

South America BYOD & Enterprise Mobility Market by Component (Software, Security Solution, and Service), By Deployment Mode (Cloud, On-Premises), By End User (BFSI, Automobile, Manufacturing, IT & Telecom, Healthcare, Retail, Transportation & Logistics, Energy & Utilities, and Others), By Country, Competition, Forecast and Opportunities, 2018-2028F.

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Abstracts

The South America BYOD & Enterprise Mobility Market was valued at USD 6.02 Billion in 2022 and grew at a CAGR of 18.41% during the forecast period. The South America BYOD (Bring Your Own Device) and Enterprise Mobility Market have undergone a profound transformation in recent years, driven by the region's increasing dependence on mobile technology and the evolving nature of work. This dynamic landscape spans a diverse array of countries, each with its unique market dynamics, cultural nuances, and technological challenges, making it an intriguing and complex region for businesses and technology providers.

One of the primary driving forces behind the growth of the BYOD and enterprise mobility market in South America is the widespread adoption of smartphones and tablets. These devices have become ubiquitous in the hands of individuals, both for personal and professional use. This shift in device preference has led organizations to recognize the need to leverage this trend for enhancing productivity, collaboration, and workforce flexibility. BYOD policies have gained prominence, allowing employees to use their personal devices for work-related tasks, thereby reducing hardware costs for organizations and providing employees with the familiarity and convenience of using their preferred devices. In the South American context, several global technology giants have played pivotal roles in shaping the BYOD and enterprise mobility landscape.

Companies like Samsung, Apple, Microsoft, Google, and IBM have established their presence, offering a diverse range of solutions tailored to meet the unique needs of South American businesses. These solutions encompass mobile device management (MDM), mobile application management (MAM), and comprehensive security offerings, addressing the region's specific requirements for secure and efficient mobile device usage.

Moreover, the ongoing digital transformation wave sweeping across South America has accelerated the adoption of enterprise mobility solutions. Businesses across various industries are embracing mobility to streamline their operations, enhance customer experiences, and adapt to the shifting dynamics of remote work. Local companies and startups are also making significant contributions to the ecosystem, offering innovative solutions that cater to the diverse requirements of South American enterprises. One notable facet of the South America BYOD and enterprise mobility market is the growing emphasis on data security and compliance. As organizations increasingly rely on mobile devices for mission-critical tasks, safeguarding sensitive information has become paramount. Businesses are investing in comprehensive security measures and robust compliance frameworks to ensure data protection, privacy, and regulatory adherence. Another significant trend shaping the landscape is the rising importance of mobile applications. Organizations are recognizing the value of custom mobile apps tailored to their specific business needs. This trend has created opportunities for local app developers and fostered innovation within the region. To efficiently deploy and manage these applications across diverse device types and platforms, enterprises are investing in app management solutions, ensuring seamless integration with their BYOD and enterprise mobility strategies.

Furthermore, South America's diverse business landscape and economic disparities present both opportunities and challenges for BYOD and enterprise mobility adoption. While larger enterprises in major urban centers are at the forefront of implementing advanced mobility solutions, small and medium-sized businesses in rural areas may face infrastructure limitations. Bridging these gaps and ensuring equitable access to mobile technologies remain key challenges in the region.

In conclusion, the South America BYOD and Enterprise Mobility Market are characterized by rapid growth, fueled by the widespread adoption of mobile devices, the embrace of BYOD policies, and the imperative to adapt to digital transformation. This vibrant landscape, influenced by both global tech giants and local innovators, offers exciting opportunities for businesses seeking to harness the power of mobile technology in their operations. As South America continues to evolve in the mobile technology

arena, navigating its unique blend of cultures, regulations, and market dynamics will be crucial for businesses and technology providers aiming to thrive in this dynamic region.

Key Market Drivers

Proliferation of Mobile Devices

The rapid proliferation of mobile devices is one of the foremost drivers propelling the growth of the South America BYOD (Bring Your Own Device) and Enterprise Mobility Market. Across the region, there has been a surge in the adoption of smartphones, tablets, and other mobile gadgets, both in personal and professional contexts. This proliferation is driven by factors such as increased affordability, improved connectivity, and the growing importance of mobile technology in everyday life. In South America, mobile device penetration rates have been steadily climbing, making mobile devices more accessible to a broader demographic. This surge in mobile device ownership has spurred businesses to leverage this trend for enhanced productivity and connectivity. BYOD policies have gained traction as organizations recognize the potential benefits of allowing employees to use their personal devices for work-related tasks. This approach not only reduces the cost of providing company-owned devices but also boosts employee morale by enabling them to work on familiar devices. The proliferation of mobile devices also underscores the need for robust mobile device management (MDM) solutions and comprehensive enterprise mobility strategies to ensure the secure and efficient operation of these devices within corporate networks. As South American businesses seek to harness the potential of mobile technology, the demand for solutions that can manage and secure a diverse range of devices continues to grow, making this proliferation a significant market driver.

Digital Transformation Initiatives

Digital transformation initiatives across various industries in South America are driving the adoption of BYOD and enterprise mobility solutions. Organizations are increasingly recognizing the need to modernize their operations, processes, and customer interactions by leveraging technology. This transformation extends to embracing mobile technology as a fundamental component of their strategies. South American businesses are implementing digital transformation initiatives to streamline operations, enhance customer experiences, and adapt to the changing landscape of work, including the rise of remote and mobile workforces. In this context, enterprise mobility solutions enable organizations to achieve these objectives effectively. For instance, businesses are developing custom mobile applications to improve customer engagement, optimize

supply chain management, and enhance field services. These applications empower employees with the tools they need to be more productive while providing customers with seamless experiences. The integration of BYOD policies into these initiatives further enhances flexibility and responsiveness. Digital transformation also includes a strong emphasis on data-driven decision-making. Enterprise mobility solutions play a critical role in data collection, analysis, and dissemination. Mobile devices equipped with the right applications enable employees to access real-time data, make informed decisions, and respond quickly to changing market conditions. As South American enterprises continue to invest in their digital transformation journeys, the demand for BYOD and enterprise mobility solutions that support these initiatives is set to rise significantly.

Security Concerns and Data Protection Regulations

The escalating security concerns and the emergence of stringent data protection regulations are compelling South American organizations to invest in BYOD and enterprise mobility solutions that prioritize data security and compliance. With the increasing reliance on mobile devices for business-critical tasks, protecting sensitive information has become paramount. In recent years, South America has witnessed a growing number of cybersecurity threats and data breaches. These incidents have raised awareness about the vulnerabilities inherent in mobile devices and the importance of safeguarding corporate data. As a result, businesses are seeking comprehensive mobile security solutions to mitigate risks and protect sensitive information. BYOD policies, while offering flexibility and cost savings, also introduce security challenges. Employees using personal devices for work-related tasks may inadvertently expose sensitive company data to potential threats. To address these concerns, South American organizations are implementing mobile device management (MDM) solutions, mobile application management (MAM) systems, and advanced mobile security software. Additionally, the region has seen the introduction of data protection regulations, inspired by global standards such as the General Data Protection Regulation (GDPR). These regulations impose stringent requirements on organizations to ensure the privacy and security of personal data. Compliance with these regulations is non-negotiable, and enterprises must deploy robust security and compliance solutions to avoid significant fines and reputational damage. To navigate the complex landscape of data security and regulatory compliance, businesses in South America are turning to comprehensive BYOD and enterprise mobility solutions that offer encryption, secure containerization, remote wipe capabilities, and compliance reporting. As security concerns continue to evolve, the demand for advanced security features and solutions in the region's BYOD and enterprise mobility market will remain a significant driver.

Remote Work and Workforce Mobility

The shift towards remote work and the increasing mobility of the workforce have become significant drivers of the South America BYOD and Enterprise Mobility Market. This transformation in the way people work has been accelerated by factors such as technological advancements, changing employee preferences, and the need for business continuity in the face of disruptions. The COVID-19 pandemic played a pivotal role in accelerating the adoption of remote work across South America and the world. Organizations had to quickly adapt to remote work arrangements to ensure employee safety and maintain business operations. As a result, businesses turned to BYOD and enterprise mobility solutions to enable remote work capabilities. BYOD policies became instrumental in ensuring that employees could use their personal devices to access company resources securely from remote locations. South American businesses quickly realized the importance of providing employees with the tools and flexibility to work effectively, regardless of their physical location. In addition to remote work, workforce mobility has become a fundamental aspect of modern business operations. Employees are no longer confined to traditional office spaces; they are on the move, engaging with customers, partners, and colleagues from various locations. To support this mobile workforce, businesses are investing in enterprise mobility solutions that provide seamless access to applications and data on the go. The demand for solutions that enable remote work and workforce mobility is expected to persist even as the pandemic subsides. South American organizations are recognizing the benefits of a flexible workforce that can adapt to changing circumstances and market demands. As such, BYOD and enterprise mobility solutions that facilitate remote collaboration, secure access to corporate resources, and enhance productivity while on the move will continue to be in high demand, making remote work and workforce mobility key drivers in the market. strategies.

Key Market Challenges

Security Concerns and Data Privacy

One of the most prominent challenges facing the South America BYOD (Bring Your Own Device) and Enterprise Mobility market is the complex web of security concerns and data privacy issues. As organizations increasingly embrace BYOD and Enterprise Mobility strategies to enhance flexibility and productivity, they simultaneously expose themselves to heightened security risks. The use of personal devices for work-related tasks introduces potential vulnerabilities that can be exploited by cybercriminals. These

concerns are compounded by the fact that mobile devices can easily be lost or stolen, putting sensitive corporate data at risk. Securing BYOD and Enterprise Mobility initiatives requires a multifaceted approach, including robust authentication, encryption, and mobile device management (MDM) solutions. However, implementing stringent security measures can be challenging, as it often involves striking a delicate balance between protecting corporate data and respecting employees' privacy on their personal devices. Organizations must navigate these complexities to safeguard their data while respecting the boundaries of personal privacy.

Furthermore, South America is home to some of the world's most stringent data privacy regulations, such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). Non-compliance with these regulations can result in significant fines and legal repercussions. Ensuring that BYOD and Enterprise Mobility strategies align with these evolving legal requirements presents an ongoing challenge, particularly for organizations operating across state and national boundaries. The challenge of security and data privacy is further exacerbated by the ever-evolving threat landscape. Cyberattacks, including phishing attempts, malware infections, and ransomware attacks, are becoming increasingly sophisticated. Businesses must continually adapt and fortify their security measures to stay one step ahead of cyber threats. Achieving this balance between flexibility, productivity, and security remains a formidable challenge in the South America BYOD and Enterprise Mobility market.

Fragmented Ecosystem and Compatibility Issues

Another significant challenge in the South America BYOD and Enterprise Mobility market is the fragmented technology ecosystem and compatibility issues. This challenge arises from the diversity of devices, operating systems, and software applications used by employees in their personal and professional lives. The BYOD landscape encompasses a wide array of devices, including smartphones, tablets, laptops, and wearable technology, each running on different operating systems (e.g., iOS, Android, Windows). Integrating and managing this diverse mix of devices within an organization's IT infrastructure can be complex and resource intensive.

Compatibility issues often arise when attempting to ensure that corporate applications and data are accessible and functional across various device types and operating systems. Ensuring seamless integration of these devices with enterprise systems and applications is crucial to maintaining a productive and efficient workforce. However, it requires significant effort in terms of software development, testing, and ongoing support. Moreover, the rapid pace of technological advancement results in a constant

stream of updates, new device models, and operating system versions. This continuous evolution can lead to challenges in maintaining compatibility with legacy systems and applications, as well as potential disruptions in the user experience.

To address these compatibility challenges, organizations must invest in Mobile Application Management (MAM) and Mobile Device Management (MDM) solutions that offer cross-platform support and ensure a consistent user experience across devices. However, this investment comes with associated costs and requires ongoing maintenance to adapt to the evolving technology landscape. Additionally, the need to accommodate different device preferences among employees while maintaining data security and corporate standards further complicates the management of a fragmented ecosystem. Striking the right balance between device diversity and standardized management remains a key challenge in the South America BYOD and Enterprise Mobility market.

Key Market Trends

Growing Embrace of Hybrid Work Models

One of the prominent trends shaping the South America BYOD (Bring Your Own Device) and Enterprise Mobility Market is the growing embrace of hybrid work models. The COVID-19 pandemic forced a sudden and massive shift towards remote work across the region and the world. However, as the situation evolves, businesses are recognizing the benefits of a flexible approach that combines both remote and in-office work. Hybrid work models offer employees the flexibility to work from different locations, including their homes, offices, or other remote sites. As a result, South American organizations are reevaluating their technology strategies to ensure seamless connectivity and collaboration for their hybrid workforce. BYOD and enterprise mobility solutions play a critical role in enabling this transition.

Employees are increasingly using their personal devices to connect to corporate networks and access work-related resources, whether they are in the office or working remotely. This trend necessitates robust mobile device management (MDM) solutions that can manage and secure a diverse array of devices across different environments. Additionally, businesses are investing in collaboration tools and cloud-based solutions to facilitate communication and teamwork among employees regardless of their physical location. This shift towards hybrid work models is driving the demand for BYOD and enterprise mobility solutions that ensure data security, compliance, and a consistent user experience, regardless of where work takes place.

Focus on User Experience and Productivity

Another significant trend in the South America BYOD and Enterprise Mobility Market is an increased emphasis on user experience and productivity. As organizations deploy BYOD policies and mobility solutions, they recognize the importance of ensuring that these initiatives enhance rather than hinder employee efficiency and satisfaction. User experience has become a critical consideration as businesses aim to provide employees with seamless access to corporate resources from their personal devices. This involves optimizing the performance of mobile applications, ensuring a responsive and intuitive user interface, and minimizing disruptions in the user's workflow. South American organizations are investing in mobile application management (MAM) solutions to deliver a consistent and user-friendly experience on a variety of devices. In addition to user experience, enhancing productivity is a top priority. South American businesses are increasingly leveraging mobile technologies to empower their workforce to be more productive on the go. Mobile applications that enable tasks such as remote access to documents, real-time collaboration, and efficient communication are in high demand.

Furthermore, BYOD and enterprise mobility solutions are evolving to provide insights into user behavior and app usage patterns. This data-driven approach helps organizations identify areas for improvement and tailor their mobility strategies to better align with employee needs and productivity goals. As the South American BYOD and Enterprise Mobility Market matures, the focus on user experience and productivity will continue to shape the development of mobile applications, management solutions, and policies. Organizations recognize that a positive user experience and enhanced productivity are not only essential for employee satisfaction but also critical for achieving business objectives in an increasingly competitive landscape.

Heightened Emphasis on Security and Compliance

The heightened emphasis on security and compliance is a significant trend in the South America BYOD and Enterprise Mobility Market. With the increasing reliance on mobile devices for business-critical tasks and the rise of remote work, organizations are acutely aware of the potential security risks associated with mobile technology. South American businesses are taking proactive measures to protect sensitive data and ensure compliance with evolving data protection regulations. This trend is driving the demand for comprehensive mobile security solutions and robust mobile device management (MDM) platforms. One key aspect of this trend is the adoption of zero-trust security

models. South American organizations are moving away from traditional perimeter-based security approaches and adopting zero-trust principles, which assume that no device or user should be trusted by default, whether they are inside or outside the corporate network. This approach involves continuous verification of identity and device trustworthiness before granting access to corporate resources.

Additionally, compliance with data protection regulations, such as the Brazilian General Data Protection Law (LGPD), is a top priority for South American organizations. These regulations impose strict requirements on the collection, storage, and processing of personal data. As a result, businesses are investing in mobile security and management solutions that provide encryption, secure containerization, remote wipe capabilities, and compliance reporting. Furthermore, the trend towards remote work has increased the importance of securing mobile endpoints. South American organizations are implementing strategies that include mobile threat defense (MTD) solutions to protect against mobile malware, phishing attacks, and other mobile-specific threats. As South American businesses navigate the complex landscape of security and compliance, they are increasingly seeking solutions that offer both robust protection and ease of management. The demand for advanced security features and comprehensive MDM solutions that address the evolving security threats and regulatory requirements in the region will continue to drive this trend in the BYOD and Enterprise Mobility Market.

Segmental Insights

Component Insights

In the ever-evolving terrain of the South American BYOD (Bring Your Own Device) and Enterprise Mobility Market, the 'Software' category has emerged as the undisputed leader, exhibiting remarkable resilience, and poised for continued dominance throughout the forecast period. This ascendancy can be attributed to a confluence of factors that have catalyzed the pivotal role of software solutions in shaping the modern workplace. With the proliferation of mobile devices and the blurring of lines between personal and professional usage, businesses are increasingly relying on robust software applications to manage, secure, and streamline the BYOD ecosystem. From Mobile Device Management (MDM) systems that enforce corporate policies to Virtual Private Networks (VPNs) ensuring data privacy, software offerings have become the linchpin of enterprise mobility strategies. Moreover, the rapid pace of technological innovation in this sector, with the integration of Artificial Intelligence, Machine Learning, and advanced security features, further cements software's prominence. As organizations seek to optimize productivity, enhance user experiences, and fortify

cybersecurity, the software category's reign in the South American BYOD and Enterprise Mobility Market appears poised to endure as an indispensable cornerstone of the digital workplace landscape.

Deployment Mode Insights

In the dynamic realm of the South American BYOD (Bring Your Own Device) and Enterprise Mobility Market, the cloud deployment mode segment has unequivocally asserted its dominance and appears primed to maintain its preeminent position throughout the entire forecast period. This commanding status is underpinned by a convergence of crucial factors that underscore the significance of cloud-based solutions in the modern business landscape. Cloud deployment offers unparalleled scalability, flexibility, and accessibility, aligning seamlessly with the evolving needs of organizations navigating the intricacies of BYOD and enterprise mobility. The ability to centralize management, security, and data storage in the cloud has become a linchpin for businesses seeking efficient and agile mobility strategies. Moreover, the global shift towards remote work and the imperatives of digital transformation have further accelerated the adoption of cloud solutions, facilitating ubiquitous access to corporate resources, and enhancing workforce productivity. As cloud technology continues to mature and innovate, offering robust security measures and cost-effective scalability, the cloud deployment mode will remain the bedrock of the South American BYOD and Enterprise Mobility Market, ensuring organizations stay agile, competitive, and securely connected in an increasingly mobile-driven world.

Regional Insights

Brazil has undoubtedly solidified its preeminent position in the South American BYOD (Bring Your Own Device) and Enterprise Mobility Market, and there are compelling factors supporting the belief that this leadership will endure well into the foreseeable future. As the largest and most economically influential country in South America, Brazil boasts a robust and dynamic business environment that readily embraces technological innovations. This fertile ground for enterprise mobility solutions is further bolstered by a rapidly expanding, tech-savvy workforce and a thriving software development industry. Brazilian software companies have played a pivotal role in shaping cutting-edge solutions for mobile device management, security, and the seamless integration of personal devices into corporate networks. Additionally, Brazil's extensive mobile network infrastructure, coupled with the steadily rising smartphone adoption rates, has created an environment ripe for the adoption of BYOD practices. The compelling advantages, such as cost-efficiency and enhanced employee productivity, associated

with BYOD strategies have resonated deeply with businesses across various sectors in Brazil, driving widespread adoption. With its firmly established market presence, technological prowess, and the growing recognition of the strategic advantages offered by BYOD and enterprise mobility, Brazil is well-positioned to maintain its leadership in the South American market. The nation's unwavering commitment to technological progress and workforce efficiency optimization is likely to reinforce its dominance in this ever-evolving landscape for years to come.

Key Market Players

Apple Inc.

Samsung Electronics Co., Ltd.

Microsoft Corporation

Google LLC

IBM Corporation

Citrix Systems, Inc.

BlackBerry Limited

MobileIron, Inc.

Telefonica S.A.

Tata Consultancy Services (TCS) Limited.

Report Scope:

In this report, the South America BYOD & enterprise mobility market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

South America BYOD & Enterprise Mobility Market, By Component:

Software

Security Solution

Service

South America BYOD & Enterprise Mobility Market, By Deployment Mode:

Cloud

On-Premises

South America BYOD & Enterprise Mobility Market, By End User:

BFSI

Automobile

Manufacturing

IT & Telecom

Healthcare

Retail

Transportation & Logistics

Energy & Utilities

Others

South America BYOD & Enterprise Mobility Market, By Country:

Brazil

Colombia

Argentina

Chile

Peru

Ecuador

Venezuela

Bolivia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the South America BYOD & Enterprise Mobility Market.

Available Customizations:

South America BYOD & Enterprise Mobility Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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