



FEBBRURY 2013



The iPass/MobileIron Mobile Enterprise Report



The Enterprise Mobility Guide for IT Management and CIOs

Corporate Headquarters
iPass Inc.
3800 Bridge Parkway
Redwood Shores, CA 94065

+1 650-232-4100
+1 650-232-4111 fx

www.ipass.com

Table of Contents

Executive Summary	3
Introduction	4
Survey Methodology	4
Section One: BYOD Policies and Trends	5
Who Has a BYOD Policy?	5
More Responsive BYOD Policies	6
Apple Dominates the Enterprise	7
Windows Phones, Tablets Attracting Attention	8
Tablets Go Mainstream	9
Section Two: IT Challenges	10
Onboarding Voted Top IT Frustration	10
Support Issues Overshadow Security Measures	12
IT Sees Mobile Data Costs Rising	12
Mobile Devices, Broadband Driving Costs	13
Mobile Broadband or Wi-Fi?	14
Mobile Data Costs and Productivity	15
Who Manages the Mobility Budget?	16
Section Three: Enterprise Mobility Strategies	16
The Need for a Mobility Strategy	16
Reducing Mobile Carrier Contracts	17
Mobile Application Trends	18
Social Media Collaboration	19
IT as New Technology Enabler	20
Conclusion	20
About iPass/MobileIron	21

The iPass/MobileIron Mobile Enterprise Report

The Enterprise Mobility Guide for IT Management and CIOs

Executive Summary

The 2013 iPass/MobileIron Mobile Enterprise Report tells a story of the rise of BYOD, and with it increased frustration and loss of control by IT, and concern over rising mobile data costs. Results from our survey show that while Mobile IT brings with it a huge potential to improve workforce productivity, it also introduces significant new challenges for enterprise IT. We also found that Mobile IT means a new relationship between IT and the end-user. The end-user now has the ability to influence IT policy, demanding less IT control and more accommodation of employee owned devices in the workplace. Our survey validates that the shift to mobile is happening, and it's happening fast. To fully realize the benefits of mobility and to mitigate potential risks will require a significant game change. Highlights include:

- IT departments are becoming more responsive to mobile employee demands. 68 percent of IT managers believed their mobility costs would go up over the next 12 months. The bulk of the increase was attributed to a rise in the number of mobile users and employees' expanding use of multiple devices.
 - 56 percent of enterprises changed their corporate guidelines within the past year to be more accommodating of employees' personal devices.
 - 81 percent of companies state they now accommodate personal devices in the office.
 - 54 percent of companies have formalized bring your own device (BYOD) policies. North American companies are more likely than European companies to have formulated policies regarding BYOD. However, more organizations allow BYOD than have policies for it.
- At the same time, BYOD is creating new challenges for IT. The top two sources of frustration (out of nine common IT issues) relate to onboarding and supporting personal devices. The fact that onboarding and supporting personal devices beat out even security concerns suggests the significance of the burden IT feels from BYOD.
- In line with the overall BYOD trend, IT is increasingly losing control of mobility budgets and departments are assuming greater responsibility. The number of enterprises in which IT manages the mobility budget has dropped from 53 to 48 percent, while it is now managed by business units in 22 percent of companies, and by finance in 18 percent of firms.
- 57 percent believe their mobile data costs will increase in the next year, with 8 percent saying they'll rise more than 25 percent. Smartphones and 3G data plans were singled out as the main reasons for rising data costs. 44 percent of IT managers said broader smartphone usage was a factor, 41 percent suggested 3G (and 4G) data usage and 22 percent pointed to an increase in the number of mobile employees.
- In 2012, Apple's iPhone passed Research in Motion's (RIM's) BlackBerry to become the most popular smartphone in terms of corporate IT support. BlackBerry is still entrenched in the enterprise but it seems that it is being phased out.
- IT is more bullish on Microsoft's Windows Phone 8 handsets than on RIM's BlackBerry 10 phones. Both device lines are new and designed to appeal to the enterprise, as well as to consumers. However, only 34 percent of IT managers plan to support BlackBerry 10, compared to 45 percent who plan to support Windows Phone 8 devices going forward.
- Tablet adoption is growing increasingly mainstream within the enterprise. Between 2011 and 2012, tablet usage increased in all non-executive departments, especially legal, HR/administration and finance/accounting. The iPad is the top choice, with support from 73 percent of companies.
- 55 percent of the companies surveyed reported some form of security issue over the past year, mostly in conjunction with lost or stolen phones.
- More than half (55 percent) of IT managers are using Wi-Fi connectivity apps for work purposes. Wi Fi apps were the most widely used out of 10 different types of enterprise mobility apps.



Introduction

The annual iPass/MobileIron Mobile Enterprise Report examines mobility trends around the world from the viewpoint of IT executives. Information from the quarterly iPass Mobile Workforce Reports is incorporated where relevant. This supplementary data provides insight into the opinions and behaviors of mobile workers, which can then be compared with those of IT managers.

New technologies are continually altering the enterprise mobility landscape. IT must stay on top of these trends while safeguarding corporate data and boosting employee productivity. It's a juggling act that grows more difficult each year. IT is expected to keep watch over multiple devices per worker—typically a smartphone, a laptop and, increasingly, a tablet. IT must also decide which mobile brands and models to support—a considerable challenge given the number of product launches throughout the year. For example, Windows Phone 8, Windows 8 and BlackBerry 10 have all come to market within the past six months. But device trends are now being driven by end users who are bringing their own devices into the workplace, not just by IT policies.

Mobile software concerns are claiming a greater part of IT's time. More than half of companies are currently developing mobile applications. Provisioning employee devices with those apps requires sophisticated mobile application management tools that operate across device types and operating systems.

Long-term planning is also part of IT's job. IT departments should be formulating clear mobility guidelines and BYOD policies for employees. Too many companies either lack enterprise mobility strategies or adopt inadequate measures.

IT's numerous responsibilities make it easy to overlook the importance of security controls. Surveyed IT respondents ranked security relatively low on their priority lists. But with nearly half of companies reporting security scares from lost, stolen or misplaced phones, security procedures should garner more attention.

This second edition of the Mobile Enterprise Report aims to guide IT managers by polling hundreds of IT executives. Which devices are other IT departments supporting or planning to support? How is tablet use expanding beyond corporate executives? What are the biggest IT frustrations? How much are IT managers spending on mobile data costs? How much are those prices expected to rise over the next 12 months?

This report tries to answer those questions and more. Responses are filtered by company size and location where applicable, so IT managers can get specific views into their peers' thoughts and actions.

Survey Methodology

This year's survey was conducted between December 2012 and January 2013. An IT list from Wi-Fi network and services firm iPass and mobile device management firm MobileIron was used, resulting in 477 responses. The majority (about 75 percent) of respondents were currently employed IT professionals, at the director level or above. Large companies were well represented; 50 percent of this year's respondents worked for companies with more than 1,000 employees.

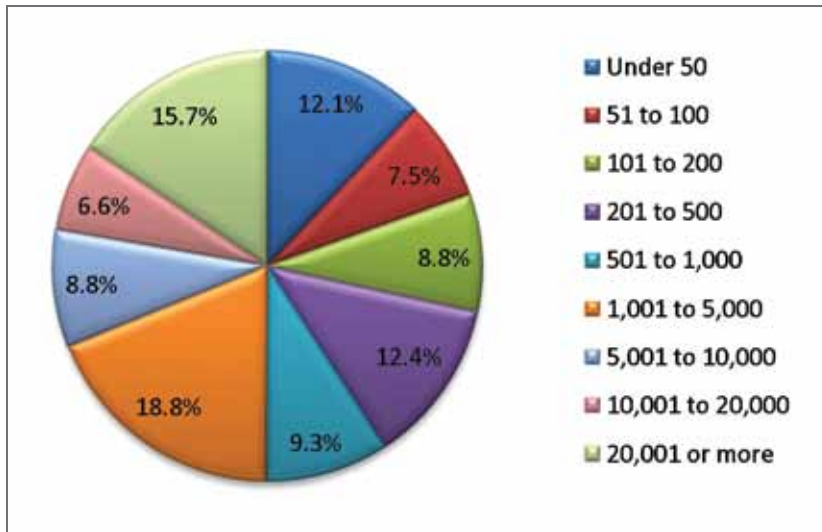


Figure 1: How many people are employed at your company?

Survey respondents were employed across a wide range of geographies. The majority of respondents were from companies headquartered in North America (63 percent), followed by Europe, Asia Pacific and the Middle East.

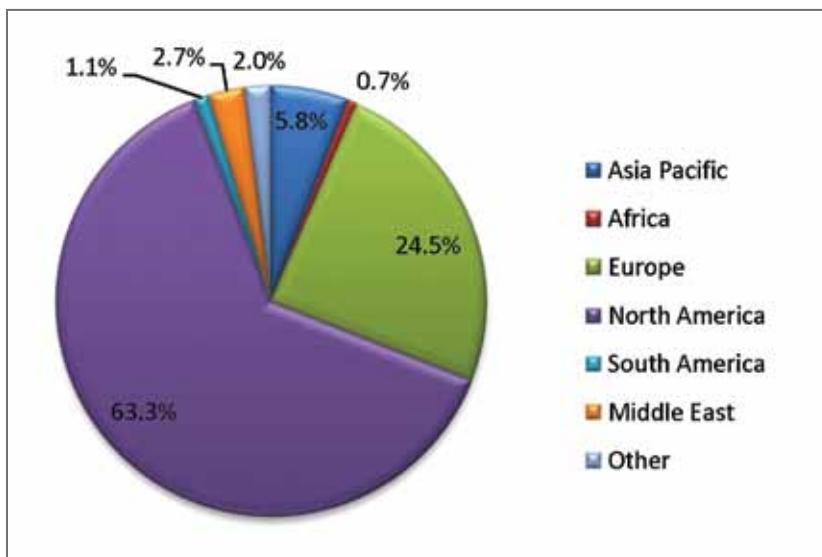


Figure 2: In which region is your company headquartered?

Section One: BYOD Policies and Trends

Who Has a BYOD Policy?

BYOD has pervaded the enterprise, driven more by end-user behavior than by IT policy, prompting companies to formulate rules about which devices can be used for work purposes and how those costs will be covered. The iPass Q4 2012 Mobile Workforce Report, which tracks BYOD statistics among mobile workers, found the percentage of employees who own their smartphones increased from 42 percent to 47 percent in 2012, while the percentage using phones provisioned by their employers declined (from 58 percent to 49 percent).

This Mobile Enterprise Report analyzes these changes from the perspective of enterprise IT managers. The formulation of specific BYOD policies is one telling measure of the trend's reach. 54 percent of IT managers said

their employers have established BYOD policies. However, a greater number of organizations (81 percent) actually do have BYOD rules in place but answered “no” in the survey because they don’t consider those guidelines to be “policy.”

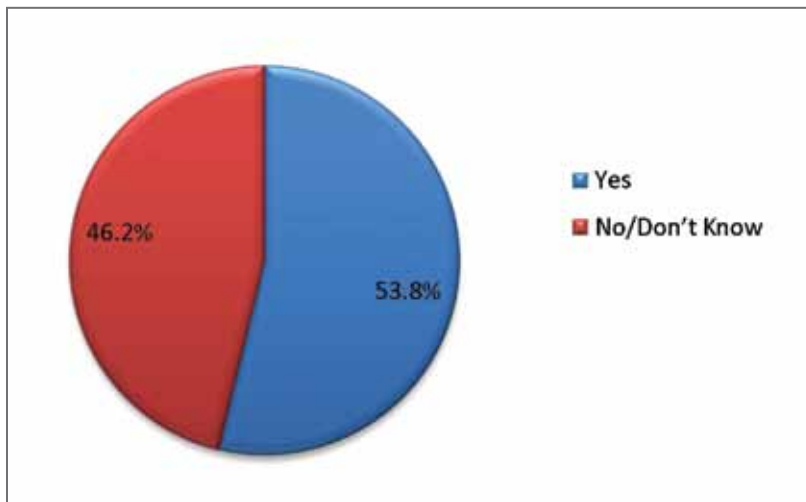


Figure 3: Does your company have a bring your own device (BYOD) policy?

North American IT managers are somewhat more likely than European IT managers to have a BYOD policy (58 percent vs. 46 percent). That finding is consistent with regional trends as European companies tend to be more hesitant about permitting employee-owned mobile devices.

More Responsive BYOD Policies

Despite internal doubts, IT policies are in fact becoming more flexible. A majority of respondents said their corporate guidelines had become more accommodating of employees’ personal devices over the past year, likely in reaction to employee demands.

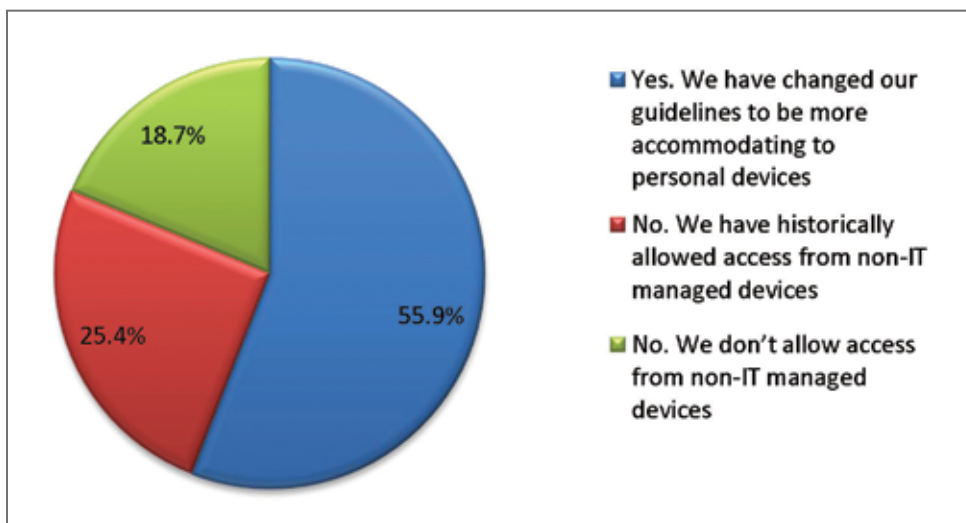


Figure 4: Have your corporate guidelines changed in the last 12 months regarding non-IT managed devices?

Executive pressure also played a role. Executives have long demanded—and won—permission to use their own devices and choice of software, and according to the Mobile Enterprise Survey, that remains the case. A majority of IT managers reported bending their rules to provision mobile devices for “specialized members” of their companies. Only 32 percent of respondents said they had never made exceptions of this type.

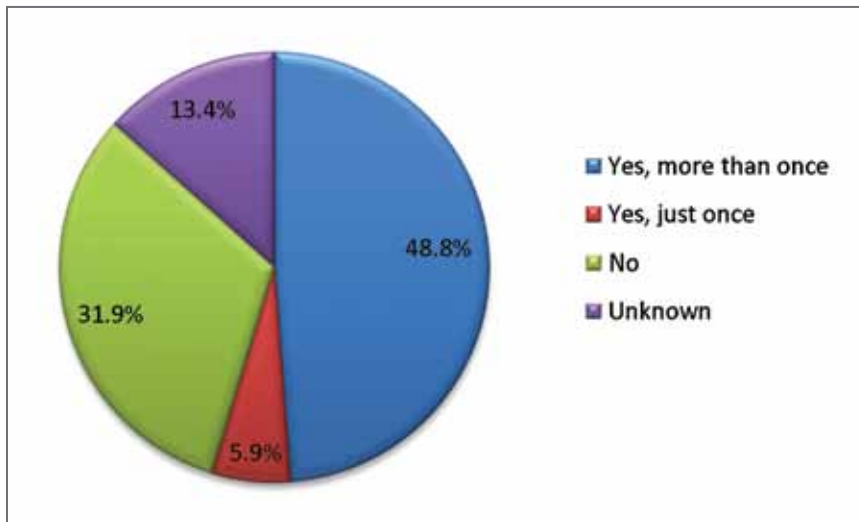


Figure 5: Have you made provisioning exceptions for “specialized members” to set up non-corporate mobile devices?

Rules are being rewritten across the enterprise. The latest Mobile Enterprise Survey recorded more corporate guideline revisions than did the 2011 survey. In 2011, 47 percent of IT managers said their policies had become more responsive to employee demands. In 2012, that number jumped to 56 percent of IT managers.

Apple Dominates the Enterprise

Increasingly flexible policies are changing the device mix in the enterprise. In 2011, RIM’s BlackBerry was the top enterprise smartphone with support at 77 percent of companies. Apple’s iPhone was second with a presence at 52 percent of enterprises.

In the latest Mobile Enterprise Survey, the brands switched places. The iPhone is now the leader, with support from 74 percent of enterprises. BlackBerry held onto second place with 62 percent but its popularity is rapidly eroding.

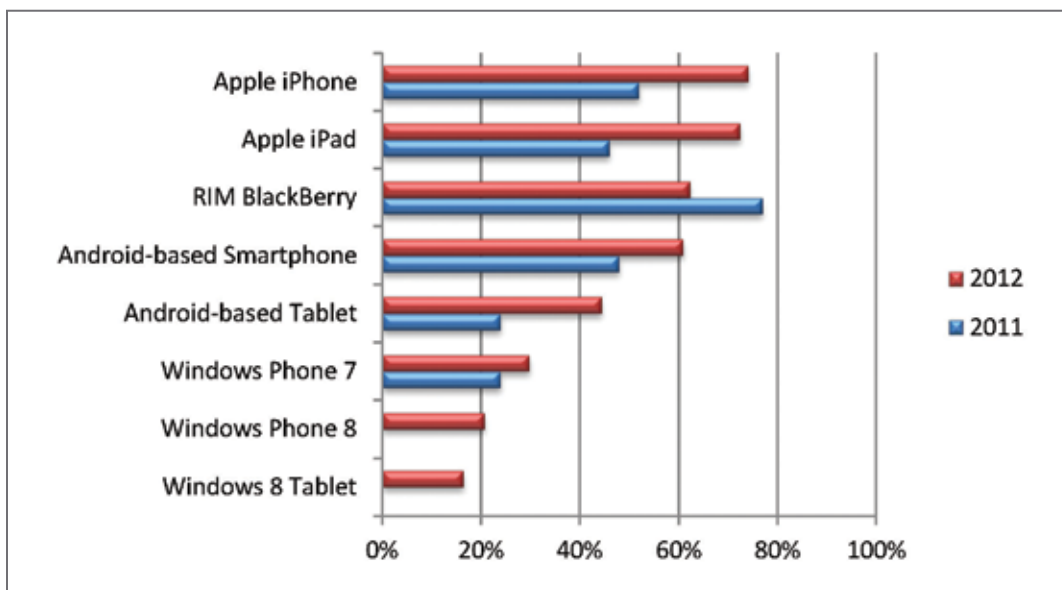


Figure 6: Does your company support any of the following devices?

Like the iPhone, Android-based phones have shown tremendous growth since the last survey, rising from 48 to 61 percent of the enterprise. Android is now a close third behind BlackBerry and is set to outpace it to claim the number two spot by next year.

These rankings are somewhat surprising since Android dominates the iPhone in the general market. According to research firm IDC, in Q3 2012, 75 percent of smartphones shipped globally were Android-based, while only 15 percent of smartphones shipped that quarter were iPhones. Yet, the iPhone is the device of choice in the enterprise.

Tablet preferences have been more consistent. The iPad remains the top choice, with support from 73 percent of companies. Android-based tablets are the second-most popular (44 percent) and Windows 8 tablets, such as the Microsoft Surface, are a distant third with 16 percent.

Windows Phones, Tablets Attracting Attention

The Mobile Enterprise survey forecasts trends by asking IT managers about their plans, as well as their current practices. The survey's forward-looking responses hint at Android's continued rise and greater enterprise acceptance for Windows mobile devices. Only 2 percent of IT managers plan to start supporting BlackBerry devices in 2013, suggesting a loss of interest in the brand. In comparison, 13 percent of IT managers plan to start supporting Android phones in the coming year. Android and the iPhone, which 11 percent of enterprises will newly adopt in 2013, clearly have more positive IT momentum than BlackBerry.

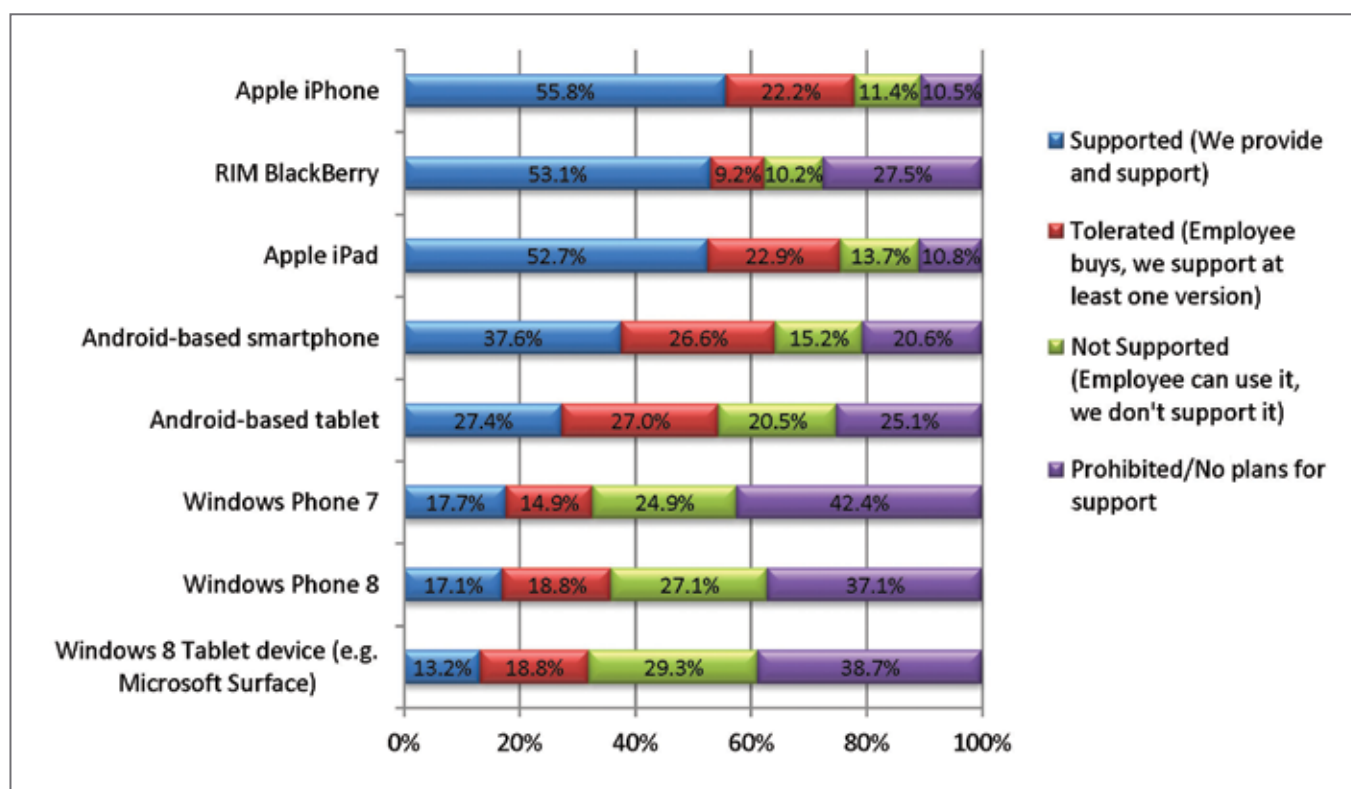


Figure 7: What are your corporate supported, tolerated, non-supported and prohibited devices?

The latest Mobile Enterprise Survey also uncovered burgeoning interest in Windows Phone 8 handsets and Windows 8 tablets. Enterprise IT has been slow to embrace Windows Phone 7 and 8 but nearly a third of survey respondents said their companies would support Windows 8 devices in 2013. Since both Windows Phone 8 and Windows 8 were released late in 2012, IT managers likely wanted to evaluate the new software before adopting it.

IT managers are more bullish about Windows Phone 8 than BlackBerry 10. RIM is hoping its new operating system, which was unveiled in January 2013 will reinvigorate the BlackBerry lineup and win back customers who have migrated to other mobile brands. However, IT managers are skeptical. Only 34 percent plan to support BlackBerry 10. In comparison, 45 percent of IT managers said they would support Windows Phone 8 devices going forward.

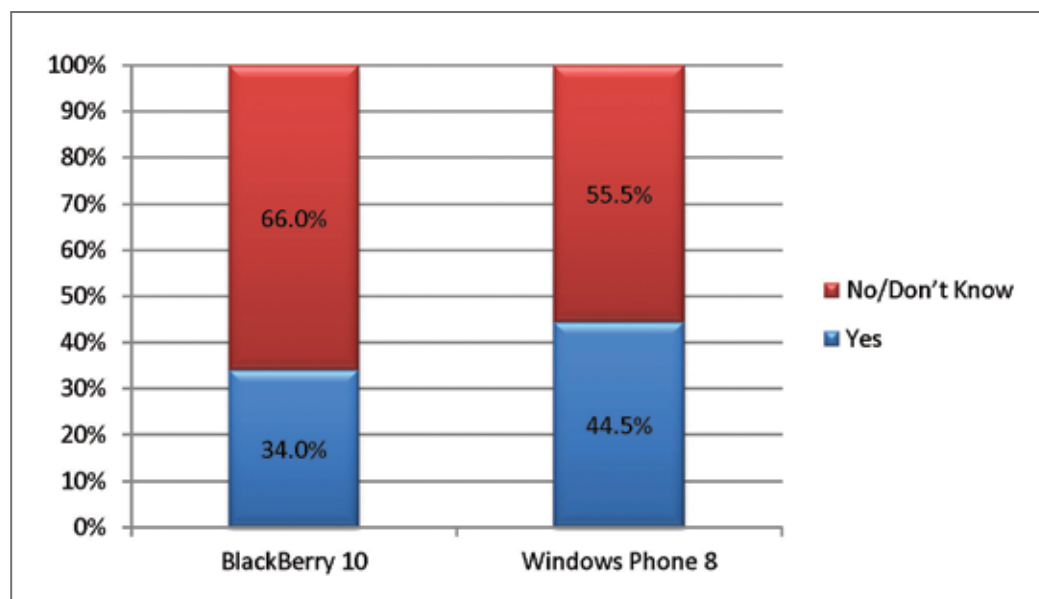


Figure 8: Do you plan to support BlackBerry 10 or Windows Phone 8?

Optimism about Windows Phone 8 appears to directly correlate with Nokia's influence over a region (Nokia is Microsoft's lead Windows Phone 8 partner). IT managers located in Nokia's strongest markets (Europe, the Middle East and Africa) were the most upbeat about Windows Phone 8 where 54 percent of IT managers say they plan to support Windows Phone 8, compared to 42 percent in North America and 37 percent in Asia.

Tablets Go Mainstream

Tablets, once strictly senior-level devices, continue to quickly gain mainstream traction. In 2012, IT managers increased tablet support for a number of non-executive departments, including sales, marketing, engineering, finance/accounting, HR/administration and legal (deployments ranged from tablets as laptop replacements to tablets as additional mobile devices). Legal and HR/administration saw the biggest boosts in tablet support (each department increased 14 percent year-over-year) followed by finance/accounting (increasing 13 percent year-over-year).

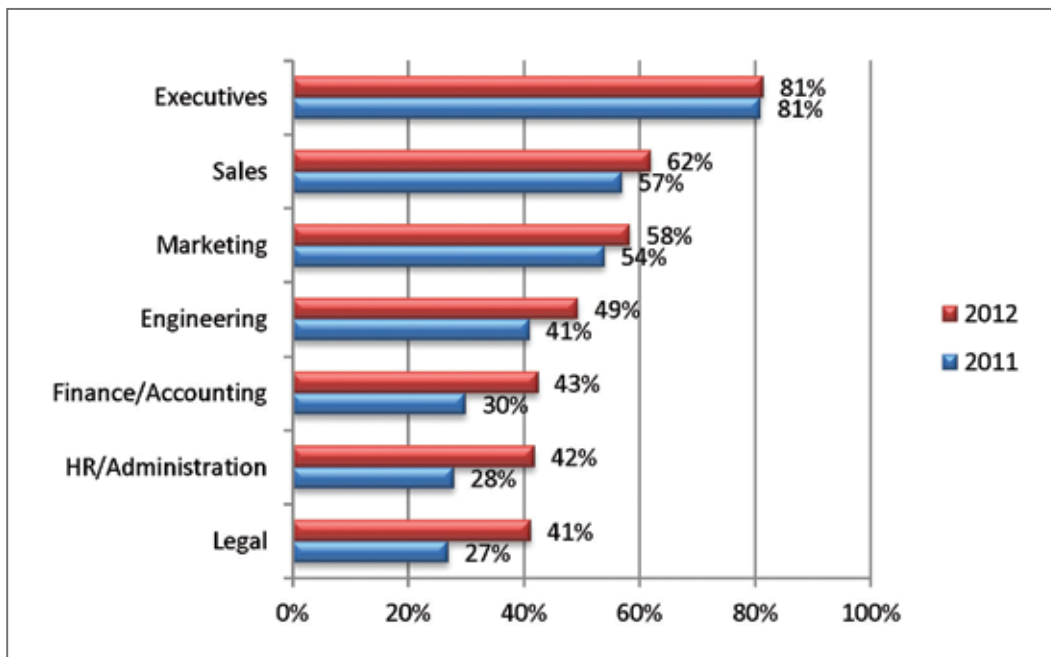


Figure 9: Which departments within your company are you supporting with tablets, either as a replacement for a laptop or as an additional mobile device?

During this period, the tablet support rate for executives remained steady at 81 percent. Non-executive corporate departments now boast tablet adoption rates ranging from 41 percent to 62 percent. In a BYOD world, changes often start with executives, but eventually trickle down, benefiting a broader group of workers.

Section Two: IT Challenges

Onboarding Voted Top IT Frustration

BYOD appeals to employees but, even if IT appreciates the productivity benefits, BYOD has made IT's job more difficult. IT managers' top complaints relate to onboarding and supporting personal devices. Respondents said their two biggest sources of frustration stemmed from these scenarios. The fact that onboarding and supporting personal devices beat out even security concerns may suggest the significance of the burden IT feels from BYOD.

Respondents identified their top frustrations as:

1. Personal mobile device onboarding and ongoing support
2. Support for specialized members' non-provisioned devices
3. Data encryption/data loss/data backup and recovery
4. Help desk ticketing/resolution
5. Corporate mobile device onboarding and ongoing support

For example, BYOD heightens concerns about data encryption and data loss. Securing data on personal devices is so complicated that IT departments are spending more time worrying about how to protect data and considering the consequences of a breach.

Another likely source of IT frustration is mobile application management. Companies are still experimenting to find the best way to securely distribute and install apps on employee devices. The most popular method is to let employees download apps from either a private app store (29 percent) or a public one (15 percent). However, no single approach dominates. Organizations are still experimenting to find the best way to support apps on various devices with differing requirements; some are pre-installing apps on corporate-issued mobile devices and provisioning apps via network connections, push software and app repositories.

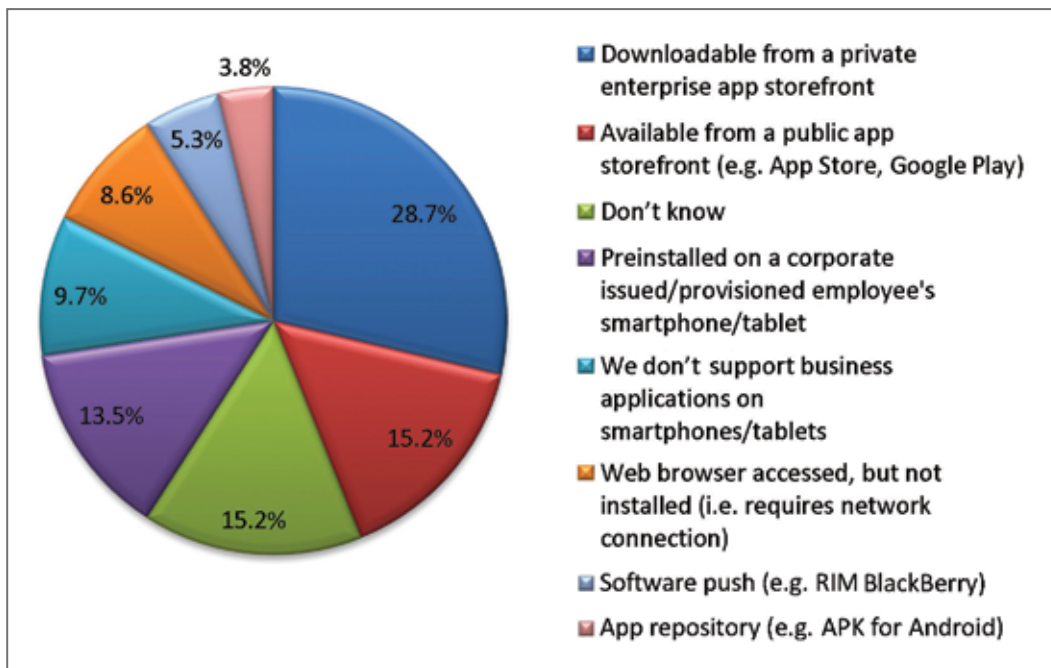


Figure 10: How are you providing/plan to provide business applications on your employees' smartphones and/or tablets?

The lack of standardization reflects the diversity of devices and operating systems that IT must grapple with these days. It could also represent a market opportunity for mobile application management providers.

The enterprise's hodgepodge of devices and apps is also fueling employee IT queries. Help desk requests dipped slightly year-over-year but remain high. In 2011, 48 percent of IT managers reported that employee support queries had increased over the past year. In 2012, that figure declined slightly, but 46 percent of respondents still thought support requests were on the rise. Just 19 percent of respondents believed the number of technical queries decreased rather than increased between 2011 and 2012.

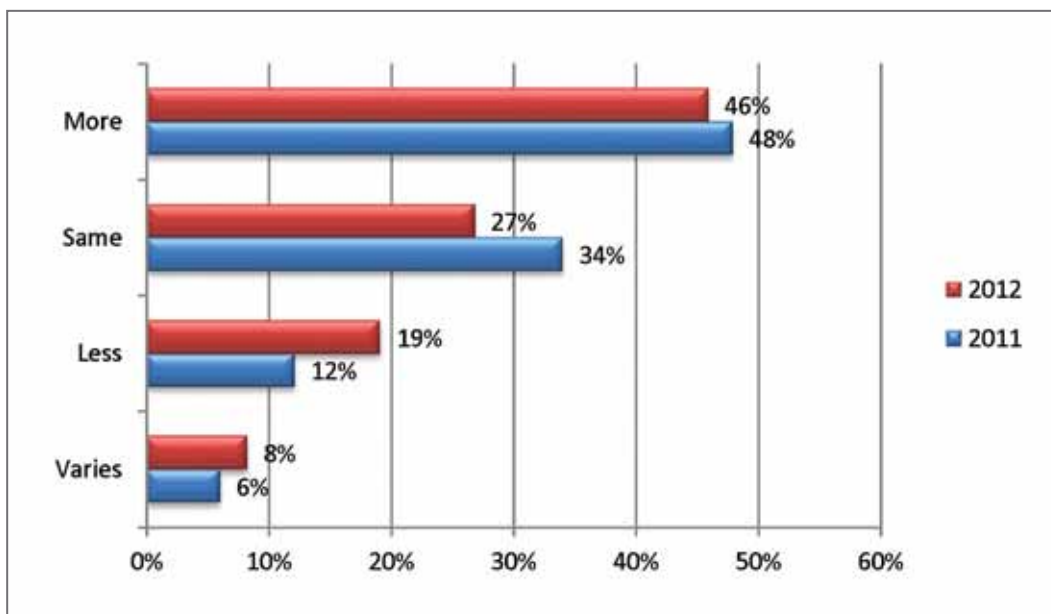


Figure 11: Do employees typically contact IT less or more for mobile device or connectivity support than they did one year ago?

Support Issues Overshadow Security Measures

Device support tasks outweigh security concerns for now, but IT shouldn't ignore security issues. At least 7 percent of respondents said they faced problems related to unsecured phones. Almost 1 percent said their company data had been leaked via a compromised device, and approximately 0.5 percent said they had experienced an external attack in which private data was swiped from a mobile device.

One security issue—device loss—was a much larger problem: 47 percent of IT managers reported dealing with lost, stolen or misplaced phones.

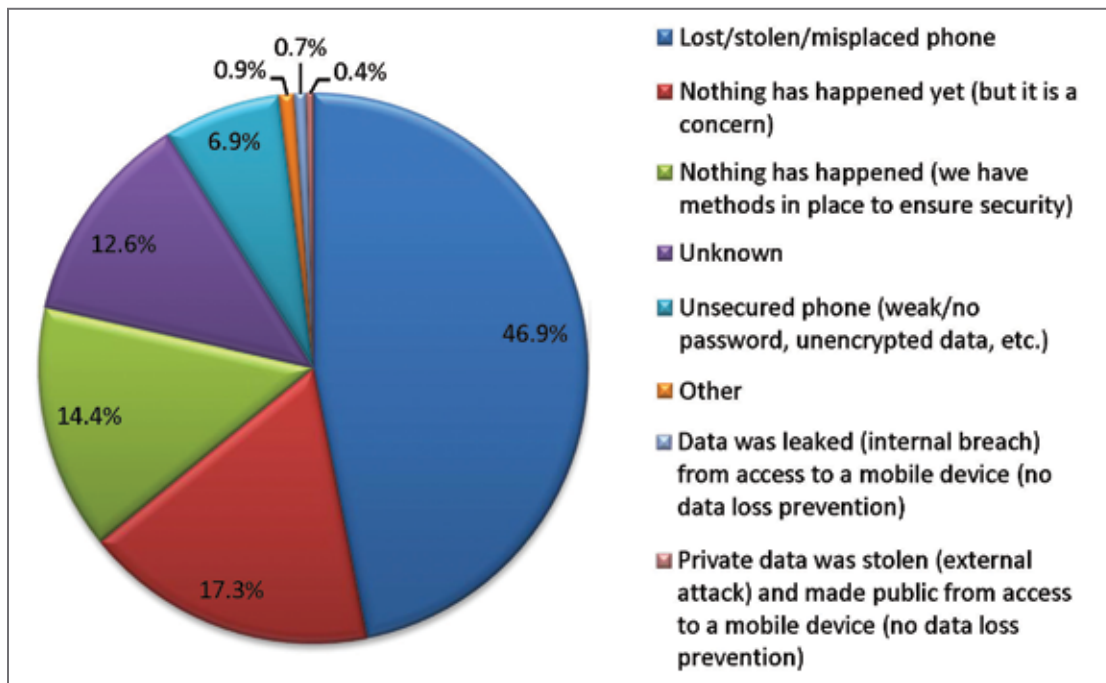


Figure 12: Have you experienced any of the following security problems?

It is also important to note that only 14 percent of Mobile Enterprise Survey respondents thought they had no security issues because appropriate measures were in place. The majority of IT managers were not as confident about their security measures. Also, IT managers may not be aware of the total number of lost phone incidents or other security breaches at their companies.

Both BYOD policies and mobile enterprise strategies should address data security issues, regardless of incident rate. A number of mobile workers disclosed that they don't follow mobile security guidelines. Only 74 percent of employees said their companies require security features on their mobile devices in the Q3 2012 Mobile Workforce Report, and just 55 percent said their smartphones were set up to be remotely wiped, one of the most basic forms of mobile security.

IT Sees Mobile Data Costs Rising

Another major IT challenge is the cost of connectivity. IT departments already spend an average of \$96 per month on data fees for each of their mobile workers. Prices are highest in North America, followed by Europe, then Asia-Pacific. On average, North American mobile workers rack up \$97 in monthly data charges across their mobile devices (smartphones, tablets, laptops). The figure drops to \$88 for European mobile workers and \$73 for Asia-Pacific employees.

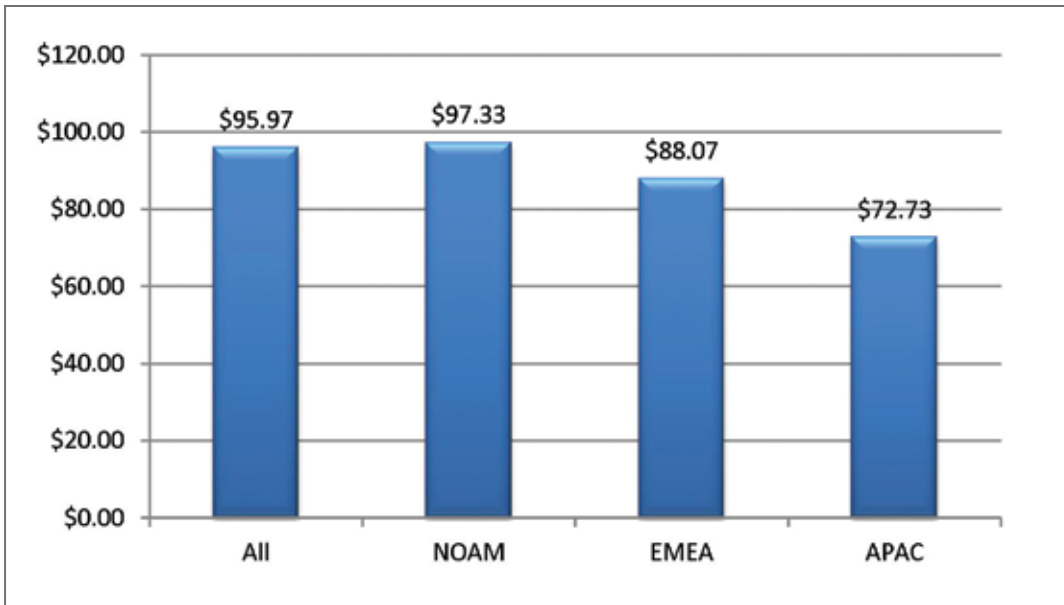


Figure 13: How much would you estimate your average mobile employee costs your company per month in data connectivity charges?

The high prices reported by North American IT managers expose the expense of mobile broadband. Since free Wi-Fi is abundant in North America, these fees primarily reflect non-Wi-Fi forms of mobility such as 3G and 4G.

Mobile Devices, Broadband Driving Costs

Indeed, IT managers identify increasing numbers of smartphones and mobile data plans as their main cost culprits. In the Mobile Enterprise Survey, respondents cited wide smartphone usage in the enterprise and pricey 3G (and 4G) plans as major cost worries. Almost one third of IT managers also named the growing number of devices per mobile worker as a factor—likely a reference to greater tablet uptake in the enterprise.

Some of the top data cost concerns:

- 44 percent believed costs would increase due to more smartphones being used for work purposes
- 41 percent believed costs would increase due to more 3G (and 4G) data users on smartphones and tablets
- 29 percent believed costs would increase due to more devices being used per individual
- 22 percent believed costs would increase due to the increase in the number of mobile employees at their companies

Mobile device and broadband pricing far outweighed IT's anxiety about Wi-Fi costs. Just 3 percent of respondents said employee expensing of Wi-Fi charges was accelerating overall data costs.

When asked about mobile data costs specifically, the majority of respondents (57 percent) thought prices would increase in 2013. More than 8 percent of IT managers believe costs will go up more than 25 percent while about 2 percent of them think costs will rise more than 50 percent. Only 11 percent of IT managers took the opposite viewpoint, stating that mobile data costs will decrease over the next year.

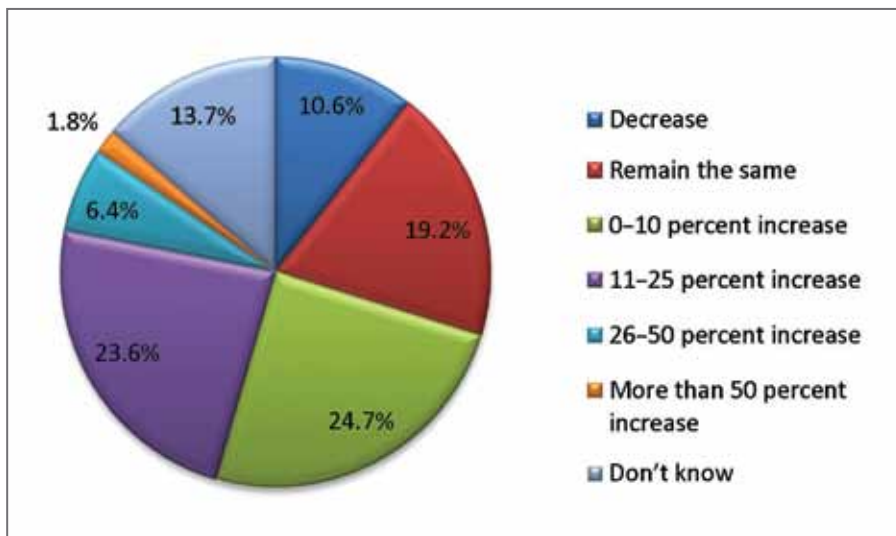


Figure 14: How do you believe mobile data costs will change in the next 12 months?

Mobile Broadband or Wi-Fi?

Cautious IT departments are watching Wi-Fi prices along with other connectivity costs. More than a third of IT managers think Wi-Fi costs are generally stable. Among the dissenters, however, a greater number believed that Wi-Fi costs are more likely to rise than fall (27 vs. 16 percent). North American IT managers were the most pessimistic with 33 percent stating that costs will go up, compared to 22 percent of Asia-Pacific IT managers and 18 percent of their European counterparts.

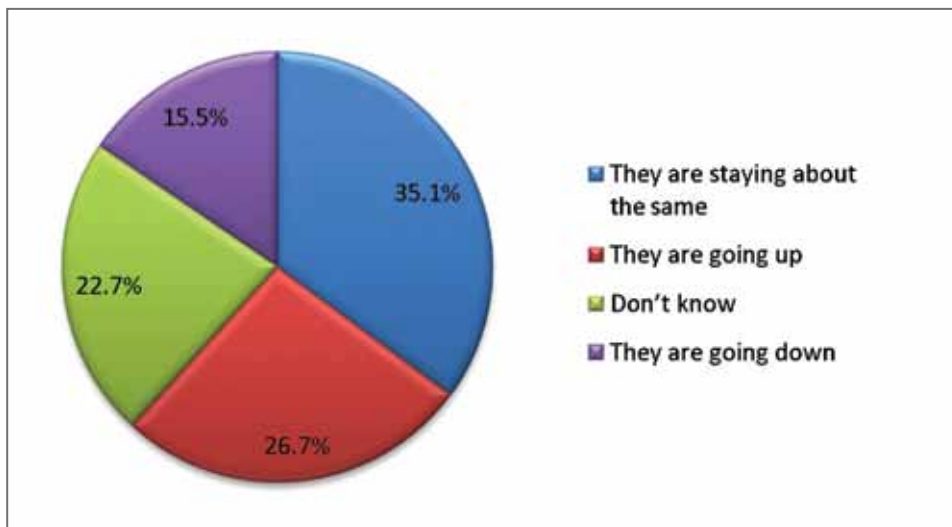


Figure 15: Do you believe Wi-Fi costs are going up?

The geographic split here is striking because free Wi-Fi is more prevalent in North America than in other regions. North American IT managers may be referencing the often poor quality of free Wi-Fi and assuming that some venues will begin charging for access to faster, more stable networks.

In fact, some organizations are transitioning to a tiered Wi-Fi system. Several U.S. hotel chains have made the move and other companies are sure to follow. IT managers understand the vast difference between low-quality and premium Wi-Fi but are still debating whether to let employees opt for the paid service. 43 percent of respondents

said they would not allow mobile workers to expense Wi-Fi if free Wi-Fi were also available. However, nearly one in three IT managers (31 percent) said they weren't sure—a sign that IT is still assessing this new trend.

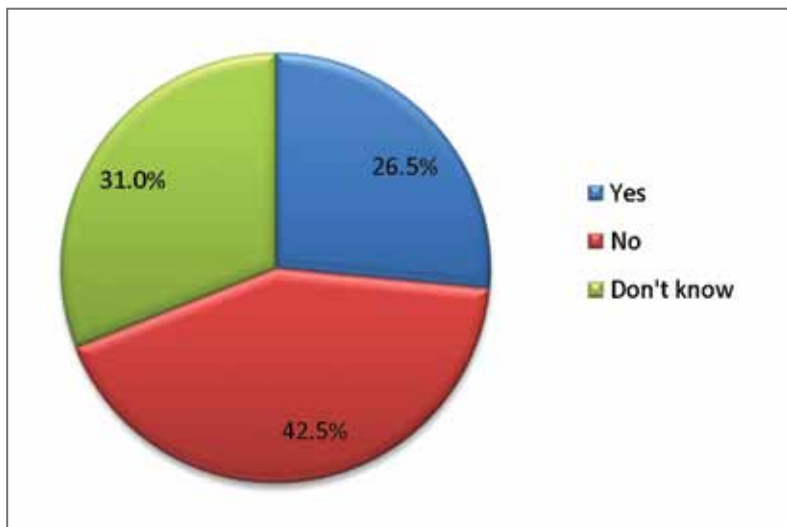


Figure 16: Would you consider allowing employees to expense back fee-based Wi-Fi if free Wi-Fi was also available?

Cost-conscious IT managers in North America were most likely to vote against fee-based Wi-Fi with only 24 percent open to the idea. European IT managers, who are more accustomed to paying for Wi-Fi, regardless of quality, were more open to the idea with 33 percent saying they would be open to expensing back fee-based Wi-Fi. IT's mixed acceptance means premium Wi-Fi will likely be an executive perk. At least at the beginning, senior-level mobile workers will probably be the only employees permitted to upgrade to higher-quality networks.

Mobile Data Costs and Productivity

IT managers aren't just cautious about paid Wi-Fi; they are conservative about mobile data costs in general. The majority of survey respondents (53 percent) don't let employees expense mobile data fees for personal devices. Companies that support BYOD are more permissive than companies without BYOD policies, but still not as accommodating as one might assume.

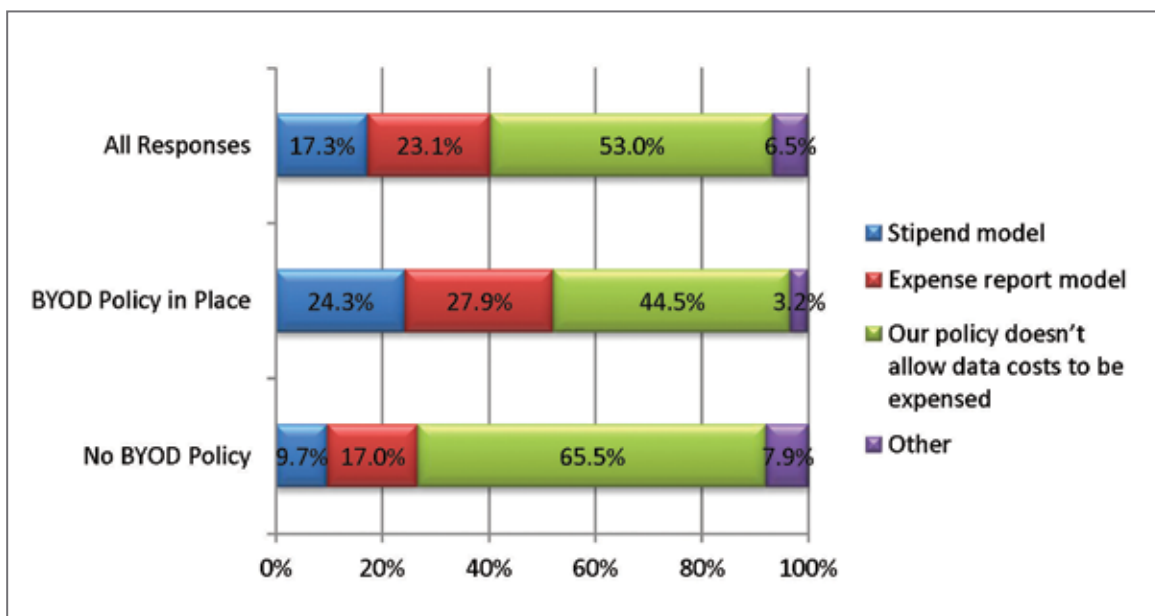


Figure 17: If your BYOD expense policy allows employees to expense back data costs, how are expenses allowed?

Strict expensing rules could have unforeseen consequences. If traveling employees cannot get online to communicate and access data, their work will suffer. In the Q4 2012 Mobile Workforce Report, employees cited lack of connectivity as their greatest barrier to efficient mobile work. 49 percent of mobile workers said searching for Wi-Fi outside their offices hindered their productivity, up from 33 percent in 2011. Companies that don't fund data access for work purposes could incur productivity losses and, ultimately, monetary losses.

Who Manages the Mobility Budget?

Questions about who pays the mobility bill may exacerbate IT's cost quandaries. Yet another resulting outgrowth of BYOD is a shift in mobility budget oversight from IT to other corporate divisions. BYOD is increasingly handled on a departmental level, with costs expensed back to employees' divisions and groups. The number of enterprises that ask IT to manage their mobility budget has dropped to 48 percent from 53 percent in 2011. Non-IT departments are assuming more management responsibilities for mobility expenditures.

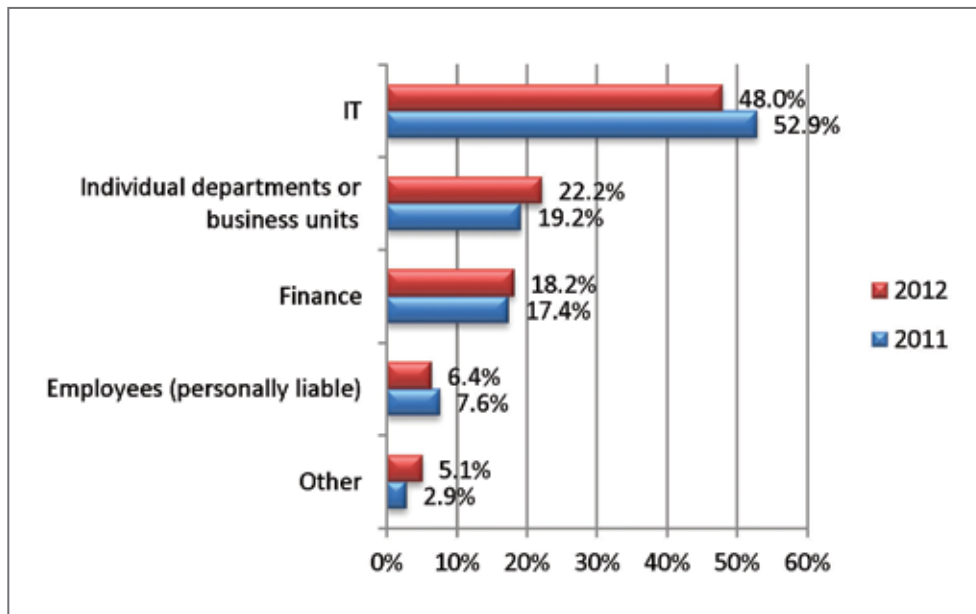


Figure 18: Who manages the majority of the mobility budget at your company?

Section Three: Enterprise Mobility Strategies

The Need for a Mobility Strategy

The countless challenges that confront IT point to the value of an enterprise mobility strategy. Almost three quarters of enterprises (72 percent) have an enterprise mobility strategy in place. However, of those enterprises only 37 percent of IT managers thought their own company's mobility strategy was effective, while 35 percent felt that their company had an insufficient approach. Devising a BYOD policy is important, but is ultimately only one part of an enterprise mobility strategy.

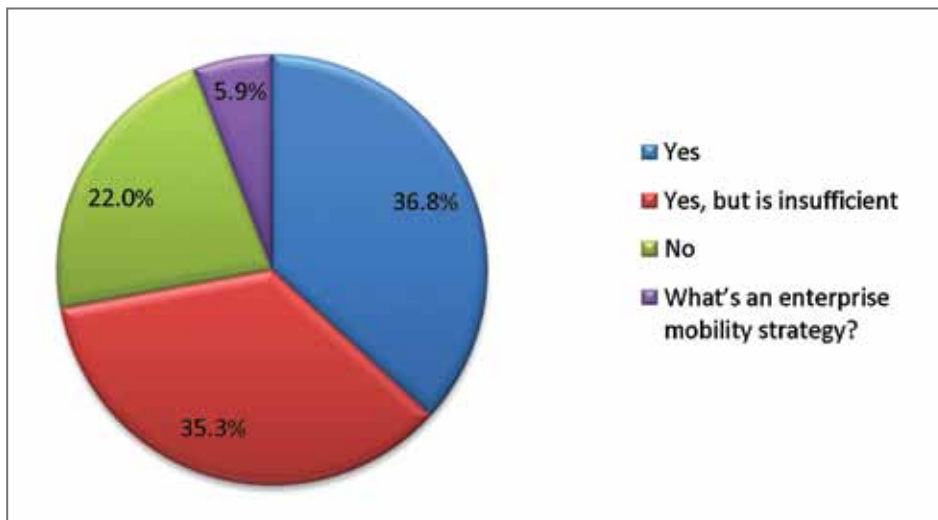


Figure 19: Does your company have an enterprise mobility strategy?

North American IT managers seemed more perplexed by the idea of an enterprise mobility strategy. The Mobile Enterprise Survey revealed that 31 percent of them either said they had no enterprise mobility strategy or asked what it was, compared to 22 percent of European IT managers. This enterprise mobility strategy gap will take time to resolve.

Reducing Mobile Carrier Contracts

One area where IT has been making progress is in streamlining carrier contracts. 70 percent of IT managers currently deal with five or fewer mobile carriers for their global data needs, whether 3G, 4G or Wi-Fi. And nearly half of those IT managers work with only one mobile carrier. The payoff: volume discounts and simplified bills, which should yield cost and time savings.

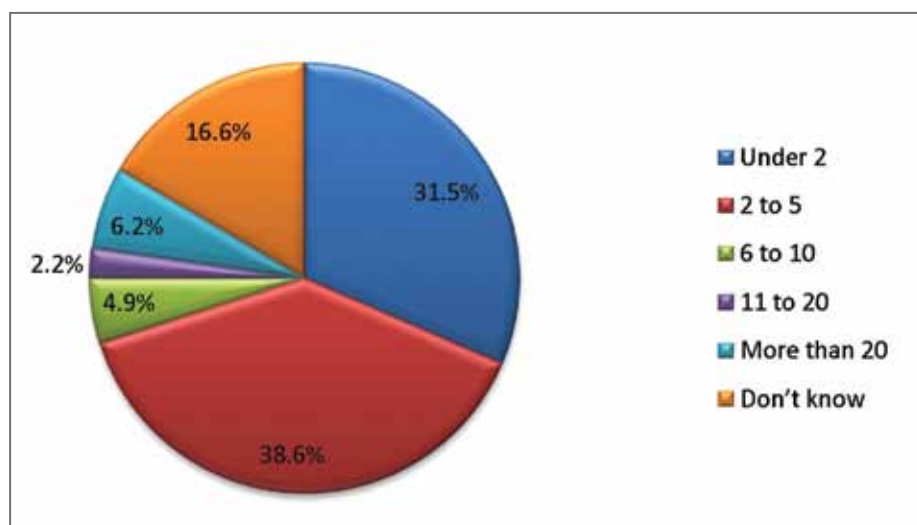


Figure 20: How many mobile carrier relationships for data do you have globally?

Much of this work took place over the past year. Between 2011 and 2012, the number of companies using a single mobile carrier increased 10 percent. During the same period, the number of companies managing a greater number of carrier relationships (2 to 5, 6 to 10, and 11 to 20) all decreased.

Mobile Application Trends

Given the popularity of mobile apps in the enterprise, it is no surprise that more than 52 percent of IT managers stated that their companies are developing apps. Native applications for specific mobile operating systems are more popular than web-based apps (30 percent vs. 22 percent) despite the buzz surrounding new web standards like HTML5.

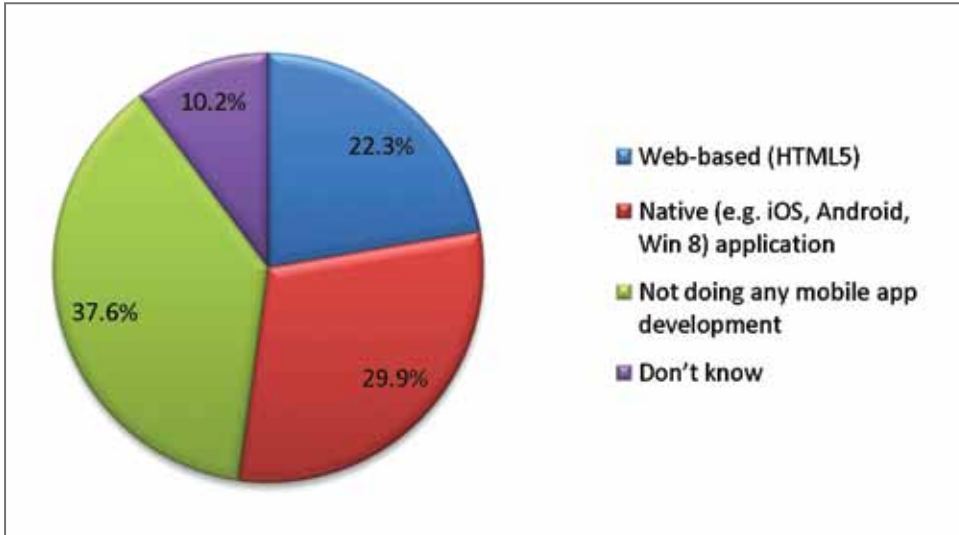


Figure 21: What type of mobile application development is your company doing?

Producing apps, of course, requires investment: in developers, designers, engineers and product managers. Large companies (with over 1,000 employees) are better able to absorb those costs and are more likely to be involved in mobile app development. Just 26 percent of large companies said they were not developing apps, compared to 50 percent of smaller companies.

Not long ago, IT would have been tasked with constructing these apps. But as mobility pervades every part of the enterprise, a greater variety of departments are taking on app projects. 16 percent of respondents said other (non-IT) lines of business were in charge of their app development.

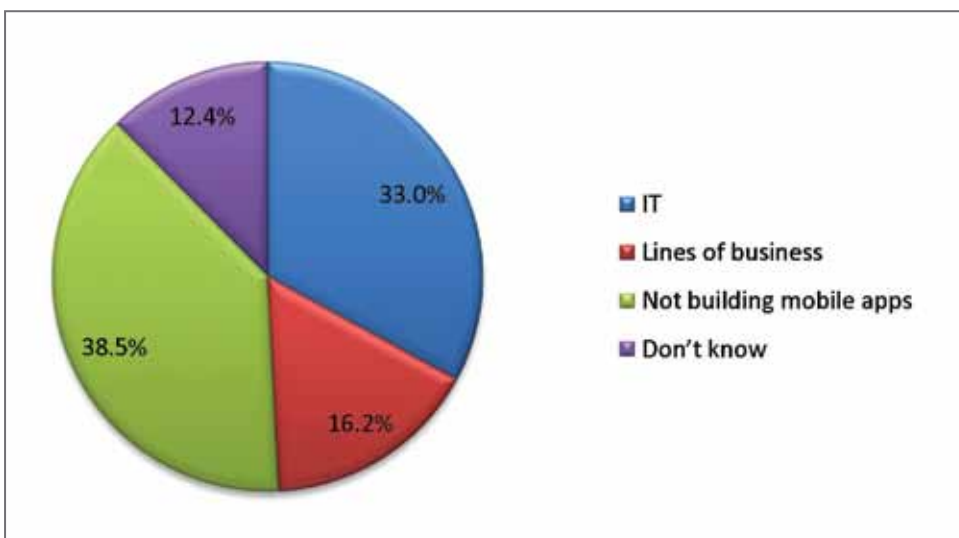


Figure 22: Who is building the mobile apps?

Social Media Collaboration

Since companies are consumers, as well as producers of mobile apps, the Mobile Enterprise Survey also asked IT managers to specify the apps they use for work. Traditional communications and security-related apps were most popular but social media clients were surprisingly high on the list, ranking seventh overall. The top picks were Wi-Fi connectivity apps (used by 55 percent of companies) and encrypted corporate email (used by 50 percent of companies). 29 percent of respondents said they use social media for work purposes.

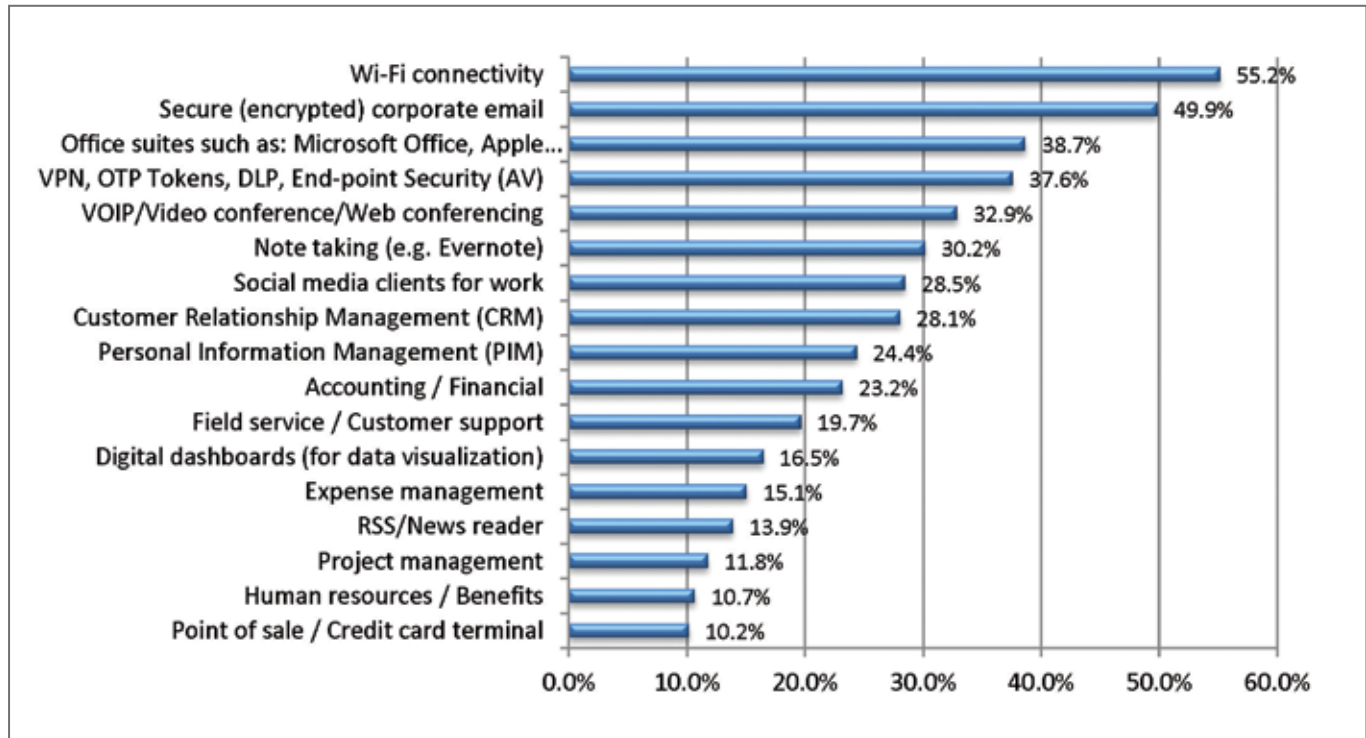


Figure 23: What types of mobile apps are you using?

The least popular apps related to business intelligence, inventory management, retail/point of sale data, human resources and product management.

IT as New Technology Enabler

In the midst of so much change, it is natural for IT's image and reputation to fluctuate. Managers must strike the tricky balance of empowering mobile workers while protecting them, and the company, from risks. That means introducing some new technologies to employees while disallowing other tools. Workers appear to view IT as both an inhibitor and enabler with a growing tendency to consider IT an enabler. These attitudes change each year, but, fortunately for IT, the current perception is mostly positive.

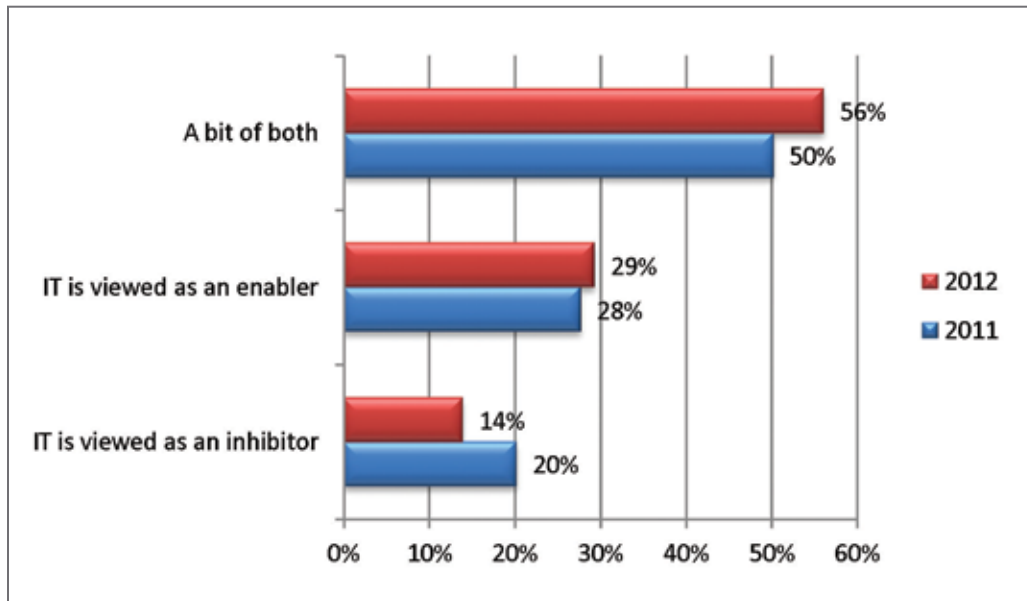


Figure 24: Do you believe employees at your company view IT as an inhibitor or an enabler when it comes to supporting new technologies at your company? (Note that 1 percent answered 'other' in 2012 and 2 percent in 2011.)

Conclusion

IT departments know what employees want and are responding to their demands. BYOD has spawned device trends and employee behaviors that continue to have impacts across the enterprise, and IT is challenged by this device proliferation. Interestingly, IT understands what it needs to do, but this awareness doesn't always translate into action. Such inaction is risky, particularly at a time when mobile complexity is multiplying and data and connectivity costs seem likely to rise.

Streamlining carrier relationships is a good first step. Investigating affordable alternatives, such as Wi-Fi as a replacement for mobile broadband, also makes sense. Above all, IT departments should establish enterprise mobility strategies including coherent guidelines for BYOD and mobile application management. Codifying expectations will reduce IT frustrations and put employees' focus back where it should be: work.



About iPass

Enterprises can't afford to have unproductive business travelers—there is a pressing need for a global Wi-Fi network and trusted connectivity platform. Only iPass can make you globally mobile, with the **world's largest commercial Wi-Fi network**, including far more hotels, airports, and business venues than any other network. iPass reduces the cost of mobility and improves user productivity. Founded in 1996 and headquartered in Redwood Shores, CA, iPass (NASDAQ: IPAS) is setting the world on Wi-Fi. On your smartphone, tablet or laptop, you get more network with less work virtually anywhere you roam. Learn more: www.ipass.com or on **Smarter Connections**, the iPass blog.

About MobileIron

The leader in security and management for mobile apps, documents, and devices, MobileIron's mission is to enable global companies to become Mobile First organizations, embracing mobility as their primary IT platform in order to transform their businesses and increase their competitiveness. Recognized by IDC as the fastest growing mobile enterprise management vendor in the world, MobileIron provides the scalable architecture, rapid innovation, and best practices for global companies to transform into Mobile First organizations. Leading global companies use MobileIron as the foundation for their Mobile First initiatives, including 7 of the 10 top pharmaceutical companies, 5 of the 10 top banks, 8 of the 10 top automotive manufacturers, 3 of the 5 top retailers, 4 of the 5 top aerospace and defense companies, and half of the 10 top law firms. For more information, please visit www.mobileiron.com.



Corporate Headquarters +1 650-232-4100
iPass Inc. +1 650-232-4111 fx
3800 Bridge Parkway
Redwood Shores, CA 94065 www.ipass.com

© Copyright 2013 iPass Inc. All rights reserved. iPass and the iPass logo are registered trademarks of iPass Inc. All other company and product names may be trademarks of their respective companies. While every effort is made to ensure the information given is accurate, iPass does not accept liability for any errors or mistakes which may arise. Specifications and other information in this document may be subject to change without notice.