

A Forrester Consulting Thought Leadership Paper Commissioned By Microsoft

# The Business Case For Standardizing On A Single Modern Browser In The Enterprise

Enterprises That Support The Use Of Nonstandard Browsers Are Burdened With Additional Support, Management, Security, And Development Costs

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FORRESTER

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## Executive Summary

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Many North American organizations are in the midst of a transformative desktop modernization effort that will introduce new hardware and form factors that open up advanced use cases, a new operating system (OS) that will improve worker productivity and delight employees, new office productivity tools that introduce flexible work styles and greater collaboration, and a new web browser that will dramatically improve workforce productivity and keep corporate and sensitive data secure. In September 2012, Microsoft commissioned Forrester Consulting to evaluate the considerations that IT managers weigh when deciding whether to standardize on a single modern browser or to support or allow the use of nonstandard browsers in the enterprise.

In conducting an in-depth survey with 133 IT decision-makers at North American enterprises with influence into their browser strategy, Forrester found that nearly all of these companies in fact standardize on a single modern browser but had different strategies about whether to support or allow the use of nonstandard browsers.

## Key Findings

Forrester's study yielded three key findings:

- **IT pros embrace desktop modernization efforts to boost worker productivity, flexibility, and experiences.** Three-quarters of the 133 IT pros surveyed identified their desktop transformation project as a critical or high priority over the next 12 to 18 months. Provisioning modern hardware and software will drive significant increases in employee productivity and will enable flexible work styles not previously made possible with legacy tools and browsers.
- **Nearly all enterprises standardize on a single browser for work PCs.** Ninety-six percent of the enterprises surveyed standardize on a single browser for work PCs — typically on the browser native to their company standard OS — but most are conflicted about whether to support or allow the use of nonstandard browsers in the workplace. In fact, most firms do not allow employees to use nonstandard browsers on work PCs primarily due to development, support, and staffing concerns.
- **IT must weigh the hidden costs of supporting or allowing nonstandard browser use.** While the vast majority of firms surveyed have standardized on a single modern browser and had no intention of embracing a multibrowser strategy in the future, it's nonetheless important to compare potential employee productivity benefits with the hidden costs of supporting or allowing the use of nonstandard browsers. The study found that firms with a multi-browser strategy spend an extra \$4,200 annually on the internal development of each web app. For large global enterprises that support an average of nearly 100 web applications, the costs of supporting a multibrowser strategy for work PCs translates into a nearly \$400,000 annual investment — which doesn't include additional support and staffing costs. Eighty-six percent of firms surveyed experienced significant cost increases — an average of more than 20% — by supporting multiple browsers.

## IT Pros Embrace Desktop Modernization Efforts To Improve PC Experiences

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In a survey of 133 IT decision-makers at North American enterprises with influence into their browser strategy, Forrester found that 74% have a desktop modernization effort that is a critical or high priority over the next 12 to 18 months (see Figure 1). So what's driving IT pros to modernize their desktop environments?

- **IT pros prioritize their desktop migration efforts as they finally rid firms of legacy productivity tools.** IT pros at firms that have remained on the same 11-year-old legacy OS — whose extended support comes to a close in early 2014 — view modern desktop environments as a significant opportunity to provide more flexible work styles that boost office productivity while bringing a measure of control to an increasingly chaotic environment.
- **OS upgrades drive new office productivity and browser investments.** Because many firms tie their OS migration to the natural PC refresh cycle, most firms are prioritizing their desktop OS upgrade today. But most of these projects affect the office productivity suite and web browser that IT provides employees just as much.
- **IT embraces new productivity and browser standards to boost productivity and delight users.** Let's face it: Legacy browsers and office productivity solutions often fall short of user expectations for accessing the latest technology in their work lives that they do in their personal lives.
- **IT pros can't overlook the importance of web apps in their desktop transformation project.** As IT pros inventory their applications, test for compatibility with the new OS standard, and remediate incompatibility issues, firms can't overlook web apps as a barrier for OS migration. The study found that firms support nearly 300 applications worldwide and 73 web apps that must be tested against their new modern browser standard (see Figure 2).

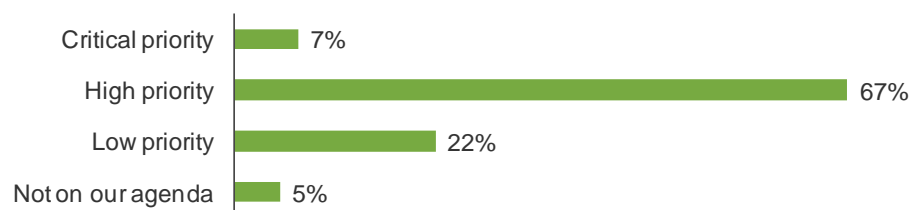
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**Figure 1**

Three Out Of Four Enterprises Identified Desktop Upgrades As A Critical Or High Priority

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**"Is a PC/desktop upgrade/modernization effort (hardware OR software) likely to be one of your organization's top IT priorities over the next 12 to 18 months?"**



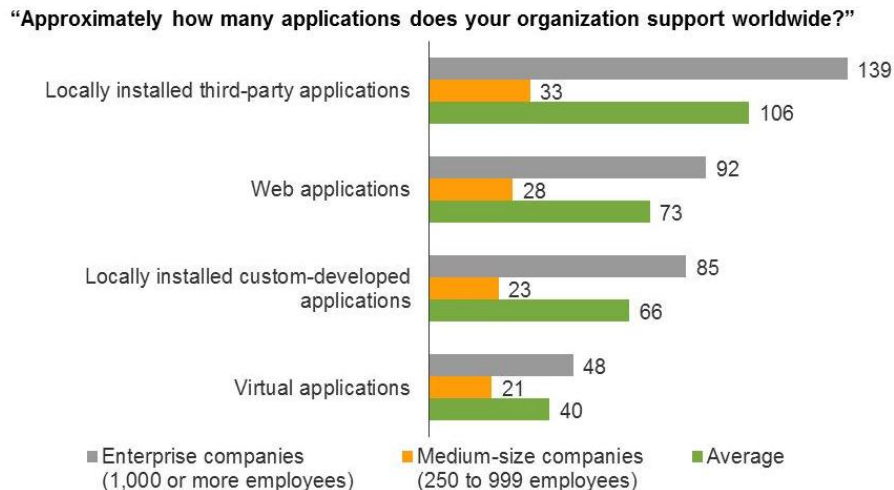
Base: 133 IT decision-makers at North American enterprises with influence over their browser strategy  
(percentages do not total 100 due to rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

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**Figure 2**

Firms Support An Average Of Nearly 300 Apps Worldwide, Including 73 Web Apps That Can't Be Overlooked



Base: 133 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

## Nearly All Enterprises Standardize On A Single Modern Browser

The study found that as IT pros prioritize their desktop transformation projects, nearly all of them standardize on a single modern browser for company-issued PCs.

- **Ninety-six percent of firms have standardized on a single browser for company-issued PCs.** Nearly all of the IT pros surveyed have standardized on a single modern browser for company-issued PCs (see Figure 3). While a number of considerations drove firms to standardize on a single browser, improved security and patching, maintenance, and deployment and management were the primary drivers (see Figure 4).
- **Security, compatibility, and management drive IT to upgrade browsers and embrace a single work standard.** Security is the No. 1 driver for browser upgrades (see Figure 5). IT pros look to benefit from improved malware protection, antiphishing capabilities, more capable privacy settings, and other security enhancements in their next standard browser. As further proof, 89% of firms restrict employees' Internet access on work PCs.
- **Total cost of ownership (TCO) was another significant factor in determining which browsers to support.** The study revealed that IT pros overwhelmingly prefer to standardize on the browser that ships with their desktop OS. In fact, 70% associated that browser with the lowest TCO in addition to other best-in-category benefits, such as ease of deployment (82%), ease of support (79%), and predictable release schedules (73%).
- **However, IT pros are conflicted about whether to support or allow the use of nonstandard browsers.** The survey revealed conflicting approaches to supporting or allowing the use of nonstandard browsers. Just over half

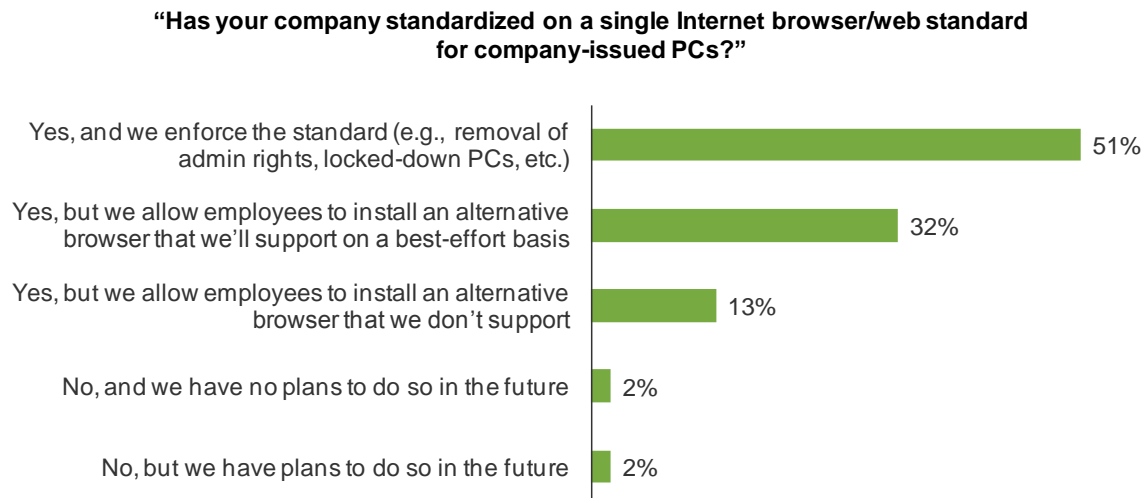
of those surveyed do not allow employees to install alternate browsers by not granting them administrator privileges or enforcing locked-down PCs; another 32% support alternate browsers on a “best effort” basis; and 13% allow their use but don’t support them at all.

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**Figure 3**

Ninety-Six Percent Of Firms Have Standardized On A Single Browser For Company-Issued PCs

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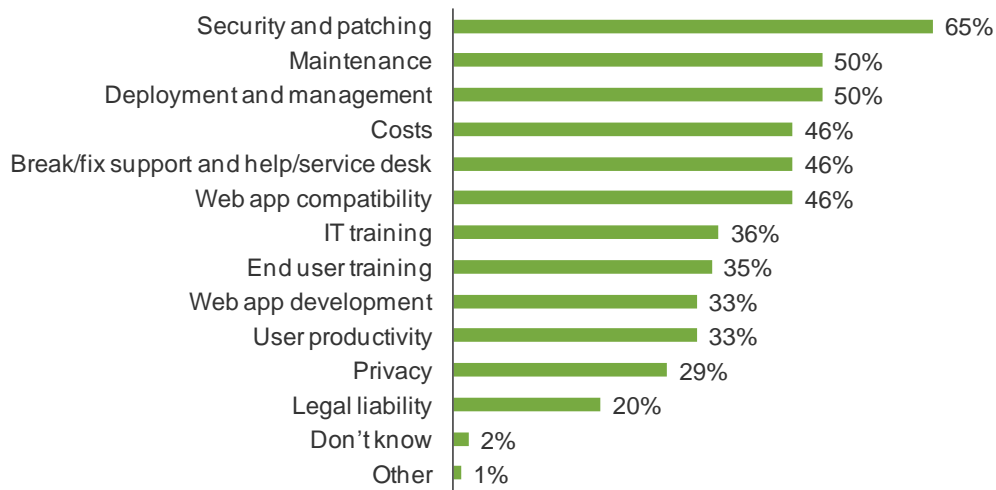
Base: 133 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

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**Figure 4**Security, Maintenance, And Management Considerations Drove Firms To Standardize On A Single Browser

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**“Which considerations went into the decision to standardize on a single modern Internet browser for company-issued PCs?”**

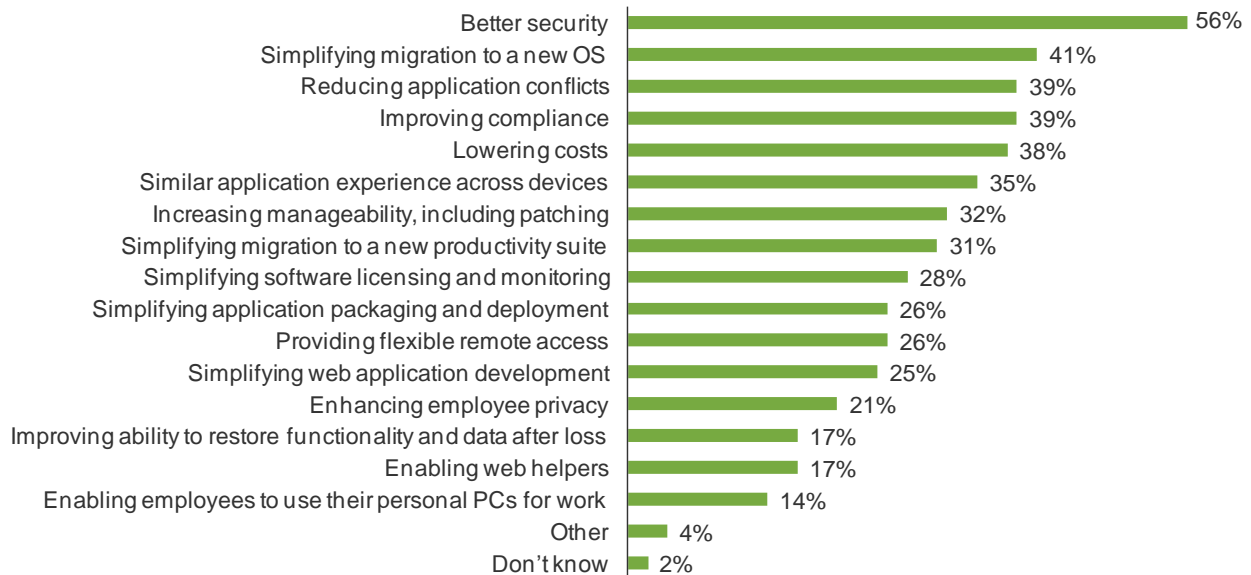
Base: 127 IT decision-makers at North American enterprises with influence over their browser strategy  
(multiple responses accepted)

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

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**Figure 5**

Security, OS Migrations, And Application Compatibility Drive Firms To Upgrade Their Browsers

**“Which features are driving your firm’s upcoming Internet browser upgrade for company-issued PCs?”**

Base: 120 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

## IT Must Weigh The Hidden Costs Of Allowing Nonstandard Browser Use

IT pros are justifiably wary of embracing a multibrowser strategy, as they're concerned about unpredictable and often hidden web app development, support, and staffing costs. More specifically, IT pros:

- **Anticipate profound cost, support, and staffing impacts in embracing a multibrowser strategy.** IT pros anticipate the most significant blows to their established management and support, security and patching, and web app compatibility testing, among others (see Figure 6). While some firms predict small user productivity and privacy increases, they're far from justifying the additional development, support, and staffing costs that are required to support a multibrowser strategy.
- **Estimated that a multibrowser strategy would increase their overall costs by 20% or more.** Of the firms that support a multibrowser strategy, one-third estimated that their total costs are at least 20% higher when compared with a single browser standard (see Figure 7). Ensuring that web apps deliver a consistently rich experience across multiple browsers often requires additional investments in testing solutions, longer web app development life cycles, and additional service desk support issues.

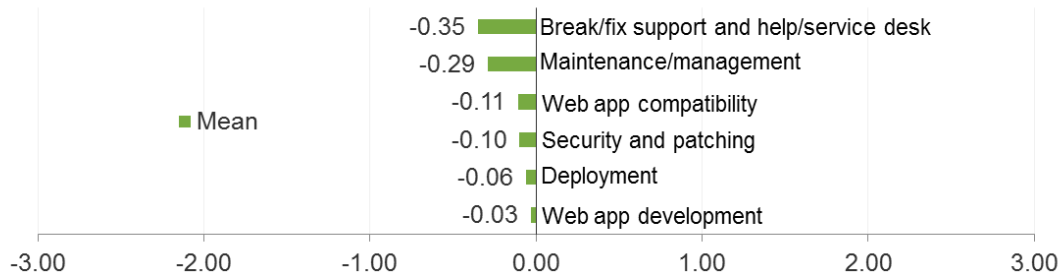


- **Are concerned with spending \$30,000 annually on app development across each life-cycle stage.** Firms spent an average of more than \$30,000 annually across each of the seven web app development life-cycle stages (see Figure 8). The most significant investments IT pros made were in security and patch management, testing, training, and maintenance and support. In fact, firms that have embraced a multi-browser strategy spend approximately \$4,200 additional annually for the internal development and testing of each web app. For large enterprises that support an average of 92 web apps worldwide, the costs of supporting a multibrowser strategy for work PCs translates into a nearly \$400,000 annual investment — which doesn't include the additional support and staffing costs.
- **Are anxious about the support implications and fear getting overwhelmed with service desk requests.** IT pros must also consider the impact on their service desk when deciding whether to embrace a multibrowser strategy. Firms were most concerned with an increase in the service desk requests for broken websites or broken web apps, questions about browser features and functionality, trouble accessing internal corporate content, and trouble accessing external content.
- **Aren't ready to invest in new staffing to support a multibrowser strategy.** With IT budgets already squeezed as a result of the down economy, most firms don't have additional budget to hire new support staff to take on these additional service desk requests and web app development costs. Of the 51 firms surveyed that have embraced a multibrowser strategy, 10 had to hire extra full-time employees; eight outsourced some job functions; six engaged external contractors; five hired extra part-time employees; and three hired extra temporary employees. In nearly half the cases, multibrowser strategies affected firms' staffing levels or business relationships with external providers.

**Figure 6**

IT Anticipates The Hardest Impacts On Support And Management If It Embraced A Multi-Browser Strategy

**What negative impacts does your company anticipate across the following domains if it decided to support a multi-browser strategy for company-issued PCs in the future?**  
(scale from -5 [very negative] to 0 [no impact])



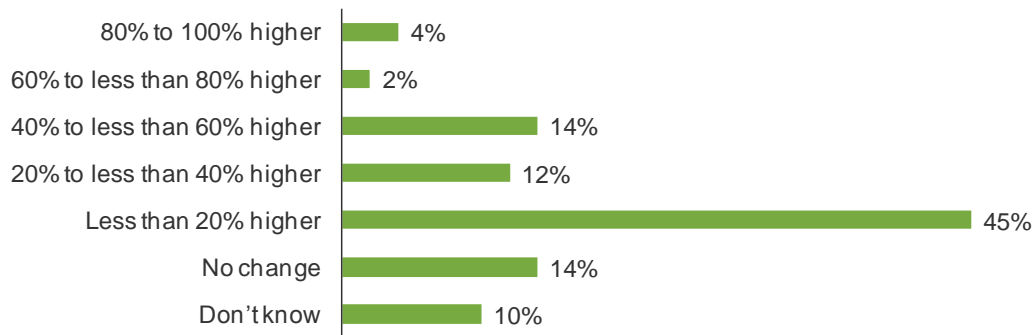
Base: 133 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

**Figure 7**

Of Those With An Opinion, 86% Of Firms Estimated That Their Multibrowser Strategy Added Significant Cost

**“If you were to estimate, how do the total costs of a multi-browser strategy compare with standardizing on a single modern browser for company-issued PCs?”**



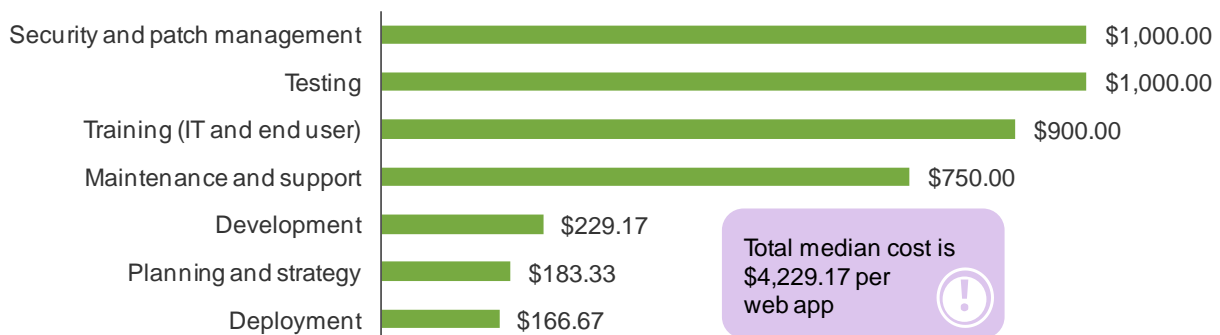
Base: 51 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

**Figure 8**

Firms Spent More Than \$30,000 Annually Across Each Web App Development Life-Cycle Stage

**“What additional internal web application development costs does your company experience annually as a result of its multi-browser strategy for company-issued PCs across the following stages?”**  
(Median per web app)



Base: 51 IT decision-makers at North American enterprises with influence over their browser strategy

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2012

## KEY RECOMMENDATIONS

IT managers eternally strive to strike the right balance between enabling business productivity without compromising security, making management more complex, and increasing costs. But in the age of empowered workforces, firms must revisit their people, processes, and technologies. How? Firms should start with a three-step approach. Specifically:

- **Educate web app developers on the support and security challenges of a multibrowser strategy.** IT managers should have a conversation with their web app developers about the need to optimize the experience for the browser that users primarily work from. It's important that they understand the long-term support and security challenges that a multibrowser strategy would introduce to the IT organization.
- **Inventory web applications and test for compatibility with modern browsers.** IT managers often overlook web apps when evaluating their readiness for a new desktop OS deployment and all too frequently underestimate browser support as a barrier to upgrading. Web apps need to be tested for every major browser release and some browsers have less predictable release schedules than others, compounding the challenges of embracing a multibrowser strategy in the enterprise.
- **Embrace open web standards like HTML5, CSS3, and SVG that drive greater web app compatibility.** In the world of web browsers, standards are constantly evolving and browsers are continuously being updated to adopt these standards. Consequently, it is very important that IT pros and their development teams ensure that web apps are compatible with modern web standards and browsers. Doing so ensures that the web apps and sites are compatible with new releases of the browser and helps prevent compatibility issues that might otherwise arise.

## Methodology

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In this study, Forrester conducted an online survey of 133 IT and business decision-makers at North American enterprises to evaluate their practices and perceptions surrounding standardized Internet browsers. Survey participants included decision-makers with responsibility for application development, browser and/or desktop architecture, desktop infrastructure and operations, and client management and security. Questions provided to the participants asked about browser and operating system usage, perceptions of various browsers, importance of browser features, and costs and challenges of supporting either a single- or multibrowser strategy. Respondents were not told who commissioned the study and were offered a small incentive as a thank-you for time spent on the survey. The study began in September 2012 and was completed in November 2012.