security breaches based on this data, including suspicious login locations or unusual data access requests. Threat detection and response capabilities can then be leveraged to more proactively resolve potential security issues.

- **Employee experience:** AI will use user habits and preferences to help deliver more personalized EX across mobile devices. Mobile app recommendations, the way employees interact with different systems and apps, mobile workflow creation using natural language, and more proactive and personalized mobile self-service and support are some examples of how AI will help deliver better EX across mobile platforms.

- **Mobile cost management:** AI will be used to analyze mobile network and device usage patterns, providing businesses with information on device utilization and insights into the most cost-effective connectivity plans based on employee use and location.

- **Regulation and compliance:** it can be difficult for businesses to adapt in response to ever-changing regulatory and compliance legislation. Mobile AI capabilities will help businesses optimize mobile reporting on compliance in addition to flagging policies that are not in compliance or in line with regulatory requirements.

- **Endpoint management and support:** AI will help detect and resolve on-device hardware and software issues, often before they have an impact on the user experience. From an admin perspective, AI will help in the automation of patch management, mobile configuration, and mobile workflow development activities.

How smartphone AI will pioneer business mobile innovation

Mobile devices developed with hardware and software capabilities to execute generative AI (GenAI) models and features, commonly referred to as GenAI smartphones, are set to disrupt the business and consumer device landscape in a big way. These devices deliver and process GenAI capabilities locally via the native phone experience, enabling users to take advantage of AI-powered features such as image processing, video editing, voice transcription, translation, and new content generation across a diverse set of apps and interfaces. The local compute power, coupled with the native experience offered by GenAI smartphones, will help usher in new business use cases and a

democratization of how AI is used in businesses. As use of these next-generation smartphones increases, businesses must ensure that this new generation of devices is secured to protect sensitive business and user data. Mobility management and security will become an even more important business activity as more compute moves from cloud services to mobile devices at the edge.

Core to the business value of GenAI smartphones is how these devices will support businesses in improving employee collaboration, communication, and productivity. Additionally, GenAI capabilities will make content consumption and creation easier on devices. Smarter on-device support agents, personalized content, mobile-OS-level AI features, and interaction via natural language are examples of features that will be integrated into in-app and native (voice and messaging) experiences. These capabilities will broaden the use of GenAI across frontline and back-office workers, give rise to new mobile experiences, and help accelerate the return on investment associated with mobile technologies by advancing utilization. Smartphones have long been important content consumption devices, but natural language processing will also make them a more important and intuitive endpoint for creating content. Flagship models boasting dedicated AI computing power are now entering the market. History has shown that as consumer technologies, especially smartphones, experience strong market adoption and growth, traction and use of these technologies in a business context also increases (e.g., through BYOD). This activity tends to happen irrespective of whether IT departments officially sanction the adoption and use of these technologies (e.g., with shadow IT).

Conclusion

Organizations should be in no doubt that the workforce is evolving to become more mobile. It is vitally important that businesses invest in digital infrastructure to support diverse work styles. Becoming more mobile centric requires businesses to focus on enhancing connectivity, collaboration, and digital enablement for the entire workforce, including the frontline workers who make up 60% of the total. Frontline workers will be a key focus for digital transformation and business mobile initiatives in the future. Mobile technology ecosystems can be complex, but DWM/UEM platforms have emerged as a vital solution for optimizing employee experiences and securing mobile work. These solutions are evolving in interesting ways, and new functionality such as AI, workflow automation, and enhanced security capabilities is set to position them as a critical component of modern digital business infrastructure.

As businesses increasingly pivot to becoming more mobile centric, the deployment of DWM/UEM platforms and strategies will help optimize operations, improve cost management, and enhance the ability of every employee to excel in a rapidly changing, digital-first world of work. In appropriately executing against a vision of the future of work, businesses must not only adapt to change: they must embrace and actively drive it, turning challenges and disruptions into opportunities to innovate and lead. Investing in a secure and enabling digital infrastructure that supports all employees in doing their best work, independent of their physical location, is key to this mandate.

Appendix

Author

Adam Holtby

Principal Analyst, Workplace Transformation

customersuccess@omdia.com

Get in touch

Omdia consulting

Omdia is a market-leading data, research, and consulting business focused on helping digital service providers, technology companies, and enterprise decision makers thrive in the connected digital economy. Through our global base of analysts, we offer expert analysis and strategic insight across the IT, telecoms, and media industries.

We create business advantage for our customers by providing actionable insight to support business planning, product development, and go-to-market initiatives.

Our unique combination of authoritative data, market analysis, and vertical industry expertise is designed to empower decision-making, helping our clients profit from new technologies and capitalize on evolving business models.

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We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

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