

# The work/life dilemma and the acceleration of the use of communication devices

Looking for answers to the latest challenges, especially the divergence in current devices.

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## Acknowledgements and contacts

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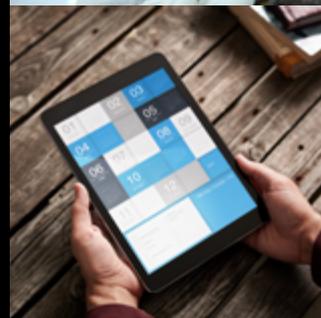
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# “Everything is mixed up for me: work devices are also personal; I don’t have any rules about time or place for answering a professional or personal call”<sup>1</sup>.

The above quotation, recorded in the course of our research, illustrates the delicate balancing act that we are all having to make on a daily basis: the subtle, but nonetheless real, merging of our private and professional lives.

This white paper is the result of a joint project carried out in Europe by Orange Belgium, Orange Business Services and BearingPoint, and is intended to provide an original and comprehensive clarification of the forms of communication currently in use in the workplace. Employees now bring in their own devices. Their usage habits are derived from their personal sphere, in response to the need, for example, to be continually and reliably connected to their friends and family. Personal usage and habits are penetrating companies and requiring them to adapt to the consequences of an unavoidable tendency which is continually gathering momentum.

The emergence of this new trend in the use of communication devices means IT managers and mobile fleet managers, who are the first to be confronted, are now in uncharted territory. This urgently raises the need to protect the confidentiality of business-critical information and gives rise to new demands

on IT support. On the other hand, it also constitutes a genuine opportunity to create a new balance: one that is collaborative, omnipresent and flexible, both for the company and for the employee. The company is therefore able to reconsider its device policy and to reinvent the user experience. This new trend will eventually affect all aspects of the company’s functioning, both in its internal interactions, as well as in its dealings with customers and suppliers.

Digital usage in today’s professional world is assuming a new dimension and we are confident that companies will find a way of coping with this for the benefit of all concerned.

We hope that you enjoy reading this report.

**Vivek Badrinath**  
**Anne-Marie Thiollet**  
**Henri Tcheng**  
**Isabelle Denervaud**

<sup>1</sup> Statement made by a user from the construction sector in a focus group, recorded as part of a study of the development of professional usage (end-user studies) carried out by Orange Business Services, BearingPoint and TNS Sofres (January 2011).



# Defining the usage of users at work

Figure 1

## ACTIVITY

1. communicating / building and maintaining a network
2. sharing / contributing
3. producing / accountability
4. checking / managing
5. finding out / learning

## DEVICES



## APPLICATIONS



Collaborative tools



Business applications



Video conference



Voice



E-mail



SMS

## WITH...

1. colleagues
2. management
3. customers
4. suppliers
5. peers
6. family / friends

# Foreword: a juxtaposition of perspectives

This document is based on research carried out in Europe by teams from Orange in collaboration with BearingPoint. It focuses on employees and the communication tools they use at work, and sets out to juxtapose two perspectives and points of view concerning two objectives: understanding what is involved in communication at work today and thinking about how it might evolve in the future.

The first perspective is that of employee 'users'<sup>2</sup>, looked at within their total communication environment at work. This environment covers their devices, applications, day-to-day activities and interactions (figure 1). Observing behaviour has enabled us to isolate the main factors which explain this usage. The second perspective is that of the decision-makers, IT directors or mobile fleet managers, who explain the challenges and constraints they are facing in the light of continually evolving usage below.

These two complementary, but sometimes antagonistic perspectives, were put to actors in the fields of marketing and customer relations at Orange in the countries covered by our study, in order to help them draw up plans of action for the future. These analyses have been enhanced by the prospective analyses carried out by BearingPoint in relation to research and development at Orange and contributions by external sociologists in the various countries studied.

This white paper explores the relationship between the employee and his or her company in the light of the continued evolution of communication on professional devices. The employee, historically passive, is now becoming a

participant in the communication choices made by the company. The boundaries between work and private life are becoming blurred. Mobile multimedia usage is expanding exponentially. The growing presence of smartphones and tablets makes it possible to use applications that are ever more intuitive.

Employees now have new reference points in their interactions with their personal environment... which they bring into their working environment. Faced with these new usage habits, companies need to reconsider the mobile communication tools used by their workers, and their policies with regard to devices, security and the management of communication tools. The employee must be at the heart of their reflections; the development of usage profiles needs to be combined with a series of devices and applications that are still often managed by different departments of the company. The IT department must help with this change by supporting new uses, adapting its security policy and assisting with the human and legal impacts.

This document is aimed at business executives to help them with their reflections on the digital world, on new ways of communicating and their impact within the company. It will be of interest to everyone from the Board of Directors to every department of the company that will be affected by these future changes.



- 2316 individual employees were surveyed as part of a quantitative study.
- 80 documents analysed.
- 9 focus groups comprising 70 employee users.
- 6 focus groups comprising 40 corporate decision-makers.
- 14 interviews with corporate decision-makers.
- 5 European countries covered: Belgium, Spain, France, Poland and the UK.

<sup>2</sup> All the figures derived from the end-user study refer to users equipped with a personal or professional mobile phone partially or fully paid for by the company.



1

**Personal usage  
and needs penetrate  
the company**

**Two factors explain new behaviour in the use of communication devices: the work/life dilemma and the the development of nomadism. Although predominantly passive in the past, employees are now gradually taking a position as integral participants in the company's choice of communication solutions. They bring their own devices to work, use their own applications and introduce new uses. This phenomenon is producing a fundamental change in the device ecosystem and the applications used by the individual at work.**

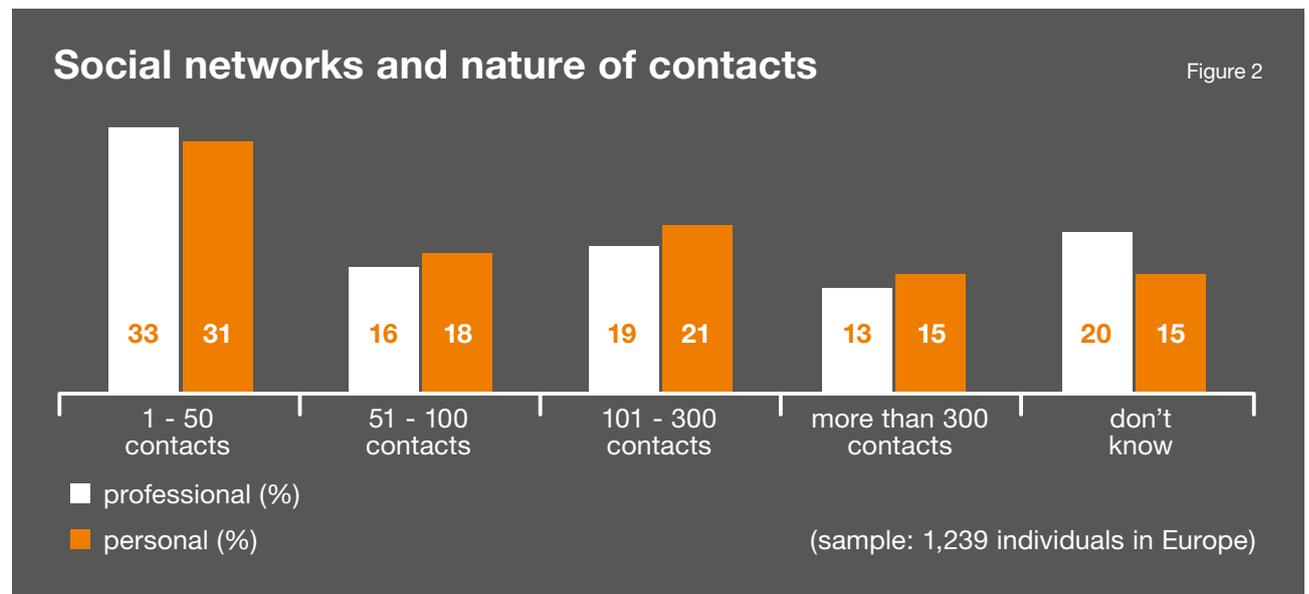
## The work/life dilemma

Observing the behaviour of individual employees reveals a work/life paradox. This is even more pronounced among younger workers.

Individual workers are looking for the right balance between professional and personal life, and this is not without impact on his or her communication usage. This research reveals a paradox, relating to the management of two spheres: work and life. Employees increasingly want greater integration between the two, while at the same time keeping these environments hermetically separated. Thus, 64%<sup>3</sup> of employees want to separate their personal and professional lives with their communication tools, while 79%<sup>4</sup> of them say that they stay in intermittent or permanent contact with their work outside working hours and 84%<sup>5</sup> claim that they use personal devices (PC, telephone, e-mail, etc.)

for professional purposes. Some want to use a single mobile telephone for work and private life: the list of contacts on their phones reveals that professional mobiles contain personal and professional contacts in almost equal numbers (figure 2).

This is reinforced by a generational effect. Younger workers, born after 1980, are in fact better equipped in their personal lives than at work. Although they do not have the same degree of responsibility as managers, although they share with them the need to integrate the two spheres. They therefore bring uses into the professional sphere that are derived from the personal sphere (instant messaging, social media, collaborative sharing tools, etc.). Characteristically, they demonstrate a desire to protect their private lives and find the right balance with their professional activity.



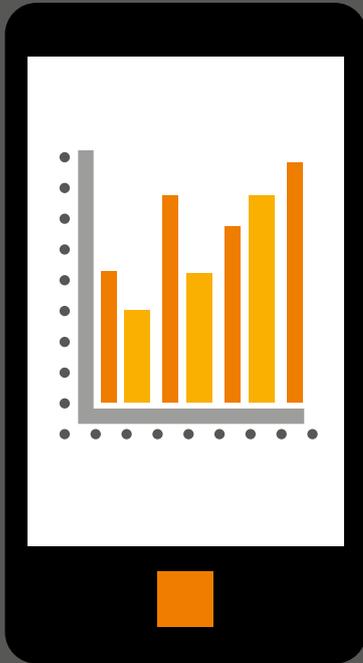
In this way, they are putting pressure on companies to accept their devices, their applications and their personal usage, but also require employers to take account of the difficult task of managing their work/life balance.

<sup>3</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.

<sup>4</sup> Op. Cit.

<sup>5</sup> Op. Cit.

## The popularity of smartphones



**727**  
million  
smartphones

**121.5**  
million  
tablets

were sold  
worldwide  
in 2012.<sup>10</sup>

<sup>10</sup> Gartner, mobile phones and consumer electronics, worldwide 3Q12, October 2012.

## The emergence of nomadism

New working habits are continually emerging to reflect an increasing need for mobility, distance working and teleworking, while allowing the employee to be permanently connected to his or her friends and family. Individual employees are now mobile and sedentary at the same time and are developing new reflexes in their day-to-day professional lives while also becoming increasingly active in managing their time.

Employees are increasingly mobile (both on and off the company site). Thus, 63%<sup>6</sup> of those surveyed work off-site at least once a week, and 37%<sup>7</sup> almost every day, and set to become more pronounced. The trend has already seen employees learn to manage their work differently. They continue working outside office hours from their mobile devices, which may be either personal or professional. These tools make off-site use simpler: they are increasingly ergonomic and permit better management of diaries, e-mails and other messages. Employees reply quickly to messages and their exchanges are of shorter duration. The emergence of distance working is another trend that will certainly increase in the future. The economic context also favours this trend, given the high costs associated with realty and limitations on travel expenses. Furthermore, employees are increasingly expressing their need for flexibility at work and in their private lives and want to take advantage of this to avoid spending time commuting.

Finally, employees are voicing the need to be in continual contact with their friends and families, wherever they are, whether for professional or personal reasons. This is true of 56%<sup>8</sup> of our focus group, compared to 44%<sup>9</sup> who prefer to set aside specific time slots to communicate with others.

Communication usage is directly impacted by these two divisions, which are expressed in a new relationship with time and place for the individual at work. This new usage can be analysed relative to either devices or of applications.

## Mobile devices serving the needs of nomadism

The next five years will see a general and significant evolution of the devices used by individual employees at work, although at the present time, it is difficult to predict the speed with which this will occur. Various trends will clash based on the development of advanced mobile phones (smartphones), the move from fixed devices towards integrated multimedia devices, as well as the adoption of tablets and touchscreens.

Conventional mobile devices are gradually being replaced by smartphones, which are flooding in on a large scale, so that, today, these new mobile devices are omnipresent in the home. Worldwide, 460 million smartphones were sold in 2011 and 645 million in 2012<sup>11</sup>.

<sup>6</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.

<sup>7</sup> Supra.

<sup>8</sup> Centre d'analyse stratégique, Le développement du télétravail dans la société numérique de demain, November 2009, pp. 18-19.

<sup>9</sup> Supra.

Since then, the demands made by individual employees in relation to professional devices have become more sophisticated. As in their personal lives, they want to be able to make use of devices that are capable of performing a comprehensive range of functions, are simple to use and boast intuitive and ergonomic interfaces.

The trend where fixed devices are replaced by mobile devices that support multimedia uses is set to intensify in the future. In our focus group 68%<sup>12</sup> of individual employees were abandoning their fixed lines, at least partly, in favour of their mobiles.

The convergence between fixed lines and mobiles is seen as desirable by more than 50%<sup>13</sup>. The convergence between IT and telecommunication is accelerating the enrichment of fixed telephony by providing unified communication solutions combining fixed and mobile voice, instant messaging, e-mail, physical presence, etc.

The ongoing substitution of desktop computers by laptops has been shaken up by a new phenomenon: some companies are actually thinking of replacing laptops with tablets, even if these are currently used more for re-reading and validating documents than for their production. Thus, tablets have recently expanded the range of devices used by employees, particularly for those uses that assist employees who are working off-site. Combined sales of smartphones and tablets will exceed computer sales by 44%<sup>14</sup>. Finally, interactive touchscreen devices are becoming increasingly common as devices for demonstrations and video communication.



## Work/life usage

# 84%

**of working individuals use their personal tools for professional purposes.<sup>11</sup>**

“ The company has evolved less quickly than the functions that employees can use for personal purposes.”

HR Access

<sup>11</sup> Gartner, mobile phones and consumer electronics, worldwide 3Q12, October 2012.

<sup>12</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.

<sup>13</sup> Supra

<sup>14</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.



## Generation Y

# 56%

of young people would not join a company that prohibits the use of social media\*

# 27%

of professionals use social networks and IM on their professional devices at least once a day<sup>15</sup>

## Applications and media serving the needs of a new relationship with time

Largely encouraged by the devices available, applications\* used in the private sphere are entering the professional environment and are expanding multimedia usage. At work, these uses are no longer limited to voice calls or browsing the internet, and are increasingly incorporating written media, video and social networks, collaborative uses and access to the company's IT system.

Individuals at work want to remain connected to their personal spheres at all times. They favour written media, to ensure that they are both readily available and can manage their time efficiently. The applications, once used for personal purposes, are now evolving towards professional uses. Applications which had previously been reserved for informal communications, such as IM (instant messaging)\*\* or SMS, are now increasingly accepted in companies and are replacing e-mails, which are not suited to brief interactions. Thus, 46%<sup>15</sup> of the employees in the focus group were abandoning oral communication in favour of written communication, with exchanges that are shorter and more frequent (e.g. IM, SMS), relegating e-mail to a means of formal communication in professional interactions. The mobile web is also a reality for professionals who have a smartphone in France. This development not only affects traditionally mobile populations (e.g. sales staff, top management), but also employees holding other positions.

Video applications and social networks are also making their entry into the working world, and employees are increasingly allowed to access them at work. Thus, 27%<sup>16</sup> of users surveyed access social networks at least once a day on their professional devices. Moreover, 36%<sup>17</sup> of owners of

professional smartphones use video or television on their device.

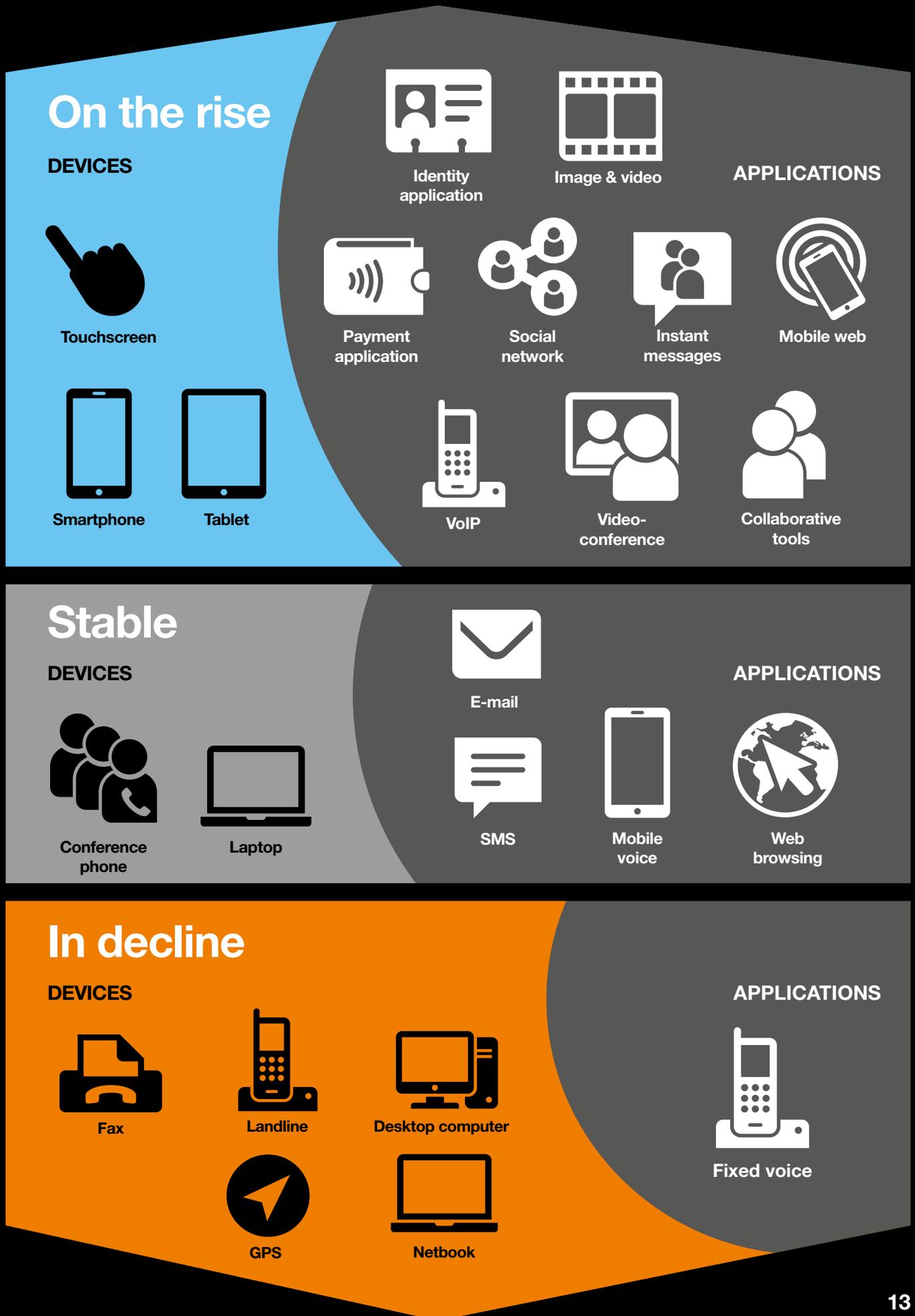
Due to their success with the general public, collaborative uses (social networks, Wikipedia, etc.) are also gaining in popularity inside companies: 32%<sup>18</sup> of surveyed working individuals use collaborative tools for sharing files at least once a day on their professional devices and 55%<sup>19</sup> of them would like to do so more often. In the study, the figures relating to the percentage of users covered a limited number of collaborative tools (e.g. Sharepoint, Google documents, etc.). The definition used in the rest of the document is broader: the term 'collaborative tools' here covers communication solutions (IM, video-conferencing), tools for shared working (sharing of applications and documents, forums, blogs), tools for access to knowledge (portals, libraries, FAQ, wikis) and workflow tools (synchronisation, shared diaries, management of tasks).



<sup>15-19</sup> Op. Cit.

\* Any asterisked terms are explained in the glossary at the end of this white paper

\*\* IT Nation, "Le salaire dans l'IT n'est pas tout..." November 2011.



## Nomadism

# 70%

take the view that it is not necessary to go into the office regularly, except for important meetings<sup>22</sup>

## The need to be continually connected

# 58%

of users need to be continually connected to their friends and family<sup>21</sup>

<sup>21</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.

<sup>22</sup> Op. Cit.



On mobile devices, applications of a professional nature are also on the increase.

These include tablet applications for queue management for sales staff in shops, activity-tracking applications using dashboards for business executives, transverse applications (e.g. for declaring time on site) or more specific applications, such as those used at La Poste Courrier ('Mon téléphone', 'Ma poste', 'Ma tournée' – see figure 7, on page 21). More than half of the decision-makers are in favour of increased investment in this kind of project<sup>20</sup> and 71%<sup>21</sup> of those surveyed are interested in having access to their data and work environment from any kind of connected screen. Finally, remote access to the company's business applications will be facilitated and expanded thanks to virtualisation solutions, such as HTML5 and Cloud\*, subject to finding a solution to the security issues relating to data feeds. These developments will be closely linked to the employee's device.

The survey reveals that owners of smartphones use all mobile applications more frequently, including voice. This trend is even more pronounced for working individuals who own iPhones.

All these developments put employees centre stage in the company's decisions about telecommunication and IT. They are participants in this process and impose the use of new tools and means of communication on the company. Even if they are not yet fully prepared, businesses need to take these new trends into consideration now in order to make the most of them in the short term.

<sup>20</sup> Study by Markess International, Applications professionnelles sur smartphones et tablettes numériques: besoins & opportunités, 22 September 2011.

A man with short dark hair, wearing a purple zip-up hoodie over a white dress shirt and a patterned tie, is sitting and smiling broadly. He is holding a black tablet computer with both hands. The background is a blurred office environment with bookshelves and windows with blinds.

2

**Companies  
reconsider their  
employees' mobile  
communication tools**

**In order to take advantage of the opportunities associated with these new uses, companies have to adapt their telecom and IT strategies in three areas. First of all, they have to take another look at their mobile-device policies in response to pressure from employees who are imposing their own tools and means of communication on the company. At the same time, these mobile-device policies need to be personalised to accommodate the business needs of users and associated risks. Historically, a general approach has been taken. Finally, the company has to revise its catalogue of devices and applications in order to cope with the arrival of new screens in the workplace (tablets, smartphones, etc.) and the needs of employees working off-site.**

## Combining three device policies

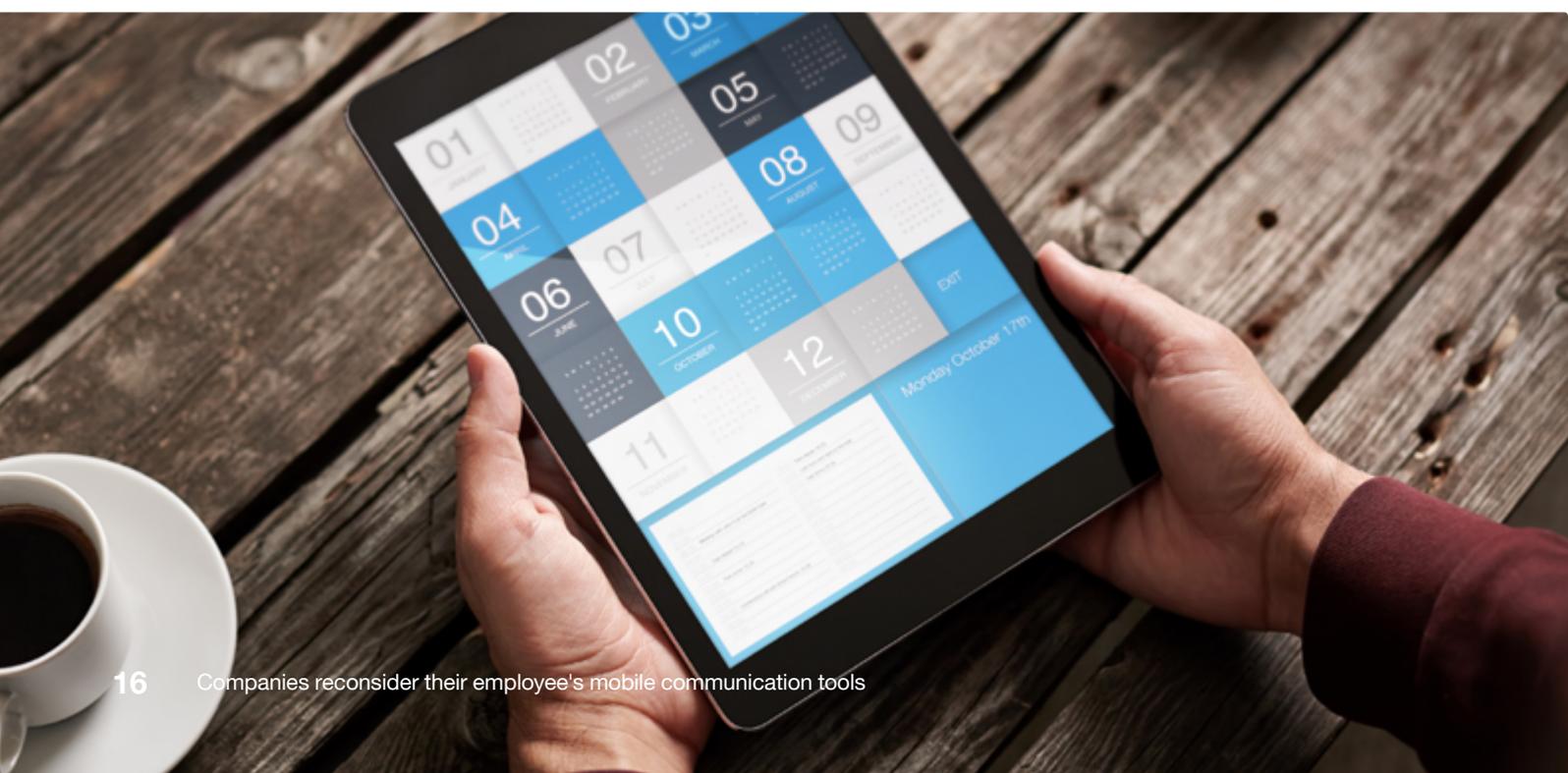
Faced with pressure from employees, their behaviour and their new uses, companies are gradually authorising the use of private devices for work. In the same way, companies are authorising the personal use of professional devices.

The influence wielded by employees is not without impact on the device policy in the workplace, which now has to respond to two issues: Who pays for the device? And who pays for the use? At present, three different different policies provide answers (figure 4).

The 'controlled' policy, which is the approach traditionally taken by companies, is currently the most common. The company provides the mobile

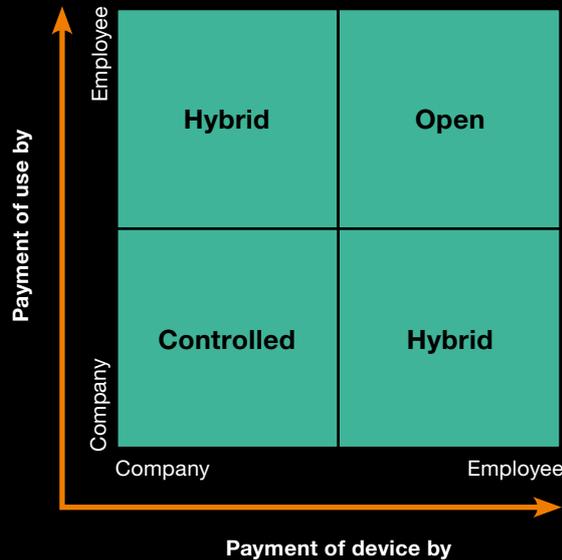
hardware and finances the complete account. The employee does not incur any expenses but he or she is required to comply with the rules regarding use and security imposed by his or her employer. In return, the company benefits from a total control of its fleet of mobile devices, which allows it to ensure traceability of devices and to establish an End-User Licence Agreement or user charters to obtain a greater degree of control of usage in order to avoid excesses.

'Open' and 'hybrid' policies, on the other hand, allow employees to bring their personal mobile devices to work and use them in their professional environments (smartphones or tablets, and, to a lesser extent, laptops). Both approaches are becoming increasingly popular with companies and some of them are known as BYOD programmes (Bring Your Own Device)\*.



## Typical device policies

Figure 4



In an 'open' policy, employees both provide and pay for their device and their account.

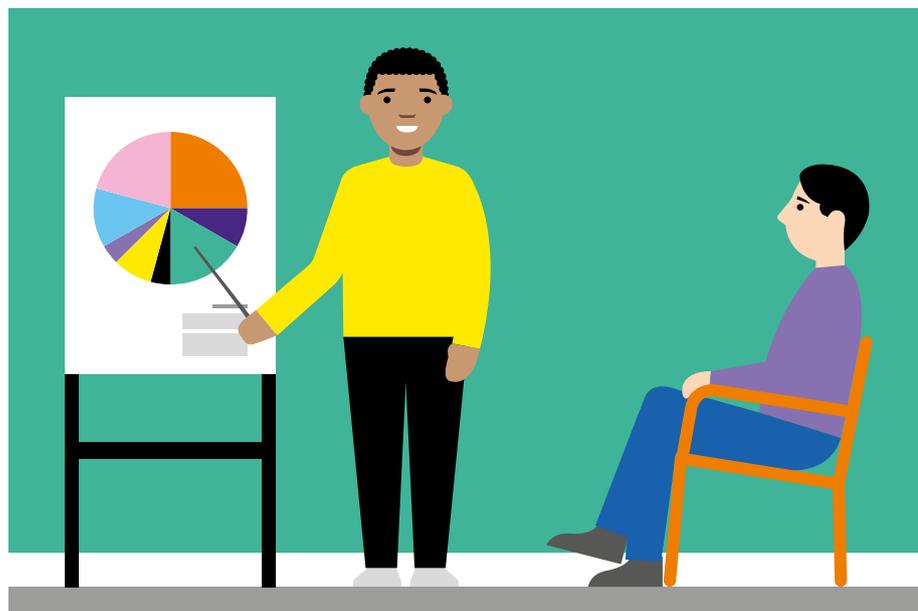
On a voluntary basis, they may access their professional applications via a secure platform provided by the company, while enjoying complete freedom of choice with respect to their device. In turn, the company has no direct responsibility either with respect to the device or the account. The company's responsibility for support and management of devices is limited. This is a policy of complete BYOD.

The 'hybrid' policy is a cross between a controlled policy and an open policy. Employees use a device, in most cases privately owned, linked to a contract (and therefore a SIM card) held by the company. The company authorises the combination of personal and professional use of the device. It finances the SIM card and part of the usage and is involved in the management aspect.

Where the company has introduced a BYOD scheme, employees can select a device of their choice. Sometimes this may be more advanced than what the company would have provided. The company, for its part, retains a legal right to set requirements for security, device management and cost control. This is a partial BYOD policy.

## SNCF

**“The SNCF group (Société nationale des chemins de fer français) has set up pro/personal packages on its smartphones so that users can use their smartphone for personal purposes. This is a threshold billing system managed directly by the operator.”**



## SNCF adapts a hybrid policy to meet the usage needs of its employees

In France, SNCF (Société nationale des chemins de fer français) has introduced new communication tools with the intention of providing features that meet specific business needs. For example, their sales staff have smartphones provided by the company so they can advise passengers of travelling conditions. They are authorised to use these smartphones for personal purposes provided an End-User Licence Agreement (EULA)\* has been signed and authorised by the company. Threshold billing ensures a fair division between professional and personal use.

SNCF has found that more and more business areas within the company want to launch experiments for the use of business applications on smartphones and/or tablets. The company is continually thinking about new projects that might benefit specific business lines and the company as a whole.

In order to manage all these mobile devices, which are particularly sensitive, SNCF has a Mobile Device Management (MDM\*) solution.

Figure 5

In most cases nowadays, it seems that certain types of policies have been imposed on companies rather than implemented by them. This is particularly true of BYOD policies,

which are nonetheless a necessary development as they constitute a unique opportunity for developing a new relationship with the user, as long as the company is the driving

force behind this change. Companies might also propose a combination of all three policies, adapted to their employees' usage profiles.



## Reconsidering usage profiles

Device policy has historically been based on a standardised and vertical approach. However, the focus is gradually shifting towards the employee, with the creation of 'usage profiles', or even the adoption of an entirely personalised approach. Job category constitutes the first criterion for segmentation, even if this is partly called into question by the arrival of personal devices in the workplace. The business needs of different user groups constitute a second criterion. Finally, usage profiles have to be based on an analysis of the risks, relating to the sensitivity of the information used within the company vis-à-vis the outside world.

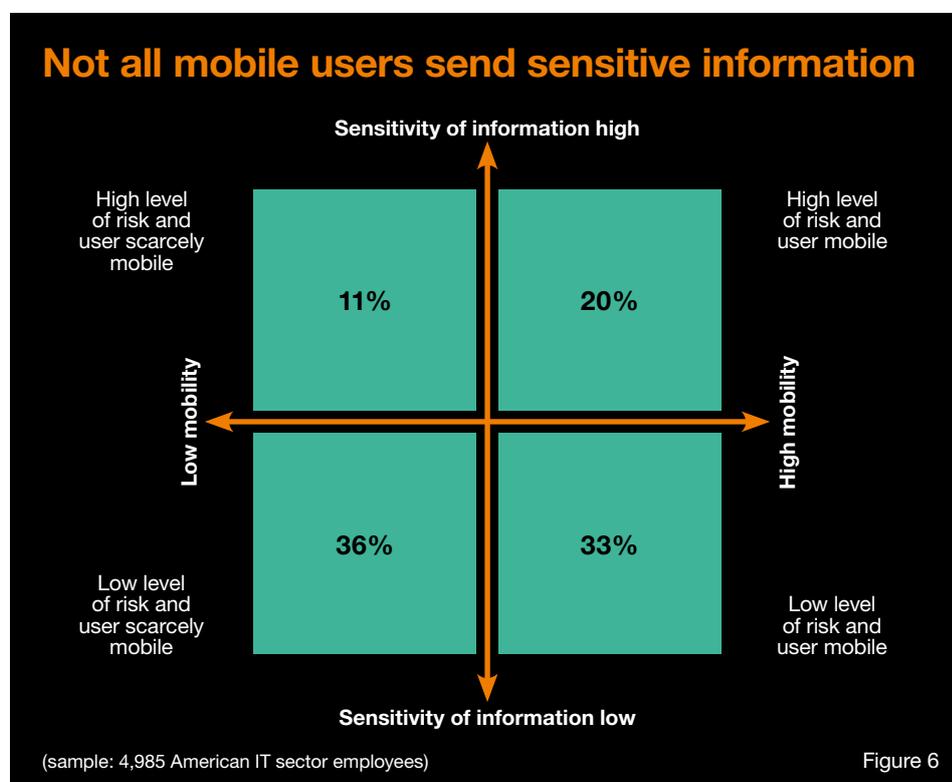
In the first place, the arrival of top-of-the-range private devices in the professional environment goes against the traditional status of such device within the

company's in-house rules. Employees often have a device of their own that is more powerful than what is provided by the company. A manager who does not have a smartphone might come across a worker using his or her own iPhone for professional purposes. This means that the mechanisms by which devices are issued within the company are currently being turned upside-down by these new behaviours. Differences between employees in terms of job status are being partially eroded, due to the effect of the introduction of fleets of smartphones at work and, in the distant future – or for specific target groups – of tablets. Today these are still items which distinguish between workers of different grades given that the procurement costs are considerably higher than for smartphones. For example, BearingPoint Deutschland provided all of its employees with tablets in late 2010, subsidised by the German Länder<sup>23</sup>.

## La Poste Courier

**“This works in the following way:**

- 1) it is the postman/woman who decides;**
- 2) the prime focus is on personal use and environment;**
- 3) it is the professional environment that benefits from this and not the other way around.”**



<sup>23</sup> German administrative units, federal states.

## SNCF

**“We equip our users with mobile devices for reasons of necessity related to their usage habits and for the benefit of the company. We provide equipment when there is a genuine need.”**

Moreover, business needs are gradually imposing themselves as an integral criterion when it comes to drawing up device policies: What are the communication needs based on job tasks and the type of activity? What are the needs in terms of work methods and the interactions between employees (e.g. mobility, collaboration and in project mode)? An employee who frequently works off-site needs an advanced device with a full range of features to be able to organise his or her work. Similarly, as project-style working becomes more commonplace within particular companies, needs change and relate more to the business activities of a particular employee than to his or her position within the company. In this case, leaving the decision to line managers is a good practice. They are closer to the worker concerned - who is better placed to make him/herself heard - and have a better understanding of what is really needed.

Conducting a risk analysis is a key element in understanding usage and developing usage profiles, especially in sensitive sectors such as finance. For example, 20%<sup>24</sup> of mobile employees in the United States send sensitive information while off-site (figure 6). They also appear to be the biggest contributors to the success of a company and therefore, they cannot be denied advanced devices and applications.

Usage profiles - drawn up on the basis of the employee's specific role within the company, business requirements in a given sector and the risks - have to be combined with an understanding of the context and culture of the company. They constitute an excellent opportunity to improve levels of satisfaction not only among company users, but also among its customers. For example, SNCF has improved its customer service by equipping its sales staff with business applications installed on advanced mobile devices. Passengers can therefore benefit from information in real time.

<sup>24</sup> Study by Forrester, "The State of Workforce Technology Adoption: US Benchmark 2011", September 2011, page 11.



## Offering postal workers new tools and applications

In its '100% connected' project, La Poste Courier has plans to provide postmen/women and site managers with equipment that meets their business needs and the reality on the ground. Postmen/women will have a device for their professional use, but also for personal purposes.

The application 'Mon téléphone' will allow them to send SMS, instant messages and voice communications. The application 'Ma poste' will be the link between postmen/women and their HR environment (career management, holiday time, etc.). Finally, 'Ma tournée' will be the business application for postmen/women, providing support in their daily tasks and keeping them in contact with customers.

For La Poste Courier, the objective is to take not only the personal and professional needs of postmen/women into account, but to also incorporate incorporate the smartphone into their relationship with the end-customer and, beyond that, to incorporate new services.

Figure 7

A device policy and a user-profile-based approach of this sort, has to be accompanied by a redefinition of the catalogue of devices and applications.

## Redefining the catalogue of devices and applications to be provided

Collaborative working methods and off-site work require companies to expand the range of devices and applications made available to users. From partitioned functioning, where each device supports specific applications, companies are moving on to an approach based around multi-screen access (PCs, tablets, smartphones), and to business applications operated from the office or remotely. In order to be able to respond to new needs and to manage this complexity, companies will have to provide the right tools and expand their traditional fields of thought, while dealing with their own constraints in terms of security, costs and risks. To support new ways of working, IT

departments have to reconsider the collaborative applications, business applications and transverse applications they provide to workers (e.g. CRM, inventory management, project areas). This particularly involves collaborative production applications as well as access to social networks. Companies are initiating numerous projects and trials to their own social networking pages or linked to business applications. For the company, this constitutes an opportunity to improve interactions between employees, in order to facilitate joint activities or the sharing of expertise, good practices and knowledge. In order to meet the requirements of employees working off-site, companies will have to adapt existing applications and develop new applications which meet specific business needs. Initially, deciding between transverse or business applications will be crucial in order to concentrate development efforts.

## BearingPoint

**“ With regard to support, the question is: does the user prefer to deal directly with his or her company or with the operator? Who is the natural interlocutor for the end-user? This is a complicated issue, but what is certain, at least, is that tripartite relationships [operator, user, company] are often more complex to manage than those involving only two parties.”**

## The key components of collaborative working



Figure 8

Employees require more flexibility on the part of the company and need to be able to access their applications and professional data off-site. Thin client-type solutions for virtualisation or 'webification'\* of applications are a promising technical response. In particular, they allow easy access to the working environment, especially for employees working off-site, but must be supplemented by an online data storage service. For example, 74%<sup>25</sup> of users are interested in having a virtualisation solution for their PC, with access to their working environment

from any screen that is connected. Providing applications in SaaS mode (Software as a Service)\* makes it possible to bill usage in a way that is attractive to companies, benefiting them with greater flexibility than they would have with a physical installation on the device.

This also allows them to reduce the fixed costs related to the purchase of licences. Multi-screens are gradually becoming a reality with which companies will have to come to terms. They are thinking about possible adaptations of existing applications and about the development of new business or transverse applications for mobile devices with a much smaller screen. 60%<sup>26</sup> of decision-makers are in favour of increasing the budget allocated to professional applications on smartphones and tablets.

Let us take the example of the consultancy firm BearingPoint, whose employees work off-site on their clients' premises. The company has adapted to this set-up by providing a range of devices and applications suitable for these uses. Employees are given a standard mobile phone or a smartphone, a laptop and a 3G card. Besides traditional VPN\* access on their PC, they can now use their professional smartphone to access an application that keeps track of time and expenses. Moreover, employees with smartphones or tablets can access professional messaging applications native to the device or via webmail\*.

<sup>25</sup> End-user Study Orange Business Services, BearingPoint & TNS Sofres, January 2011.

<sup>26</sup> Study by Markess International, Applications professionnelles sur smartphones et tablettes numériques: besoins & opportunités, 22 September 2011.

## MMA

**“ We didn't provide training when we introduced smartphones. However we had requests for support, and have therefore been obliged to issue our own handbook”.**

## 'Mon iPhone à moi by Logica'<sup>27</sup>

Logica France has equipped its full workforce of 9,200 with an iPhone. The 'Mon iPhone à moi by Logica' initiative will be covered by a monthly subscription customised in conjunction with Orange Business Services. This subscription includes fifteen hours of communication, 100 texts, push mail and unlimited\* access to the Internet. Private use of this iPhone is subject to a financial contribution by the employee, limited to €20 per month.

The objective is threefold: to meet the need for mobility which is intrinsic to the company's business; to facilitate teleworking; and to achieve a better work/life balance.

This initiative will allow users to be more efficient in carrying out regular administrative tasks (e.g. entering details of expense accounts or of time worked). They will also have access to business applications via a 'Logic'Apps Store', which will simplify their day-to-day working. Moreover, this new scheme meets users' needs in terms of mobility, giving them off-site access to their e-mails, contacts and professional diaries.

Logica France gave each of its employees an iPhone since 1 December 2011.

\* Limited bandwidth above a certain data volume consumed.

<sup>27</sup> [www.decision-achats.fr](http://www.decision-achats.fr), item entitled "Logica France fournit un iPhone à tous ses collaborateurs", 1 December 2011.

Figure 9

By establishing an expanded catalogue of mobile devices and applications, companies will be able to offer a comprehensive range of uses to employees while at the same time making new ways of working and communicating more secure. Moreover, this integration of multi-applications and multi-screens removes a real headache for IT departments and telecom fleet managers. Redefining Telecom and IT strategy in this way represents a major opportunity to allow IT departments to reinforce their role as integral partners supporting the company's business processes. In order to transform this opportunity into a reality for the company, the challenge consists of harmonising these initiatives with the company's overall strategy.





**3**

**Companies  
reinvent the  
user experience**

Once it has a device policy suited to employees' usage profiles and an expanded catalogue of devices and applications, the company has to steer the change through its organisational structure. Three major challenges lie ahead: supporting the new uses, adapting the security policy and, finally, taking the human and legal impacts into account.



## Supporting work/life uses

In the past, user support was essentially confined to PCs and networks. The working environment is expanding with the development of advanced mobile devices, new, constantly evolving operating systems and a wide variety of applications. Integrating work and life spheres extends the need for support beyond the purely professional setting and beyond the company's comfort zone. Companies have to manage this complex phenomenon and support their workers as they adopt new tools. They therefore have to rethink their processes of procurement, familiarisation, user assistance and remote resolution of incidents.

The multiplicity of devices and the diversity of OSs and applications have made the task of managing the mobile fleet much more complicated, particularly for large-scale projects. Logistics, procurement, deployment and maintenance are key challenges, especially for large corporate groups. They have to define and make available a more extensive catalogue of devices, derived partially from the private sphere, and then manage the replacement of existing equipment or the issuing of new equipment. Companies will have to be able to develop new processes to help employees master

the use of devices and applications: training, practical guides, videos, e-training\* or e-books\*.

At Microsoft, employees benefit from personalised support every time new technology is made available. The methods used are varied and take advantage of multiple forms of communication and support media. These range from a newsletters to specific webcasts dealing with simple scenarios and group training sessions, and from individual support to large-scale information sessions in lecture theatres, as well as a specific VIP-type service.

In all cases, this support is focused on usage and not on technical aspects, putting users and their needs at the centre of the solution. The challenge here is to provide staff members with IT devices and IT services according to their role in the company and their requirements in relation to mobility and flexibility.

The company will also have to adapt its traditional user support by including IT and Telecom components that have traditionally been managed in different ways.

# MMA

**“ At the request of managers and sales staff, we are experimenting with tablet PCs as a replacement for laptops, with access to diary-type transverse applications, professional messaging, and intranet access. There will also be a dashboard application for branch managers.”**

Individual workers have now become participants in the new generation of support, developing mechanisms for providing assistance and advice. Organisations thus have to facilitate exchanges between users and develop, for example, a 'support 2.0\*'. Focused on technophiles and younger workers, this initiative does not suite all employee typologies of employees<sup>28</sup> and will therefore have to be delivered by means of a specific support mechanism in which speed of response will be crucial.

Support will also depend on the company's device policy. For example, in a 'liberal' policy (which will result in a multiplicity of devices and operators), the single point of contact for support could be the company IT department that manages professional applications, but it might also be the access operator. In a 'hybrid' policy, if the device is personal and the account is professional, the question of the single point of contact, although much less complicated, is still an issue: Who will be responsible for providing guaranteed services and comprehensive user support? In a 'controlled' policy, the employee will look to the IT department to provide the quality of service expected, as is currently the case with work computers.

Companies will have to equip themselves to deal with incidents remotely (problems of synchronisation, installation, viruses, etc.), requiring authentication of the device. Choosing a solution that is compatible with a large range of operating systems is of crucial importance, especially in a context in which employees provide the device of their choice. As with computers, technicians could easily take control of the device in order to provide assistance.

Companies will prepare themselves for this transformation by reviewing their management processes and supporting the change with and for its users.

The employee's life cycle within the company has to be at the centre of their analysis (joining the company, changing jobs, leaving the company) and must be reconciled with the life cycles of the devices, applications and technologies.

## Adapting the security policy

Changes in the ways we communicate and work have to be supported and not resisted. This means that the security of IT systems has to respond to new challenges. IT and Telecom departments have to update their security policies, organise themselves to stop new threats and strike the right balance between security and flexibility of access and use.

In order to adapt their security policy to this new situation, companies have to perform in-depth security analyses and map out all the most common threats. Afterwards, they have to choose security strategies, set objectives and decide how to reach these objectives.

<sup>28</sup> Whereas 57% of workers surveyed in this end-user study stated that they wanted a simple communication device with basic features, 65% of technophiles preferred a more advanced device with multiple features.

Depending on the choices made, the security policy may involve installing a system for protecting business-critical information. This is becoming a sensitive topic in a world where the amount of information exchanged is continually growing. Apart from the problem of 'infobesity'<sup>29</sup>, the risks of divulging information are also on the increase.

For example, the 'sharing' of a confidential piece of data on a social network is instantaneous and can reach thousands of people: 45% of employees admit to having published information relating to their company on social media<sup>29</sup>. Companies must control the flow of information and rank data according to how critical and how valuable it is.

All user profiles can therefore access certain predetermined categories of information. The most advanced companies are rolling out management solutions for their mobile fleets, or Mobile Device Management schemes, application stores where access rights are managed based on

business lines, and where sensitive applications and data are kept separate in dedicated areas.

Security policy is further based on securing mobile devices: protecting them, authenticating the owner, securing the data feed and anticipating risk situations.

Protecting the device is also becoming a major challenge for the company and involves providing anti-virus, firewall\* and anti-spam\* (SMS and voice) solutions appropriate to the security risks. Malware\* on mobiles is on the increase, rising from 900 in 2010 to 1,300 in 2011<sup>30</sup>. It is becoming increasingly important to regularly supply the latest rules and updates on mobile devices. Mobile Device Management (MDM) tools allow the company to impose its security policies on heterogeneous fleets with a wide variety of mobiles and operating systems.

Verification of employees who work off-site involves confirming the identity of the employee by authenticating the device. The latter

has to be recognised by the system which authorises access. The existing solutions on the market are based on a variety of authentication techniques and on how the chosen solution is delivered.

For example, there is a system based on simple authentication by means of a user name and password, strong authentication by means of a physical Token\* or Token software, where a unique password is sent by SMS, or by an individual certificate installed on the mobile device. Companies can decide for themselves, depending on the level of security desired and the flexibility of use required.

The securing of data feed on mobile devices is a critical challenge as they are vulnerable when connections are made 'over the air'. In this case, it is possible to set up encrypted tunnels (or VPN) using specific software programs installed on the mobile device. In this way, data can flow with complete security.

<sup>29</sup> Les Echos: "Convergence vie privée-vie professionnelle: le mobile bouleverse la sécurité informatique", 6 December 2011, according to a survey conducted on behalf of LANDesk by VansonBourne among 480 CIOs and employees in France, the UK and Germany.

<sup>30</sup> Les Échos: "Le nombre de virus visant les smartphones explose", 23 November 2011.



# Malware\*

The volume of malware on smartphones increased by

# 44%

between 2010 and 2011<sup>31</sup>.

Mobile devices can easily be lost or stolen. It is therefore necessary to protect the device by anticipating these situations and protecting the sensitive data stored on the device. Management solutions for mobile fleets comprising multiple devices (smartphones and tablets for professional and personal use) offer the possibility of anticipating the dissemination of confidential information (MDM solutions). In fact, these tools make it possible to block access to the device and erase or restore its content.

These solutions, which would ideally be available to all types of operating system, also allow the possibility of creating inventories of applications and managing them remotely, as with all the various features of the devices. MDM platforms have only recently come onto the market and constitute the best and the most reliable solution to device management issues. Furthermore, the arrival on the market of virtualisation technologies on smartphones and tablets allows the cohabitation of professional and personal

environments in a way that keeps them hermetically separated and secured. The emergence and spread of the Cloud and applications delivered in SaaS mode (Software as a Service)\* thus present an interesting solution, given that in this configuration the user's data is no longer stored on the mobile device. Any confidential data that is still stored off-line has to be encrypted, rendering it unusable for unauthorised access. The small number of solutions that exist are still very complex and tend to replicate those used on computer hard disks (by means of storing certificates in the hardware layer).

The array of devices needs to be supported by preventative measures which need to be formalised in policy documents. It is necessary to support and guide change through accountability workshops and good security practices.

Once in place, analysis tools will allow the company to ensure correct use of services as part of a long-term approach.

<sup>31</sup> Les Échos: "Le nombre de virus visant les smartphones explose", 23 November 2011.

## The features of the mobile device management tool

Figure 10

**A mobile device management solution enables IT managers to remotely manage the entire fleet of mobile devices (smartphones and tablets, irrespective of the OS) via a platform, while also allowing them to do the following:**



Administer user profiles.



Administer devices remotely (data synchronisation, back-up and restoration, inventories and updating the mobile fleet, etc.).



Implement company security policy (encryption of data, embedded VPN management, anti-virus, firewall and blocking devices, geo-localisation and remote deletion of data).



Support use management (user information, control of services subject to charges, flagging the activation of roaming, etc.).

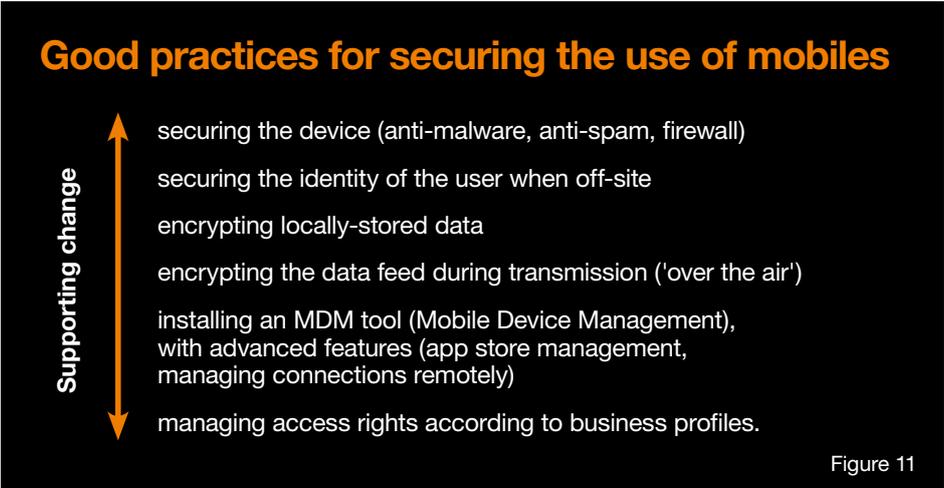


Offer a private business app store and manage applications (distribution, update, activation and de-activation of business applications according to user profile, etc.).



Personalise mobiles according to user profile by controlling native features according to the location of the mobile and the time they are requested (SMS, diary, camera, etc.).

In view of the new forms of communication and the rapid evolution of mobile devices, having a reliable and continually updated device management service is a fundamental necessity. These solutions must be integrated into an overall approach to security and management of the mobility phenomenon. Monthly billing solutions for individual users help the company to stay within its financial limits.



## Offering more flexibility at AXA Technology Services France, thanks to a mobile device management platform

The aim was to allow employees to optimise their time, increase flexibility and ensure that they were available at the right moment for the company and for them.

With this in mind, AXA Technology Services France wanted to offer its workers the possibility of connecting to their e-mail, contacts, diary or intranet via their smartphones or personal tablets.

Today, thanks to the investment in a secure Mobile Device Management (MDM) platform, employees can choose to register their own device and gain access to the aforementioned features they require, subject to authorisation from management and if they so wish.

Figure 12

## Taking the human and legal impacts into accounts

Due to the risks, clear rules have to be drawn up to establish a relationship of trust. Employees will have to protect themselves against the potential consequences of their usage. The company will be obliged to protect itself legally in order to anticipate any possible eventuality.

Individual workers want to protect themselves against the potentially invasive presence of professional communication tools in their private lives. Maintaining a balance between these two environments is not easy. The new devices and their uses need to respect the balance between work and life, which is now

the responsibility of both the company and the employee. User charters, hands-on management and regular employee satisfaction surveys are all ways of making sure that this balance is being maintained. The protection of personal information, which is now mixed with professional information on the same smartphone, is crucial consideration. In the event of loss or theft of a device that serves a dual purpose, the company's right to erase all the data is at stake. Employees must be able to take steps which allow them to recover personal data. Equally, they must be able to ensure the confidentiality of personal data that

they do not wish to be known by the company. In a situation where an employee is obliged to assume part of the cost of the device that he or she uses, the question of ownership will also have to be clarified. In the past, companies were the owners of all devices provided for workers and recovered them if the employee left the firm. Where the cost is shared with the employee, a refund mechanism could be considered in order to take account of his or her device, it raises issues relating to the return of company data; explicit contractual clauses relating to the terms of data return will need to be authorised.

# Microsoft

**“ We firmly believe that the opportunity of being equipped with these new devices, and new technologies, makes life more comfortable for Microsoft employees, and the return for the company outweighs the cost. Efficiency is improved and employee satisfaction is greatly increased.”**

Companies must protect themselves legally in the light of new uses as well as the, sometimes complex, legal aspects. Illicit or fraudulent use committed from a professional access point affects the company's responsibility. Providing 'unsecured' IT resources exposes the company in terms of its civil liability<sup>32</sup> and means that it needs to protect itself and make sure that it can take possession of a device if an investigation has to be carried out, especially if it is not the owner of the device. Moreover, the use of professional applications for personal purposes raises the need for certain controls, as this also involves the company's liability. If a 'controlled' policy is

in place, employees are authorised to use the company account for personal purposes 'within reasonable limits'.

Company's HR and legal departments look into issues relating to Belgian law. PCs and mobiles are regarded as benefits in kind which must be declared by the company and noted on employees' pay slips.

HR and legal departments therefore have to work together to formalise the rules for responsible use in company reference documents (e.g. in-house rules, user charter, employment contracts, etc.), in collaboration with workers' representatives.

<sup>32</sup> C. civ., art. 1382.

## Supporting digital usage at Microsoft France

In order to provide effective work tools and support the change in communication usage, Microsoft France consulted with workers' representatives to introduce a series of simple ground rules aimed at respecting the private lives of its employees. The rules apply to teleworking, face-to-face and remote meetings, and the use of e-mail. New ways of working, for example working at home, have been promoted through consultation between telecom/IT decision-makers and HR departments on the one hand, and workers' representatives on the other. The challenge was to understand the driving and braking forces related to this practice and use them for the benefit of all involved.

In this way, Microsoft, together with workers' representatives, put together a set of rules intended to guarantee the best possible work/life balance, to be respected by all concerned and backed by the Executive Committee, management and the workers' representatives. These are the so-called '4x4', a series of 16 rules that have been published and are currently 'hardwired into the DNA' at Microsoft. They relate to the use of e-mail, management of meetings, videoconferences and the principle of flexibility. They respond to mobile devices, acknowledging that each user has a smartphone and a laptop at the very least, as well as a broadband connection at home paid for by the company. Employees can remotely access the company's information system, their normal messaging service and their working environment via their laptop, wherever they are (transparency for the employee). Every employee manages his or her work/life balance and working time, and sets aside time slots for personal activities, so long as this does not conflict with his or her professional obligations.

Microsoft regularly asks its workers about the balance between their personal and professional lives. They ascertain satisfaction by seeking employee opinions on the company's provision of quality tools. This demonstrates management's willingness to listen to employees.

Figure 13

## Volkswagen regulates access to professional e-mails for its German workers<sup>33</sup>

Given the increasing integration of work and private life, and acknowledging it is not always well-managed, Volkswagen has agreed to stop the transmission of work-related e-mails outside working hours. All sending and receiving will therefore cease half an hour after the end of the working day and resume half an hour before the start of the following working day.

This decision was reached in consultation with workers' representatives. It does not apply to members of Volkswagen management teams or to employees who are on call. Around 1,150 German managers will be affected by these new regulations for parts manufacturers. The aim is to provide employees with the advanced communication tools they need to be able to work in a flexible and ergonomic way, without creating an oppressive working environment. "As far as the company is concerned, we need modern means of communication and we use them, yet we have also arrived at this balanced arrangement,<sup>34</sup>" explains a Volkswagen spokesperson.

<sup>33</sup> The New York Times, "Volkswagen Agrees to Curb Company E-Mail in Off Hours", 23 December 2011.

<sup>34</sup> Les Echos, "Volkswagen réglemente l'utilisation des BlackBerry de ses managers hors du lieu de travail", 29 December 2011.

Putting these new balances into place will only benefit everyone if they are based on an effective usage support system that is available to all. The challenge for the company will be to strike the right balance between the limits and expectations of all concerned.

Figure 14





# Conclusion

**The evolution of personal communication usage at work has greatly accelerated in the past few months. From being hardly detectable, it has developed into an inevitable trend for which companies will have to prepare themselves, and which they have to anticipate and support.**

Coming to terms with this means that there are a series of issues to be faced by IT and telecom departments that go well beyond their traditional area of research and expertise. The anchorage points in any reflection on this usage come back to questions relating to achieving the right balance between personal and professional life for employees, corporate strategy, and the way the company functions both internally as well as in relation to its customers and partners.

This reflection is therefore not just a matter for IT and telecom departments, but involves all the company's various levels and functions: from the Management Team to HR managers and business unit leaders. It is now up to companies to regain the initiative by bringing their teams together in a joint endeavour to find solutions to meet the specific needs of all concerned.

Thanks to its thorough understanding of employees' use of communication devices at work and the key challenges facing companies today, Mobistar has established itself as a leading consultant, able to provide support to companies as they go through this process of change, and able to suggest a range of solutions aimed at making security management more effective, as well as optimising the management of devices and access to applications.

## Schematic summary of good practices in response to the new users

- Segmenting user profiles according to business usage and levels of risk.
- Adapting device allocation policy accordingly by opening it up to personal use to a greater or lesser extent.
- Setting out clear rules of use, formalised and communicated to the employees to protect the company and its workforce.
- Adapting company security policy to provide secure access to its IT system and applications.
- Protecting devices and business-critical information with custom tools for mobile fleet management.
- Assisting with distribution and reconsidering user support so that it is suited to new tools and mobile usage.

Figure 15



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# Glossary

<b>Anti-spam</b>	A collection of systems and technical and legal resources used to combat spam (unsolicited e-mail advertising).
<b>API</b>	Application programming interface.
<b>Applications /media</b>	The medium through which an individual communicates or an application is used (e.g. phone calls, texts, instant messaging, e-mails, video-conferencing, GPS, physical meetings, etc.).
<b>BYOD</b>	'Bring Your Own Device'. A policy that permits company employees to use their own devices as part of their professional activities .
<b>CIO</b>	Chief Information Officer.
<b>Cloud</b>	A concept where IT processes that are traditionally located on local servers or on the user's device are transferred to remote servers.
<b>Consumerisation</b>	Use of personal devices (smartphone, tablet, laptop, etc.) and personal applications (social networks, instant messaging, etc.) for professional purposes.
<b>CYOD</b>	Choose Your Own Device; Phenomenon where employees use their own equipment or devices in their professional activities.
<b>Device</b>	Item of hardware used for communication (landline, mobile phone, tablet, PC, etc.).
<b>E-book</b>	Digital book. An electronic file containing a text in digital form.
<b>E-training</b>	Online training delivered by electronic means.
<b>EULA</b>	End-User Licence Agreement. The conditions of use relating to a device or service.
<b>Firewall</b>	A software program and/or hardware item that enforces the network security policy, by deciding which types of communication are authorised on the network in question.
<b>Generation Y</b>	Sociological concept referring to individuals born between 1980 and 1999.
<b>Hardware</b>	Physical component used for communication (see device).
<b>Helpdesk</b>	A service providing assistance to users of products or services.
<b>ICT</b>	Information and Communication Technology is the result of a convergence of audio-visual and telephone networks with computer networks.
<b>Infobesity</b>	Concept referring to an excess of information (also known as over-information)
<b>IS</b>	Information system.
<b>IT</b>	Information Technology.
<b>Malware</b>	Collective term for programs designed by hackers intended to be implanted into a system in order to trigger an unauthorised operation or to interfere with its functioning (e.g. viruses, worms, Trojan horses, etc.).
<b>MDM</b>	Mobile Device Management. An application to enable the management of a fleet of mobile devices.
<b>Mobile broadband</b>	Internet access from a laptop using 3G.
<b>Mobile web</b>	Direct Internet access from a smartphone.
<b>Multimedia</b>	Generating, operating and using different media simultaneously. (video, image, sound, music, etc.).

<b>Operating System (OS)</b>	Software program which allows a device to be used and which permits the use of other applications on a given device (e.g. Windows for a laptop, iOS on an iPad, Google Android on other smartphones, etc).
<b>SaaS</b>	Software as a Service, an economical means of using applications. Use is consumed and paid on demand and not acquired by the purchase of licences. SaaS applications can therefore be stored on an IT infrastructure within a network. Data and applications are accessed online, in connected mode.
<b>Smartphone</b>	An advanced mobile phone which allows the user to send and receive e-mails and to browse the web.
<b>SMS</b>	Short Message System. A service which allows the user to send short written messages via a mobile phone.
<b>Software</b>	Program for an electronic device or computer.
<b>Split-billing</b>	An invoicing system in which bills are shared between the company and the user.
<b>Support 2.0</b>	User assistance system which operates on the model of social media.
<b>Tablet</b>	Mobile computer without keyboard or mouse with a touchscreen as its principal interface (iPad, Playbook, etc.).
<b>Token</b>	A physical authentication device or software, frequently used as proof of electronic identity.
<b>Video-conference</b>	Communicating by means of voice and image, via a connected device which could be on a PC, smartphone, tablet, etc. (e.g. Skype).
<b>VPN</b>	Virtual Private Network. A system intended to permit secure communication on a local network .
<b>Webification</b>	Migration of a software program or PC application to a web-type solution.
<b>Webmail</b>	Web interface permitting the sending, consultation and editing of e-mails on the web from a browser.
<b>Web OS (Web Operating System)</b>	An imitation of a desktop or the graphic environment of an operating system. This is a web application containing icons, toolbars, windows (which can be reduced, enlarged and moved) and, in some cases, PC office suite-type applications online.
<b>Webservices</b>	Programs that permit communication and the exchange of data between heterogeneous applications and systems in different environments.

## Orange Belgium

Orange Belgium is one of the principle players in the telecommunications market in Belgium and Luxembourg and is active in fixed and mobile telephony, ADSL and other services with strong potential for growth. The company develops innovative products and services for the residential and professional markets. Orange Belgium is listed on the Brussels Stock Exchange and is part of the France Télécom group.

**Find out more:** <http://business.orange.be>

## Orange Business Services

Orange Business Services, the business communication services arm of France Telecom-Orange, is a world leader in the field of integration and consultancy with regard to communication solutions for multinationals. With the world's largest seamless network, its services are available in 220 countries and territories, with local support in a further 166 countries. In 2010 Orange Business Services achieved a turnover of €7.2 billion. Orange Business Services is the leader in its field because of:

- Its understanding of the needs of both, companies and end-users
- Its global vision of the challenges in the workplace, for all areas of the company and for all technologies, not just telecom
- Its comprehensive range of solutions and services including Cloud computing, enterprise mobility, Machine-to-Machine, security, unified communications, video-conferencing and broadband.

Clients of Orange Business Services can take advantage of the fact that it has more expertise in this field than any other company in the world. 1.4 million users rely on our Business Everywhere solution and thousands of companies use the Orange Business Services international platform to communicate and do business. Orange Business Services provides communication solutions to companies of all shapes and sizes in France, with more than 2.7 million professional clients, small businesses and larger firms in France.

**Find out more:** [www.orange-business.com](http://www.orange-business.com)

## BearingPoint

BearingPoint is an independent consultancy firm whose core activity is Business Consulting. The cornerstone of its success is the expertise of its consultants in both management and technology. Inspired by a true spirit of entrepreneurship and collaboration, our 3,200 consultants are committed to creating value and securing tangible results for their clients. They help every step of the way from defining strategy to the final implementation of transformation projects.

We make our clients' priorities our own priorities, which is why for more than ten years, two-thirds of the Eurostoxx 50 companies and several major public bodies have put their trust in us.

At BearingPoint more than 250 consultants support telecom and media actors with their projects all over Europe, as well as in Africa, America, Asia and the Middle East. Half the members of our teams are usually former employees of operators, equipment manufacturers or media groups. Our teams intervene to solve a wide variety of problems within the sector: from strategic studies to the implementation of solutions to specific professional challenges, product marketing, CRM, finance, supply chain, HR, services, etc.

BearingPoint, the accelerator of innovation, has more than 50 experienced consultants specialised in Innovation Management and R&D. We support companies from the initial stages of defining their innovation strategies right through to operational implementation in multiple sectors of activity. Our fields of intervention cover: assistance in the genesis and incubation of ideas, planning the route map for innovation, constructing functioning models (governance, processes, culture, tools) and guiding implementation.

**To get there. Together.**

**Find out more:** [www.bearingpoint.com](http://www.bearingpoint.com)



