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A woman with long hair is shown in profile, looking out of an airplane window. She is holding a smartphone in her hand, and the light from the window is illuminating her face and the phone. The background is a bright blue sky with some clouds.


**Next  
Mobile  
Economy**

A report by THE : FUTURE : LABORATORY

# Contents

<b>3</b>	<b>Mobile Revolution</b>
5	Business transformation in a connected world
6	Disrupt or Be Disrupted
<b>8</b>	<b>The Death of Closed Technology</b>
10	Closed can't do the Next Mobile Economy
11	The Open Opportunity
<b>12</b>	<b>Open Collaboration</b>
14	Tools of the Trade
15	Unifying Devices
<b>16</b>	<b>Open Customisation</b>
18	Immersive Brand Experiences
19	Unleash data. Unlock potential
<b>20</b>	<b>Open yet Controlled</b>
22	Controlled Connections
23	Work/Play Balance
<b>24</b>	<b>Open yet Secure</b>
26	Access all areas?
27	One device. Many uses.
28	Intelligent Security
<b>28</b>	<b>Conclusion</b>

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# Mobile Revolution



**J**ust 10 years since the introduction of first mass-market smartphones, mobile devices have become the default for how people and companies, governments and other organisations communicate. In this new era of mobile, a single choice could define the success or failure of your business or career in the new mobile decade:

Are you open or closed?

Most companies, governments and organisations are still woefully unprepared for what's coming next in mobile. Sooner than you think, almost everyone on Earth will be connected to everyone else. Everyday objects are already being connected to form a vast Internet of Things. Our world has become an expanding ecosystem of people, devices and systems – soon to be turbocharged with near zero-latency 5G. If you think mobile has changed everything already, you haven't seen anything yet.

## **"A single choice could define the success or failure of your business or career in the new mobile decade:**

### **Are you open or closed?"**

Those that have been slow to address mobile now face an existential crisis, as mobile technology shifts to the next level. Do we isolate or do we collaborate? Do we want to succeed, or are we ready to fail? The questions are many and complex, but the time to choose is now. Because failing is no longer about simply falling behind, it can mean the survival of your business or career.

The world needs open – and businesses and people who cling to old, closed systems, attitudes and ways of doing business risk missing out on the opportunities open brings. A new kind of partnership is needed that relinquishes the closed, corporate mindsets of the past, and opens them up to the Next Mobile Economy.

In order to understand the drivers and implications of mobile over the next decade, Samsung has commissioned research from The Future Laboratory, a London-based business think tank. As well as gathering insights, The Future Laboratory conducted primary quantitative and qualitative research with business and IT decision makers from businesses in the US, UK, France and Germany, ranging from global enterprises to small companies.

# Business transformation in a connected world



**T**he research showed clearly that mobile has already impacted the way almost every business – from humble neighborhood stores to the world’s biggest enterprises – works. Eight out of 10 business leaders believe mobile will create future opportunities for their company to lead in their sector.

But fewer than four in 10 cite maintaining competitive advantage, and even fewer mention new product and service development, as key expectations for mobile in their enterprise. More worrying, only a quarter of respondents mention the exploration of new mobile business models as one of the things they expect mobile technology to enable for them.

To turn these convictions into roadmaps for corporate success, business leaders must grasp that mobile and associated technologies don’t just hold the keys to survival in an increasingly disrupted, mobile world. They are also the main drivers of business transformation that will move beyond incremental productivity improvement to power growth, both now and for the years to come. The change has come. It’s real, it’s huge – and it isn’t going away.

# Disrupt or be Disrupted

The scale of this mobile revolution is greater than any previous technological shift. It will create new business models, new products and new services. It will power frictionless transactions and trade across the planet. Mastering mobile will separate the winners from the losers in the decade ahead.

“All signs point to a huge transformation,” says DJ Koh, president of Samsung Electronics. “We are no longer just reacting to new mobile technologies as they appear. Today, all the great ideas are born mobile. Our task is to be ready to seize the moment. At Samsung, we call it the Next Mobile Economy, and we recognise that while it offers tremendous opportunity, there is also potential for serious risk and disruption.”

In the Next Mobile Economy, workers and consumers alike will rely even more on mobile devices as their primary point of interaction. New devices and new ways to use them will accelerate the transformational impact of mobile and associated technologies on business, deepening the scope and scale of disruption across every sector.

Sophisticated use of smartphones and tablets is already enabling greater employee performance and productivity. As a 2017 study by Sapio Research for Synchronoss Enterprise<sup>1</sup> reveals, businesses deploying advanced devices and apps to support business processes see, on average, 15% greater productivity and 29% higher profitability than those restricting the use of mobile to basic functions such as email, calls and scheduling.

In a world where 1.87 billion people<sup>2</sup> – almost half the total global workforce – already use mobile devices for business, CEOs, CIOs and other business leaders must truly come to terms with the risks and potential rewards of the shift to mobile. They must, as a matter of urgency, investigate the transformation opportunities it offers across sectors, from retail and finance to healthcare, logistics, government and beyond.

But perhaps the more urgent question is what companies stand to lose if they fail to seize the transformative initiative. What happens to businesses who hang on to

old fashioned fixed workplace systems, closed systems and generic solutions? What happens to companies who fail to adapt in a world in which change is as fast as it is irreversible?

According to The Future Laboratory research, they risk the fate of an increasing number of enterprises who have failed in the face of disruptive entrants and more nimble competitors.

For CEOs, CIOs and IT decision makers who choose not to adapt, the writing is on the wall: fail to keep up with the pace of change and the Next Mobile Economy could well make both you and your business obsolete.

It's already started. Established companies are falling out of the Standard & Poor (S&P) 500 at a rate of one every two weeks. At that rate, 75% will be replaced by the late 2020s.<sup>3</sup>

Even more marked is the correlation between advanced mobile integration and growth. Boston Consulting Group's Most Innovative Companies 2018<sup>4</sup> reveals that 42% of the world's leading business innovators are prioritising mobile products and capabilities. These companies have a clear focus on big data analytics and are quick to adopt and integrate new technologies like VR and open systems as catalysts for progressive business innovation.



## 42% of the world's leading business innovators are prioritising mobile products and capabilities

<sup>1</sup> 'The State of Enterprise Mobility', by Synchronoss, page 9: [http://synchronoss.com/wp-content/uploads/The\\_State\\_of\\_Enterprise\\_Mobility\\_Whitepaper.pdf](http://synchronoss.com/wp-content/uploads/The_State_of_Enterprise_Mobility_Whitepaper.pdf)

<sup>2</sup> Research by StrategyAnalytics: <https://www.strategyanalytics.com/strategy-analytics/news/strategy-analytics-press-releases/strategy-analytics-press-release/2016/11/09/the-global-mobile-workforce-is-set-to-increase-to-1.87-billion-people-in-2022-accounting-for-42.5-of-the-global-workforce#WseYmpPwbBI>

<sup>3</sup> 'Creative destruction whips through Corporate America', by Innosight, page 2: [https://www.innosight.com/wp-content/uploads/2016/08/creative-destruction-whips-through-corporate-america\\_final2015.pdf](https://www.innosight.com/wp-content/uploads/2016/08/creative-destruction-whips-through-corporate-america_final2015.pdf)

<sup>4</sup> From 'The Most Innovative Companies 2018: Innovators Go All In on Digital', by BSG: <https://www.bcg.com/d/press/17january2018-most-innovative-companies-go-all-in-digital-181185>



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**For business leaders,  
the Next Mobile  
Economy offers just  
two choices: disrupt  
or be disrupted**



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# The Death of 'Closed' Technology





**“Businesses are more likely to succeed by being open than by sticking with closed systems, where innovation is much slower”**

**David Shim**  
SVP of Global Solutions, Services & Alliances,  
Samsung Electronics

**O**ver the last two decades, the dominant model for technology and ecosystems has involved uniform devices and proprietary applications. These closed systems created easy-to-use customer experiences and offered high levels of control with low levels of differentiation: every user was treated pretty much the same.

But that world is disappearing fast. The march of technology across mobile, IoT, AR, VR, cloud and big data means ‘closed’ no longer works. Today’s user expects their tech to be connected and, increasingly, collaborative. The systems we build and use have to reflect this expectation if businesses hope to continue to attract and develop the best talent. C-suite business leaders and IT decision makers can choose either to watch their closed technologies die, or harness the power and potential of open mobile platforms and systems, like the Android open mobile operating system, to build a better future.

This shift will mean abandoning the walled gardens that are the enemy of interoperability and positive change. As David Shim, senior vice president of Global Solutions, Services & Alliances at Samsung Electronics, states: “With open systems you get the benefits of both collaboration and innovation. Businesses are more likely to succeed by being open than by sticking with closed systems, where innovation is much slower.”

# Closed can't do the Next Mobile Economy

**B**usinesses, governments and other organisations have long been wary of sharing their information, so the shift towards openness will require change that is as much cultural and philosophical as it is technological. But the stakes are high, and the choice is stark: either ditch increasingly obsolete, laborious closed systems that hold your people back, or risk drifting into irrelevance.

The world's business leaders already recognise the benefits of an open approach to using mobile for enterprise. In the Future Laboratory study, 83% of business chiefs agreed their companies should focus on increasing agility and openness in order to protect and future-proof operations in the changing global business landscape.

Notably, agreement was strongest among companies with more than 10,000 employees, where the need for agile and customisable open systems is critical to ensure fluency in business operations. What's more, a clear 67% believed that businesses using open software and systems will be leaders in their sectors, driving growth through more fruitful collaboration.

As Terry Halvorsen, Samsung CIO and executive vice president of IT Mobile notes: "Smart businesses see transformation to open systems and mobile technology as an opportunity, not a burden. It's a chance to leap forward while reducing the costs of maintaining and updating legacy systems."



# 83%

**of business leaders agree their companies should focus on future-proofing their operations by increasing openness and agility**

# The Open Opportunity



**T**here is an urgent question facing every business as we begin the second mobile decade: what will success look like in the Next Mobile Economy?

The answer is simple. Businesses will win by grasping the Open Opportunity – unlocking the potential of open mobile platforms, and unleashing their potential to become the disruptors in their sectors.

These businesses will enable Open Collaboration by building close and trusting relationships with technology partners who help them unleash the true power of mobile.

They will harness Open Customisation by leveraging the knowledge, manufacturing power and R&D of their tech partners to build custom hardware and intuitive software solutions, finely tailored to the needs of both their business and their customers.

With tomorrow's employees and freelancers increasingly freed from desks and outdated workplace tech to work on-the-go, businesses seizing the Open Opportunity will need to be able to manage mobile devices and software remotely, yet securely.

As global business continues to grow in the Next Mobile Economy, Open yet Secure mobile hyper-connectivity will be critical in enabling businesses to disrupt, adapt, innovate and grow with confidence.

The following chapters reveal the opportunities and key considerations for businesses ready to thrive in the decade ahead. And they highlight the four pillars of the Next Mobile Economy: Open Collaboration, Open Customisation, Open yet Controlled, and Open yet Secure.

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# Open Collaboration



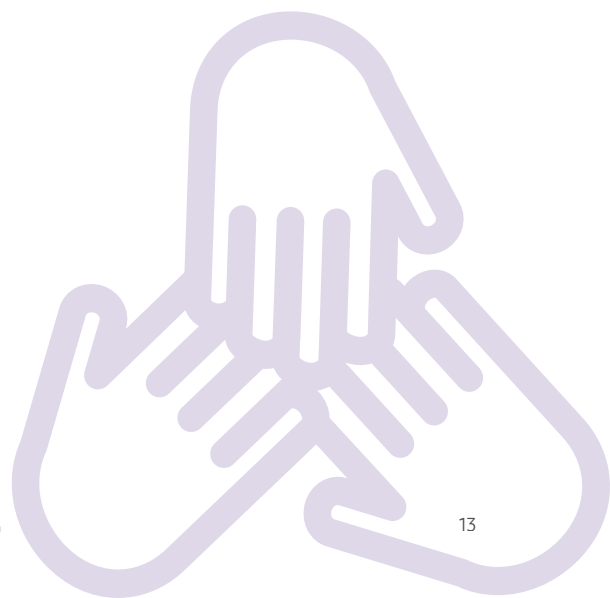




**Open Collaboration is vital to business success for the decade ahead. Organisations must prioritise the establishment of collaborative technology partnerships to aid a seamless transition into the Next Mobile Economy.**

**A**s innovation continues to surge ahead, it will create ever more open ways of working. Our future workplaces will be filled with technology tools enabling new kinds of collaboration. Able to adapt in real time to evolving trends and circumstances, these tools will enable businesses to develop products, services and business models in order to deliver better solutions to tomorrow's customers.

As Irene Greif, head of the Collaborative User Experience Group at IBM notes: "I have always believed collaboration is most meaningful when you are creating something together, to the extent that it is helping to build trust."<sup>5</sup>



<sup>5</sup>'The Psychology of Collaboration', by IBM researcher Irene Greif: <https://www.technologyreview.com/5/423322/the-psychology-of-collaboration>



# Tools of the Trade

**A**lignment Healthcare (AHC) has adopted an enhanced mobile system for sophisticated remote health monitoring of high-risk patients. By equipping them with tablet devices, AHC can facilitate immediate medical interventions whenever patients need them.

Meanwhile, AHC captures and monitors patients' daily biometric data in their normal environments, and allows healthcare professionals to communicate simply and easily with them via video calls, reducing the need for inconvenient, expensive and time-consuming hospital visits and lowering the barriers between patient and professional that get in the way of optimal healthcare decisions.

The Future Laboratory study shows 87% of today's business leaders believe collaborative mobile tools will unlock the flexibility and productivity that is key to meeting the needs of employees and customers alike.

Smart business leaders will equip their workforces with the intuitive, efficient mobile technologies they need to match their increasingly flexible, peripatetic ways of working, and to be able to perform essential tasks wherever they are.

Swiss company Scandit, which provides high-quality mobile barcode scanning solutions for smartphones, tablets and wearable devices, exemplifies this approach. It has been able to address a number of in-field usability issues for customers including global logistics company DHL, which it has helped enhance end-to-end logistics processes while lowering costs.

Research from McKinsey & Company<sup>6</sup> confirms the world's top-performing B2B companies are those working in collaborative ways. Most importantly, McKinsey reports that the businesses with the best understanding of their clients are those using mobile tech to capture key in-field insights and analytics – the companies already transitioning to the Next Mobile Economy.



# 87%

**of today's business leaders believe collaborative mobile tools will unlock the flexibility and productivity**

<sup>6</sup> 'How B2B digital leaders drive five times more revenue growth than their peers', by McKinsey&Company: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/how-b2b-digital-leaders-drive-five-times-more-revenue-growth-than-their-peers>

# Unifying Devices

Inter-company collaboration through mobile devices will improve the delivery of essential business insights in the Next Mobile Economy.

Maximising collaborations between individuals and companies will be a key element of the Next Mobile Economy, particularly in sectors such as security and the military, where instant, clear, and unambiguous communication is critical.

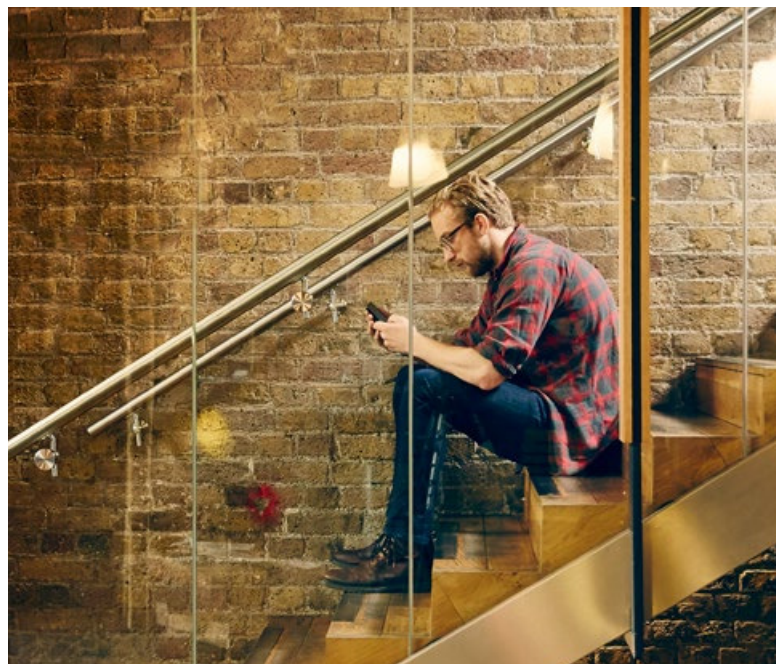
In fact, The Future Laboratory's research regarding Open Collaboration reveals that 86% of business leaders agree they must provide employees with solutions to improve communication and information access in the workplace, with those working in finance, retail and government roles among the highest in agreement. Law enforcement communities, which rely on sharing highly sensitive information at speed, are beginning to see the advantages of using mobile devices in-field to improve the secure flow of data between control rooms and officers on duty, allowing them to collaborate in new ways.

With more than half of the world's 500 largest public companies already working with start-ups,<sup>7</sup> more and more large businesses will partner with start-ups and SMEs to build cost effective collaborative solutions. This will ensure continual development and evolution of mobile services to keep pace with an ever-changing business and technology environment.

As businesses look to enhance their position and better serve the needs of their clients, customers and the public in the Next Mobile Economy, mobile devices and open platforms will inspire Open Collaboration, creating partnerships to drive future innovation and growth.

**86% of business leaders agree they should give employees the solutions they need to improve communication and information access**

As Samsung's Terry Halvorsen notes: "Today, no single company can provide every solution to clients. Those which learn to collaborate with B2B partners will be the ones that prosper. We've seen this in how the world's leading companies have changed over the last 20 years. Companies resisting collaboration have failed, while those embracing it now lead."



<sup>7</sup> 'The Connection of Startups within industry', by Open Axel, 2016, page 4: <http://openaxel.com/wp-content/uploads/2016/05/OpenAxel-white-paper.pdf>

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# Open Customisation



## As a new generation of digitally-fluent business leaders takes the reins of the Next Mobile economy, the demand for customised mobile business solutions will become irresistible.

Open Customisation means mobile technology tailored for individual business needs. While consumers have long expected businesses to deliver bespoke experiences, internal and B2B technologies have remained 'off the shelf'.

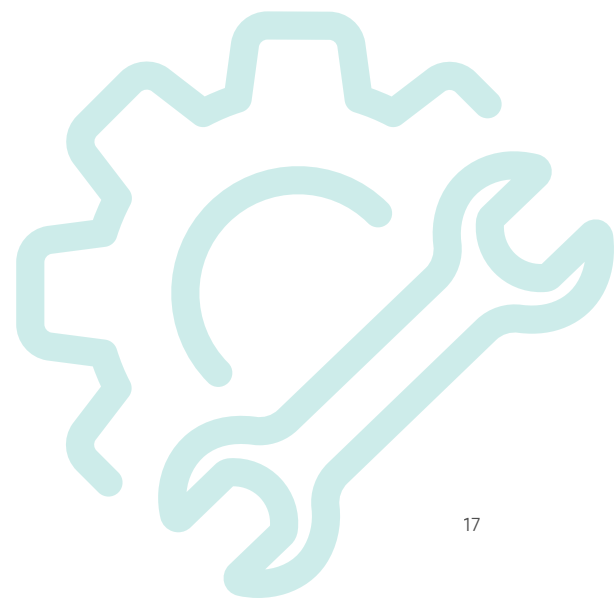
It is becoming vital for businesses to integrate custom solutions across every device, from smartphones and tablets to VR, AR and wearables. As these digital natives start running businesses, that's how they will expect them to be.

The Future Laboratory research findings show that younger business leaders in their 40s are more likely to agree that off-the-shelf solutions are no longer suitable for their company's working practices. This was of particular concern for those operating businesses with between 3,000 and 10,000 employees, where the necessity for bespoke internal systems is fundamental to achieving streamlined, proficient working across a large number of employees.

As global business moves into the 2020s, we will see more and more companies begin to reject legacy systems and one-size-fits-all solutions, turning instead to mobile and

software partners offering inspiring, customisable open systems. This will not only improve work for employees, but will also increase satisfaction for both B2B and B2C customers.

Ross Rubin, principle analyst at Reticle Research, a consultancy firm focused on the impact of consumer technologies, says: "Businesses feel more confident and comfortable when they can tailor solutions based on their workforce or business needs with a partner who delivers the right support, stands behind the product, and continues to invest in R&D."





# Immersive Brand Experiences



**VR usage in business will soon outpace that for leisure, with spending reaching US\$9.2bn by 2021**

In retail, customised wearables are increasingly essential for both employees and end-consumers. ABI Research forecasts that enterprise wearable shipments will reach over 118 million in 2022, increasing from just over 38 million in 2017.<sup>8</sup>

Retail staff are already wearing smart glasses supported by bespoke app solutions such as GoInStore, a video app that allows online shoppers to view products in-store, in real time, as the member of staff moves around the store. In turn, this creates a memorable experience and offers an augmented and enhanced layer of customer service.

Premium car manufacturer Jaguar Land Rover has used customised VR technology to create great brand experiences at key engagement points, designed to appeal to its younger, tech-savvy clientele. Its customised, immersive VR programme allows potential clients to discover new models ahead of launch, boosting interest which can

be converted into sales.

Mobile VR is tipped to become a major platform for businesses for training, product simulations, healthcare therapy and other applications. According to research by Tractica, VR usage in business will soon outpace that for leisure, with spending reaching US\$9.2bn by 2021.<sup>9</sup>

A major pharmaceutical company gave custom tablets to patients requiring complex medical care. The devices offered the patients portable access to information and interactive instructions relating to their medicines, improving compliance and reducing the need for time-consuming and expensive consultations.

Customised to the brand's specific requirements, these tablets are built to be secure, while the in-built, remotely accessible CMS (Content Management System) is seamlessly updated with new patient information as soon as it is available. "It provided the perfect solution for that company, as well as supportive and insightful interactions for the patients," explains David Shim.

<sup>8</sup> Excerpt from 'Staff Wearables: Closing the Retail IoT Loop' report, by ABI Research: <https://www.abiresearch.com/press/enterprise-wearables-forecasted-reach-118-million/>  
<sup>9</sup> Tractica research, Feb 2017: <https://www.tractica.com/newsroom/press-releases/the-enterprise-and-industrial-virtual-reality-market-will-grow-to-9-2-billion-by-2021/>



# Unleash data. Unlock potential

**F**or sectors such as financial services and healthcare, dialogue will be vital in adopting Open Customisation solutions to modernise and streamline internal processes and data sharing.

For sectors such as financial services and healthcare, which have long relied on closed, structured systems with legacy architecture and one-size-fits-all systems, surviving in an open world with API-driven customised environments will become increasingly difficult. Organisations in these sectors must, as a matter of urgency, start dialogues with partners who can help modernise and streamline their internal processes and data sharing capabilities.

A review of healthcare strategies across 35 countries by technology analysts Gartner<sup>10</sup> found two-thirds were still using Enterprise Resource Management mega-suites. These legacy systems lock data and insights inside proprietary systems, obstructing the information-driven, critical environments that could revolutionise service provision.

The solution, Gartner health analyst Mike Jones suggests, is to move to open ecosystems and networked platforms such as Android, which enable the development of custom tools and applications and add value to patients and professionals alike.

The challenge for businesses is to add value for employees and end-consumers. They should form partnerships to build customised mobile solutions which will increase efficiency and productivity, and grow revenues across all sectors and business sizes, making them fit for a digital future.

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## The challenge for businesses is to add value for employees and end-consumers



10. Quoted from Gartner: <https://www.digitalhealth.net/2017/09/gartner-says-nhs-reliant-closed-systems/>

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**Open yet  
Controlled**

A large, stylized graphic element consisting of a thick purple arrow pointing left, overlaid with a horizontal purple bar. The arrow is positioned diagonally across the page, and the horizontal bar is positioned horizontally across the middle. The text 'Open yet Controlled' is overlaid on the arrow.



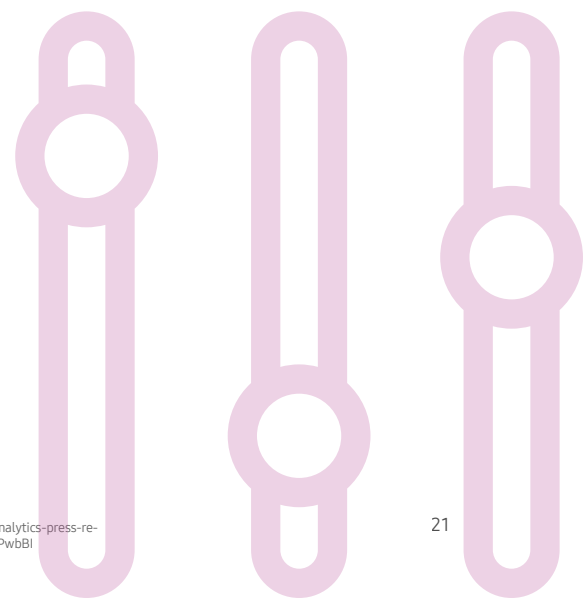
## The Next Mobile Economy's advances in mobile devices and 5G connectivity will enable a hypermobile, hyperflexible workforce. But business must ensure that mobile empowerment doesn't come at the expense of control or security.

In this new information-rich era, employers will be responsible for providing cutting-edge mobile tools with the highest standards of security and control, allowing people to spend less time tied to their desks and more time driving business forward with smartphones and IoT-connected devices.

The ease and speed with which confidential information can be transferred through mobile devices is a particular concern to those working in the finance and IT sectors. The Future Laboratories study found a quarter of business leaders in the IT sector expressed 'extreme concern'.

According to Strategy Analytics,<sup>11</sup> more than 40% of the world's workforce – some 1.87 billion people – will be mobile by 2022. It's clear businesses will need control over devices used in-field by employees and freelancers

alike. Meanwhile, employees need to know they can work, research, manage data and share files freely, and safely with the right people, safe in the knowledge their data can't fall into the wrong hands.



<sup>11</sup> From research by Strategy Analytics, Nov 2016: <https://www.strategyanalytics.com/strategy-analytics/news/strategy-analytics-press-releases/strategy-analytics-press-release/2016/11/09/the-global-mobile-workforce-is-set-to-increase-to-1.87-billion-people-in-2022-accounting-for-42.5-of-the-global-workforce#.Wseh6JPwbBI>

# Controlled Connections

**D**ata is the fuel of the Next Mobile Economy. Securing and controlling it will be of paramount concern. By 2020, the average digital citizen will have access to at least 10 connected devices across their work and home lives, according to business consultants Frost & Sullivan.<sup>12</sup> Each and every one of these interactions poses a potential risk.

“Information and data will travel so fast in the Next Mobile Economy, giving us so much more in terms of valuable resources and breaking down working barriers,” explains Terry Halvorsen. “But there are hard challenges around control of data and physical devices, as well as the ability to flag anomalies instantly and remedy any issues as quickly as possible.”

CIOs and IT Decision Makers will demand software and systems that are open, but which also provide total assurance. They want to be certain, at all times, that their teams have the latest security software, they can check for any signs of security breaches, and they can remotely control devices when threats arise. And all while ensuring their systems remain open, adaptive, and in tune with the accelerating pace of global business.

This business need for simultaneous openness, mobility and control calls for a new generation of Enterprise Mobile Management (EMM) systems. They will enable IT managers to control any remote device – from smartphones to wearables, VR to voice control – effortlessly. They will eliminate the need for costly hands-on tech support – and the extended downtime it involves.


These EMM systems will allow IT managers to integrate, configure, and update their mobile devices, operating systems and apps quickly, easily and remotely – which is a powerful advantage for business leaders, too. Over a third of respondents to the Future Laboratory study said a centralised system for device control was a top priority for them, while a similar number emphasised the importance of real-time device control access.

This access is particularly important for sectors including retail, healthcare, construction and policing where devices are deployed as business tools. In finance, tablets are increasingly commonplace during client meetings or within

banking branches, where they are used for data collection or for customers to apply for products online.

These tablets offer customers the ease, intuitive interface, and familiarity of the devices they use at home, while simultaneously limiting their use to the banking environment. They are familiar, open and friendly... but controlled.

The ability to control mobile devices used in certain sectors like defense, law enforcement, legal and healthcare is and will remain paramount to public safety – as the consequences of data theft can be severe. EMM systems allow remote wiping of devices that are lost or stolen, and give employees and employers alike the confidence to use devices in the field, safe in the knowledge their contents are always protected if they fall into the wrong hands.



**Over a third of business and IT decision makers said central, real-time access and control of remote devices was important to them**

<sup>12</sup> 'The Internet of Things; Connecting the dots', by Frost and Sullivan, page 2: [https://ww2.frost.com/files/7314/8233/2176/IoTBrochure\\_UK.pdf](https://ww2.frost.com/files/7314/8233/2176/IoTBrochure_UK.pdf)

# Work/Play Balance

**B**y separating work data from personal data on a single device, companies enable mobile workers to blur the boundaries between home and work, maximising productivity and performance while reducing the risk and scale of data breaches.

The BYOD trend is widespread across business, with remote and freelance workers regularly logging on to their personal devices to work. It's increasingly how people want to work. But as we move into the Next Mobile Economy and the touchpoints for mobile connectivity increase, more and more questions will arise around the control and security of corporate data on personal devices, the updating of their operating systems and software and how businesses can enable employee freedom and openness without losing oversight of potentially sensitive and confidential information.

As Terry Halverson explains, careless employees are the greatest security threat to today's organizations: "They don't always do smart things with data, and some don't even use passwords on their devices." Even something as innocent as connecting to an unsecure network with an unprotected device can cause a major breach.

Whether a Next Mobile Economy business is integrating a fleet of devices or enabling BYOD, their mobile systems will be managed with secure, unified management systems to increase both control and security. As well as cutting the costs and downtime involved in clearing up security breaches, these networks give business leaders the confidence to free their employees to work the ways they want, improving uptime, productivity and effectiveness.



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**Careless employees are the greatest security threat to today's organizations**



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**Open  
yet secure**

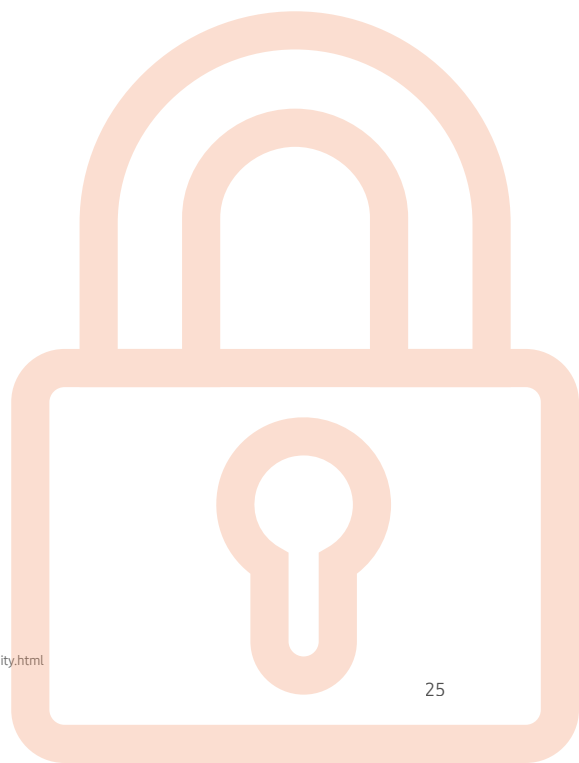


**In the Next Mobile Economy, mobile workforces will forge new, exciting inter-company collaborations to boost efficiency and effectiveness. The challenge for business leaders is to make the most of these opportunities and enjoy the flexibility of open mobile working, while retaining security and control.**

In a truly connected, open system world, companies will need to be ever more vigilant over their data and systems. Repeated security breaches against social media sites, fitness trackers, healthcare operators, finance giants and more prove today's security systems just don't cut it. Cyber-attacks are a major concern for 62% of global CEOs, according to PwC.<sup>13</sup>

This challenge is made even greater by the ever growing array of mobile, IoT devices, and Cloud platforms workers use to connect – often without thought to the risks. In order to survive and thrive in tomorrow's open, 5G-fuelled world, business mobile systems need a total security overhaul.

<sup>13</sup> PwC's 20th Global CEO Survey by PwC: <http://pwc.blogs.com/resilience/2017/03/for-ceos-cybersecurity-is-both-rising-concern-and-significant-opportunity.html>



# Access all Areas?

Tomorrow's connected devices will transmit ever more information between multiple individuals and devices, exponentially increasing the opportunities for data to be intercepted and stolen. This will bring the need for systems that are both open AND secure into sharp relief.

According to Cisco, the amount of data stored on devices by 2021 will be an almost unimaginable 5.9 zettabytes: 4.5 times higher than that stored in data centres. Gartner, meanwhile, predicts that by the same year, 27% of corporate data traffic will bypass perimeter security entirely, flowing directly from mobile devices to the Cloud.

As we have already highlighted, the security of devices and software will be particularly important for workers wanting to use a single mobile device across their work and personal lives. Yet almost half of the organisations reviewed by Cisco<sup>14</sup> cite employees using their own devices, software, or Cloud applications for business tasks as a significant internal security challenge.

As Ross Rubin of Reticle Research explains: "Mobile devices and apps tend to be closely identified with the location and actions of their owners. That can give rise to security concerns – and certainly presents a potential privacy risk."

So, does being open equate to being less secure? David Shim believes the opposite is true. "If we work to the viewpoint that companies have faced a lot of challenges from cyber security attacks, there is actually no single approach that makes a system more secure. If anything, open systems benefit from people working on them constantly to make them more secure. In my view, the benefits of collaboration and innovation through open systems far outweigh the perceived issues of their security." Indeed, 65% of business leaders and IT decision makers

surveyed by The Future Laboratory agree a business can be truly open and agile while ensuring full security of information and systems, with 77% of business leaders from the IT sector specifically in agreement – a telling and positive insight into the secure future of open mobile systems.



**77%**

**of IT business leaders think businesses can be truly open and agile while also ensuring security of information and systems**

<sup>14</sup> 'Cybersecurity Report 2016', by Cisco: [https://www.cisco.com/c/m/en\\_us/products/security/offers/cybersecurity-reports.html?Keycode=001124371](https://www.cisco.com/c/m/en_us/products/security/offers/cybersecurity-reports.html?Keycode=001124371)

# One device. Many uses



**E**ighty percent of those polled by The Future Laboratory agree their businesses would benefit from keeping sensitive company data on fewer devices – ideally just one device per worker. In the finance industry this sentiment is even clearer: 85% of sector leaders agree it would be ideal to limit sensitive data to a single device. In a BYOD world, this means your personal phone is your work phone – with all that entails in terms of keeping track of sensitive data.

Enterprises will increasingly look to mobile partners who can provide their employees with intelligent devices and systems that both secure and streamline working processes so they can be used safely for work and personal purposes alike. In the Next Mobile Economy, the ability to ‘containerise’ information on devices – to separate the professional from the personal – will add a further layer of control, satisfying both individual device users and their employees.

Effectively creating two phones in one, container applications separate accessibility to business documents, data and communications from data that is personal. This makes EMM simpler for the enterprise, while vastly reducing the risk and severity of data leaks. “They are almost like a series of locks,” explains Halvorsen. “I used to carry four phones but now I use a container system I only need one.”



# Intelligent security

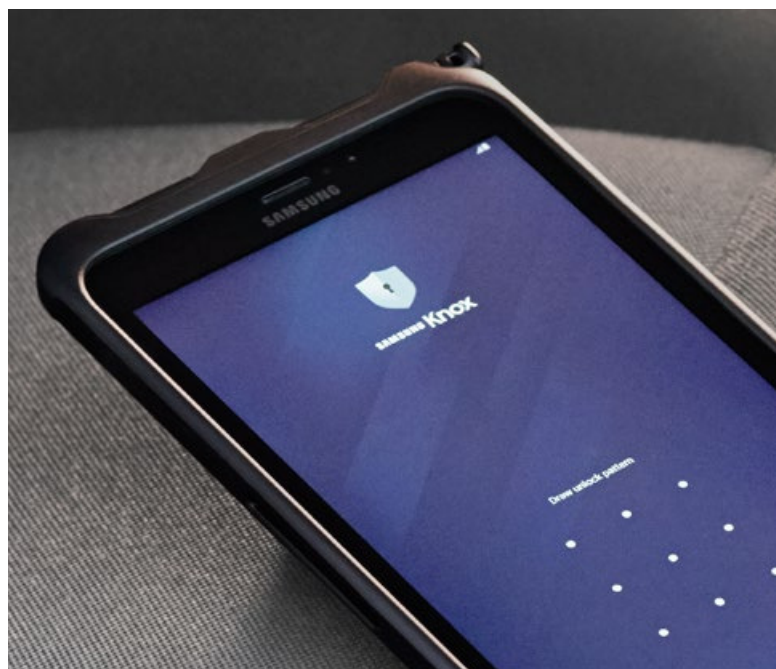
**N**ew innovations in biometric security promise simple, effective protection for sensitive business data in the Next Mobile Economy.

Advances in biometric security from fingerprints to iris and face recognition have already changed the user's perception of securing their device and their data from being a password they remember to something they are – intrinsic to themselves. But this is just the beginning of a new, more intelligent approach to security.

The advent of AI integration into device security ecosystems – whether for voice recognition or to understand individual device usage patterns – will soon come to the fore as businesses demand in-built mobile contextual awareness.

As Samsung Knox strategy and business development director Nick Dawson outlines, the ability to determine where someone is, what they're doing and how they're interacting with their device will be a major benefit to enterprise security. "AI infrastructure can automatically change the configuration of the device as a security response. It might recognise a user's typing pattern has changed and challenge them to prove their identity. Or if they connect their device to an untrusted Wi-Fi source, AI could automatically revoke access to sensitive areas or applications."

Whatever the advances in mobile security that arise over the next decade – and there will be many – one thing is clear. It will be devices and platforms combining openness and flexibility while offering businesses defence-grade security from the chip up that will energise tomorrow's enterprises to thrive in the accelerated, connected landscape of the Next Mobile Economy.



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**AI infrastructure can automatically change the configuration of the device as a security response**



# Conclusion

**The Next Mobile Economy is a new era of almost limitless opportunities. Business leaders ignore it at their peril.**

**For business leaders and IT decision makers, the challenge is clear. As their companies approach a tipping point, they face a simple choice.**

**Do they choose to lead, by unleashing the capabilities of disruptive, open systems? Or do they choose to remain tethered to obsolete closed systems, see their business environment change without them and watch their customers leave them behind?**

**As thousands of defunct companies have already discovered, complacency is not an option.**

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As DJ Koh, President of Mobile Communications Business at Samsung Electronics, explains, **“The Next Mobile Economy will transform our businesses, and push us to reimagine how we work... in this new era, it is as simple as disrupt, or be disrupted.”**

Only the innovators will prosper, by forging strong, mobile-driven partnerships to build open, collaborative, customisable systems that meet the new needs of their customers. They will be relentless in their quest for ways to use new technology to inspire new ideas and provide new answers.

By daring to re-imagine their entire enterprise as mobile-first, the leaders of the Next Mobile Economy will meet the needs of a changing global consumer landscape and the expectations of tomorrow’s workforce. They will make their business models fit for the future.

They will ride the advancing tide of colossal data flow by embracing the need for greater mobile device security. They will free their data, without ever giving up control.

The time for action is now. Business leaders and IT decision makers must prepare for the Next Mobile Economy and embrace both its opportunities and its challenges. They must explore the strategic partnerships that enable their companies to live, grow and thrive in the Next Mobile Economy. And the time to start is now.

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The Future Laboratory is a global trends forecasting consultancy which aims to inspire and future-proof organizations.

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