I D C   E X E C U T I V E   B R I E F

How to Equip Your Company for the Growing Mobile Workforce

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Introduction

The number of mobile workers is growing dramatically, and will represent more than 70% of the U.S. workforce and 30% of the total workforce worldwide by 2011. A byproduct of this growth is the expansion of the workday, as mobile and other remote workers have — and increasingly need — 24/7 access to the most current company information and application resources. This Executive Brief examines the critical role remote-access services play in enabling efficient and effective workplace mobility, particularly for small and midsize businesses (SMBs).
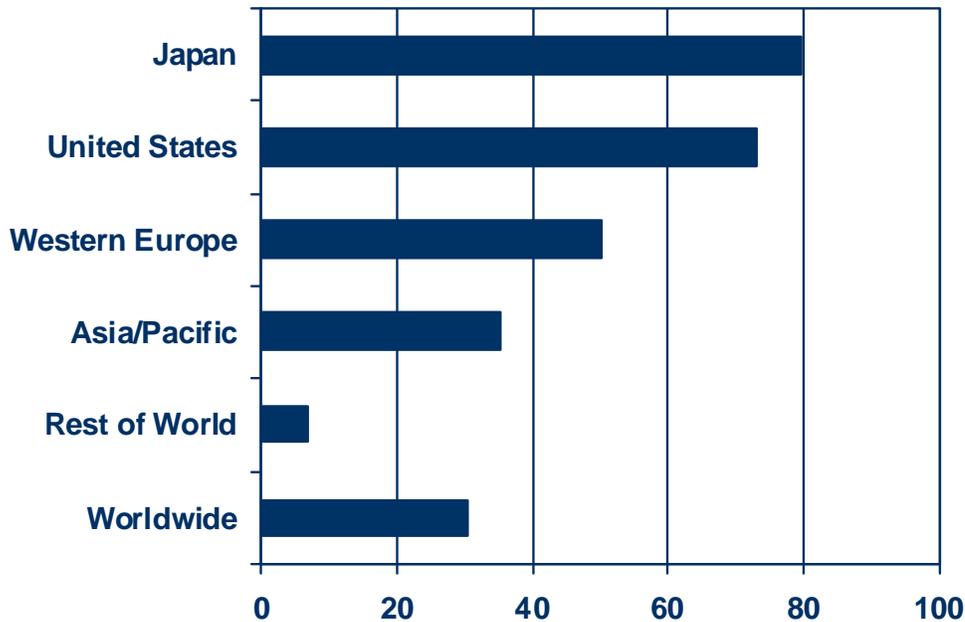
The 24/7 Mobile Workforce

Businesses worldwide are seeing increasing benefits from empowering remote or mobile workers. Advances in mobile technology have allowed companies to create "ever-connected" workers who can have full access to critical corporate resources such as applications, documents, and email from anywhere in the world on notebook computers and handheld devices as they travel.

Consequently, the common workday is hardly restricted to nine to five anymore. People are constantly working: accessing the most up-to-date information, responding immediately to client contacts, and taking care of many more daily tasks around the clock.

IDC estimates that the worldwide mobile worker population is set to increase from 24.8% in 2006 of the worldwide workforce, to 30.4% of the workforce in 2011 (see Figure 1) — representing more than 1 billion workers.

Figure 1

Worldwide Mobile Workforce Penetration by Region, 2011

Source: IDC, 2009

The U.S. accounts for the second highest percentage of mobile and remote workers worldwide. Only 26% of the U.S. respondents to a global survey were non-mobile professionals. This supports existing IDC assumptions that the United States has the largest percentage of mobile workers when compared with other key regions such as Western Europe and Asia/Pacific (excluding Japan).

Mobile professionals and the occasionally mobile are very similar across all regions of the globe, but the U.S. exhibits the highest combined percentage at 52%. Part of the disparity is because the U.S. has a higher percentage of home-based business owners and telecommuters. The U.S. also accounts for the largest combined percentage of mobile and remote workers at 74%.

Remote Access Needs of Mobile Workers

Remote access services provide a secure means for office-based employees to work remotely. Remote access services software is a screen-sharing technology that enables one computer to stream its desktop to a remote computer via an Internet connection. Once on the remote computer, users can access all of the applications sitting on their desktop via a Web browser.

These products are offered as a service. Remote access services products are typically used by individuals so that they can access their own machines remotely. They differ from remote support services in that they are not typically used by an IT department for troubleshooting. They also differ from remote control software in that

they are offered as a service, and also used by individuals instead of IT departments.

As such, remote access services along with alternate access methods of remote access are a contributing factor to a growing willingness among managers to allow office-based employees to work remotely for part of the time. Other factors contributing to this trend include long commute times and volatility of gas prices and two-income families with children, among others.

Small and midsize businesses (SMBs) are especially interested in leveraging remote access services because of particular needs. For example, SMBs generally lack IT staff, or have a skeletal department, and yet they need easy remote-access services. These services offer an alternative to the virtual private network (VPN), and without the need to install and maintain a client on the remote PC or laptop.
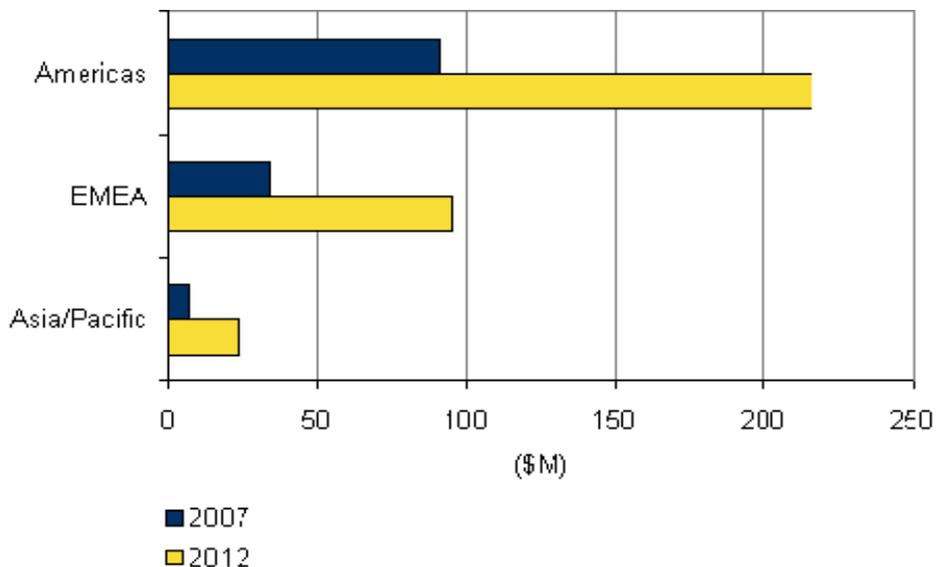
Remote access services also save SMBs the up-front capital expenses of buying and installing software, as well as the ongoing costs of maintaining that software. A service model likewise relieves SMBs from having to refresh their expertise and infrastructure with the latest remote-access solutions.

Market Assessment

IDC projects that the worldwide market for remote access services software will grow from $131.1 million in 2007 to $334.6 million in 2012 at a compound annual growth rate (CAGR) of 20.6%, with the highest growth occurring in the Americas region (see Figure 2).

F i g u r e 2

Worldwide Remote Access Services Revenue by Region, 2007 and 2012

(\$M)

■ 2007
□ 2012

Source: IDC, 2009

The remote access services software market is still in its earlier stages and thus will continue to experience higher-than-average growth over the forecast period. IDC predicts continued growth in the number of mobile workers worldwide.

Remote access services software provides employees with an alternative to traveling with a laptop or having to bring it home to work. Heightened security concerns related to employees traveling with laptops will spur adoption of remote access services software solutions. IDC expects that remote access services vendors will enhance their business-focused products with features that meet the needs of mobile workers and IT administrators.

Remote access services software has potential to grow across many horizontal and vertical users. It can be used by consumers and businesses. This market may be tempered by the growth in laptops and converged mobile devices. However, vendors are also employing strategies to position remote access services software as complementary to converged mobile devices and laptops, as opposed to VPN access via such devices.

Conclusion and Recommendations

The worldwide mobile workforce is substantial at over 840 million workers for 2008 and it will grow to over 1 billion workers by 2011, accounting for 30% of the total global workforce. The percentage of workers that are mobile is even more dramatic in the U.S., with mobile workers constituting 70% of the total workforce by 2011. Growth in the mobile workforce is being driven by many factors including; faster growth in services-oriented industries, longer commute times, growing legitimacy of work/life balance, along with better and more cost-effective enabling technologies.

Remote access services software provides a means for remote and mobile workers to securely access their desktops in the office while working from home or while traveling for business, and without the need for a VPN client. The market for such solutions will grow by 20.6% over the next five years to reach $334.6 million in revenues for 2012.

IDC recommends the following for organizations looking to address the needs of their mobile workers:

- Employ remote access technologies in support of remote and mobile workers that are easy to use and maintain

- Employ solutions that allow you the flexibility to scale up and scale down your remote workforce as needed

- Adhere to the government, industry, and organizational policies for security and privacy. However, it is important to leverage technologies with security features that do not hinder the ability to use the product. Security needs to be seamless for end users, and IT professionals need the controls in place to tailor security and reporting capabilities to the needs of their businesses.