

Magic Quadrant for Managed Mobility Services

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This research provides corporate mobility buyers with a view of vendors that can manage globally distributed, enterprise-liable devices and BYOD users. Over the past year, vendors have improved execution and vision to support corporate mobility for many small to large multinational companies.

Market Definition/Description

This document was revised on 21 August 2014. The document you are viewing is the corrected version. For more information, see the [Corrections page](#) on gartner.com.

Managed mobility services (MMS) encompass the IT and process services provided by an external service provider (ESP) that are required to plan, procure, provision, activate, manage and support mobile devices, network services, management systems, mobile applications and application stores.

For this Magic Quadrant, devices include smartphones, tablets and field service equipment. This Magic Quadrant does not consider the management of laptops or other end-user compute devices (that is covered in such regionally focused research as the "Magic Quadrant for End-User Outsourcing Services, North America" and the "Magic Quadrant for End-User Outsourcing Services, Europe"). The focus of this study is extended to corporate-liable devices as well as individual-liable, or bring your own device (BYOD), users.

Gartner's coverage of MMS focuses on ESPs' assumption of day-to-day IT management and support routines for mobility devices. MMS also provide business process administration (such as expense management, asset management and logistics, including recycling, return materials authorization management, ordering and provisioning the help desk). In the market, users will find sufficient skills and expertise related to enterprise mobility services; however, they may be challenged to find a single ESP that delivers all the IT and process services they require globally, which may necessitate vendor management of multiple providers or the use of third-party program management (such as multisourcing service integration).

A common user question has emerged regarding the difference between the mobile device management (MDM) software market and MMS. The latter are generally consumed as bundled IT and process services in conjunction with enterprise mobility management (EMM) software (which includes MDM software). Managed mobility software (of which MDM software is only one part of the solution) is crucial to the delivery of MMS, in the same way that the use of IT operations and service

management software is used in the delivery of broader IT managed services and outsourcing contracts.

In terms of ESP capabilities, Gartner breaks MMS into six categories:

- **Sourcing and logistics management:** This comprises the systems and services used to purchase, provision and activate network services, applications and devices. Included is the use of portal-based service catalogs with self-service capabilities for corporate-liable devices and BYOD users (for example, device acquisition, device upgrade, local number portability, service plans and report lost/stolen). Forward and reverse logistics support includes staging and kitting, depot repair, advanced replacement, recycling and device cascading.
- **Mobile service management:** This includes the systems and services to inventory network contracts and endpoints. It may also audit and log users' network service usage, performance and availability, and assign qualitative and quantitative ratings to mobile network operators (MNOs) relating to negotiated service-level agreements. In addition, mobile service management offers the ability to audit and optimize spending on mobile services, based on the ongoing inspection of contracts, standing inventories and call details. Proactive usage management — where usage has a threshold based on global and regional roaming policies, expense thresholds, and location — is in scope. Many of these service management features are stand-alone capabilities offered in telecom expense management (TEM) solutions.
- **Device and system management:** This includes the systems and services that make device-specific information visible, measure device performance and yield health diagnostics, manage and optimize connection options (cellular, hot spot and Wi-Fi), establish process control, and apply consistent change and revision management processes and methodologies. The ongoing support of EMM servers is in scope. This managed service category also includes service desk and help desk capabilities to address users' technical requests for corporate-liable devices (for example, Level 2 and Level 3 help desk) and BYOD users. In addition, these services may include decommissioning and asset destruction and recycling.
- **Application and collaboration management:** This includes the systems and services to enable enterprise collaboration as well as mobile application distribution and updating (that is, updates, upgrades and patches/fixes) across diverse devices and OSs. This service offering often includes release and change management as well as incident and problem management of commercial off-the-shelf mobile applications. Similar services may be provided for proprietary/customized applications as well. Mobile application development is considered part of this Magic Quadrant; however, it is weighted much lower in terms of customer impact, because the greatest focus of the study is on device and EMM-related services.
- **Security and content management:** This includes the systems and services to administer and enforce rule-based policies relating to the access and consumption of corporate resources and content through authentication, encryption, containerization, and enterprise cloud file synchronization and sharing (EFSS). These policies may also help to define resource entitlement, such as type of device, service plans and the allowance of third-party apps on devices (for example, blacklist/whitelist). Requests for release and change management related to security and content management in a managed mobility services contract are most often controlled by the service provider, unless the user requests root access.

- **Program and financial management:** This is the ability to act as an agent on behalf of a customer with third-party providers (such as MNOs, application publishers [independent software vendors], device OEMs and device resellers) to conduct ongoing and project-based services on behalf of the user — for example, service outages and network performance and coverage issues, warranty management, device upgrade management, and local number portability transfer issues. Financial management relates to device financing plans, program audits, payments and disputes (for example, accounts payable), and allocation of mobility expenses through products such as TEM solutions. Included within this service offering may be service contract novation (a change of obligation), where the provider becomes the customer of record and takes ownership of corporate-liable devices. Many of these capabilities are at the core of mobility outsourcing agreements.

The categories above are composite services modeled on the bundling of IT services, process services and mobility management software. They can include project-based services such as consulting and training, as well as many other recurring management services.

The pricing scheme of MMS is typically as a monthly recurring charge per device or per user. The monthly recurring charge may include project-based services (such as consulting), which are typically nonrecurring charges. Many companies prefer to amortize consulting fees, as well as upfront integration fees, within the monthly recurring charges. It is quite typical for MMS proposals to come in the form of a bill of materials, where each discrete service charge (for example, help desk, kitting, sourcing and software release management) is presented as an individual charge.

Magic Quadrant

Figure 1. Magic Quadrant for Managed Mobility Services



Source: Gartner (July 2014)

Vendor Strengths and Cautions

AT&T

Headquartered in Dallas, AT&T is a global communications service provider (CSP). Its emerging managed services practice is focused on consulting and design, MDM software, expense and

carrier management, and device and application life cycle services. The company goes to market as a direct service provider, and may engage partners for private-labeled service delivery for additional reach or capabilities. Gartner estimates that AT&T manages approximately 1,600 EMM software instances and 700,000 devices, with 24% of those devices residing outside North America. AT&T should be considered for large North American and Pan-European opportunities to manage corporate-liable devices on behalf of the customer, and to integrate systems in order to enable BYOD users.

Strengths

- AT&T's ongoing investments in EMM platforms and delivery resources (to create a strong programmatic approach to managing and outsourcing enterprise mobility) contribute to its improved capabilities in the market. These efforts also include continual vetting of organic resources versus best-in-class partnerships.
- AT&T is a leading provider (in terms of number of instances and related revenue) for planning, integrating and managing hosted and on-premises MDM software.
- Customer references rate AT&T highly for help desk services for device ordering and activation.
- AT&T continues to invest in resources and partnerships to deliver integrated EMM software services and MMS capabilities globally. AT&T also partners with relevant third parties to ensure choice on behalf of its clients.

Cautions

- AT&T focuses primarily on U.S.-based multinational corporations (MNCs), and its strategy for growing presence follows AT&T's resource distribution.
- Customer references believe that AT&T's program and project management represents an opportunity for improvement.
- While internally built and supplied EMM solutions serve limited markets, AT&T's global footprint continues to expand its broadening availability.

Deutsche Telekom

Headquartered in Bonn, Germany, Deutsche Telekom (DT) is a European CSP that is expanding into broader mobile-centric value-added services (VASs). The company focuses on hosted and cloud-based EMM services, project-based consulting services for mobility strategy, business process and application development. DT's primary go-to-market partner, in terms of service delivery and fulfillment, is its IT service arm — T-Systems. DT goes to market as a direct service provider, and engages some partners (beyond T-Systems) for private-labeled service delivery where it lacks internal resources. DT should be considered for global MMS opportunities by companies headquartered in Europe with modest user pools in the U.S.

Strengths

- DT is now significantly better articulating and delivering its vision of managed mobility, making it clearer for customers to understand what role DT expects to take in this market segment. DT maintains a strong consulting portfolio spanning architecture, development, integration and security.
- DT's investments in expanding its service catalog, organically and through partnerships, have been instrumental to its growth over the past year. The mobile-centric systems, app expertise and capabilities are also positive elements in DT's portfolio and capabilities.
- DT's base of managed EMM services can support pools of corporate-liable devices, as well as provide managed BYOD offerings. DT's capabilities extend across smartphones, tablets and field service devices.
- Customers rated DT highly for its comprehensive end-to-end enterprise mobility portfolio, highlighting the productivity layer of mobile application development and mobile application store management.
- DT is rated highly by customers for help desk services for device ordering and activation.

Cautions

- DT's base of managed devices follows its targeted customer footprint of Europe-based companies, focusing on those that are headquartered in Europe. While DT is fully capable of meeting many global delivery demands, it opportunistically pursues deals with companies that are not headquartered in Europe. Based on some customer feedback and bid document reviews, DT's MMS portfolio is priced somewhat higher than many competitors.
- Some customers cite sporadic lapses in DT's program management (for example, the management of subcontractors and other third-party vendors to support mobile-related contracts with a broader scope).

DMI

Headquartered in Bethesda, Maryland, DMI is a pure-play MMS provider and delivers against all six MMS categories defined in the Magic Quadrant. The company focuses exclusively on mobility solutions for the enterprise, spanning devices, applications and business processes. It goes to market primarily as a direct service provider, and also engages partners in some indirect service delivery. DMI is one of only a few managed service providers that brings solutions spanning devices and custom applications that are wholly focused on mobility. Gartner estimates that DMI manages approximately 750,000 devices, 25% of which reside outside North America. DMI should be considered for MMS opportunities with a large base of devices in the U.S., and with lesser device requirements across other geographies.

Strengths

- As a pure-play mobile-centric organization, DMI represents the future state of a mobile IT services company. Strategic acquisitions and organic growth in capabilities span device management, mobile app development, process re-engineering, m-commerce and digital agency to contribute to the company's Ability to Execute and Completeness of Vision.
- DMI has a broad portfolio of mobility-centric solutions, ranging from project-based consulting, custom mobile application development and training services, to annuity agreements for incident management and release management for device and EMM software management.
- DMI customers consistently report high levels of satisfaction with the company's mobile application development services and mobile app store management services.
- DMI customers cite mobile application testing and certification (to determine mobile app usability across OSs and devices) as key strengths.

Cautions

- DMI's current customer base consists primarily of U.S.-based companies and government organizations, and its resource distribution mirrors this fact. DMI provides white-label services on behalf of major carriers internationally, and supports non-U.S.-based multinational corporations (MNCs) in this capacity; but non-U.S.-based MNCs will want to ensure that DMI is providing adequate resources to meet specific country-level needs.
- Some DMI customer references cite the provider's weakness in meeting agreed-on deadlines relating to EMM integration and mobile app development.
- Some DMI customer references have cited issues related to the management of third-party partners for depot repairs of devices.

Enterprise Mobile

Headquartered in Dallas, Enterprise Mobile is a division of Honeywell International that goes to market as an MMS provider. This division focuses exclusively on mobility solutions for the enterprise, spanning all smart devices from smartphones and tablets to field service devices. The division operates as a blended direct and indirect service provider. Enterprise Mobile is differentiated in the market because it provides depot and on-site repair services across a broad range of devices. Gartner estimates that Enterprise Mobile manages approximately 200 EMM instances and 700,000 devices, with about 15% of those devices residing outside North America. Enterprise Mobile should be considered for MMS opportunities with a large base of smartphones, tablets and field service devices across North America, and with minimal device requirements across other geographies (for example, fewer than 10,000 devices per geography outside North America).

Strengths

- Enterprise Mobile is rated well by customers for technical strength, help desk, device sourcing (ordering and activation), hardware support (depot and on-site repair) and software support (OS release management, including updates/upgrades, patches and fixes).
- Enterprise Mobile is considered one of the stronger providers in the market for device provisioning (for example, device kitting, staging and pick-pack-ship). This is a longtime key service for the company, valued by direct customers and partners.
- Clients praise Enterprise Mobile's expense and asset management (for example, device configuration tracking, invoice auditing and optimization).
- Enterprise Mobile is rated well for program management (for example, management of subcontractors and other third-party vendors to support mobile-related contracts with a broader scope).

Cautions

- Some customer references cite concerns with the pace of Enterprise Mobile's geographic expansion and capabilities.
- Some customer references continue to cite that Enterprise Mobile's fast growth has negatively impacted account knowledge transfer and access to resolution. Multiple references also indicated high levels of help desk turnover also contributing to these problems.
- Because Enterprise Mobile is a subsidiary of Honeywell's ruggedized handheld division, it will limit how effectively the company can partner with and support third-party devices. Customers must test this concern and perhaps get contractual assurances of support going forward.

Fujitsu

Fujitsu, headquartered in Tokyo, is a global IT outsourcer that focuses on key customer attributes. Typically, Fujitsu MMS customers are midsize to large enterprise or government organizations; they have a diverse and complex range of mobile business applications, data and security requirements; and they possess a diverse and complex mobile workforce with demanding requirements for high-usability work tools and a need for greater productivity. Gartner estimates that Fujitsu actively manages approximately 700,000 smart devices, slightly less than 25% of which reside outside Japan. Fujitsu's past performance qualifies it to be considered for MMS for smartphones and tablets across Japan and Europe and in North America when device counts are low. The company lacks significant experience in the Middle East and Africa and in North America. Fujitsu should be considered for large Japan, Australia, New Zealand and Europe-centric opportunities to manage corporate-liable devices on behalf of the customer, and to integrate systems to enable BYOD users.

Strengths

- Fujitsu's global presence, continued investment in cloud-based EMM service automation and legacy IT service capabilities provide a solid foundation for global MMS delivery.

- Customers within regulated industries acknowledge Fujitsu's fast turnaround times for mobile app deployments to meet regulatory requirements.
- Customers in formal surveys and ad hoc conversations cite Fujitsu's knowledgeable and supportive help desk and strong technical partnerships as key strengths in their relationship.

Cautions

- Although investments in sales and delivery are leading to stronger results in Europe and Asia/Pacific, Fujitsu's more limited presence in the Americas has historically discouraged some organizations with global requirements from selecting the company for end-to-end deals. To consistently compete for global deals, Fujitsu will need to enhance its delivery capabilities in North America.
- Some customer references noted that Fujitsu could improve its mobile-centric business and transformational consulting capabilities.
- While the provider is generally well-rated, some customer references did indicate an opportunity for improvement in Fujitsu's on-site concierge and help desk services.

HP

HP, which is based in Palo Alto, California, is a provider of hardware, software and IT services for consumer and commercial markets. Currently, it is moving from the "fix and rebuild" phase into the "recovery and expansion" phase of its 2012 turnaround plan. HP's strategy is focused on "the new style of IT" and requires it to move toward a portfolio of integrated solutions and services. Gartner estimates that HP actively manages approximately 600,000 smart devices, slightly less than 45% of which reside outside North America. The company does not claim deep experience related to field service devices. HP should be considered for large opportunities in Asia/Pacific, North America and Europe to manage corporate-liable devices on behalf of the customer, and to integrate systems to enable BYOD users.

Strengths

- HP offers exceptional account management related to the people and processes involved in amending commercial agreements based on need. This includes the ability to address concerns and lapses in the relationship, and to mediate lapses in service delivery.
- HP possesses a deep and strong bench of consultants related to mobility technologies and the integration of EMM software services.
- HP has exhibited market-leading vision in terms of its integrated, cloud-based EMM services from the desktop, to unified communications and collaboration, to mobile applications, to the mobile device.

Cautions

- HP does not effectively pursue opportunities that are comprised primarily of corporate-owned devices. HP tends to leverage its integrated EMM platform to enable opportunities to manage BYOD environments.
- HP lags its peers in terms of an installed base as well as past performance related to supporting large corporate-owned, globally distributed smart devices.

IBM

Headquartered in Armonk, New York, IBM maintains a comprehensive IT service portfolio and a pervasive sales and delivery presence across the globe. Currently, it continues to invest to rebuild and modernize its end-user services with a focus on service management, mobility and analytics. IBM's position in the mobility market is promoted through the MobileFirst brand, which aggregates IBM's capabilities (from strategy to security) into a single architecture and go-to-market model. Gartner estimates that IBM actively manages approximately 600,000 smart devices, 40% of which reside outside North America. IBM maintains a presence in all regions considered. It should be considered for large managed device deals in which there are large pools of smartphones and tablets in North America and across Europe. Although IBM has a strong global presence in general, users must exercise due diligence in large global deals in which significant device counts exist across the Middle East and Africa and Latin America.

Strengths

- IBM's IT and business consulting services across multiple business units — such as Global Business Services and Global Technology Services, which are dedicated to enterprise mobility — are considered market-leading in their combined ability to influence technology selection and adoption, and to ensure that technology choice supports business outcomes.
- IBM's consistent investments in its portfolio of software, IT services and personnel that are dedicated to EMM services and MMS allow the company to add value to nearly every step on the customer's journey to becoming a more effective mobile-centric enterprise.
- IBM's acquisitions in software and services (for example, Fiberlink Communications) provide the company with a significant installed base for growth on which to layer MMS VASs.

Cautions

- IBM still has difficulties bringing the value of Big Blue to its clients. Customer references — ad hoc and in formal references — have stated that IBM faces challenges conjoining different capabilities from different business units to provide iterative, life cycle value to its clients.
- Customer reference feedback on IBM shows weakness in its help desk services for EMM software and mobile devices.

Motorola Solutions

Headquartered in Schaumburg, Illinois, Motorola Solutions is a technology manufacturer and service provider. It is differentiated in the market because it provides managed services primarily for field service devices and wireless access points (APs). The company maintains an installed base of smartphones and tablets under management, but the number of devices is very small. Gartner estimates that Motorola Solutions manages more than 830,000 field service devices, nearly 340,000 APs and nearly 30,000 wireless LAN controllers. Gartner estimates that about 15% of the company's installed base of managed devices resides outside North America. Motorola Solutions should be considered for managed mobility for large, global pools of multivendor field service devices. Companies that need smartphone and tablet management outside North America should proceed with caution when considering Motorola Solutions, due to the low number of these devices currently being managed by the company. Motorola Solutions maintains a global installed base; it should be considered by U.S.-based companies and MNCs with critical field service devices/point of service (POS) devices and device counts outside the U.S.

At the time of publication, Motorola Solutions' sale to Zebra Technologies is pending. The company was unable to speak to future events that might impact its MMS operations.

Strengths

- Motorola Solutions is rated well for postsales account management. Verbatim reference responses cited "flexible service delivery" and "effective problem management."
- Motorola Solutions' account management was identified as a partner that "makes it easy to conduct business with their organization" (for example, a single contract across geographies, ordering and provisioning, billing in local currency, a single support contract).
- Motorola Solutions brings deep-dive expertise related to the life cycle management of business-critical POS/field service devices.

Cautions

- Motorola Solutions' pending sale to Zebra Technologies introduces some potential risk on a relationship. Users should inquire directly with Motorola Solutions on its go-forward plans within MMS.
- Motorola Solutions maintains no device installed base beyond standard support services under management in the Middle East and Africa.
- Proceed with caution when considering Motorola Solutions for environments that require only consumer smartphones and tablets, because the company's focus has been primarily on supporting business-critical field service/POS devices and wireless APs.

Orange

Headquartered in Paris, Orange is a global CSP that is expanding into broader mobile-centric VASs. The company focuses on managed services related to MDM software as well as various

professional services. The company goes to market as a direct service provider. Gartner estimates that Orange manages approximately 700,000 smart devices, 20% of which reside outside Europe. Orange should be considered for expense management and the management of hosted mobility software for BYOD users. The company's pool of managed devices is almost entirely in Europe; however, Orange is able to provide managed mobility to companies with fewer than 20,000 devices in Latin America, North America, the Middle East and Africa, and Asia/Pacific.

Strengths

- Orange has strong experience in managing complex MNC customers with a combination of global connectivity and IT service integrations. It has leveraged that experience in its approach to MMS.
- Through service delivery partnerships and internal investments in EMM services, Orange has improved its MMS catalog over the past year.
- Orange is rated highly by customer references for its strong Pan-European processes and capabilities.
- Orange is rated highly for sourcing and provisioning of mobile devices.

Cautions

- Based on some customer feedback and bid document reviews, Gartner believes that Orange's MMS portfolio is priced higher than many competitors.
- Despite a strong focus from the Orange Business Services management and sales teams on mobility, some customers are still disappointed about the lack of visibility into and awareness of Orange's mobile capabilities.
- Although mobility workshops with Orange partners and the Orange Labs organization are growing with enterprise customers, some customers are citing Orange's inability to anticipate future trends and to proactively present innovation related to enterprise mobility.

Tangoe

Tangoe, which is based in Orange, Connecticut, is a technology-enabled provider of communications life cycle management. It is differentiated in the market because it leverages leading competencies from its core TEM business. Additionally, Tangoe maintains intellectual property related to its own MDM software, and it works with other third-party software. Tangoe's TEM solutions (in part or in whole) are private-labeled by various management service providers (MSPs) and CSPs around the globe, including some providers that are in this Magic Quadrant. Gartner estimates that Tangoe manages nearly 4 million devices, including smartphones and tablets, as well as a very small pool of field service devices. Gartner also estimates that slightly more than 20% of the company's installed base of managed devices resides outside North America. Tangoe should be considered for large, global opportunities to manage corporate-liable devices on behalf of the customer, and to integrate systems to enable BYOD users.

Strengths

- Tangoe's consulting and advisory organization continues to add value to customer engagement, and is highly rated for engagements related to mobile strategy development, technology selection and optimization.
- Tangoe maintains its high rating for expense and asset management (for example, device configuration, tracking, invoice auditing and optimization).
- Tangoe also maintains its high rating for forward logistics pertaining to device ordering, activation and inventory management.
- Tangoe offers global support services in 18 languages, which is available 24/7.

Cautions

- Tangoe leverages its own MDM software, which is not considered as robust as leading EMM solutions (it is rated in the 2014 "Magic Quadrant for Enterprise Mobility Management Suites"). One year after Tangoe entered a joint development agreement with SAP to integrate its mobility services with the SAP Afaria solution suite, there has been little traction in the market. Tangoe continues to expand its strategy with partnerships that permit installing, configuring and managing other leading EMM software provider instances. This presents a suboptimal solution set in terms of software and IT services.
- Tangoe's broader logistics offer, which supports application and accessory kitting, is still relatively new and relies on third parties in some geographic regions.
- Some Tangoe references continue to cite dissatisfaction with account management and project management, including issues such as delayed response cycles, weak coordination between sales and service delivery, and missed deadlines.

Telefonica

Headquartered in Madrid, Telefonica is a global CSP that is expanding into broader mobile-centric VASs. The company's managed services practice focuses on management and support related to EMM software. Telefonica goes to market as a direct service provider and engages partners for private-labeled service delivery where it lacks internal resources. Gartner estimates that Telefonica manages approximately 500,000 devices, 30% of which reside outside Europe. Telefonica should be considered for sourcing and provisioning management services, and for managed mobility software for large companies with operations across Europe and Latin America.

Strengths

- Telefonica is a leading provider (in terms of the number of instances) for planning, integrating and managing hosted and on-premises MDM software.
- Telefonica's account management continues to gain praise from customers across geographies in terms of proactive communication, attentiveness to needs and flexibility.

- Customer references say that Telefonica has exceptional mobile-device-specific technology expertise, which enables stronger capabilities to support multi-OS, multidevice enterprise environments.

Cautions

- The catalog and value of Telefonica's mobile expense and asset management (for example, device configuration tracking, invoice auditing and optimization) are not competitive with most providers and are not well-regarded by customers.
- Customer references and ad hoc discussions with Gartner customers continue to point to dissatisfaction with the processes and outcomes related to integrating Telefonica's cloud-based MDM software. Gartner has been updated on investments and efforts to improve customer experience related to Telefonica's cloud-based MDM.
- Telefonica currently does not actively manage mobile devices in the Middle East and Africa.

Vodafone

Headquartered in Newbury, Berkshire, U.K., Vodafone is a global CSP that is expanding into broader mobile-centric VASs. The company focuses on managed services related to MDM software as well as various professional services. The company goes to market as a direct service provider and engages partners for private-labeled service delivery where it lacks internal resources. Vodafone should be considered for expense management, sourcing and provisioning services in large global opportunities for smartphones and tablets. Vodafone does not maintain any significant experience in managing purpose-built field service devices.

Strengths

- Vodafone is rated highly by customers for Level 1 and Level 2 help desk services.
- Vodafone provides its customers with strong mobile-device-specific technology expertise through its consulting and advisory services as well as its technical account management.
- Vodafone is a strong provider of managed mobility software for enabling the management of BYOD users.
- Vodafone is rated well for postsales account management. Verbatim reference responses cited "ease of business" and "proactive communication."

Cautions

- Although improving, Vodafone's program management (for example, in the prime contractor role — the management of subcontractors and other third-party vendors to support mobile-related contracts with a broader scope) was a point of concern for some Vodafone customers.
- Vodafone is rated poorly for not aggressively pursuing and achieving continual service improvement related to enterprise mobility operations.

Vox Mobile-GEMA

Headquartered in Cleveland, Vox Mobile is a pure-play MMS provider. It focuses exclusively on life cycle IT services related to the enterprise mobile estate. The company goes to market with a balanced direct and indirect channel model.

Vox Mobile is a leading investor in a joint venture between 13 MMS providers around the world — the Global Enterprise Mobility Alliance (GEMA). In the past year, GEMA has added the following providers into its alliance: Evry (Sweden), CWSI (Ireland), XSAT (India), BMobile (Mexico), YouCo (Italy), Qolcom (the U.K.) and Mobila (Belgium).

Gartner estimates that Vox Mobile, with the support of GEMA, actively manages nearly 500,000 devices, 15% of which reside outside North America. Vox Mobile is a focused provider of MMS related to help desk, sourcing and provisioning, and activation. The company should be considered by large companies in which smartphones and tablets are concentrated in North America and Europe. Vox Mobile also should be considered for the delivery of large opportunities across Asia/Pacific, Latin America, and the Middle East and Africa, but only in countries where GEMA maintains joint-venture partners.

Strengths

- Vox Mobile continues to be highly rated for MDM application integration services, Tier 3 help desk services, OS and application release management, and device provisioning (staging and kitting).
- Vox Mobile aggressively pursues and achieves continual service improvement initiatives related to enterprise mobility.
- Vox Mobile presents a compelling and logical service catalog; it is structured around different stages of mobility requirements that are incremental in depth and breadth.

Cautions

- Customer concerns with Vox Mobile's ability to maintain service delivery quality with the expansion of its installed base have increased. Customers are most concerned, however, by help desk turnover and slow response times from overburdened account managers.
- Large MNC clients cite lapses in communication with GEMA members, which leads to lapses in service delivery related to incident management, ordering and provisioning, and EMM software change management.
- Although the GEMA partnership has made significant strides in improving Vox Mobile's global coverage, there are significant country-level gaps in the GEMA membership. For some customers, the joint venture may not provide the global breadth and depth they need to justify doing business with a company of Vox Mobile's size.

Wipro

Wipro, which is based in Bangalore, India, is an offshore IT services provider. Gartner estimates that it actively manages more than 1,000 EMM software instances and 400,000 smart devices, with slightly more than 20% of those devices residing outside the Asia/Pacific region. Wipro maintains a presence in all regions considered, but does not actively manage devices and instances in all regions. Wipro should be considered for large managed device deals in which there are large pools of smartphones and tablets in North America and across Europe that require help desk services and remote management of EMM software instances. However, Wipro's presence is limited where significant device counts exist across the Middle East and Africa and Latin America.

Strengths

- Although it is from a relatively small base, Wipro continues to experience strong growth in smart mobile devices and EMM instances that are placed under management. In fact, the company experienced nearly triple-digit growth in managed devices since last year's "Magic Quadrant for Managed Mobility Services." Wipro focuses on end users' IT efficiency enhancement delivered through service desk operations, which is supported by service industrialization and automation such as call avoidance and self-service.
- Wipro customers praise the company for responsiveness and flexibility across technology services for mobile devices and EMM software. Wipro customers also praise its account management.
- Wipro clients cite a high level of overall satisfaction, and identify help desk services for incident management and EMM software management as particular strengths.

Cautions

- Wipro's leverage of the industrialization of its MMS offering is early stage, and has less impact in terms of help desk workflow and incident remediation. Potential customers need to be mindful of the value of service automation and industrialization beyond price, and they must work to benchmark Wipro against the competition.
- Clients reported that Wipro is slow in proposing innovative solutions for service improvement, and that it needs to reinforce the link between account management and operations, and across teams, in order to leverage best practices. They also would like Wipro to intensify its focus on users' enrichment and workplace transformation, while reinforcing its transition management expertise and fine-tuning the homogeneity of tools/processes.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Fujitsu, HP and Wipro were added to the Magic Quadrant in 2014.

Dropped

- Accenture and Unisys were dropped because the companies did not meet Gartner's criterion for the number of devices under management.
- Stratix and WidePoint Solutions were dropped because the companies did not meet Gartner's criterion for the geographic distribution of managed devices.
- Atos and Mobi were dropped because the companies did not meet Gartner's criteria for the number of devices under management and the geographic distribution of managed devices.
- Tata Consultancy Services was dropped from the Magic Quadrant analysis because the company did not participate in the Magic Quadrant research process, which was mandatory for inclusion.

Inclusion and Exclusion Criteria

- Providers must have at least 400,000 smart mobile devices under management.
- Providers must support at least 15% of their installed base outside their home geographies.
- Providers must manage mobility assets and related processes in at least three of the five geographies identified in Gartner user and vendor surveys (that is, Asia/Pacific, Latin America, the Middle East and Africa, Europe, and North America).
- Providers must maintain IT service portfolios that include the integration of mobility management software.
- Providers must maintain IT service portfolios to include consulting and advisory services related to mobility strategy, mobile devices, mobile software and mobile applications.
- Providers must maintain IT service portfolios to include the ongoing management of smart mobile devices, mobile management software and related software releases.
- Providers must deliver managed services in support of customer-owned EMM instances (for example, MDM, mobile application management [MAM], mobile content management [MCM] and telecom expense management [TEM]; inclusive of server/OS and VM management).

Evaluation Criteria

Ability to Execute

Gartner evaluated the providers on the quality and efficacy of their processes, methodologies, systems and personnel related to managing corporate mobility. Gartner also judged each provider's execution in the market based on the evidence presented to Gartner analysts through formal presentations and ongoing communications from the providers outside the Magic Quadrant process. In addition, Gartner conducted a reference survey in which the providers' customers were asked to give feedback related to point services (for example, help desk and release management), and on the vendors' global expertise and level of skill in the delivery of services. We also factored in feedback from client interviews.

Product or Service

This category evaluates each provider's service delivery capabilities as well as the services the provider offers. Gartner focused on the provider's service definitions, service capabilities and how the provider ultimately worked to meet customer requirements. Specific areas of focus were, in order of weighting:

- The ability to assume day-to-day management and operational control on behalf of enterprise customers' mobile devices and systems
- The ability to support user needs through multilevel help desk services (IT and process)
- The ability to provision mobility assets according to customer requirements
- The ability to efficiently source corporate-liable and individual-liable — also known as BYOD — mobility assets and services
- The ability to integrate, implement and manage EMM software and systems
- The ability to engage in regional and global partnerships to supplement weaknesses and lapses in its service delivery capabilities
- The existence of technology alliances to offer users the broadest service platform capabilities and functionality

Overall Viability

This category assesses and rates the overall financial health of each service provider, the financial success of MMS operations, and the likelihood that an MMS business unit will continue to invest to support state-of-the-art delivery within the organization's portfolio of products. Gartner also considered the outlook for this segment in each provider's business. In particular, we evaluated whether revenue and margins were likely to grow, decline or remain stable, as well as the general importance of MMS to the company's core business.

Sales Execution/Pricing

This category assesses and rates each provider's capability in all sales activities and the structure that supports them. In particular, we considered the provider's sales management, pricing and clarity of scope. Gartner used reference feedback related to price-to-value and account management.

Market Responsiveness/Record

This category assesses and rates the provider's ability to respond to changing customer requirements and competitive market pressures worldwide.

Marketing Execution

This category assesses and rates the clarity, quality and efficacy of marketing programs that are designed to educate and condition the market and promote the provider's brand.

Customer Experience

This category assesses and rates customer references for MMS delivery. Gartner requested that the references be able to speak to the provider's service capabilities in terms of global geographic distribution. In the survey, references were asked to provide qualitative ratings on the following: overall satisfaction with the provider; satisfaction with individual services provided; satisfaction with the value relating to price and expertise; and satisfaction with their provider by geography. Gartner factored in overall customer satisfaction with the service and the relationship, based on the references and other Gartner client interactions.

Operations

This category assesses and rates each provider's ability to meet its financial and operational goals and commitments, while satisfying contractual obligations for service delivery to clients. Factors include the quality of the organizational structure, skills, experiences, programs, systems and other areas (such as human capital management plans) that enable the organization to operate effectively and efficiently on an ongoing basis.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Low
Sales Execution/Pricing	Low
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (July 2014)

Completeness of Vision

Gartner evaluates each service provider on its ability to articulate statements regarding current and future market direction, as well as plans for innovation in addressing ongoing customer needs and competitive forces. We also assess how well each provider's vision matches Gartner's view of the market. Ultimately, the Magic Quadrant rates providers on how well they understand the requirements of the market.

Market Understanding

This category assesses and rates the provider's strategic plan and vision as they relate to the MMS market globally; it also assesses and rates the provider's commitment to align its services with future market needs. Gartner evaluated how each provider is addressing the main requirements of its global clients, and how it differentiates its strategic vision from those of its competitors.

Marketing Strategy

This category assesses and rates the provider's main strategy and approach to marketing global MMS. Gartner considered the current and future value proposition for MMS as well as the importance of these services in the provider's broader IT service portfolio. Gartner also assessed the provider's go-to-market strategy, including the ability to articulate its value proposition and differentiate its services.

Sales Strategy

This category assesses and rates the provider's ability to illustrate its overall sales strategy and sell MMS. This evaluation also includes a review of cooperative selling through partners and indirect channels.

Offering (Product) Strategy

This category assesses and rates the provider to identify the most important aspects of the service offering that differentiates it and offers value to clients. Gartner considered the provider's practice areas and evaluated the size, projected revenue, number of supported users and devices, geographic reach and diversity, management team and that team's position in the corporate structure. We also assessed operational/tool expertise.

Business Model

This category assesses and rates the provider on its business model for MMS, and on how this fits into its overall business model.

Vertical/Industry Strategy

This category assesses and rates the provider's strategy to direct resources, skills and offerings to meet the specific needs of individual market sectors. Gartner considered each provider's penetration of different industries for MMS; we also considered each provider's ability to demonstrate expertise in, and acumen related to, vertical markets and business processes underpinned by MMS.

Innovation

This category assesses and rates the provider's position in the market as a thought leader and an innovator. Gartner also evaluated each provider's leadership and investment to achieve its vision, and to develop innovative strategies in the market for global MMS.

Geographic Strategy

This category assesses and rates the provider's regional capabilities, global program management, and local alliances and partnerships for service delivery.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	Medium
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	High

Source: Gartner (July 2014)

Quadrant Descriptions

Leaders

Leaders must prove that they have developed and invested in systems and resources to address the growing needs of this market, starting from device-specific forward and reverse logistics to the management of customer-owned EMM instances, and growing to mobile application development and then integrating mobility into the business process when required. Leaders must consistently update their existing service products to address rapidly changing use cases, so they can be relied on for enterprise-class delivery and service management. Leaders have proven technical competence and the ability to deliver services to multinational customers. Leaders will maintain broad and deep portfolios of project-based services in addition to longer-term and annuity service contracts.

Challengers

Challengers must have a track record of meeting core requirements relating to device management and EMM with consistent service capabilities and service levels. Challengers trail the evolution of the market in terms of its ability to meet broad and deep user requirements. Challengers are companies that have solid, traditional IT and process services, but they may not have invested heavily in the systems and resources, or geographic reach, to provide holistic or leading-edge MMS solutions.

Visionaries

Visionaries have an innovative and disruptive view of mobility and its effect on the enterprise; however, their service capabilities are highly dependent on the use of private-labeled subcontractors, and they frequently have limited service portfolios in terms of breadth and depth. Visionaries have an early mover advantage in providing project-based services, such as consulting, development and integration. Visionaries maintain the potential to quickly become Leaders, based on the creation of deeper managed services, or outsourcing, relationships that span tactical and strategic user requirements.

Niche Players

Niche Players are typically specialists with more focused service portfolios, and they service relatively few vertical markets or focus on limited mobility platforms (for example, field service equipment). In addition, Niche Players are typically emerging service providers.

Context

Gartner estimates that the worldwide number of corporate-liable and individual-liable devices to be placed under management by ESPs will grow by more than 75% in 2014. Driving this rapid adoption is the fast commoditization of EMM software service prices, and the recognition that enterprises require third-party IT services to better manage the mobile estate.

This Magic Quadrant exists to help Gartner clients that are working to:

- Expand legacy MMS for corporate-owned devices to encompass individual-liable (BYOD) devices.
- Determine the appropriate mobile device and network service entitlements by employee or by profiles and personas.
- Understand how to better enable employees through mobile access to corporate resources.
- Deploy, activate, and integrate mobile assets and services to enable a connected workforce.
- Audit, inventory and optimize users' usage of corporate resources.

During the second quarter of 2014, Gartner surveyed 40 potential Magic Quadrant participants. The results influenced the development of our inclusion criteria. Next, Gartner interviewed the 14 service providers that qualified for inclusion in this Magic Quadrant, and then interviewed the 145 client references provided by the Magic Quadrant participants to gain their input for this research. Gartner asked:

- The providers to characterize their current operations and capabilities, and to provide insight into their experiences of selling and providing global MMS in 2013
- The customer references about their satisfaction (related to overall satisfaction as well as satisfaction with point service delivery) and their assessment of provider value

It should be noted that Gartner relies heavily on conversations with its own clients related to their expectations and satisfaction with the providers in the Magic Quadrant. These data points represent hundreds of conversations involving various analysts worldwide, and these conversations contribute to the research as part of Gartner's peer review process.

Gartner's Magic Quadrant research process includes evaluation criteria that provided a comprehensive framework, which we used to analyze the Ability to Execute and Completeness of Vision of 14 providers of MMS worldwide.

Market Overview

In 2014, the Magic Quadrant for Managed Mobility Services registered its first Leader, IBM. Overall, there was significant movement for most vendors that carried over from the 2013 "Magic Quadrant for Managed Mobility Services," and some new entries registered promising ratings.

The MMS market is still catching up to fast-growing market requirements. Many large ESPs have yet to organize mobility-specific business units, and they are providing services from incomplete service catalogs (in terms of meeting customers' life cycle demands). Many small ESPs are challenged to scale their operations to meet the global requirements of their MNC customers.

That said, there have been significant improvements in service delivery capabilities (organic and partnered), service catalogs and service-level quality in the market.

For companies with multinational requirements, MMS are an increasingly popular and viable sourcing option. A growing complement of vendors is making the requisite investments in people, processes and tools to better manage a globally diverse mobile estate that is inclusive of BYOD governance structures.

Although pricing for component and bundled services remains somewhat disparate, the market is settling into more consistent price points. Bids are typically priced as a monthly recurring charge:

- Per device
- Per EMM instance
- Per help desk resource

Depending on the scope of nonrecurring projects and tasks, pricing is similarly extended per unit for staging and kitting and for ordering activation. Strategy and technology consulting services and mobile application development are generally offered as fixed-fee time engagements.

Gartner believes that the capabilities and expertise required to deliver MMS globally are growing in the market. The unique challenges presented to many providers are to address: (1) how they can best leverage their legacy capabilities; (2) how to invest in organic resources to extend their mobility service catalogs; and (3) how, when and where to partner for noncore mobility services that do not fit their core go-to-market strategies.

The following descriptions represent how different types of major MMS providers come to market with different core capabilities to address the broad market demands:

- **Third-party maintainers:** These companies bring core competencies (related to forward and reverse logistics) that they gained in the desktop outsourcing and ruggedized POS device markets.
- **TEM providers:** These companies have long focused on the audit and optimization of mobile assets and mobile service contracts. As the market has matured, they have extended the model to include Level 1 and Level 2 help desk services to address process and IT support issues.
- **OEMs:** Leveraging knowledge related to their mobile and POS devices, these providers focus on wrapping value around their own products, with some MMS capabilities for multivendor technologies.
- **System integrators and IT outsourcers:** These providers maintain legacy capabilities related to day-to-day management and some maintenance and support services. However, they have not created robust managed service life cycle portfolios; instead, they have focused on project-based consulting or managed hosting related primarily to MMS. These companies benefit from large, in-region pools of global expertise as well as delivery and account personnel.
- **CSPs:** These providers view MMS as an extension of their core telecommunications market; however, their efforts are disproportionately focused on enabling BYOD, self-managed environments by hosting managed mobility software. These companies partner for a great deal of the value delivered in life cycle managed mobility contracts.
- **MSPs:** The MSP label is used as a broad "catchall" for smaller companies that are focused exclusively on enterprise mobility. These companies tend to focus on ongoing relationships for the management and support of mobile devices, or on project-specific engagements such as strategic consulting and mobile application development.

As part of the Magic Quadrant process, Gartner conducted Web-based surveys as well as telephone surveys of customer references supplied by the rated providers. Most of the customer references indicated an overall level of satisfaction. The average rating provided was the same as last year's survey average at 5.82 out of 7.00, where 7.00 indicated "extremely satisfied, with expectations being exceeded."

Providers investing in MMS capabilities in 2014 focused on three key demand themes:

- **Deliver value-added IT services independent of mobile device ownership:** Providers in the market are confronted by companies that require more support for their corporate-liable devices, while still being able to support users within the customer's company using their own devices to access corporate resources. Gartner conducted a satisfaction survey with 65 references for this Magic Quadrant. In the survey, approximately 66% identified their mobility environments as being "primarily corporate-owned devices and service contracts." Another 30% identified their environments as being balanced between corporate-liable and BYOD users. Only 4% identified their environments as being composed of predominantly individual-liable devices.

- **Invest in cloud-based, preintegrated EMM platforms:** Delivering against the value proposition of MMS can be very labor-intensive, and service providers are investing heavily to remove as much of the full-time-equivalent components of their service catalogs as possible.
- **Provide value across a broad and diverse device landscape:** Large MNCs are not interested in partnering with providers that focus on one piece of the device equation. For example, a retailer has no interest in working with one provider for managed services related to Android smartphones, a second provider for iPads as POS devices, and a third provider for purpose-built field service devices. Many users and prospects believe that multivendor, multitechnology capabilities are exactly what is needed for a successful MMS contract.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Critical Capabilities for Enterprise Mobility Management Suites"

"Critical Capabilities for Enterprise Mobile Services, Western Europe"

"Survey Analysis: What IT Leaders Need to Know About Employee BYOD Attitudes in the U.S."

"The Six Pain Points of Managing Mobile Devices for Small or Midsize Businesses"

"Respond to Employees' Use of Consumer File Sharing With 'Easy Content Management'"

"Best Practices in Choosing, Implementing and Using MDM and EMM"

"How Gartner Evaluates Vendors and Markets in Magic Quadrants and MarketScopes"

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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