

# The Hybrid Workspace:

Enabling Security and Mobility  
for an Agile Workforce



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# Executive summary

The COVID-19 pandemic has substantially raised the level of uncertainty in our environment and unleashed a new era of change for businesses. With a vast number of activities being catapulted online, mobility has increased significantly. Digital transformation, already an integral part of many CEOs' business strategy before 2020, has taken on added importance and is being fast-tracked to meet new challenges and new ways of working in a world defined by COVID-19.

In this increasingly digitalized economy, CEOs will need to address these key objectives that has a strong focus on the employee experience:



Creating a resilient hybrid workforce



Investing in the right technologies



Empowering employees



Responding to customer needs and expectations



Being secure



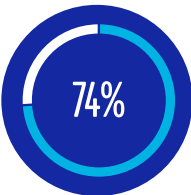
Planning for a safe environment in a post-vaccine world

A **hybrid working model** provides organizations the ability to react swiftly to unexpected changes in the business landscape, as the ability to work from anywhere provides the resilience and agility that this new world demands.

This IDC InfoBrief takes a deeper look into the CEO agenda and addresses these objectives in relation to a strategic mobility strategy that will enable employees to work productively and effectively in a hybrid workspace.

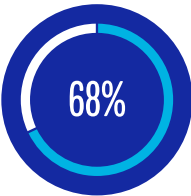
# The CEO's new agenda in the digital economy

IDC's research reveals these top three priorities in the CEO agenda:



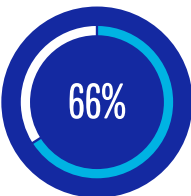
### Engender trust with customers

Organizations desire more data from customers in order to delight them with the products and services they offer. The need for greater data protection across the entire ecosystem grows as this information has value to criminal elements in the black market.



### Define new value in the digital economy

The digital supply chain is a highly connected ecosystem and is critical to the success of all digital businesses. A well-formed community that operates together, with partners creating, designing, delivering, and taking payment for goods and services in an efficient and seamless manner defines the value chain, changing the focus from the “product” to the “customer”.



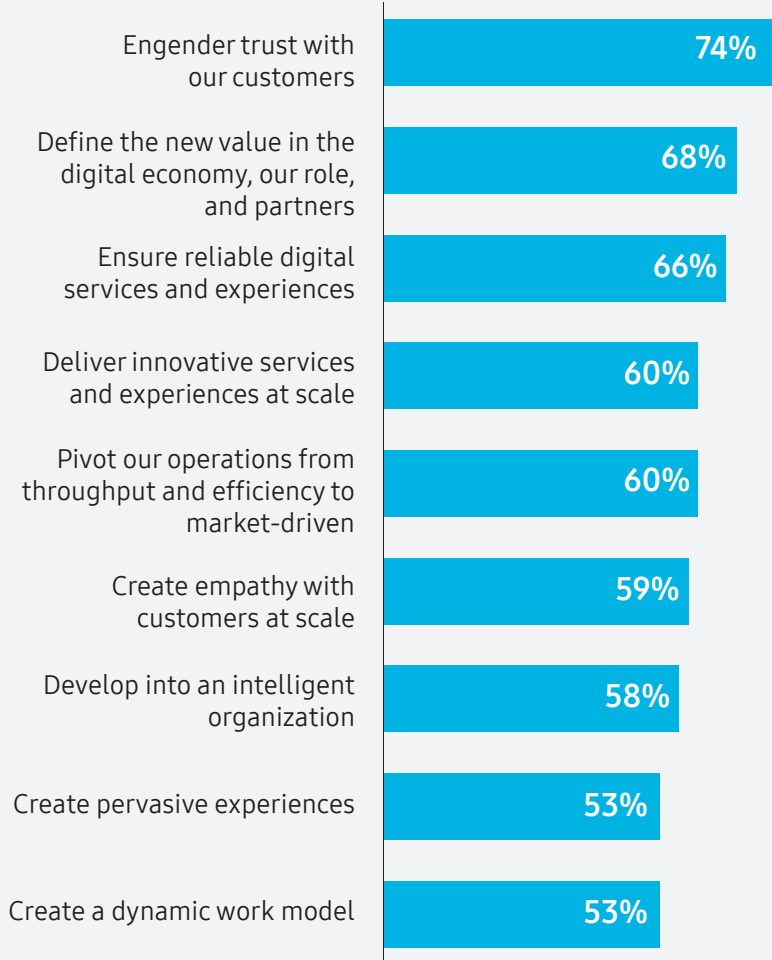
### Ensure reliable digital services and experiences

At a time when almost every transaction needs to be digital, having a resilient infrastructure that is secure and available 24x7 is critical. This also means equipping the workforce with equally resilient tools and secure access to systems.



As a result of the pandemic, “social selling” has become less relevant as relationships move online. Being mobile – and always available – will be a basic hygiene factor for business to survive. Looking to the future, this mobility will be embedded into how the organization operates. Organizations will need to empower employees with the right tools to do their job – particularly those who interact with customers and partners.

## CEOs' top priorities



# Creating a resilient hybrid workforce

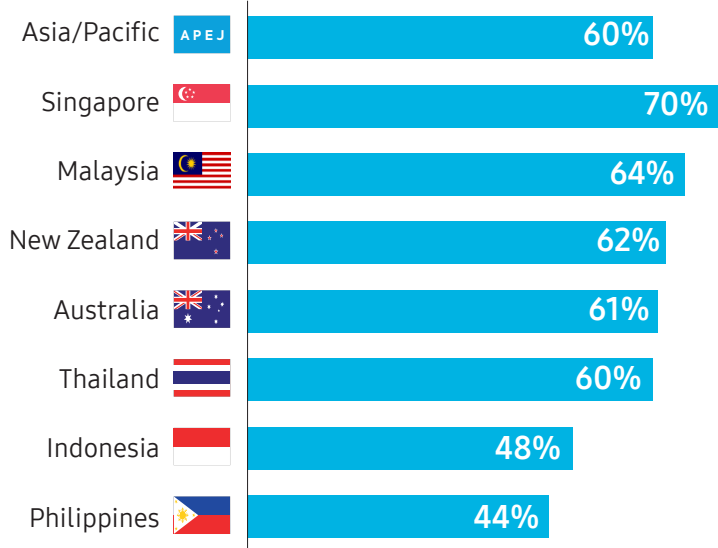
A non-traditional workspace will be the norm; in some industries, this is already the case for about a third of employees

To support the CEO’s agenda, organizations will need to adopt a flexible hybrid work model to support a mobile workforce. This “work anywhere” concept is not new to Asia/Pacific – **60%** of all employees already required remote or mobile access to complete their tasks out of the office prior to the pandemic. As the benefits of remote working became evident during the pandemic, a hybrid model that involves a mix of remote and office setup will be increasingly formalized as corporate policy and integrated into business operations.



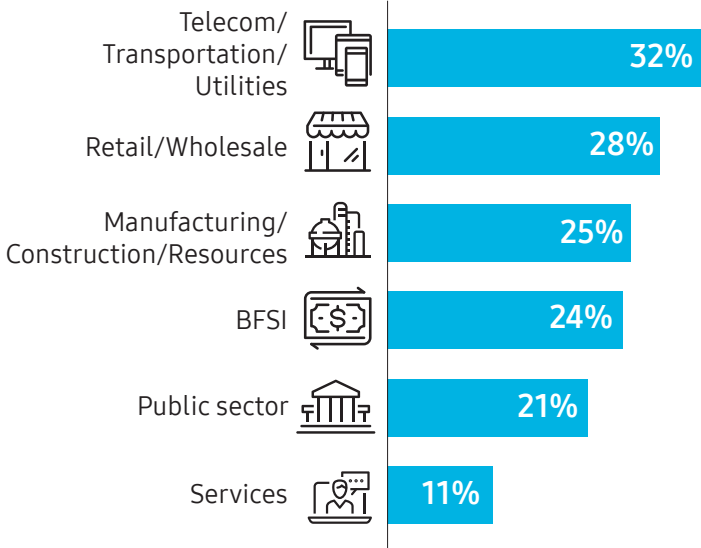
**60%** of Asia/Pacific employees already demanded mobile/remote work access before COVID-19

My work requires me to be on mobile/remote access



**23%** of Asia/Pacific employees would normally work outside a traditional office environment before COVID-19

Frontline/field workers normally working outside the office



## Observed benefits of remote working, Asia/Pacific

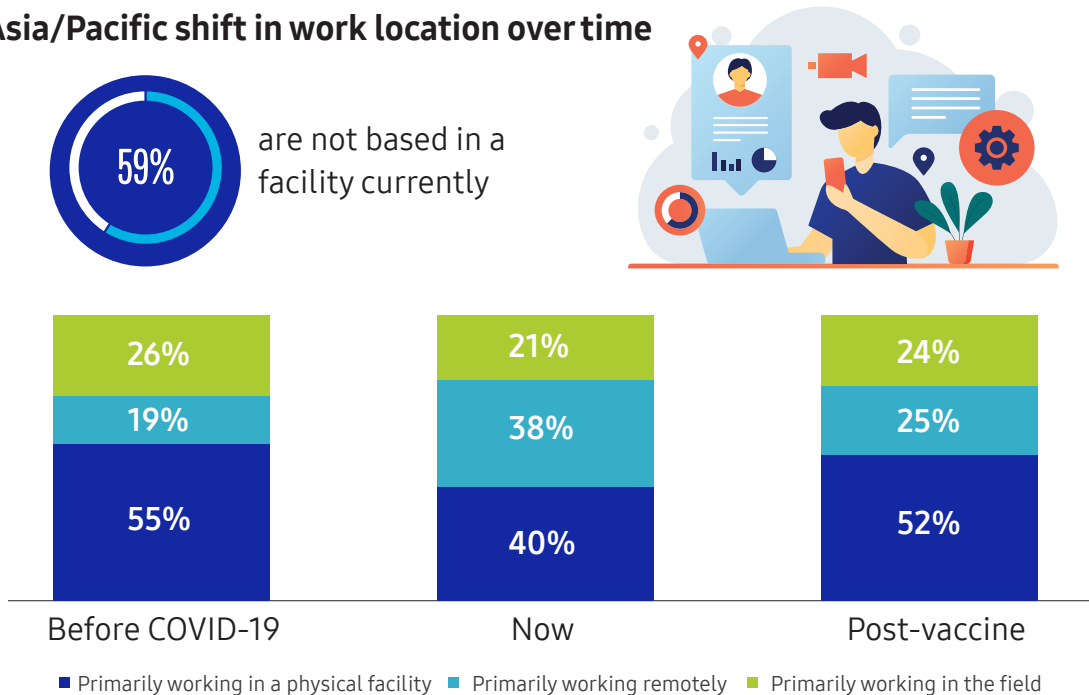




# Asia/Pacific was hybrid before COVID-19 — so what has changed?

IDC studies show that before the pandemic, **45%** of workers were not based in a facility, and worked either remotely or in the field. In a post-vaccine scenario, this number will increase marginally to **49%** as many organizations in Asia still prefer to have office-based employees.

## Asia/Pacific shift in work location over time



**As organizations adjusted to remote working during the pandemic and begin to understand the value it brings, especially in terms of a motivated, mobile workforce, more businesses are expected to make remote working available to employees post-COVID. IDC projects that the number of organizations which implements remote working as a policy will increase from 49% pre-COVID to 73% post the pandemic.**

Source: IDC COVID-19 Impact Sentiment Survey 2020 (N=337 – 500+ employee size) - Wave 10 – 19th Aug 2020

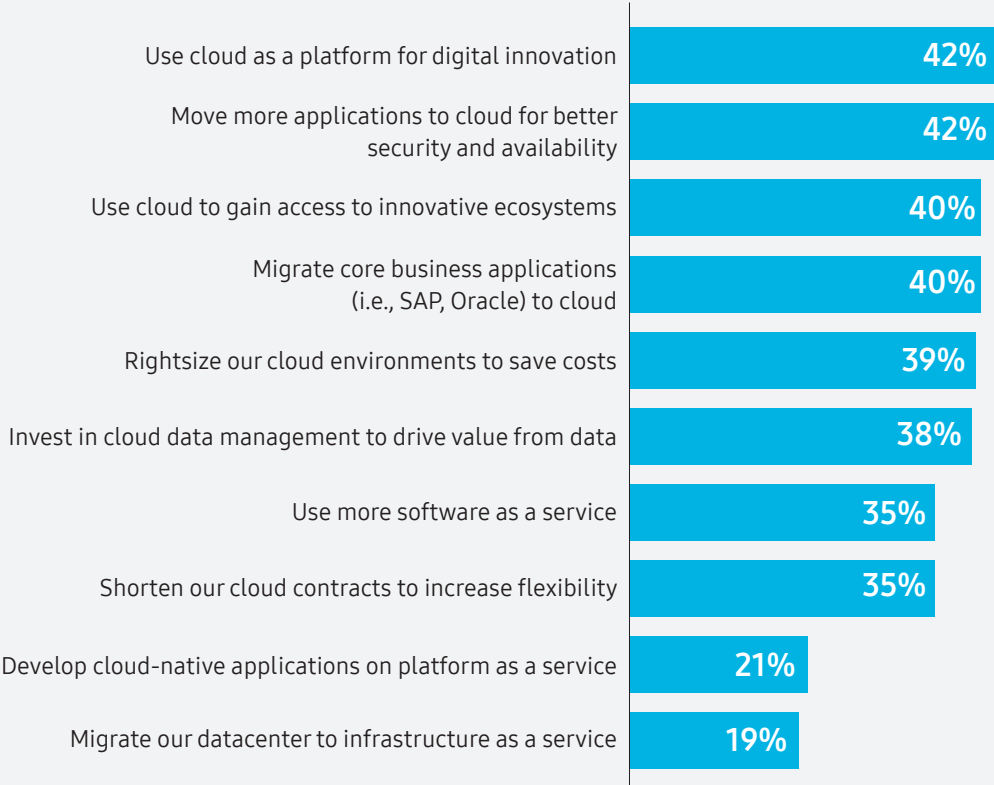
## COVID-19's impact on cloud spending in Asia/Pacific



Wi-Fi access and the right mobile device are among the top 5 drivers of productivity in 12 of the 13 markets IDC studied.



Cloud computing is now used aggressively, not just from a resilience perspective, but also to drive innovation, security, and availability.

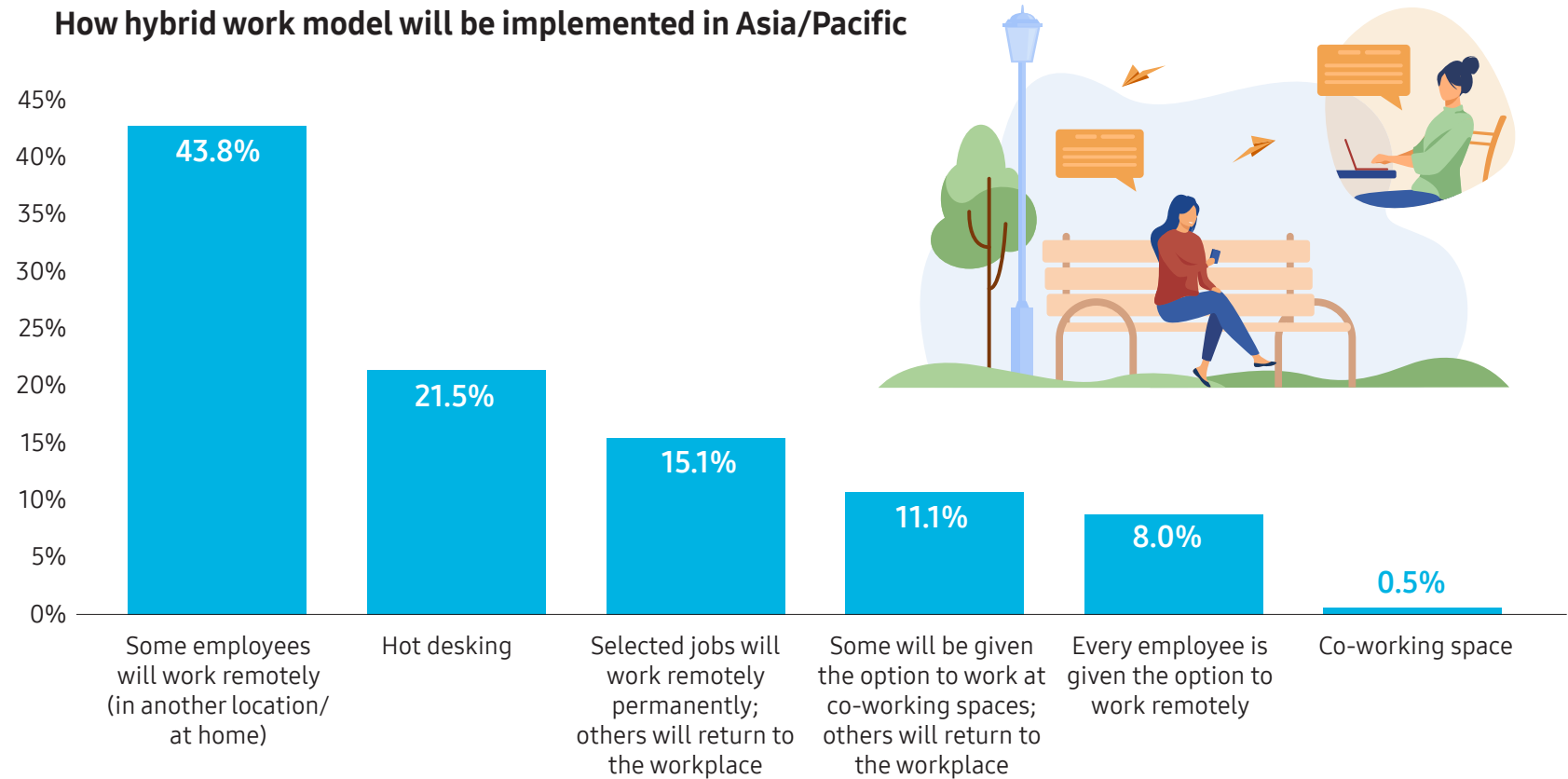


Source: IDC Cloud Pulse Q2 2020

# Making the hybrid workspace a part of business strategy in the next normal

Smart learning organizations have realized the benefits of the work-anywhere model and are now incorporating this concept into their business strategy. Providing employees choice on where they want to work brings new advantages – provided it is adequately supported by policy and technology, and challenges that arise from a hybrid work model are adequately addressed.

How hybrid work model will be implemented in Asia/Pacific



# Empowering employees: flexibility boosts motivation

IDC's Future of Work Study demonstrates the freedom to choose the working location and working hours rank even higher than fair remuneration as a motivational factor for employees. In the competition to attract talent with the critical skills for a digital environment, this knowledge becomes invaluable to digital-first organizations.



**Employees rank flexible working arrangements higher than remuneration as a motivational force**

**What are the factors around work culture that motivates you most to work for your employer?**



Not all countries are the same though. While nearly all have remote/flexible work in the top 5, there are some country-specific outliers that should be taken into consideration.

**Key employee motivational factor by country**

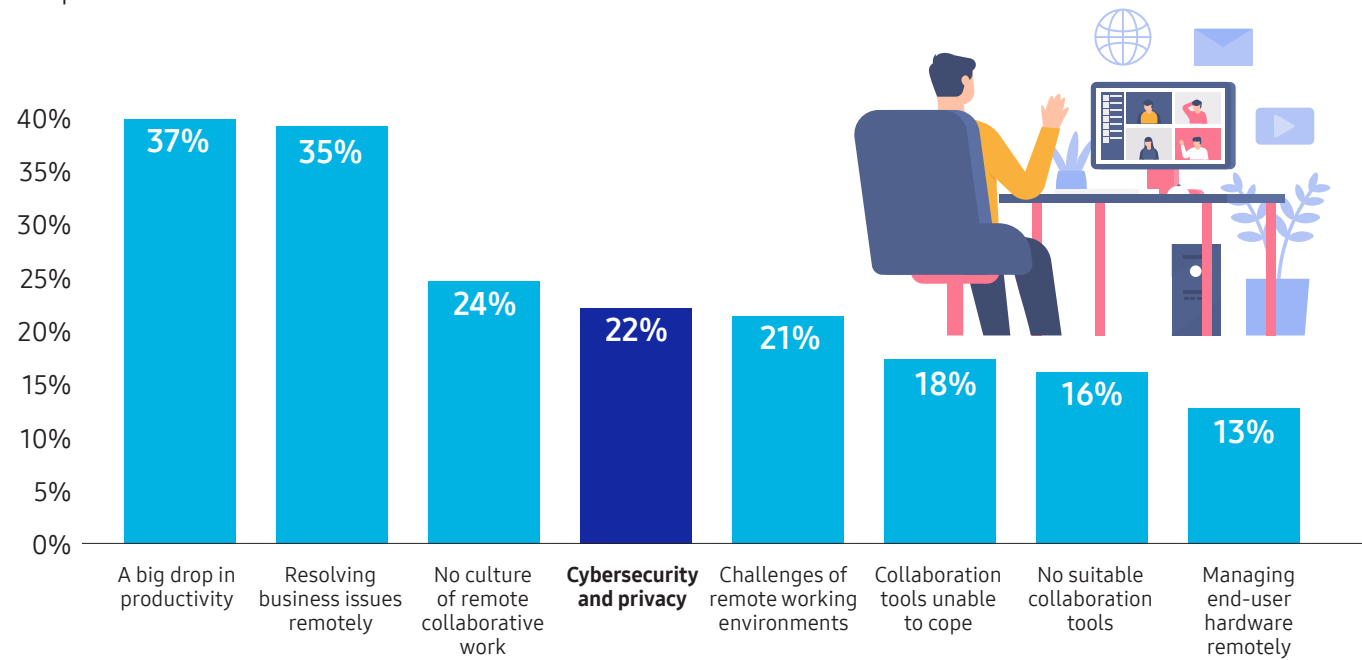
						
Australia	Indonesia	Malaysia	New Zealand	Philippines	Singapore	Thailand
Supportive manager supervisor and team members	Remote/flexible working hours	Remote/flexible working hours	Fair remuneration	Better perks at work/benefits	Supportive manager supervisor and team members	Better perks at work/benefits

# Organizations need to address security challenges of remote working

CEOs cited “engendering trust with customers” as their top priority. As such, devices used by employees must be secure to protect the integrity of data – especially customer data. With a hybrid workforce, devices will need greater security and management as they will be highly mobile. This requires mobile management tools, but not at the cost of productivity to the end user – a challenge that can be overcome with the right choice of technology partner.

## Key concerns around remote working, Asia/Pacific (Jan-Feb 2020)

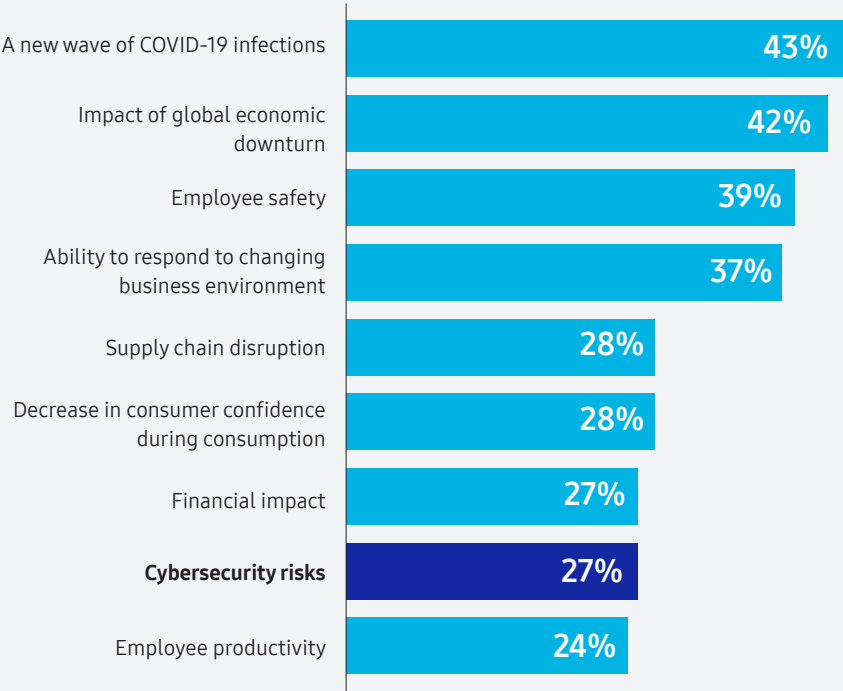
In the early stages of the COVID-19 pandemic, apprehensions over remote working were mostly centered on process which was subsequently addressed. However, cybersecurity was soon identified as a challenge with the discovery that the process concerns around productivity or culture were not “real” issues, but merely perceived as such.



Sources: The CEO and CxO View of the Future Enterprise in the Digital Economy Survey, Jan-Feb 2020 (APeJ N=196)  
IDC COVID-19 Impact Survey Wave 9, 5th August 2020 (N=310), 15th June 2020 (N=308 – 500+ employee size)

## Key concerns around return to office, Asia/Pacific

As we look to returning to the office, cybersecurity again emerges as a major concern, which indicates that it has not been tackled comprehensively. Yet it is the only one that can be addressed immediately – by using technology.



Source: IDC Future of Work Study 2020

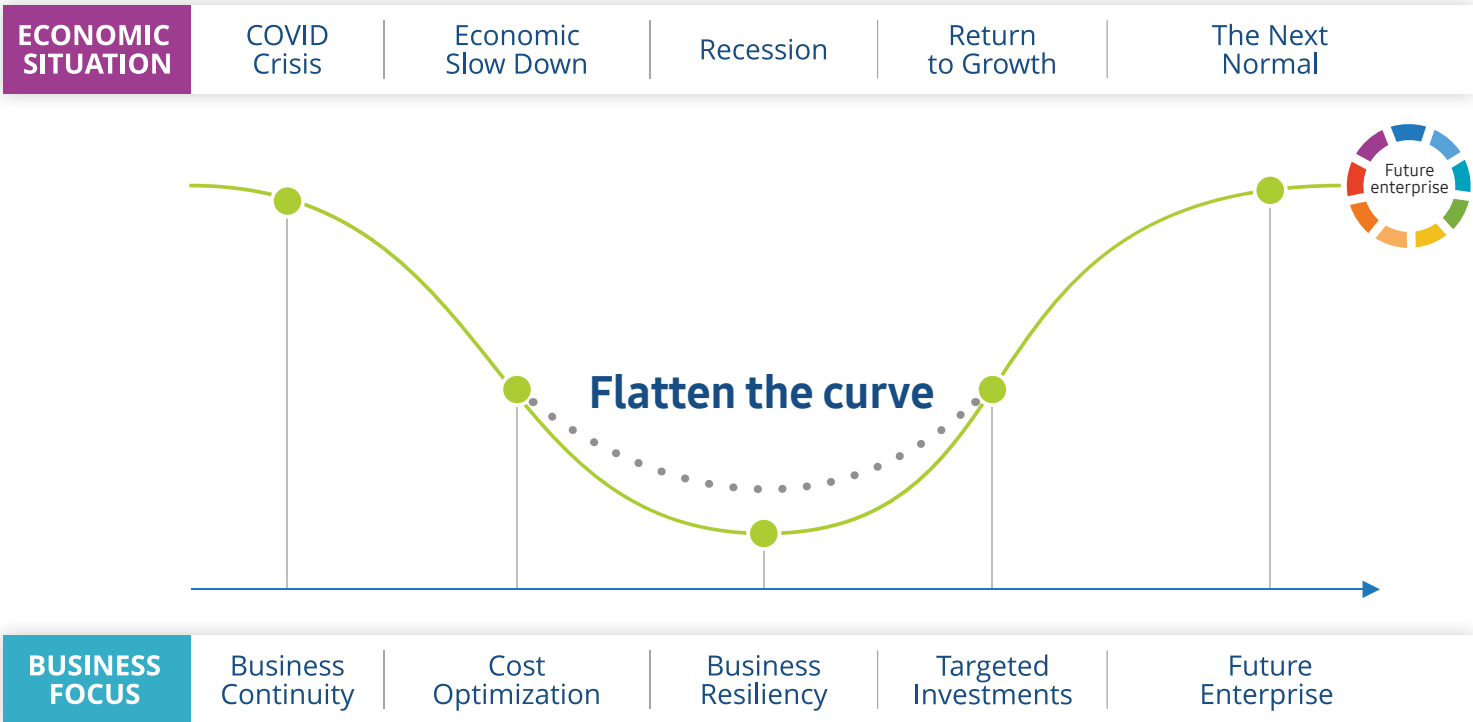


# Leveraging technology to enable a mobile/remote workforce

IDC has been tracking the economic impact of the pandemic and analyzing how organizations have responded, and it is clear that organizations which make the right type of investments are well-positioned to recover faster from the recession.

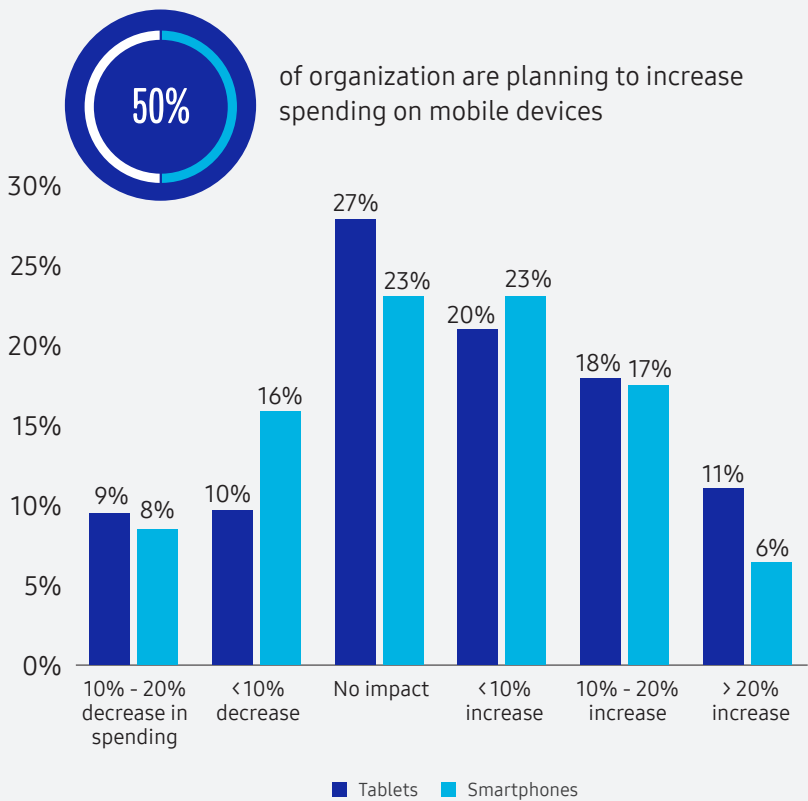
The key to this are investments that enable a mobile/remote workforce to support a hybrid work model. Indeed, **IDC research shows that organizations which have achieved “next normal” status are making larger investments into mobile devices than others, and that Australia, China, Singapore, and India are ahead in this investment curve.**

## IDC Crisis-to-enterprise-recovery framework



Source: IDC

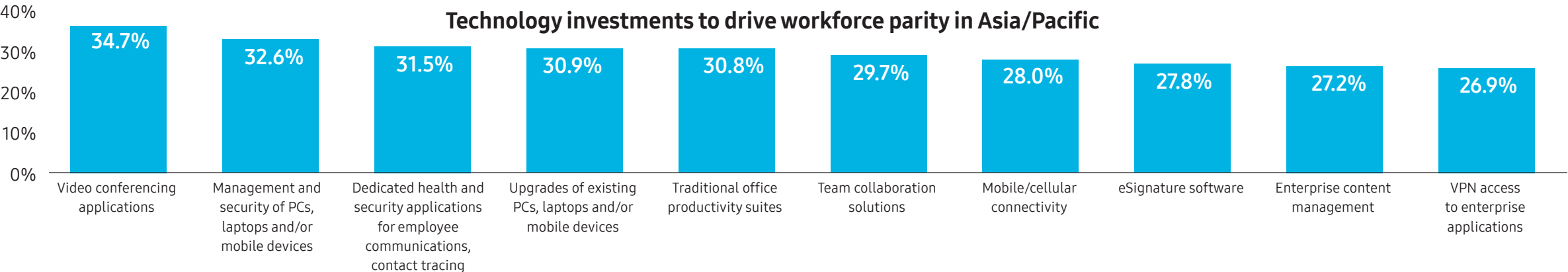
## Changes in planned budget for mobile devices



Source: IDC COVID-19 Impact Sentiment Survey 2020 (N=337 – 500+ employee size) - Wave 12 – 15th Sept 2020

# Solutions to support the hybrid work model

The management and security of devices, upgrades to existing mobile-enabled devices, and mobile/cellular connectivity are essential to achieving the ideal hybrid work model. IDC research shows that technologies that support remote working are in demand – a clear indication of a trend towards the hybrid model.



Key regional variations have emerged due largely to the different stages of the pandemic the markets are at, along with local approaches and attitudes to the hybrid working model, but the concept of **mobility** features strongly across these markets.

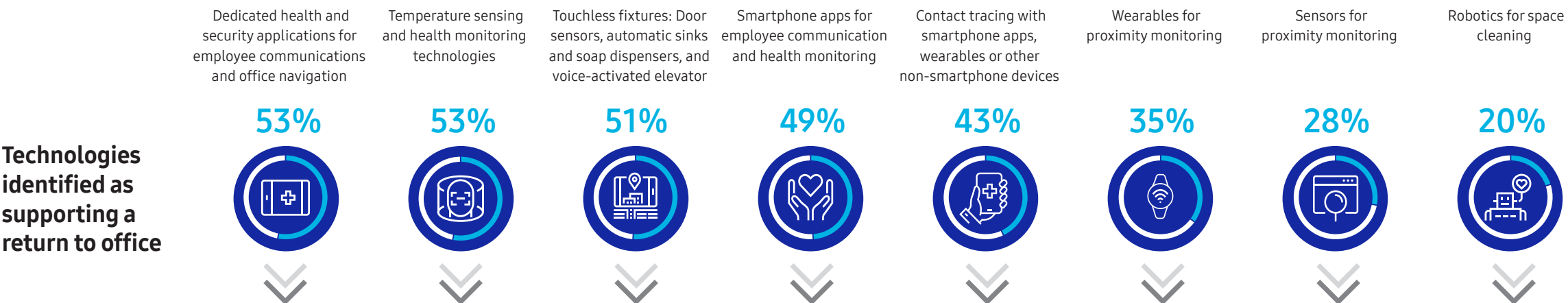


## Technology investments – regional variations

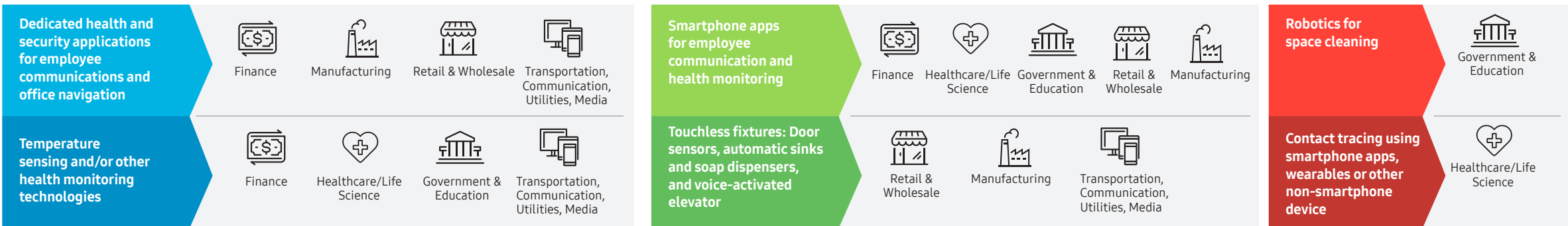
	<b>China</b> <ul style="list-style-type: none"><li>• Management and security of PCs, laptops and/or mobile devices</li><li>• Employee engagement</li><li>• eSignature software</li></ul>		<b>Australia</b> <ul style="list-style-type: none"><li>• Video conferencing applications</li><li>• Upgrades of existing PCs, laptops and/or mobile</li><li>• VPN access to enterprise applications</li></ul>
	<b>Indonesia</b> <ul style="list-style-type: none"><li>• Dedicated health and security applications for employee communications, contact tracing</li><li>• Management and security of PCs, laptops and/or mobile devices</li><li>• Video conferencing applications</li></ul>		<b>New Zealand</b> <ul style="list-style-type: none"><li>• Scanners and/or printers for supporting a hybrid workforce</li><li>• Traditional office productivity suites</li><li>• Virtualized access to legacy on-premise (behind the firewall) applications</li></ul>

# Focused investments to support a return to the workplace

To support office-based roles and activities in a hybrid work model, organizations will need to make focused investments to keep employees safe and empower them to work effectively. Topping the list in Asia/Pacific are temperature sensing and health monitoring technologies to curb the spread of any infection. At an industry level, however, smartphone applications surface in the top three in almost all industries studied.



## Industries making these technologies as their top 3 investments



**Manufacturing** has the highest percentage of businesses making investments in the top three technologies as it is among the hardest hit due to a reliance on physical labor.

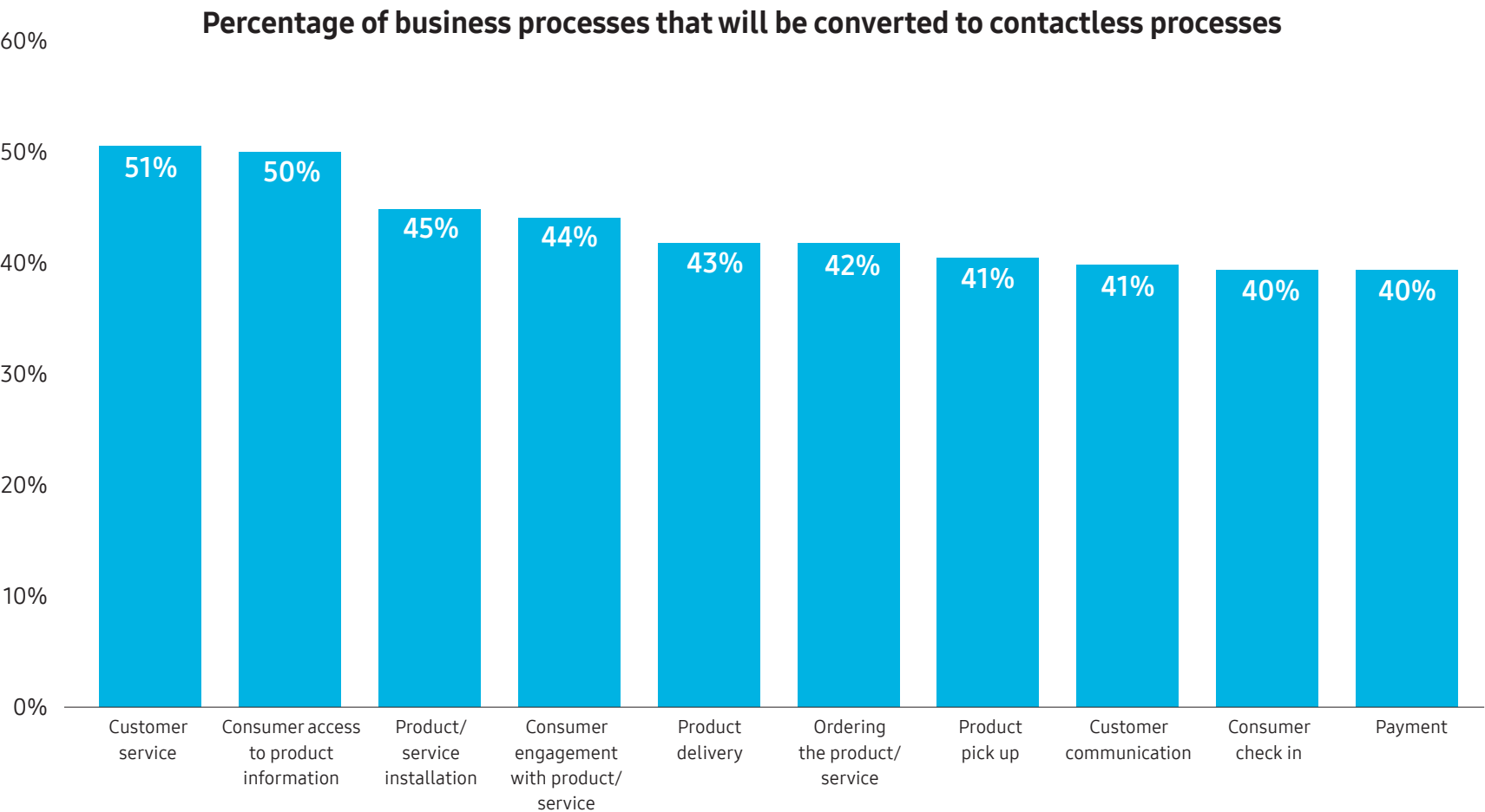


**Governments**, due to security concerns, are keen on wearables for proximity monitoring. This applies to retail as well, although price and availability of suitable devices will be key considerations.



# Customer concerns will drive investments in mobile technology

At the heart of the CEO's technology investment decisions will be customer expectations. Contactless technologies are in demand as **44%** of organizations across Asia/Pacific respond to the demands of social distancing and the need to minimize physical contact in areas of high traffic. The focus on the customer points to the need for mobile content and applications.



# How Asia/Pacific is leveraging mobile technology



The mobile health app trend is present in almost all markets in Asia/Pacific.



In the Philippines, a local bank saw its mobile digital transactions in Q1 2020 equaling the total number of transactions in FY2019.



Publishing houses across Malaysia, Singapore, and Indonesia are using mobile apps to link their traditional print and online media more meaningfully to their subscriber base.



Mobile wallets from traditional (FSI) and non-traditional (telco) businesses are appearing in Singapore, Hong Kong, Indonesia, Thailand, and Philippines catering to retail and corporate banking, along with insurance demands.



The biggest change seems to be in telemedicine, where the smartphone is now the primary channel through which medical professionals are communicating with, consulting, and prescribing treatments to, patients across ASEAN.



Wearables are being used by a leading builder of oil rigs to improve health and safety on oil rig construction sites.



Mobile devices are a critical part of a retirement community in Australia to not only secure, but enhance the lifestyles of the residents and community members.



# Essential Guidance

## Planning for the hybrid work model

Lessons learned from the COVID-19 pandemic highlight the need for an agile workforce. This means not tying teams down to specific locations; ensuring secure productivity in all possible locations will be the **workspace of the future**.

A modern employer should embrace the following:



### Accessibility from anywhere

- ▶ **Connectivity.** Ability to connect to business systems regardless of the type of network coverage (Wi-Fi or local telecom network).
- ▶ **Mobility.** Employees cite Wi-Fi access, mobile access, and mobile devices as the top three tools that enable them to work more effectively and productively.
- ▶ **Remote access.** 60% of all employees require remote or mobile access.



### Ongoing security

- ▶ **Device security.** Identity security, and monitoring require a new approach to how security is provisioned, with a greater emphasis on non-intrusive (password-less) ongoing authentication, probably from biometric functions built into the device.
- ▶ **Seamless experience.** “Time spent complying with security protocols” is among the top 5 challenges in daily work; ensuring security is seamless to end users is critical.



### Overall manageability

- ▶ **Remote support.** IT must be able to address issues remotely, especially with personally-owned devices as the procedures can be more challenging.
- ▶ **Backup.** Able to remotely back up, and if not, to at least communicate to employees the need for an update.
- ▶ **Application access.** Is there a native mobile app, or is it a web interface? This can bring limitations to functionality.

Underpinning this is a secure, mobile device that the organization can easily manage – a device that seamlessly connects to on-premise and cloud-based applications and can also support the myriad new health and safety applications that promote a healthy, hybrid working model.



# Message from the sponsor

## Hybrid is the future and being remote-ready is the key

A hybrid working model is increasingly the approach businesses will take in the next normal. How can organizations remove barriers and unlock the full potential of their remote workforce? The key is to utilize scalable mobile technology and solutions for a connected ecosystem of devices that is secure and easily managed to embrace a mobile-first strategy.

### One connected workspace

**Samsung DeX** – Transforms your smartphone into a powerful workstation. And now Wireless DeX makes set-up a breeze.

**Virtual workspace** – Make any place a secure workspace with VDI solutions from Citrix and VMware.



### Mobile efficiency

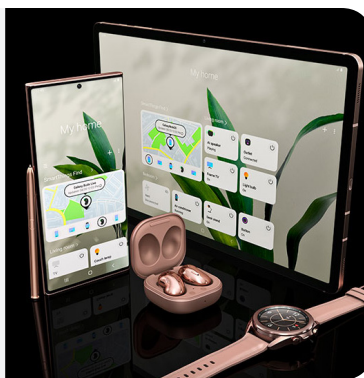
**B2B ecosystem** - Our open ecosystem that involves strong alliances with customers and global technology partners like Microsoft, IBM, Cisco, and more, ensures Samsung systems are flexible, innovative, and ready to integrate into your existing setups and systems.



### Built for organizations of any size

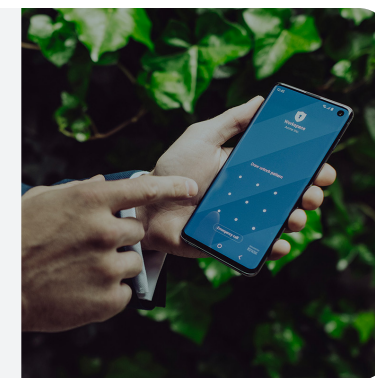
**Device portfolio** - Offers a broad portfolio of smartphones and tablets, with devices suited for any role and any industry.

**Rugged devices** - Samsung's rugged phones and tablets elevate the capability of every team member, enabling them to perform multiple tasks on tough phones and tablets that are made to stand up to real world challenges.



### Security and manageability

**Samsung Knox** - A complete suite of enterprise mobility solutions designed to keep your work phones, tablets, and wearables under IT control. Samsung Knox remotely configures any number of devices, tailoring them to your need, and can be deployed directly to your workforce straight out of the box.



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