

Critical Capabilities for Managed Mobility Services

Published: 22 December 2011

Analyst(s): Eric Goodness, Phillip Redman

The number of vendors marketing IT and process services to support corporate mobile devices is growing rapidly, based on promises of cost reduction, global support and worker empowerment.

Rigorous due diligence is required as the market is nascent and vendor capabilities, service delivery partnerships and geographic coverage vary widely.

Key Findings

- All of the vendors in this Critical Capabilities research offer the market mature service offerings and should be considered in competitive bids, depending on the user's desired capabilities and use case.
- Many managed mobility services (MMS) providers' "private label" significant amounts of their own brand service delivery to third parties. Companies concerned with managing the risks associated with service supply chains must scrutinize how their provider executes against contracted deliverables and service levels.
- In terms of product viability, of the 12 profiled companies, four were cited as "excellent," five were cited as "good" and three were cited as "fair."

Recommendations

- Companies should prepare a specific requirements document that outlines exactly what they are looking for from MMS in terms of outcomes and critical success factors as services vary.
- Companies should view MMS as similar outsourcing projects, prepare SLAs and plan for internal support as necessary.
- Use the criteria and vendor rating information in this research to evaluate your MMS providers in relation to their partners, their directions and their plans. Match your MMS requirements to each vendor's portfolio to identify your strategic vendors for investigation. Any investment in MMS should be with a company that invests in internal and external service delivery capability and relationships.

What You Need to Know

Mobile environments are becoming more complex with the adoption of advanced handheld devices, a wide variety of platforms available and lack of standardization. External service providers (ESPs) are increasingly bringing service products to market that provide multiyear contracts to support and manage corporate smartphones and other handheld mobile devices. This research analyzes key providers' progress in an emerging and dynamic market.

Analysis

Introduction

The market for third-party MMS is nascent, fragmented and lacks clear innovation and leadership. However, Gartner sees MMS as an important response to offloading tactical management and support issues that many businesses are unable, or unwilling to address for the rapidly expanding portfolio of smartphones, tablets and field service devices. In addition to new pure-play MMS companies emerging globally, traditional system integrators, IT outsourcers (ITOs) and communication service providers (CSPs) are using MMS as a portfolio offering to expand into a market adjacency related to their core capabilities.

This analysis offers a guide to competitors and potential partnerships for competing in the MMS market.

Product Class Definition

MMS encompass the IT and process management services required by a company to plan, procure, provision, manage and support corporate smartphones, tablet devices and ruggedized field force devices with integrated cellular and/or wireless connectivity. While the market for these services is overwhelmingly focused on corporate liable devices, MMS contracts may also provide a level of control to individual liable devices accessing corporate resources and information.

Gartner's coverage of MMS focuses on the assumption of day-to-day management and support routines by third parties. These services are generally built on a centralized operations center environment that leverages a management platform consisting of mobile device management software used in conjunction with technical and customer services personnel. These services also provide logistical and business process administration that will occur outside hardened, secure, operations-center environments.

Critical Capabilities Definition

Mobile sourcing and logistics management are the systems and services to purchase and provision mobile services, applications and devices. Included is the extension of portal-based service catalogs and self-service capabilities for corporate liable requirements.

Mobile service management is the systems and services to inventory network service contracts and detailed service elements. Mobile service management may also track network service

performance and availability and assign qualitative and quantitative ratings to mobile network operators relating to negotiated SLAs. It also offers the ability to audit and optimize spending on mobile services, based on ongoing inspection of contracts, standing inventories and call details.

Proactive expense management, where usage is flagged for administration based on policy profiles pertaining to roaming and expense thresholds, is becoming more common. Many of these service management features are stand-alone capabilities offered in telecom expense management (TEM) solutions.

Mobile device and system management are the services that make device-specific information visible, measure device performance and health diagnostics, manage connection options, establish process control (such as real-time usage monitoring of voice, Short Message Service, Multimedia Messaging Service, PIN-to-PIN and data functions) and apply consistent change management processes and methodologies. This discipline also includes help desk and network operations center-based services to address account queries, technical requests and remote management of associated communications systems (such as related servers and premises-based mobile device management [MDM] software behind the firewall).

Mobile software and messaging management are the systems and services to enable proprietary mobile application publication and the distribution and change management of both proprietary commercial off-the-shelf data collection and presentment apps, across diverse devices and OSs.

Mobile security management are the services and systems to administer and enforce rule-based policies relating to resource entitlement, such as type of device, service plans and allowance of third-party apps on devices. The purview of mobile security management services also extends to users' consumption of services through authentication and encryption.

Mobile program and financial management is the ability to act as an agent on behalf of a customer with relevant vendors, such as network operators and device resellers, regarding service and device support. Contract novation and vendor assumption of corporate-liable devices is a component of many offerings.

Use Cases

Secure access to information. Enterprises require improvements in policy development and access controls relating to corporate information and resources. Most companies categorized by this use case manage a blended model of corporate- and individual-liable devices. While this use case may require vendor IT services in terms of help desk, logistics and support, most users simply require access to hosted MDM software for self-service capabilities.

Resource and cost visibility and control. Companies aligned with this use case are less worried (but not unworried) about security and access to information and view corporate mobility as a significant problem in terms of cost and unmanaged entitlement. Solutions in this use case blend expense management (reactive and proactive event-based notification) and low-level device control mechanisms focused on service consumption.

Mobility outsourcing. Mobility outsourcing is a convergence of the capabilities of the first two use cases, but its value proposition goes much further. Mobility outsourcing is appealing because it offers the promise of heavily structured and managed processes and methodologies, in addition to providing a program office to strictly enforce resource entitlement and costs. In short, mobility outsourcing provides operational and financial controls based on corporate need. At its most expansive, mobility outsourcing transfers all devices, service contracts, personnel and related systems into the hands of a third-party provider. Unsurprisingly, Gartner believes that mobility outsourcing solutions will gain traction fastest in large multinationals facing the challenge of managing a diverse and mobile workforce. At present, only a few providers, typically global network operators and outsourcers, offer such an outsourcing choice.

Business extension and transformation. Companies engaging the market with this use case may well incorporate many of the tactical components found in the previous use cases, such as device, application and expense management. However, the qualifying activity here is the company's focus on enabling employees, partners and customers (through access to mobile apps) to influence business process and market growth.

Figure 1. Weighting for Critical Capabilities in Use Cases

Critical Product Capabilities	Overall	Secure Access to Information	Resource and Cost Visibility and Control	Mobility Outsourcing	Business Extension and Transformation
Mobile sourcing and global logistics	15.3%	5.0%	25.0%	15.0%	10.0%
Mobile service management	14.7%	5.0%	40.0%	15.0%	10.0%
Mobile device and systems management	14.0%	15.0%	5.0%	15.0%	10.0%
Mobile application and messaging management	13.2%	20.0%	5.0%	15.0%	40.0%
Mobile security management	35.8%	50.0%	20.0%	15.0%	25.0%
Mobile program and financial management	7.0%	5.0%	5.0%	25.0%	5.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Gartner (December 2011)

Inclusion Criteria

In this research, we've included service portfolios for evaluation, based on the following criteria:

- The service portfolios must cover elements within the core managed mobility services functions.
- The service portfolios are in general availability and are deployed in customer environments as of January 2011.
- Various service portfolio aspects must be viewed as market leading, in terms of vision or quality, independent of MMS revenue.

Critical Capabilities Rating

Based on these criteria, we've included services from 12 vendors: AT&T, HP, IBM, Intermec, Motorola, Orange, Symphony, Tangoe, Telefonica, Verizon, Vodafone and Vox Mobile.

Each of the services meeting our inclusion criteria has been evaluated based on the six critical capabilities, on a scale of 1.0 to 5.0 (see Figure 2).

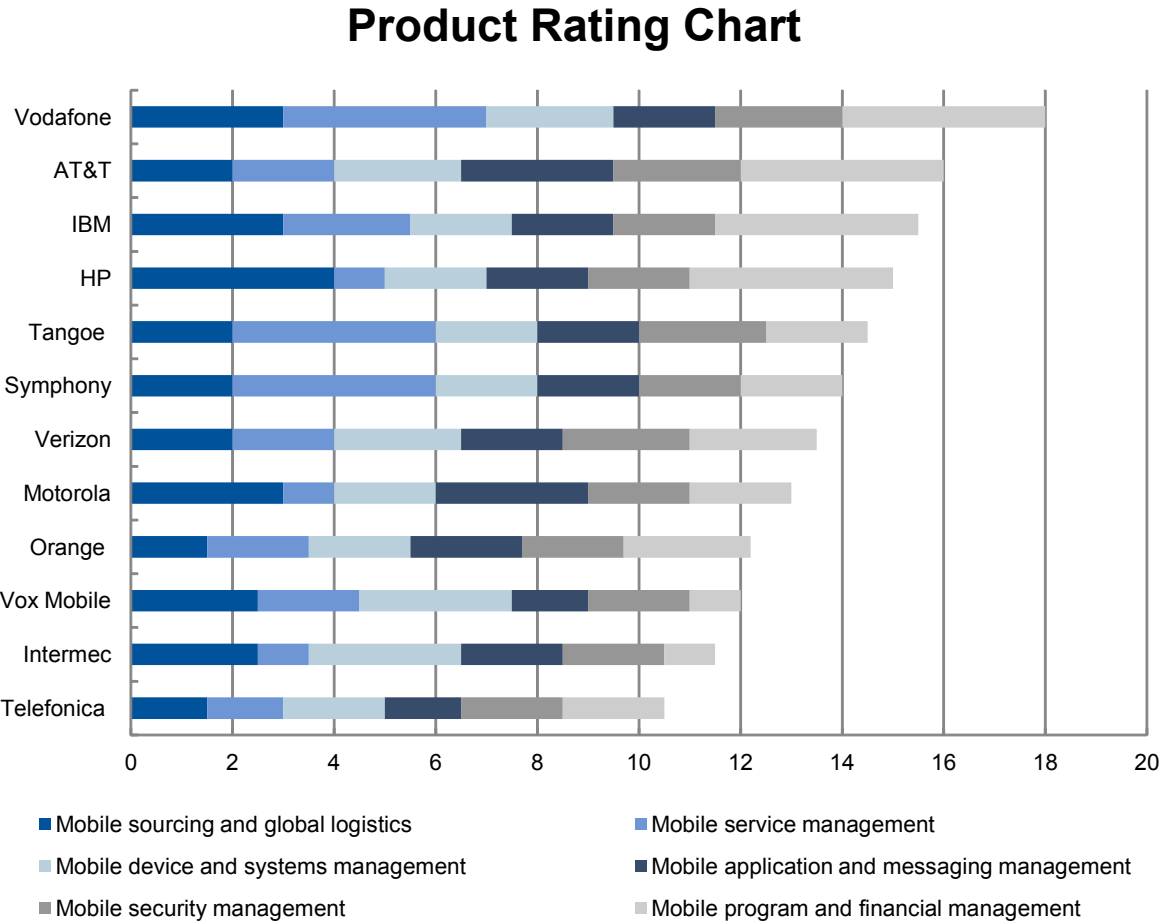
Figure 2. Product Rating on Critical Capabilities

Product Rating	AT&T	HP	IBM	Intermec	Motorola	Orange	Symphony	Tangoe	Telefonica	Verizon	Vodafone	Vox Mobile
Mobile sourcing and global logistics	2.0	4.0	3.0	2.5	3.0	1.5	2.0	2.0	1.5	2.0	3.0	2.5
Mobile service management	2.0	1.0	2.5	1.0	1.0	2.0	4.0	4.0	1.5	2.0	4.0	2.0
Mobile device and systems management	2.5	2.0	2.0	3.0	2.0	2.0	2.0	2.0	2.0	2.5	2.5	3.0
Mobile application and messaging management	3.0	2.0	2.0	2.0	3.0	2.2	2.0	2.0	1.5	2.0	2.0	1.5
Mobile security management	2.5	2.0	2.0	2.0	2.0	2.0	2.0	2.5	2.0	2.5	2.5	2.0
Mobile program and financial management	4.0	4.0	4.0	1.0	2.0	2.5	2.0	2.0	2.0	2.5	4.0	1.0

Source: Gartner (December 2011)

To determine an overall score for each product in the use cases, the ratings in Figure 2 are multiplied by the weightings shown in Figure 1. These scores are shown in Figure 3, which also provides our assessment of the viability of each product. Figure 4 shows the product score in use cases.

Figure 3. Overall Score for Each Vendor's Product Based on the Non-Weighted Score for Each Critical Capability



Source: Gartner (December 2011)

Figure 4. Product Score in Use Cases

Use Cases	AT&T	HP	IBM	Intermec	Motorola	Orange	Symphony	Tangoe	Telefonica	Verizon	Vodafone	Vox Mobile
Overall	2.5	2.3	2.4	2.0	2.1	2.0	2.3	2.5	1.8	2.3	2.8	2.1
Secure Access to Information	2.6	2.2	2.2	2.1	2.2	2.0	2.1	2.4	1.9	2.4	2.6	2.0
Resource and Cost Visibility and Control	2.3	2.2	2.6	1.7	1.9	1.9	2.8	2.9	1.7	2.2	3.3	2.1
Mobility Outsourcing	2.8	2.7	2.7	1.8	2.2	2.1	2.3	2.4	1.8	2.3	3.1	1.9
Business Extension and Transformation	2.7	2.2	2.3	2.0	2.4	2.1	2.2	2.3	1.7	2.2	2.6	1.9

Product viability is distinct from the critical capability scores for each product. It is our assessment of the vendor's strategy and the vendor's ability to enhance and support a product throughout its expected life cycle and is not an evaluation of the vendor as a whole. Four major areas are considered: strategy, support, execution and investment. Strategy includes how a vendor's strategy for a particular product fits in relation to the vendor's other product lines, its market direction and its business, overall. Support includes the quality of technical and account support, as well as customer experiences with that product. Execution considers a vendor's structure and processes for sales, marketing, pricing and deal management. Investment considers the vendor's financial health and the likelihood of the individual business unit responsible for a product to continue investing in it. Each product is rated on a five-point scale from poor to outstanding for each of these four areas and it is then assigned an overall product viability rating.

Source: Gartner (December 2011)

Product Viability

Product viability is distinct from the critical capability scores for each product. It is our assessment of the vendor's strategy and its ability to enhance and support a product over its expected life cycle (see Figure 5).

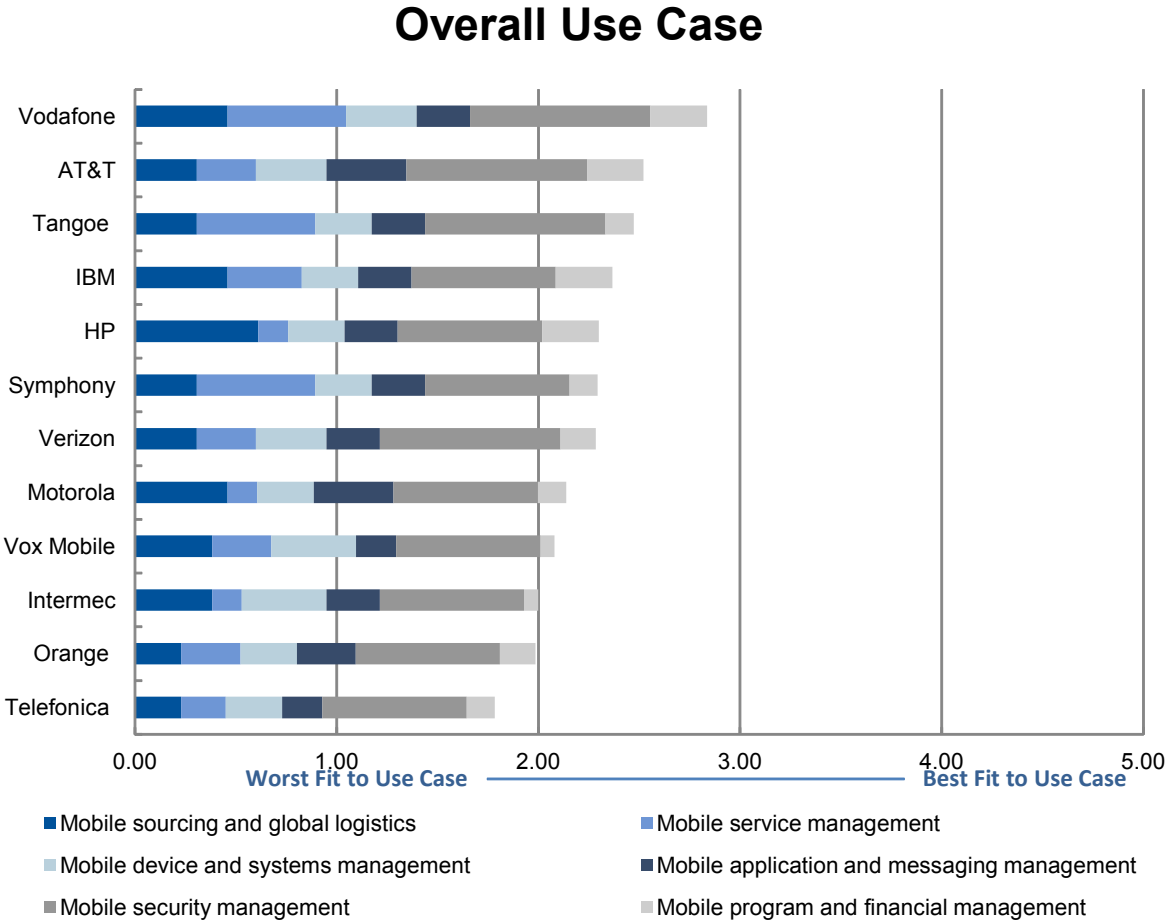
Figure 5. Product Viability

Evaluation Guidelines	AT&T	HP	IBM	Intermec	Motorola	Orange	Symphony	Tangoe	Telefonica	Verizon	Vodafone	Vox Mobile
Strategy	5	3	3.5	4	4	3	4	3.5	3	4	5	4.5
Support	2.5	3	2.5	4	4	2.5	3	2.5	2	3	4	4
Execution	3	2.5	2	2.5	3	2	3	2.5	2	2	3	3
Investment	4	2	2	4	3	2	3	4	2	3	5	4
Total	14.5	10.5	10	14.5	14	9.5	13	12.5	9	12	17	15.5
Product Viability	Excellent	Good	Fair	Excellent	Good	Fair	Good	Good	Fair	Good	Excellent	Excellent

Source: Gartner (December 2011)

Figures 6 to 10 show the weighted capabilities scores for all use cases displayed as components of the overall score.

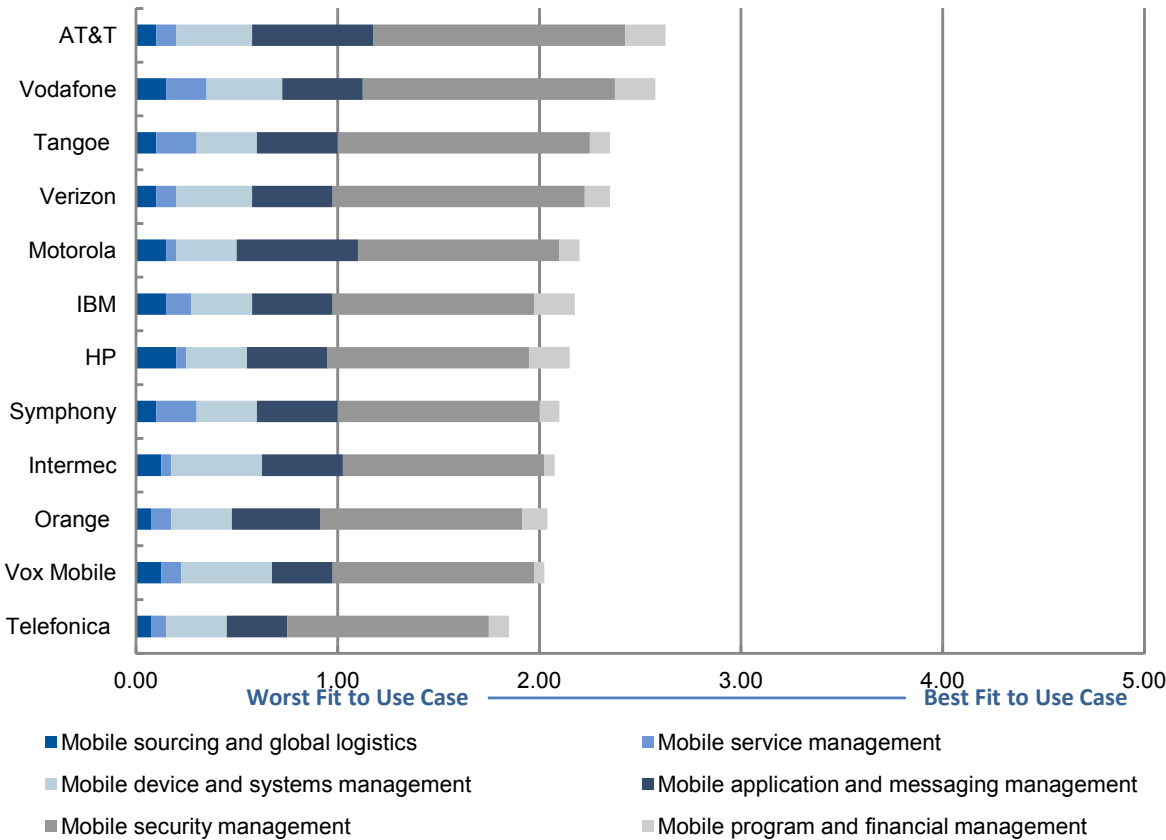
Figure 6. Overall Use Case



Source: Gartner (December 2011)

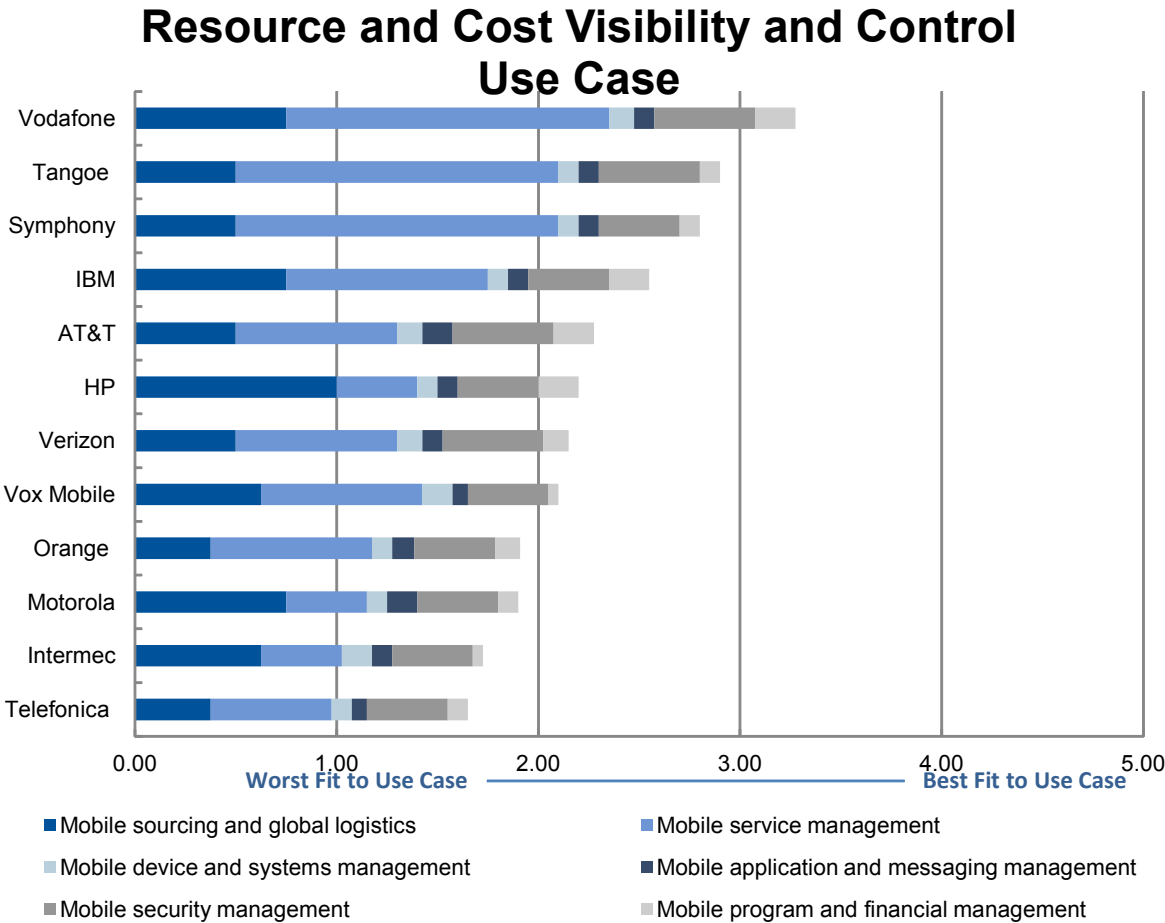
Figure 7. Secure Access to Information Use Case

Secure Access to Information Use Case



Source: Gartner (December 2011)

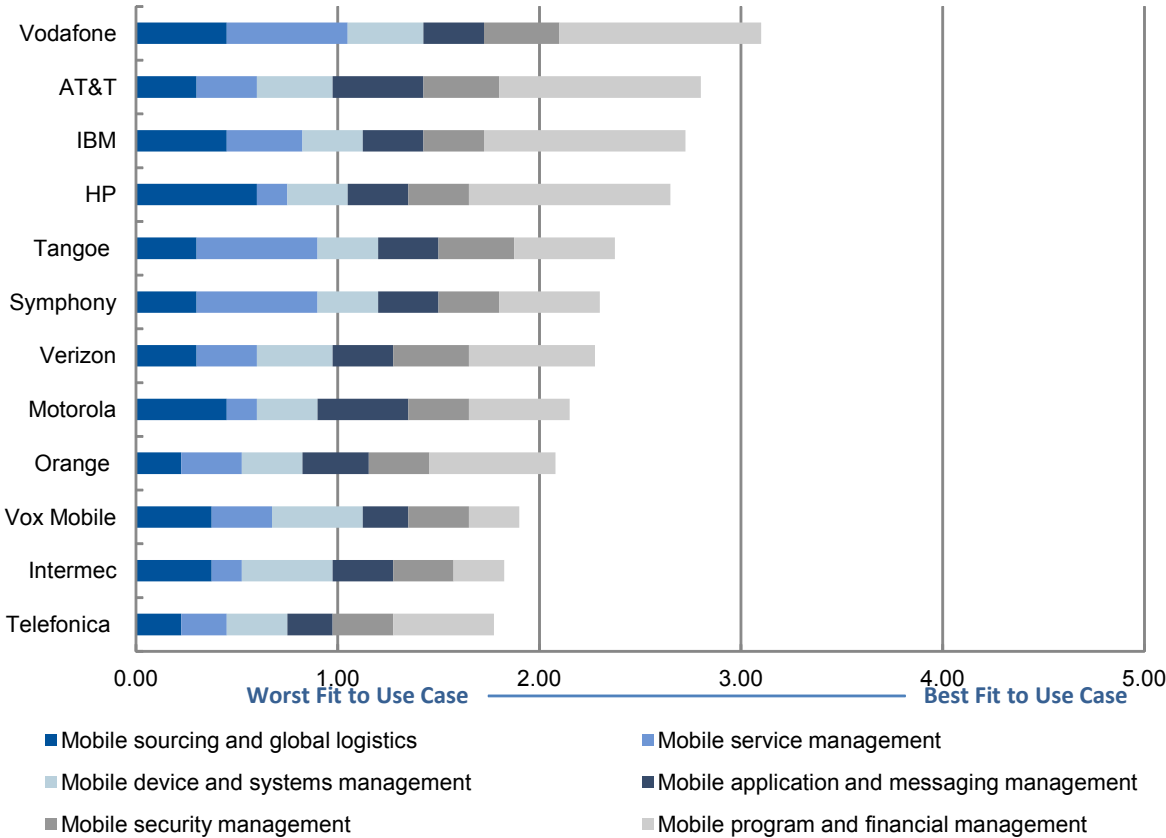
Figure 8. Resource and Cost Visibility and Control Use Case



Source: Gartner (December 2011)

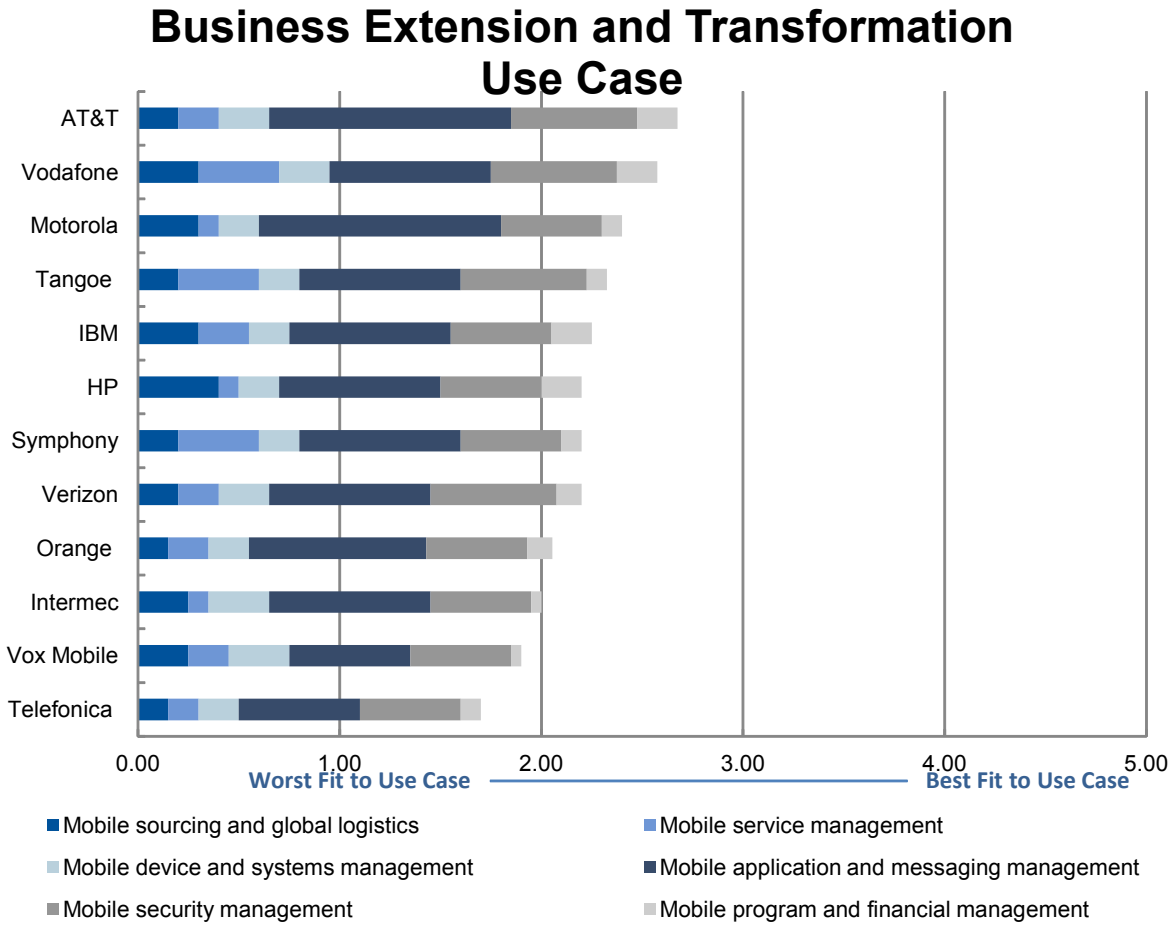
Figure 9. Mobility Outsourcing Use Case

Mobility Outsourcing Use Case



Source: Gartner (December 2011)

Figure 10. Business Extension and Transformation Use Case



Source: Gartner (December 2011)

Vendors

AT&T

AT&T is increasing its investment in MMS through its Advanced Mobile Solutions business unit that provides the company with a leading competitive position in the market to address the MMS requirements of North American and global companies. Currently, AT&T brings to market a whole suite of MMS services to meet the needs of its customers, both large and small.

AT&T utilizes a combination of in-house and third-party vendors to fit solutions to end customers' needs. The company offers market solutions that are focused on extending hosted software for enterprise self-service. The company does maintain the capabilities to provide managed services in its portfolio, including the ability to assume day-to-day operations related to corporate application

and device management. Most of AT&T's organic capabilities come from internal consulting and integration services for better management of companies' global mobile environments.

The acquisition of InCompass Wireless' services division gave AT&T much more customer-facing credibility related to MMS and the IT services related to connected devices. AT&T has shown exemplary program management capabilities to make the solutions perform well. The company actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian, webOS, Windows Mobile and Windows Phone (see Table 1)..

Table 1. AT&T Global Mobile Management (GMM)

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	The company heavily leverages third-party services to deliver help desk and logistics support.	2.0
Mobile service management	AT&T TEM services are based on the private labeled capabilities from Symphony Services; an Indian firm with deep telecom expense management expertise and help desk capabilities. The company utilizes a combination of in-house and third-party services to deliver mobile service management.	2.0
Mobile device and system management	The company maintains partnerships with MDM vendors McAfee, MobileIron and Good, as well as utilizing a combination of internal resources (AT&T Mobility Solution Services) and private label IT and process service delivery from partners.	2.5
Mobile software and messaging management	The company maintains partnerships with MDM vendors McAfee, MobileIron and Good, as well as utilizing a combination of internal resources (AT&T Mobility Solution Services) and private label IT and process service delivery from partners.	3.0
Mobile security management	The company maintains partnerships with MDM vendors McAfee, MobileIron and Good. Additionally the company private label IT and process service delivery from partners.	2.5
Mobile program and financial management	The company may extend mobile service contract novation and service resale for large global customers. Strong progress has been made to improve program and vendor management to coordinate multiple providers and technologies in a customer solution.	4.0
TEM = telecom expense management; MDM = master data management		

Source: Gartner (December 2011)

HP Enterprise Services

HP, through its acquisition of EDS, maintains one of the most mature MMS portfolios in the market. Originally known as Enterprise Connected Office, HP's Mobile Workplace Services offers service design and integration for mobile messaging, security, logistics and support, device management and expenses management. HP actively manages various versions of the following device OSs: Android, BlackBerry, iOS, webOS, Windows CE, Windows Mobile and Windows Phone (see Table 2)..

Table 2. HP Mobile Workplace Services

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	HP offers global delivery of Mobile Workplace Services through a global solution delivery model that consists of a Global Mobility Services Center of Expertise in Ireland that provides customer solution support and delivery guidance, Global Level 2/3 Mobility Help Desk Support in Malaysia and three Infrastructure Management and Support centers in Costa Rica, Bulgaria and India. All HP delivery capabilities are ITIL-compliant with strict standards enforcement and repeatable processes.	4.0
Mobile service management	<p>HP Carrier Management Services manages clients' mobile telephony across multiple telecommunication vendors to improve the performance of service delivery and control or reduce telecom expense. The offering is focused on providing customers with fiscal, quality and performance control over their carrier estate through specialized management of circuits, carrier services and mobile telecommunications services.</p> <p>HP Carrier Management Services are divided into four linked offerings:</p> <ul style="list-style-type: none"> ■ Carrier governance ■ Telecom expense management ■ Carrier provisioning and inventory management ■ Carrier procurement 	1.0
Mobile device and system management	Mobile Device Management (MDM) is a full-service offering that will bring a complete suite of mobile support functions to clients' handheld devices, supporting iOS3/4, Android 2, Windows Mobile, Symbian, and Palm operating systems. It will allow enterprise customers the ability to perform backup and recovery, software distribution, application management, and asset tracking.	2.0
Mobile software and messaging management	<p>HP offers mobile messaging for both Exchange ActiveSync-based devices and RIM BlackBerry devices through Managed Messaging services. These services include managed Microsoft Exchange and managed BlackBerry Enterprise Server (BES) environments. BES monitoring is available as an option.</p> <p>HP Mobile Applications Services provides access to corporate applications and information from anywhere, anytime. The services include mobile application integration, development, and support. The mobile applications are designed to take advantage of managed services, such as other service modules within Mobile Workplace Services.</p> <p>HP has standardized on a mobile framework so that the solutions developed leverage a single toolset and across the business ecosystem. Application delivery to the mobile device is supported through the HP mobile device software distribution solution (part of the larger MDM service). This solution allows for the distribution of software applications and other business data over-the-air. HP developed mobile applications, custom applications, line-of-business applications, and security patches and device upgrades will all be delivered to mobile devices via this capability. It also allows clients to selectively determine what applications and software updates should be pushed to definable user groups or which application can be "pulled" by the end user on a self-service basis.</p>	2.0

Mobile Security Management	The company partners with MDM providers to extend hosted, self-service solutions. Does not provide active IT management services in support of mobile security.	2.0
Mobile program and financial management	The company has maintained a work space portfolio of services for laptops and desktops, which has been extended to include smartphones and ruggedized devices. Mobility services were originally marketed as Enterprise Connected Office. Based on its legacy outsourcing businesses, the company maintains significant financial services and IT services capabilities to extend funding and to take over the day-to-day management of multiple third parties (mobile services, technology and devices) to effect holistic ability solutions on behalf of a customer.	4.0
MDM = master data management		

Source: Gartner (December 2011)

IBM Global Technology Services

IBM offers a portfolio of mobility services that encompass mobility consulting services, mobile device and middleware management, mobile life cycle, mobile security, mobile application management and core networking and communications architecture services.

Stand-alone consulting and professional services related to organizational improvement, networking strategies, core networking and communications architectures are considered IBM's strength. The company has made significant investment in the last few years in the development of a portfolio of standardized mobile enterprise solutions and delivery skills in delivery centers across the globe. The IBM MMS management platform has integrated the software of IBM's Tivoli line, Sybase, Tangoe, Juniper and Research In Motion. This allows IBM to offer its clients a set of standard solutions, with the flexibility to address a wide range of client-specific requirements. These solutions are deployed and managed by IBM delivery and are offered as on-premises managed, hosted and cloud service delivery models.

IBM's strategy and road map expands and further integrates its mobility solutions and offers a fully-integrated end-to-end mobility platform that enables clients to develop and deploy mobile applications securely to mobile devices.

The company is investing in cloud mobility solutions, further development of managed mobile application platform solutions and enhanced mobility consulting and analytics services.

IBM supports a wide range of mobile OSs for smartphones and tablets, including Android OSs, BlackBerry OS, iOS, Windows Mobile OS, Windows CE OS and Symbian (see Table 3).

Table 3. IBM Mobile Enterprise Services

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	<p>IBM offers online ordering, provisioning and self-help for corporate liable devices as well as support for "Bring Your Own Device" (BYOD) and personal-liable devices. In addition, IBM provides organizational change management, which enhances corporate changes with training and education for all end users.</p> <p>IBM also offers service integration with corporate procurement and accounts payable outsourcing service offerings. IBM delivers on-going business case build and tracking, corporate savings and cost avoidance for the corporation to leverage the savings to invest in other strategic and tactical initiatives.</p> <p>Based on its legacy, the company maintains good global logistics and related processes for the support of enterprise mobility.</p>	3.0
Mobile service management	<p>IBM links mobility devices with other assets within the overall organization. Capabilities include assessing the total cost per employee, division, geography, country or total global asset costs as well as professional global contract renegotiations and refreshing terms and conditions.</p> <p>The company integrates with technology partners for technology capabilities. IBM provides a global delivery center as a core delivery capability with 24/7 delivery support. IBM's global delivery centers hold project management and consulting certifications have been trained in business process outsourcing and organizational change management.</p>	2.5
Mobile device and system management	<p>IBM provides mobile device and system management solutions optimized to support clients' requirements. The solution does support BYOD as well as tightly integrated corporate-managed devices. IBM has built managed service solutions around a set of preferred MDM vendors that is offered in an on-premises managed model or a hosted model. It continues to test the latest MDM software releases with the latest devices to reduce potential issues prior to installation for clients. The mobile device and system management solutions are managed by a team of experienced mobile experts and offers full integration with enterprise email, messaging and business applications back-end to ensure end to end performance monitoring and security.</p> <p>Key capabilities of IBM's proactive Mobile Device Management solution are to enforce IT and security policy, provide application updates over the air, a self-service portal, ability to track real time device characteristics and statistics, blocking of applications, real time data and voice minutes usage, and provide console to manage mobile middleware. The company provides both self-service options and fully managed end user support options to help manage client's mobile environments.</p>	2.0
Mobile Software and Messaging Management	<p>IBM offers a mobile enterprise suite including Tivoli Endpoint Manager, Lotus Traveler, IBM Connections, IBM Sametime, Cognos, Lotus Symphony viewers and LotusLive cloud-based collaboration suite. In addition, IBM partners with multiple mobile middleware providers to offer a comprehensive suite of on-premises, hosted and cloud mobile enterprise services including custom mobile application development services.</p>	2.0
Mobile Security Management	<p>IBM offers a range of mobile device security management services that includes security consulting, on-device anti-malware protection, device security policy configuration and enforcement, application blacklisting, and additional security controls delivered as a hos-</p>	2.0

	ted or on-premises managed service. IBM also offers advanced secure email environments with separate containers for corporate and personal information.	
Mobile program and financial management	<p>Based on its legacy outsourcing businesses, the company maintains significant financial services and IT services capabilities to extend funding and to take over the day-to-day management of multiple third parties (mobile services, technology and devices) to effect holistic ability solutions on behalf of a customer.</p> <p>IBM provides complete life cycle managed mobility services from multiple third parties with the flexibility of predictive per-device per-month pricing. IBM acts as an agent between device vendors and clients and provides financing options for corporate managed mobile smartphones and tablets and includes mobile voice and data services in collaboration with service providers on a custom basis.</p>	4.0
MDM = master data management		

Source: Gartner (December 2011)

Intermec

Intermec's MMS capabilities support multivendor platforms and are not limited to its own mobile devices. Intermec Global Solutions was formed in July 2010 and later that year the company launched INcontrol, an MDM service for enterprises that look to outsource this function.

With the acquisition of Enterprise Mobile in March 2011, Intermec extended its MMS offering to address the complete mobility life cycle beyond its own product family. These capabilities include consulting, deployment, support/help desk and depot services delivered from its Plano, TX facility. Founded in 2006 with investments from Microsoft, Enterprise Mobile has been exclusively focused on delivery of mobility initiatives that increase worker productivity, lower operating costs, create a competitive advantage and reduce total cost of ownership (TCO). As a result of the acquisition, Intermec now manages more than 150,000 mobile devices across multiple operating systems.

Over the next 12 months, Intermec will focus on MMS opportunities in key verticals including field service, distribution centers, direct store delivery and transportation and logistics, including courier and postal services.

Simultaneously, the company will extend service penetration within its customer base to support broader enterprise mobility strategies, such as the introduction of smartphones and tablets, device migration and managing the complexity of corporate and personally liable "bring your own device" (BYOD) environments.

Through the acquisition of Enterprise Mobile, Intermec's customers now span a broad range of industries including airlines, retail, media, financial services, healthcare and pharmaceuticals.

Intermec's knowledge and experience with mobility platforms applies to Windows Mobile, Windows CE, Windows Phone and Windows 7; Apple iOS, Android, BlackBerry and Symbian (see Table 4).

Table 4. Intermec INcontrol Managed Services

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Intermec provides deep expertise and experience related to logistics requirements. Its outsourcing services include forward/reverse, depot repair, kitting and help desk support. The company's asset management system captures data to track devices throughout the entire life cycle. Management reports demonstrate support (help desk) and depot incidents to identify trends and prompt corrective action. A portal view is available for customer self-care. Working with an outside partner, Intermec can provide a device-ordering portal for customers. The related services are available primarily to companies located in North America; however, the company leverages partners to provide services outside that region.	2.5
Mobile service management	The company has strong working relationships with the major carriers in North America and other regions, primarily related to activation services. The company's mobility life cycle services are complementary to those offered by TEM providers. There is limited experience partnering with TEM providers to create value for its customers.	1.0
Mobile device and system management	The company provides consulting services to help customers understand their needs and select the most appropriate solution. It partners with MobileIron, AirWatch, Good Technology, Sybase and SOTI and is authorized to sell and implement these MDM solutions. For enterprise customers that have purchased instances of MDM software, the company can assume responsibility for the management of their mobile environments. The company also provides a complete outsourced MDM service called INcontrol. Enterprise customers can outsource full management of their entire estate of mobile devices. INcontrol Centers are located in Plano, TX; Cedar Rapids, IA; Monterrey, Mexico; and Sao Paulo, Brazil. To support EMEA and Australia and New Zealand-based customers, the company partners with authorized INcontrol delivery assisted resellers. Intermec INcontrol centers and partner networks are all connected to Knowledge Central, the company's technical resource database and case management system. All MDM cases can be monitored and reported and authorized resellers can access the service via a Web portal. Intermec also provides a repair authorization Web portal for customers to log repair requests and for customers operating on the BlackBerry platform, it provides BlackBerry Enterprise Server outsourcing services.	3.0
Mobile software and messaging management	Through its depot services, the company deploys fully configured replacement units to users whose rugged device, smartphone, tablet, mobile or fixed printer has become inoperable, lost or stolen. Technicians configure and activate devices per customer specifications and load with commercial and line-of-business applications. The company can deliver MDM services via the INcontrol Web console or through one of the other partner providers it regularly works with, MobileIron, AirWatch, Good Technology, Sybase and SOTI. The company provides consulting services to advise customers on how to select the most appropriate MDM solution and can provide implementation and administration of those solutions.	2.0
Mobile security management	The company provides Mobile Security Management in a variety of ways: Solution Integration. By eliciting customer requirements, the company can design the security solution that fits the mobile environment and business application best. Through an agnostic approach, best-of-breed solutions are presented and best practices followed to ensure a successful implementation.	2.0

	<p>Consulting. Leveraging its depth of mobility expertise, the company can advise customers of best practices for BYOD, mobile policies, security, solution implementation, mobile OS platforms and end-user support.</p> <p>Outsourcing. The company can provide a holistic solution, as well as day-to-day administration, patching and ongoing maintenance for the full solution. This is delivered from the Plano, TX facility using proprietary tools and by partnering with leading MDM solution providers: MobileIron, AirWatch, Good Technology, Sybase and SOTI.</p>	
Mobile program and financial management	<p>The company's INcontrol MDM offering is a managed service that enables complete outsourcing on a per-device, per-month price basis. Similarly, the company's support/help desk and depot services allow the mobile enterprise to avoid fixed overheads through a per-device, per-month pricing model. With its rich heritage in rugged mobile computers, printers, software and services, Intermec can provide a complete solution bundle. Equally, through its strong partner network, single-source programs can be delivered for smartphones, tablets and associated peripherals.</p>	1.0
<p>MMS = managed mobility services; MDM = master data management; BOYD = bring your own device; TEM = telecom expense management</p>		

Source: Gartner (December 2011)

Motorola Solutions

Motorola Solutions serves both enterprise and government customers focusing on more industrial mobility hardware solutions and services. Motorola provides MMS capabilities beyond cellular-centric solutions and includes systems and device management related to alternative wireless topologies based on Motorola's legacy focus on field service data capture devices such as bar code scanners and RFID products for business. Motorola does offer multivendor and multitechnology MMS capabilities, but these service products are embryonic and it is not viewed as a significant player in the market to date.

Of all the vendors in this Critical Capabilities analysis, Motorola remains the most elaborate and established in terms of service operations, processes, methodologies and systems across broad mobile and wireless environments. Motorola's success is based on a deep focus of key vertical markets such as manufacturing, state and local government, national government and retail environments. It is less focused on broader, horizontal market offerings.

Motorola's Managed Services Delivery Center Global Architecture is based on its proprietary device management platform. The single instance ensures integration and consistency across service centers, help desks, support centers, network operations centers and security operations centers. The Motorola tools and processes are used to provide efficient, effective and consistent service levels worldwide.

Motorola has invested significantly in service program development. The service offered by the Start program gives customers a service catalog that is easily navigable in terms of service options and capabilities. Motorola actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian, webOS, Windows CE, Windows Mobile and Windows Phone (see Table 5).

Table 5. Motorola Solutions Managed Services

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	The company provides deep expertise and experience related to logistics requirements such as forward/reverse, depot repair and kitting. Services are available on multivendor equipment and devices. The related services are available globally.	3.0
Mobile service management	The company has established initial capabilities that are available to customers through partnerships.	1.0
Mobile device and system management	The company maintains a global operations center from which it manages customer mobility and wireless technologies.	2.0
Mobile software and messaging management	The company maintains the platforms and personnel for the management of mobile-specific application development and management.	3.0
Mobile security management	The company maintains a global operations center including security operations center and help desk operation from which it actively provides security-related management services across mobile devices and wireless technologies. The company had been focused primarily on its own field force and mobility technologies for management services, but has now expanded to multivendor support, capturing a number of customer contracts in the current period.	2.0
Mobile program and financial management	The company is actively developing capabilities and has secured initial customer contracts to provide program and financial management.	2.0

Source: Gartner (December 2011)

Orange Business Services

As a large, global service provider focused on enterprises, Orange sees MMS as a broader approach to a more holistic view of the management of connected devices and includes machine-to-machine services as a focus within its MMS practices. Orange Business Services is considered one of the leading providers of network and communications-centric managed services deals in Western Europe. The company's comprehensive IT capabilities provide significant permission to assume new service offerings in support of business communications.

Orange Business Services' ongoing investments in MDM solutions position the company as a market challenger in mobility-centric transformation. To date, the company enables more self-service customers via hosted MDM software than it does in terms of actively assuming day-to-day control of corporate mobile devices. Orange Business Services has limited presence in North America in terms of devices under management.

Orange actively manages various versions of the following device OSs: Android, BlackBerry and iOS (see Table 6).

Table 6. Orange Business Services Mobility Solutions

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Orange has established a dedicated International Business Care operation for multinational customers that manages mobile sourcing as part of the standard international mobile service portfolio. An implementation manager is assigned to each customer to plan and deliver successful service transition from project initiation to service handover to a named international service manager. The implementation service includes project planning, project management, risk management, device/SIM logistics, number portability, user initiation and billing and reporting configuration to ensure that customer needs and Orange contractual obligations are met.	1.5
Mobile service management	Orange has established a dedicated International Business Care operation for multinational customers that manages service implementation and service management as part of its standard international mobile service portfolio. The international business care manager is responsible for service management during the life of the contract, as well as management of all in-life requirements such as handling service requests, managing and reporting on service performance, proactive fleet and service optimization and escalations.	2.0
Mobile device and system management	Orange provides a fully managed service based on platforms from market-leading vendors. The standard service is based on a SAP-Sybase Afaria platform and Orange has also developed capabilities to support the platforms of several smaller vendors to meet customer requests for platform-specific features.	2.0
Mobile software and messaging management	Orange leverages its partnerships with SAP-Sybase and several selected SAP system integrator partners to ensure expertise in every area of the project. Similarly, in the mobile messaging area, Orange leverages strategic relationships with global partners such as Microsoft, Cisco, IBM and Avaya to provide fully integrated mobile messaging and mobile unified communications.	2.2
Mobile security management	Orange leverages its partnerships with EMC-RSA, Juniper and IBM to deliver an end-to-end device to data center service spanning application, device, access network and transport network to secure hosting facilities including identity management, policy enforcement, authentication and encryption.	2.0
Mobile program and financial management	In addition to the other competencies mentioned here, the company's premium expense management service leverages its legacy capabilities to manage multiple operator relationships in terms of inventory management, vendor management, invoice processing, arbitrage, contract novation and service optimization.	2.5

Source: Gartner (December 2011)

Symphony Software Management Solutions (SMS)

Based in Dallas, Texas, Symphony SMS is one of two vendors in this Critical Capabilities analysis with leveraged legacy TEM software and service capabilities that it has extended into managed mobility services. The company's primary business is outsourced software development and engineering services.

Symphony is unusual in that its most successful channel to market is indirect, through large integrators, outsourcers and network operators. While Symphony does sell MMS solutions directly to end users, the company is fully focused on enabling partners with point services or broad private label capabilities. Despite its success, Symphony has yet to effect a structured indirect channel organization to strongly dissuade large providers from building their own organic solutions in favor of private labeling Symphony's service capabilities.

The company's MMS service is primarily in North America, but can be supported globally with three network operations centers worldwide.

Gartner expects Symphony's indirect channel to continue to drive its near- and- long-term growth. Symphony actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian, webOS, Windows CE, Windows Mobile and Windows Phone (see Table 7).

Table 7. Symphony Management Services Enterprise Mobility

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	The company facilitates workflows related to procurement and service catalogs and provides all logistics through Symphony's global operations center in Asia/Pacific, EMEA, Latin America and the U.S.	2.0
Mobile service management	A market leading provider of expense management services leveraging its own service automation platform and internal help desk resources.	3.5
Mobile device and system management	The company utilizes Afaria from Sybase to provide and support a managed service MDM software solution operated in the company's cloud environment. It maintains significant depths related to the Sybase software as the company is an outsourced developer for SAP.	2.0
Mobile software and messaging management	The company utilizes Afaria from Sybase to provide and support a managed service MDM software solution operated in company's cloud environment.	2.0
Mobile security management	SMS utilizes Afaria with Sybase to provide and support a managed services MDM software solution operated in companies' cloud environments.	2.0
Mobile program and financial management	SMS has not yet created a compelling market offering that addresses funding and acquisition.	2.0
MDM = master data management		

Source: Gartner (December 2011)

Tangoe

Based in Orange, CT, Tangoe is the largest TEM provider in terms of process outsourcing. Early in 2009, Tangoe acquired Internoded, an MDM software company, and combined its TEM and MDM skills into an MMS capability.

Tangoe actively manages more North American smartphones in terms of fulfilling the broadest scope of device and expense management than any other vendor in the market, primarily driven through its TEM service. The number of devices outside of North America remains relatively small compared to its North American base and it offers limited, local support globally. The company has worked to use MDM features and MMS solutions as a growing part of its portfolio offering, including messaging hosting.

Tangoe's most successful approach to selling MMS solutions has been to bundle them with its expense management services. This combination supports better ROI justifications, since highly commoditized TEM services yield distinct and measurable hard cost reductions, while MMS generally provides softer cost reduction opportunities. In fact, MMS often seeks to offload processes and services that most user organizations have yet to staff.

Tangoe has also had success in selling MMS to its legacy expense management customers. The cost of selling to existing customers is certainly lower than seizing entirely new opportunities and Gartner believes that pull-through sales of MMS that follow expense management face significant pricing pressures. Tangoe also sells its MMS solutions as stand-alone services in a licensed or outsourced model.

Tangoe's MMS management platform is built entirely on its own expense management and MDM software and it competes on price as well as value. In bid reviews with Gartner customers, Tangoe generally embeds entry-level device management functions at little or no cost within its TEM contracts. This exposes Tangoe's customer base to the merits of automated, third-party management and the new functionality protects margins in TEM contract negotiations. Based on broader market bid reviews, Tangoe's street pricing is generally 20% to 30% less than most competitors.

Tangoe executes both organic and acquisitive growth strategies. In addition to the acquisition of the MDM software company Internoded, Tangoe has acquired four expense management companies to build the company into a market revenue leader. Gartner fully expects Tangoe to continue acquiring additional companies to build out its MMS capabilities.

Tangoe actively manages various versions of the following device OSs: Android, BlackBerry, iOS, and Microsoft (see Table 8).

Table 8. Tangoe Communications Life cycle Management

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Tangoe facilitates workflows related to procurement and service catalogs and provides process outsourcing related to procurement and provisioning. The company provides rule-based, portal-based and self-service capabilities encompassing mobile services, applications, devices, and accessories. The company partners for logistics support.	2.0
Mobile service management	A market-leading provider of expense management services leveraging its own service automation platform and internal help desk resources.	4.0
Mobile device and system management	Tangoe publishes its own MDM software and also leverages the software as its platform to provide information visibility, usage monitoring, process control, change and performance management related to enterprise devices. Tangoe also provides multilevel help desk support for end users for account and technical issues, as well as remote management of premises-based MDM.	2.0
Mobile software and messaging management	Tangoe deploys or removes public or corporate applications and provides a private app store, as well as support for updates, patches and fixes. Enterprises can determine the level of end user involvement and either deploy/manage automatically via a central console or allow the user to pull apps via the app store based on policy/privilege. The company provides rule-based policy enforcement for mobile applications and device usage.	2.0
Mobile security management	Tangoe provides a granular role-based security model that can restrict all components and actions within MDM.	2.5
Mobile program and financial management	Tangoe has minimal market offerings that addresses funding and acquisition. It doesn't provide full sourcing contract negotiation services (acting as an agent on behalf of customers).	1.0
MDM = master data management		

Source: Gartner (December 2011)

Telefonica

Telefonica's MMS strategy appears sound, although the actual installed base is very small. In fact, Telefonica's user base for expense management across Europe and Latin America is much larger than its base of customers using it for device, applications, security and logistics management.

Telefonica actively manages various versions of the following device OSs: Android, BlackBerry, iOS and Symbian (see Table 9).

Table 9. Telefonica Managed Mobility

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Telefonica's global help desk is provided by its Global SMC in "follow the sun" locations; Miami, Sao Paulo, Madrid and Prague. The company leverages third-party services to deliver logistics support.	1.5
Mobile service management	Telefonica uses partners to offer hosted service management solutions for self-management. The company provides a managed service wrapper with active help desk services. The company not only assumes responsibility for ongoing change management, but also develops custom-made expense management.	1.5
Mobile device and system management	The company partners with MDM provider SAP Sybase to extend hosted, self-service solutions and its service wrap with active help desk services. Telefonica not only assumes responsibility for ongoing fault and change management, but also develops custom-made MDM solutions over the Sybase Afaia stack.	2.0
Mobile software and messaging management	Telefonica partners with MDM provider SAP Sybase for MEAP services using the Sybase Unwired Platform. Telefonica provides a full service wrapper with active help desk services provided by the Global SMC. Telefonica not only assumes responsibility for ongoing fault and change management, but also provides mobilization services using the MEAP for multinational customers.	1.5
Mobile security management	The company partners to provide hosted security management solutions for self-management. Telefonica provides a full service wrapper with active help desk services provided by its Global SMC.	2.0
Mobile program and financial management	The company has not yet created a compelling market offering that addresses funding and acquisition. Good progress has been made to improve program and vendor management to coordinate multiple providers and technologies in a customer solution. The company's value proposition is based on leveraging MDM, TEM and mobile security software with a managed services wrap to create a seamless user experience across geographies.	2.0
MEAP = mobile enterprise application platform; MDM = master data management; TEM = telecom expense management; SMC = service management center		

Source: Gartner (December 2011)

Verizon

Verizon is another global CSP that is a highly competitive force in the market for large global communications outsourcing deals. Verizon was an early investor in MMS capabilities for its global multinational corporation (MNC) customers using its internal service delivery organization (Verizon IT) and technology partners, along with a suite of complementary mobile professional services. The solution suite was launched over two years ago.

Verizon was the first global CSP to acquire and "operationalize" mobility management software assets, invest in subject matter experts and service delivery personnel, and create saleable structured service programs.

In late 2009, Verizon brought a leading MMS portfolio structure to the market based on significant investments in infrastructure and personnel. While considered innovative and market leading, the company has experienced slow customer adoption and lags behind some competitors that announced MMS portfolios more than 12 months later. Additionally, many companies are hesitant to allow Verizon or any CSP to manage their expenses from other cellular companies.

However, Verizon is in the top 10 vendors in terms of smartphones and mobile devices under management and Gartner expects that as the market increases, Verizon will be well positioned to create growth in this space. Gartner sees Verizon as being able to ramp up success much more quickly over the next 12 months. The improvements in MMS sales will increase, based on Verizon's compelling value propositions related to its ability to provide integrated MMS solutions that cut across smartphones and connected laptops.

Most of Verizon's competitors will continue to private label third parties to deliver large segments of MMS. By controlling much of the service value chain, Verizon will be able to manage service quality and other customer experiences better, which are significant challenges for MMS providers navigating fractured service value chains spanning fulfillment, support and management.

Additionally, the improving relationship between Verizon and Vodafone promises to create a strong and far-reaching partner ecosystem to provide global connectivity and in-country management resources outside of North America. Verizon's MMS platform is based on Quickcomm, SAP and Sybase.

Verizon actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian (see Table 10)

Table 10. Verizon Managed Mobility

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	The company relies on a combination of partnered and internal resources for logistics fulfillment. It provides a robust user platform for global ordering and fulfillment across multiple carriers.	2.0
Mobile service management	The company is one of the few large MNOs or ITOs to acquire a TEM application and then build an IT services business around it. The company partners with Quickcomm, a Vodafone company, for its expense management platform.	2.0
Mobile device and system management	Verizon also partners with Sybase to extend managed, hosted, solutions. The company does not provide active end-user help desk services to assume responsibility for ongoing fault or change management.	2.5
Mobile software and messaging management	The company partners with Sybase to extend managed and hosted solutions, but does not provide active end-user help desk services to assume responsibility for ongoing fault or change management.	2.0
Mobile security management	The company partners with Sybase to extend managed and hosted solutions, but does not provide active end-user help desk services to assume responsibility for ongoing fault or change management.	2.5
Mobile program and financial management	As an outsourcer with a good record in network and data center environments, Verizon maintains the program management capabilities to provide global multicarrier agency and support.	2.0
MNO = mobile network operator; TEM = telecom expense management; ITO = IT outsourcer		

Source: Gartner (December 2011)

Vodafone Global Enterprise

As a global network operator with increasing investments in IT services capabilities dedicated to corporate fixed and mobile communications, Vodafone (including Vodafone Global Enterprise and Vodafone operating companies) is gambling heavily that companies will look to skilled, third-party service providers to manage their connected devices.

Vodafone Global Enterprise offers a full service MMS solution covering all MMS layers, as defined by Gartner.

The "umbrella" service program is known as Vodafone Telecom Management (VTM). The MMS management platform is built on software from MobileIron, Vodafone Quickcomm and other proprietary technologies.

In 2010, Vodafone Global Enterprise acquired the TEM software company Quickcomm and the expense process outsourcer TnT Expense Management. The strategy behind this acquisition was to firstly create a differentiated MMS platform from which the company delivered MMS solutions and secondly to push these capabilities to Vodafone operating companies and network operator partners. This strategy created standardized platforms, processes and services for global MNCs, targeted by Vodafone Global Enterprise, or smaller, international companies serviced by Vodafone operating companies and partners.

If Vodafone executes this strategy, known as "Vodafone International Enterprise," it promises to have a level of technology and process consistency that few traditional outsourcers achieve for service delivery.

Of all the vendors featured in this research, Vodafone is the most forceful in conditioning the market on the value of total mobility outsourcing to include global service negotiations or novation, procurement and provisioning, support and management services and reverse logistics.

Given the robustness of Vodafone's capabilities, Gartner expects that it will focus on creating a much more active indirect channel model to private label its capabilities for large integrators and outsourcers. As a percentage of revenue, the indirect channel represents about 20% of sales, but Gartner fully expects that partner-driven sales, or collaborative sales, will represent close to 50% of devices under management in two years time.

Vodafone actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian, webOS, Windows CE, Windows Mobile and Windows Phone (see Table 11).

Table 11. Vodafone Managed Mobility Services

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Vodafone facilitates workflows related to procurement and service catalogs and provides process outsourcing related to multoperator and multitechnology procurement and provisioning. The company has partners for logistics support.	3.0
Mobile service management	A market leading provider of expense management services leveraging its own service automation platform and internal help desk resources. Vodafone Global Enterprise acquired both Quickcomm and TnT Expense Management, two leading U.S.-based TEM companies, in 2010.	4.0
Mobile device and system management	The company partners with MobileIron and AirWatch to extend hosted, self-service solutions. It provides active help desk services to assume responsibility for ongoing fault or change management.	2.5
Mobile software and messaging management	The company partners with MobileIron and AirWatch to extend hosted, self-service solutions. It provides active help desk services to assume responsibility for ongoing fault or change management.	2.0
Mobile security management	Vodafone partners with MobileIron and AirWatch to extend hosted, self-service solutions and provides active help desk services to assume responsibility for ongoing fault or change management.	2.5
Mobile program and financial management	Vodafone may extend mobile service contract novation for large global customers. Good progress has been made to improve program and vendor management to coordinate multiple providers and technologies in a customer solution.	4.0
TEM = telecom expense management		

Source: Gartner (December 2011)

Vox Mobile

In 2004, Vox Mobile emerged as one of the first managed mobility service providers and system integrators focused exclusively on serving the mobile enterprise. Vox Mobile was the very first RIM-certified system integrator.

Serving businesses based in North America, many with international operations, Vox Mobile provides enterprise mobile life cycle management services. The Vox Mobile service offerings include strategic consulting, procurement and logistics, device configuration and deployment, mobile application deployments and hosting, mobile device management, training, wireless expense management, mobile IT services and 24/7 support delivered from its own call center.

The company manages more than 100,000 connections and 900 communications servers worldwide. With more than 450 enterprise clients, Vox Mobile is growing rapidly (100% annually) and derives its revenue from services and software. However, strategic consulting, enterprise tablet deployments and technical support services are its fastest growing lines of business.

While Vox Mobile has recently expanded its channel with the addition of several partners, including wireless carriers, Gartner estimates that less than 25% of Vox Mobile's revenue is generated through partner relationships, although it is looking to increase that figure and establish a matrix of global partners.

The company also provides private label services for OEM mobile software vendors. Additionally, Vox Mobile has augmented its international service delivery reach through the formation of the Global Enterprise Mobiles Alliance (GEMA), an alliance of providers across geographies that share a common set of tools and infrastructure to provide MNC customers with consistent local account management and in-country, multilingual services (currently to more than 365,000 connections across 37 carriers in seven languages). Developing such alliances is proving to be more successful as more IT services firms gain experience in managing partnership relationships.

Vox Mobile's MMS is focused on mobile sourcing and logistics, mobile service management, mobile device and system management, and mobile security management with the industry's largest breadth of MDM offerings. In addition, Vox Mobile is expanding its service offering in mobile application and messaging management as well as mobile program and financial management. The majority of devices relate to RIM BlackBerry, but it is also supporting various other platforms using partner-provided software for MDM.

Vox Mobile actively manages various versions of the following device OSs: Android, BlackBerry, iOS, Symbian, webOS, Windows CE, Windows Mobile and Windows Phone (see Table 12).

Table 12. Vox Mobile

Critical Capability	Product Description	Rating
Mobile sourcing and global logistics	Vox Mobile delivers expertise in the procurement and provisioning of mobile devices, applications and services from its integrated framework of mobile systems including a client customized portal for organizational and individual self-service. This includes individually liable users participating in a BYOD segment inside the corporate program. Role-based administration enables segmentation of service for users such as VIPs. These segments may enjoy specific services in relation to RMA processing, hot/swap/spare depot service and training. Global asset management is a compilation of verification via various touchpoints including HR data, cellular carriers, MDM inventory, portal MACD's, and end user phone validation.	2.5
Mobile service management	<p>Vox Mobile delivers carrier service management solutions to optimize and proactively manage the largest component of the mobile IT total-cost-of-ownership (TCO) — wireless services spend. Vox Mobile takes a comprehensive view of the wireless service ecosystem and works to ensure that the carriers and services are best aligned with each user within the enterprise. On an ongoing basis, Vox Mobile orchestrates a quarterly service review (QSR) to ensure that the mobile network operators are achieving the stated SLAs in customer contracts.</p> <p>In addition to managing the mobile network operators, Vox Mobile also delivers enterprise service administration as part of mobile service management. In order for enterprises to achieve regulatory compliance, mitigate security risks and limit excessive service costs, Vox Mobile provides wireless policy and communications enforcement by tracking end-user utilization and flagging cases where the mobile device and service usage is in violation of the corporate policy. Vox Mobile can provide alerts to end-users and administrators to help correct the usage behavior that is out of compliance.</p>	2.0
Mobile device and system management	<p>Vox Mobile has integrated one of the broadest portfolios of mobile device and system management solutions in the industry. Vox Mobile's MDM and System Management solutions deliver visibility and control of the mobile devices, applications, services and systems infrastructure through proprietary solutions and strategic partnerships with best in-class-providers like 3LM, AirWatch, Good, MaaS360, MobileIron, Sybase, Zenprise and others.</p> <p>Vox Mobile's support is based on a multisite, highly-available North American support center. The Technology Services segment of the Support Center handles inbound technical support requests and proactive remote management, monitoring, customization and outage resolution of client mobile technology servers and real-time device connectivity status and health. The Carrier Services segment handles inbound requests, via phone, email and best-in-class, business process automation system that integrates multiple systems to provide self-service support, single-pane-of-glass manageability and carrier-related moves, add and changes. The Vox Mobile Support Center operates 24/7 and is extended to an international, follow-the-sun, multilingual support center via the Global Enterprise Mobiles Alliance.</p>	3.0
Mobile Software and Messaging Management	Technology services include deployment of systems and technology to provide enterprise application storefronts, via available MDM or carrier specific technology, and end-user application experience management including 24/7 client side application support and server side remote management.	1.5

<p>Mobile Security Management</p>	<p>Vox Mobile's managed mobility portfolio includes mobile security management to minimize threats by addressing the multiple layers that present risks with mobility deployments. The Vox Mobile solution includes policy development, training, enforcement and comprehensive device and application controls. The foundation for Vox Mobile's mobile security management offering is based on strong relationships and deep technical certification and knowledge of the industry's leading MDM technology platforms, as well as OEM API rules. There are also specific methodology and services around MDM choice and configuration, based on device type and customer industry. These support organizational requirements for security across common and emerging mobile device security concerns including malware and exploits, physical device security, browser, email, rogue application and SMS attacks and inappropriate content use. Consulting services offer organizations a multi-tiered approach to mobile security, developing programs that integrate MDM, PKI, and Cert technologies with policy development, procedure design, monitoring disciplines, enforcement planning, event mitigation and end-user training strategies.</p>	<p>2.0</p>
<p>Mobile program and financial management</p>	<p>Vox Mobile's offer of mobility-as-a-service makes program management a central offering. By maintaining relationships and integration points with a wide array of network operators, mobile device management software providers and other services suppliers in the mobile life cycle, Vox Mobile assumes full ownership of maintaining program value for clients. Vox Mobile does not take programmatic activation fees from network operators.</p>	<p>1.0</p>
<p>RMA = return material authorization; MACD = moves adds changes deletes, MDM = master data management; BOYD = bring your own device; PKI = public-key infrastructure</p>		

Source: Gartner (December 2011)

Evidence

Our research is based, in part, on the following information:

- Feedback derived from Gartner inquiries, which amounts to more than 700 end-user client discussions per year.
- More than 100 face-to-face meetings with clients and vendors.
- Vendor responses to questionnaires specific to this research.
- Interviews with vendor references.
- Periodic vendor briefings during a 12-month time frame.
- Generally available information, news and data in financial and industry publications.
- Attendance at vendor analyst conferences and industry tradeshows.
- Discussions with Gartner peers during research communities.
- Gartner management critique, peer review and vendor review and confirmation.

In addition, the authors of this research meet regularly with clients in face-to-face meetings through telephone discussions. The authors have also produced several items of research that involved conversations with vendors and their referees.

Previous research includes topics such as mobile device management, telecom expense management and communications outsourcing and professional services Magic Quadrant documents and other related subjects.

Critical Capabilities Methodology

"Critical capabilities" are attributes that differentiate products in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

This methodology requires analysts to identify the critical capabilities for a class of products. Each capability is then weighted in terms of its relative importance overall, as well as for specific product use cases. Next, products are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities overall, and for each use case, is then calculated for each product.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor: most or all defined requirements not achieved

2 = Fair: some requirements not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

Product viability is distinct from the critical capability scores for each product. It is our assessment of the vendor's strategy and its ability to enhance and support a product over its expected life cycle; it is not an evaluation of the vendor as a whole. Four major areas are considered: strategy, support, execution and investment. Strategy includes how a vendor's strategy for a particular product fits in relation to its other product lines, its market direction and its business overall.

Support includes the quality of technical and account support as well as customer experiences for that product. Execution considers a vendor's structure and processes for sales, marketing, pricing and deal management. Investment considers the vendor's financial health and the likelihood of the individual business unit responsible for a product to continue investing in it. Each product is rated on a five-point scale from poor to outstanding for each of these four areas, and it is then assigned an overall product viability rating.

The critical capabilities Gartner has selected do not represent all capabilities for any product and, therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making an acquisition decision.

Regional Headquarters

Corporate Headquarters

56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

European Headquarters

Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters

Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters

Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters

Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509

© 2011 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information. This publication consists of the opinions of Gartner's research organization and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice. Although Gartner research may include a discussion of related legal issues, Gartner does not provide legal advice or services and its research should not be construed or used as such. Gartner is a public company, and its shareholders may include firms and funds that have financial interests in entities covered in Gartner research. Gartner's Board of Directors may include senior managers of these firms or funds. Gartner research is produced independently by its research organization without input or influence from these firms, funds or their managers. For further information on the independence and integrity of Gartner research, see "Guiding Principles on Independence and Objectivity" on its website, http://www.gartner.com/technology/about/ombudsman/omb_guide2.jsp.