

Competitive Landscape: Managed Mobility Services

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Analyst(s): Harsha Shetty, Lisa Uden-Farboud, Pablo Arriandiaga

The managed mobility service market is a "co-opetition" ecosystem of providers that leverages one another to gain differentiation. Technology product management leaders using this research can find insight into the current market structure, competitive strategies and expected future trends of MMS.

Key Findings

- In this complex co-opetition ecosystem, MMS providers leverage each other's capabilities, acting as channels and/or partners to achieve geographical expansion and consistent service delivery.
- Providers go to market with MMS bundles where the standard components do not map to the diverse needs of enterprise profiles and personas.
- Customer experience through ubiquitous self-service support and optimized service delivery is a key element of differentiation between MMS providers.
- Emerging MMS propositions include extended security, advance analytics, machine learning (ML) and robotic process automation (RPA) that help providers achieve improved efficiency advantages in a customer enterprise environment.

Recommendations

Technology product management leaders exploiting communications service provider (CSP) or IT services market dynamics to gain competitive advantage in MMS must:

- Create an ecosystem of partners to enhance their capabilities and geographical reach by selecting partners among their current competition to create a win-win situation for both.
- Simplify their go-to-market approach by using a consulting proposition to derive user personas/profiles based on users' usage and productivity patterns, and build granular MMS opex-based bundles to suit them.

- Enhance their support process by creating a self-service option to minimize help desk interaction, along with differentiated support options containing self- and full-managed support packages.
- Evolve their product portfolio by incorporating extended security, as well as ML, advanced analytics and RPA, to automate manual, repetitive and voluminous processes and interaction, with service portals to optimize operations cost and improve margins.

Table of Contents

Strategic Planning Assumption.....	3
Analysis.....	3
Competitive Situation and Trends.....	5
Market Definition.....	5
Key Competitive Trends.....	5
Strategic Partnerships for Global Reach and Complementing Capabilities.....	5
Bundling and Persona-Based Approach Continue to Power MMS Go-to-Market.....	8
Enhancing Customer Experience Remains a Differentiator for MMS Providers.....	8
Adoption of Technology for Product Evolution.....	9
Market Players.....	10
How Do They Compete?.....	10
Players Covered.....	11
The Future of Competition.....	12
Competitive Profiles.....	12
Cass Information Systems.....	12
DMI.....	13
HCL Technologies.....	13
IBM.....	14
MOBI.....	15
Navita.....	16
Vodafone.....	16
References and Methodology.....	17
Appendix.....	17
Gartner Recommended Reading.....	18

List of Tables

Table 1. List of Providers (in Alphabetical Order) Covered in this MMS Competitive Landscape.....	11
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Table 2. MMS Components	18
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List of Figures

Figure 1. Gartner Observes MMS Trends in Multiple Categories.....	4
Figure 2. MMS Partner Ecosystem.....	6

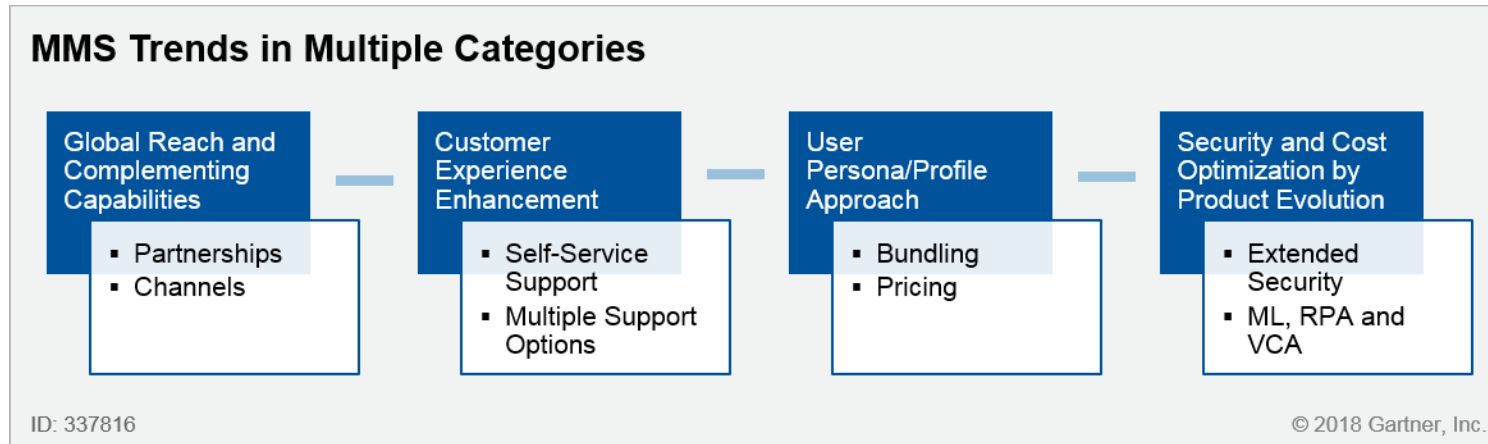
Strategic Planning Assumption

By 2022, 75% of smartphones used in the enterprise will be bring your own device (BYOD), up from 35% in 2018, forcing a migration from device-centric management to app- and data-centric management.

Analysis

The managed mobility service (MMS) market is mature and offers challenges for providers, requiring them to differentiate themselves to stay ahead in the game. MMS providers, to differentiate themselves, have developed various strategies that help them increase global reach, and enhance customer experience, go-to-market effectiveness and product evolution. Figure 1 depicts the MMS trends Gartner commonly sees in the market that are covered in this document.

Figure 1. Gartner Observes MMS Trends in Multiple Categories



Source: Gartner (March 2018)

- **Global reach and complementing capabilities:** MMS providers use partnership strategies to gain competitive advantage by acquiring complementing abilities to formulate an end-to-end offering by filling gaps in their MMS portfolio. It also helps increase their global reach by having go-to-market with channel partners, as well as reinforces regional support.
- **Customer experience enhancement:** MMS providers offer differentiated customer experience with enhancements on their support strategies. Proactive recommendations on self-service channel and offerings, along with differentiated support options such as full-managed support scenarios, lead to better customer experience.
- **User persona/profile approach:** MMS provider go-to-market initiatives focus on service bundling and consultative selling by deriving user persona/profiles for the right bundle fit. Bundling strategies are targeted to contribute to enterprise requirements of price simplicity.
- **Security and cost optimization by product evolution:** Along with controlling, managing and securing mobile devices and apps, MMS providers focus on extended security beyond enterprise mobility management (EMM), and process automation for cost optimization, process efficiency and enhanced customer experience using RPA and bots.

Competitive Situation and Trends

Market Definition

Per Gartner's definition (see "Magic Quadrant for Managed Mobility Services, Worldwide"), MMS encompasses the vendor-provided IT and business process services required to plan, procure, provision, activate, manage and support mobile devices, mobile network services, related mobile management systems and mobile applications. "Devices" include smartphones, tablets and purpose-built field service equipment with embedded connectivity. This definition pertains to both corporate-liable devices and individual-liable, or bring your own device (BYOD), users.

The scope of MMS does not consider the management of laptops or other end-user compute devices. Gartner's coverage of MMS focuses on a provider's assumption of day-to-day IT management, administration and support routines for mobile devices.

Gartner identifies the component service disciplines of MMS as sourcing and logistics, managed EMM, security management, finance management and program management (see the Appendix section of this document).

Key Competitive Trends

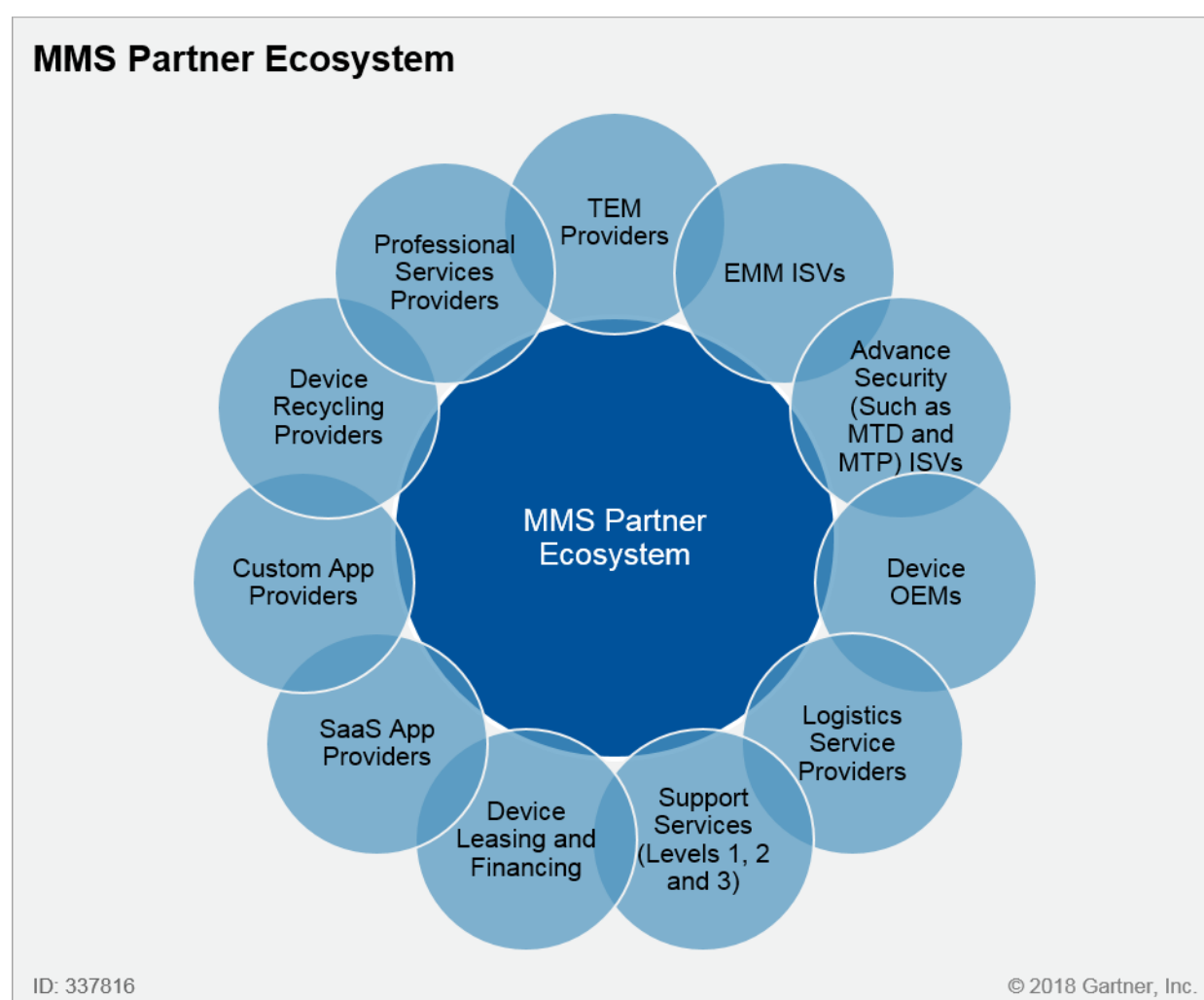
Strategic Partnerships for Global Reach and Complementing Capabilities

Building globally consistent capabilities and enhancing reach for MMS providers would mean creating a comprehensive portfolio with specific offerings that suit the target market, and tailor it enough to meet regional, cultural and regulatory differences. MMS providers striving for a global solution look to offer consistent delivery and support models (including multiple language support),

topped with a software platform that supports any carrier integration worldwide, with access to users in multiple languages. This contributes to consistent and enhanced customer experience, especially for global multinational corporations (MNCs).

Figure 2 defines an MMS provider's ecosystem of partners (it is not an exhaustive list). Many MMS providers themselves own components defined in the ecosystem. For example, IBM offers an EMM solution, device financing and others; Fujitsu offers its own mobile devices; and many MMS providers have an in-house, Level 1 help desk and Level 2 support services. In the partner ecosystem, the provider of one or more components could be another competing MMS provider, which emphasizes the fact that it is a co-opetition ecosystem.

Figure 2. MMS Partner Ecosystem



EMM = enterprise mobility management; ISV = independent software vendor; MMS = managed mobility services; MTD = mobile threat defense; MTP = mobile threat protection; OEM = original equipment manufacturer; TEM = telecom expense management

Source: Gartner (March 2018)

Technology product management leaders should consider the following scenarios when deciding on strategic partnerships.

Partnership with software providers that have evolved roadmaps: With the rise of BYOD adoption, MMS partnership with software providers is driven by app, data, user and productivity centrality, rather than device centrality. EMM providers, for example, AirWatch, MobileIron and Citrix, are enhancing their capabilities to provide a more complete unified endpoint management (UEM) tool. This is because the consistent policy governance across end-user devices requires placement of data controls, security and access conditions as a part of apps. To develop a competitive edge, MMS providers partner with EMM, advanced security and telecom expense management (TEM) providers that have evolved their propositions with focus on app and data centrality, rather than device centrality.

Global logistic providers are a favorable choice for global reach: Serving global MNCs and covering global opportunities with a homogeneous solution as a competitive differentiator drives MMS providers toward strategic partnerships. Many MMS providers continue to partner with global providers for device logistics, and support TEM and EMM to maintain homogeneity in their overall offering. Device logistics providers such as Ingram Micro and Brightstar provide global capabilities for MMS providers such as Vodafone and MOBI. TEM provider Tangoe, and EMM providers AirWatch, MobileIron and BlackBerry continue to be global partners for MMS providers such as Vodafone.

Regional/local versus global MMS players: Localized or regional MMS providers match strength to strength with global players in their home territory or country. In a bid for globalization, many CSPs partner with other regional operators to complete their mobile coverage outside of their home turf. They partner with IT outsourcers (ITOs) or MMS pure-play providers to complete the professional services capabilities, app development, system integration and support capabilities within and outside their home territories.

In a bid to globalize, many local and regional MMS providers partner with global players and vice versa to extend their reach. For example, Navita has extended its global coverage by partnering with Telefónica, and global players are extending to specific regions using the regional players such as Mobilise IT in Australia. Vox Mobile has a distinct approach to covering opportunities globally. It is a driver in the consortium of 10 regional MMS providers worldwide called Global Enterprise Mobility Alliance (GEMA), and it leverages its partner members to offer solutions globally.

Co-opetition environment shapes channel and partnership strategies: In a co-opetition-driven environment, many global MMS providers have channel partnerships to spread their reach or to formulate a part of a bigger ecosystem of workplace transformation. Examples are partnerships with EMM technology service providers; other MMS providers; device OEMs; ecosystem providers of devices, apps, OSs and so on (such as Apple, Google, Samsung and Microsoft). They also partner with resellers that have minimal or no contribution to the offering. Many EMM providers take in MMS providers as channel partners for consulting and managed services for their clients. Unisys has partnered with Dell EMC to resell its Workspace Productivity as a Service proposition that includes MMS. Providers, however, need authorized relationships with the device OEMs to be able to resell, configure and repair their devices.

Bundling and Persona-Based Approach Continue to Power MMS Go-to-Market

MMS providers bring about the granularity in MMS bundles especially for the large-enterprise customers. This is done by identifying various user profiles or personas (using a consulting approach; see "Four Managed Mobility Service Bundling Strategies for Communications Service Providers to Gain Differentiation"), including those that may be specific to an enterprise's vertical market. After that, they offer suitable bundles for them — rather than a high-level combination of available products.

Price simplicity drives bundling strategies of MMS components: Traditionally, providers bundle MMS components into an opex-based (monthly recurring charge) model. Many providers, along with the traditional approach, offer an "as a service" (prepackaged opex-based) model of MMS component bundles for price simplicity to suit user profiles or personas. Prepackaged MMS components include one or more components of EMM, support, SaaS apps, device logistics, TEM and so on, suiting target personas aligned to enterprise policy of BYOD or corporate liable devices. This makes it easy for enterprises to choose the required bundles and measure the ROI. MMS providers such as Vodafone and DMI offer mobility as a service, offering packages for multiple user personas in an enterprise. They also offer a device-as-a-service proposition that includes reverse-auctioning of devices after a period of use to realize the revenue to incentivize the leasing company and the customer enterprise.

Consultative selling to derive user profiles increases chances of winning a deal: To drive adoption, it is necessary to effectively define the MMS offerings for an enterprise such as device types, connectivity plans, support involvement, and device and app control level. Many MMS providers, including, but not limited to, Vodafone, DMI and HCL, have been offering consulting offerings to derive multiple personas at the workplace that could be targeted, thereafter, with life cycle management services and ROI monitoring. Specialist managed mobility sales initiatives led by consultative selling has put MMS providers in a better position to win a deal.

Enhancing Customer Experience Remains a Differentiator for MMS Providers

MMS providers that target service adoption and ROI ensure good customer experience in multiple facets of MMS business, such as the offering, sales and operations. MMS bundles defined to suit user personas at the workplace, consultative selling and postsale self-service (Tier 0) support are a few basic aspects of enhancing customer experience. MMS providers often go the extra mile to ensure customer delight in multiple facets of the MMS business.

Recommendation-powered self-service channel: MMS providers offer self-service support as a tool to offer differentiated customer experience. This, however, is not yet a complete replacement for help desk services, but a tool for instant fulfillment and reducing calls to customer support. This helps decrease Tier 1 issues such as password reset and app navigation. MMS provider DMI enhances its self-service proposition by coupling a recommendation engine with it to proactively detect issues (before they occur). The process is based on analytics performed on data from various sources such as usage data, tickets information and so on to generate actionable insights. Further, it uses the self-service channel for sending proactive notifications and communications directly to end users.

Differentiated support options enhance user experience: Because the need of mobility support for different usage segments in an enterprises varies, MMS providers offer differentiated support options targeting user segments to ensure customer experience enhancement. CSP Telefónica offers a fully managed MMS offering for high-range user segments such as sales, field agents, VIP and influential users at the enterprise. This support model includes full technical support for the entire MMS bundle and onboarding assistance, including service activation support. It also has a self-managed MMS offering that includes basic support options for small and midsize businesses (SMBs), and low and midrange users at large enterprises (see "Four Managed Mobility Service Bundling Strategies for Communications Service Providers to Gain Differentiation" for further details).

Global MMS providers offer centralized subject matter experts (SMEs) who are a part of a center of excellence team backing up regional support functions (with awareness of local language and culture) that drives customer experience for large enterprises. IT services providers such as HCL and Fujitsu, and CSPs such as Vodafone, Telefónica and Orange handle MMS support operations (Levels 1 and 2) globally in-house, leveraging centralized SMEs.

Adoption of Technology for Product Evolution

Extended security beyond EMM: Security is getting the due focus in the mobility space with respect to data access, threats to the device and the data stored on the device. Security management is recognized as a distinct component that covers the security aspect beyond MMS (see "Magic Quadrant for Managed Mobility Services, Worldwide" or the Appendix section of this document). MMS providers resort to partnerships with security service providers such as Wandera and Check Point Software Technologies that offer services related to threat detection and prevention on the mobile devices, apps and data.

ML coupled with predictive analytics: Many MMS providers are exploring the technologies such as ML coupled with advanced analytics for deriving actionable insights. Use cases relate to predicting key events and issues based on processing of data from sources producing both structured and unstructured data. Broadly, the application of such predictive analytics ranges from maximizing device uptime, enhancing employee productivity and automating the time-consuming manual processes within MMS. Certain possible use cases enable proactive recommendations such as alerting enterprises on device health, license, and asset and carrier data utilization patterns.

RPA for process efficiency: RPA is increasingly adopted by MMS providers to achieve process automation. This is done especially in the TEM component of their portfolio, for optimizing cost and process efficiencies, for example, in the case of accessing a carrier portal for invoice access in the absence of an API. MMS provider MOBI is working on bots in a few areas to improve efficiency and cost margins. Use cases include parsing email data, automating third-party transactions (order processing) in the absence of standard APIs and accessing users' bill details (on scheduled bill cycles) from carrier portals followed by validating and optimization of those details .

Virtual customer assistant (VCA) as a solution for consistency in end-user interactions: Many providers working on VCAs intend to substitute support services and offload Level 1 and, to an extent, Level 2, support functions onto a self-service channel powered by VCAs that could

potentially resolve user issues. Many system integrators (SIs)/ITOs have invested/developed VCAs to handle service desk functions to address operational efficiencies in service project requirements; however, there is no visible evidence of the same being used explicitly for MMS in a commercial setup. MMS provider MOBI has been working on a VCA that handles scenarios such as reset voicemail password, guided process to update the OS/app, and reconnect the user's EMM/UEM. Its usefulness in migration projects is key due to the handling of many end-user queries without overloading the help desk.

Market Players

Along with pure-play MMS providers, the market is currently a mix of players (CSPs, ITOs/SIs and TEM providers) that have created MMS propositions extending on top of their core competencies.

How Do They Compete?

The MMS global market has been dominated by IT services providers and pure-play MMS vendors during the last five years, as the "Magic Quadrant for Managed Mobility Services, Worldwide" illustrates. CSPs Vodafone, Orange and Telefónica have maintained their position or slightly improved during that period.

CSPs

CSPs with a core business of connectivity have looked to bundle the connectivity with an MMS proposition for a specific customer set, especially with regional scope. However, many CSPs compete with stand-alone MMS offerings that are carrier-agnostic. For bundled connectivity, key focus would be customer retention; the intention is to provide value-added services in the data margins, and keep the overall average revenue per unit (ARPU) intact by increasing consumer stickiness to the service. In global MMS markets, CSPs such as Vodafone compete with other MMS providers for global deals and regional providers, in the case of region-specific deals.

IT Services Providers

With their strength in professional services and the ability to execute service projects, SIs and ITOs have included MMS as a key value add to their overall managed workplace service proposition. This gives them an edge since they can compete as a part of large-scale workplace transformation service projects that are infrastructure-led deals, as well as individual MMS requirements from enterprises.

TEM Providers

As the global TEM market continues to grow, TEM providers have been offering MMS propositions as an extension of their TEM penetration. They compete with MMS providers with their offerings as an extension of their base proposition of telecom and technology expense management. However, TEM players do not offer MMS propositions as stand-alone offerings without a financial management component included.

Pure-Play MMS Providers

Pure-play MMS providers compete on the advantage of the legacy of developing and working on the MMS proposition as a specialty. They compete directly with other providers or partner with global providers such as SIs or CSPs to offer the overall proposition. They make a favorable choice for SIs and CSPs since the spectrum of coverage of their MMS proposition requires the reseller to have minimum involvement.

Players Covered

Gartner analyzed many MMS vendors while researching for Competitive Landscape report. The vendors include (but are not limited to) Fujitsu, Sprint, Tangoe, Telefónica, Unisys, Verizon, VoicePlus, Vox, Zensar and so on. Players covered in this competitive landscape are strictly meant as representative vendors to illustrate and highlight some of the differentiation and competitive approaches in the market now. Gartner is aware of other vendors with similar offerings and approaches to the market. Table 1 lists the vendors covered in this report.

Table 1. List of Providers (in Alphabetical Order) Covered in this MMS Competitive Landscape

MMS Provider	Reason for Choosing
Cass Information Systems	TEM provider has an MMS offering as an extension to its expense management solution in a partnership-driven model
DMI	Pure-play MMS provider has extended capabilities beyond conventional managed services around mobile devices and apps
HCL	Investments to create various IP in the mobility space that are bundled in its software-defined workplace offerings and industry vertical solutions
IBM	Managed service offering built with a service ecosystem around its own products such as MaaS360, along with an active partnership strategy
MOBI	Expanded capabilities around MMS, with innovations in enhanced user experience and cost optimization using RPA
Navita	Developing specific IoT software capabilities in its MMS Navita Connect platform for expanding its services into the IoT space
Vodafone	CSP provider of MMS has invested to create a global portfolio of MMS that has shown positive progress in our MMS Magic Quadrant over the years.

IoT = Internet of Things; IP = intellectual property

Source: Gartner (March 2018)

The Future of Competition

As enterprises continue to invest in the digital transformation of their workplace, managed workplace providers such as SIs/ITOs and a few CSPs managing end-user technologies, including the mobile estate, continue to pose a threat for MMS providers. Conversely, MMS providers in the future have a chance to compete against managed workplace providers with Windows 10 (manageable under the UEM umbrella) slowly taking over PCs in enterprises. To be able to address client needs in the complex market of the future, MMS providers need to orchestrate managing of traditional EMM-based offerings, as well as the ecosystem of devices and apps that are managed using UEM.

To deliver consistent solutions globally, MMS providers would be required to take up a multisourcing service integrator (MSI) role or partner with an MSI provider to gain a competitive advantage in the MMS market. It would be necessary to rethink not only the skills required to deploy, operate and support global MMS projects, but also the processes and tools (and technology) required to operationalize the same emanating from an MMS scenario. This would also enable providers to consider services beyond MMS and look at market adjacencies for service management and delivery of solutions such as IoT, unified communications (UC), cloud and network. Taking up such opportunities would mean facing exponential complexity involving the new processes, toolsets and expertise necessary to adapt to in order to gain traction in the market.

Competitive Profiles

Cass Information Systems

Market Overview

Cass Information Systems is a publicly listed, federally regulated bank holding company that has provided expense management services for more than 60 years. In 2004, it started its TEM offering for wireline and wireless, which it has evolved to incorporate MMS and other IT management areas. Cass serves U.S.- and European-based multinationals or large domestic/regional companies. It also serves Latin America and Asia/Pacific, either directly or via partners. Cass maintains offices and teams in the U.S., U.K., Netherlands, Singapore and Brazil.

How Cass Information Systems Competes

Cass Information Systems provides a comprehensive solution (with single sign-on) for procure-to-pay management through its proprietary cloud-based system, ExpenseSmart, with additional MMS offerings as required (including a global, 24/7 multilingual help desk, device provisioning, kitting and recycling). ExpenseSmart integrates with ServiceNow and other IT service management products, all the leading EMM solutions, and the leading human resources information system and ERP systems. Cass has a patented BYOD management service offering for individual liable mobile users that includes a solution that streamlines the process of reimbursing employees directly under BYOD.

The expense management solution is central to its wider MMS proposition. It is, therefore, offered either independently as a fully managed service, or with the other services (such as EMM, logistics and recycling) bundled in as required. MMS services are not typically provided in stand-alone mode. Cass focuses on go-to-market with SIs such as CompuCom, Acuative (go-to-market) and Arrow Electronics (logistics and recycling) for logistics, and continues to build its indirect channel. It also offers an emerging IoT/machine-to-machine solution as an extension to its mobile offering, focused on IoT inventory, provisioning, invoice processing, audit, disputes and payments in more than 90 countries.

DMI

Market Overview

Headquartered in Bethesda, Maryland, U.S., DMI is a pure-play MMS provider delivering against all five MMS categories defined in our recent Magic Quadrant. The company focuses exclusively on mobility solutions for the enterprise, managing devices, applications and business processes, to allow for mobility to deliver business outcomes into a broad range of industry segments.

How DMI Competes

It has "as a service" offerings for device, mobility, IoT and analytics, along with MMS offerings tailored around Office 365 and Surface. It looks to broaden its as-a-service offering to cloud, IT and platforms in the future. To reinforce its IoT focus on vertical industry solutions, it acquired Lochbridge in early 2017. It also acquired Allegient to strengthen its business and technology consulting that is focused on translating business challenges into technology solutions with particular depth across the Microsoft domains

For better qualification and prospecting, its inside sales is integrated into marketing for the demand generation process. DMI goes to market primarily as a direct service provider, and it also engages partners in some indirect service delivery. DMI is one of only a few managed service providers that bring solutions spanning devices and custom applications that are wholly focused on mobility.

DMI has aligned all of its MMS offerings with ITIL best practices to include working with each customer to develop a joint operating plan. The joint operating plan documents the customer's operational needs and aligns them to DMI's established processes, as well as the established SLAs that are monitored in real time and reported on regularly.

HCL Technologies

Market Overview

HCL Technologies is an IT services provider headquartered in India that provides MMS as a part of its overall digital workplace portfolio. Its primary target market segment is large and global enterprises, but it also looks to penetrate into the midsize market segment. HCL focuses primarily in

Europe and North America for MMS, which consists about 90% or more of its customers. It has delivery centers spread in Asia/Pacific, South America, Africa and Japan.

How HCL Technologies Competes

Its workplace aggregation approach, MyWorkplace, for a unified and persona aligns experience to its users, enabling them to access services that constitute their workspace from a single unified browser. Under its Kaleidoscope umbrella, has been providing consultancy, transformation and management of mobility services for its customers across the complete life cycle for a mobility journey, including apps and infrastructure. In 2017, HCL claimed to have worked on a human-centric approach with the concept of "software-defined digital workspaces." The approach targets end-user liberalization fueled by mobile through platform-agnostic anywhere, any device, any location access to workspaces, with a focus on securing corporate assets and privacy concerns.

It has an IP- and framework-led approach that helps it map enterprises' unique needs and requirements, from an initial roadmap, to the full-scale implementation, to its available IP for efficient delivery and user experience. Kaleidoscope offers consulting, whereas, LibreSpace and MyWorkplace are leveraged for workplace services. It has mobility enablers WorkBlaze, offering analytics, and OptiBot and DRYICE LUCY that are artificial-intelligence-based solutions.

HCL provides 24/7 support in more than 35 languages from its global delivery centers worldwide. It has vast experience and capability in providing omnichannel customer services through voice, web, chat, email and social media. It has invested in labs and customer experience zones, where it implements and showcases all beta features, next-generation use cases that it is testing, and introduces them to its customers before the actual versions are launched.

IBM

Market Overview

IBM is a global IT services provider headquartered in Armonk, New York, U.S., with a presence in all regions of the world for presales, sales, solutions and delivery resources. Its Digital Workplace Services brand aggregates IBM's capabilities from strategy to security through to logistics into a single as-a-service architecture and go-to-market model. Digital Workplace Services addresses all enterprise mobility requirements and digital workspace needs for BYOD, choose your own device (CYOD) and corporate-owned, privately enabled (COPE).

How IBM Competes

IBM has a strong global presence. It often supports large sophisticated, multigeographical deals for MMS or when MMS is incorporated into a larger IT outsourcing deal that requires project and program management skills for integration and implementation of various software requirements and solutions. IBM leverages a strong ecosystem of technology partners such as GSG and MOBI for TEM offerings, and Zebra, Apple and Microsoft, among others, adding to its complete MMS capabilities. In December 2017, IBM introduced IBM Expense Management with Watson — Device

Refresh, an innovative and patented cognitive approach that enables a more optimized refresh cycle than the traditional fixed-term offers.

IBM has strong global delivery capabilities, with its MMS portfolio typically delivered using consultative- or outsourcing-based approaches. The company supports content and applications across multiple platforms and multivendor requirements (Windows 10, Windows Phone, Windows Mobile, Apple and Google Android) across multiple device types. Using integration of analytics and IBM Watson capabilities, IBM is able to provide things such as productivity in a contextual manner for enterprises for MMS. IBM also uses a persona-enabled agent support model, analytics, cognition and automation in its MMS service desk for enhanced user experience and productivity. IBM is also enhancing its capabilities in IoT, offering device integration and device management associated with use cases, though its MMS and IoT propositions are not yet integrated.

IBM provides a prominent device program around device recycling, disposal, financing (including leasing), procurement, on-site concierge and help desk services. IBM offers global financing for devices and also longer-term transformation initiatives, with predictable monthly payments. The company is also expanding into the SMB space through a package offering for mobile services that is delivered through an e-store as an integrated platform.

MOBI

Market Overview

MOBI is a private-owned pure-play MMS provider headquartered in Indianapolis, Indiana, U.S. MOBI delivers MMS through its cloud-based platform that is also used by other MMS competitors as IBM to deliver sourcing and logistics management. Out of North America, MOBI uses partners for delivering sourcing and logistics management services on top of their platform. MOBI's portfolio spans all MMS elements and has a strong partner ecosystem including specific system integration services for corporate systems.

How MOBI Competes

MOBI's MMS cloud platform provides telecom expense and asset management, program management for BYOD, COPE, and IoT, workflow management, analytics, and strong APIs capabilities. On top of this platform MOBI offers managed services mainly around EMM, logistics and sourcing management through its help desk and professional services. They are currently integrated with more than 100 mobile network operators around the world. Their service desk supports Tier 1-3 questions and claims to have 97% first-call resolution rate.

MOBI has shown strong innovation and software development capabilities in its MMS platform around workflow design and integration and RPA with a series of bots spanning different MMS operational processes. Audrey bot for service support and live chat, Johnny bot substituting manual tasks around sourcing management in common carrier-related tasks, Otto bot for communication parser tasks together with Johnny bot, and Mikey bot for billing data collection. Main KPIs from this RPA strategy are 15% of help desk support fully automated, reducing average carrier transaction

times from minutes to seconds or eliminating 120 hours of monthly work for billing data collection. They also claim KPIs around substantial cost saving using Bots as against using manual processes. Their channel strategy is based on technology partners that include MMS powered by MOBI as part of their MMS strategy and reseller partners that sell MOBI's off-the-shelf products.

Navita

Market Overview

Navita is a private-owned, pure-play MMS provider headquartered in Sao Paulo, Brazil. Navita recently moved out of the GEMA alliance. It maintains a strong partnership with Telefónica locally in Brazil for SMBs and large enterprises, and globally (16 countries) for the multinational customer segment, through its Navita Connect platform and managed services for EMM and financial management. Navita recently opened an office in Barcelona, Spain, to expand its channel partner ecosystem in Europe and reinforce its strategic partnership with Telefónica.

How Navita Competes

Navita's portfolio spans mobile consulting, including BYOD programs and auditing services, EMM, TEM, device as a service, and sourcing and logistics management through its Navita Connect platform. The platform also supports fixed-telephony and data services. Navita provides 24/7 help desk support with its mobility center based in Sao Paulo. It also offers a mobile app for end users and administrators. Navita has invested in training and certification, with more than 1,000 videos available that simplify onboarding methodology.

In 2017, Navita strategically started moving into the IoT space, extending the Navita Connect platform as a gateway between IoT devices and cloud. This initiative leverages the Navita Connect platform to offer unified endpoint management services for both mobile and IoT devices. In this strategy, it has been working to integrate Navita Connect with the main IoT connectivity platform vendors (such as Cisco [Jasper] and Ericsson), providing device management, IoT security, connectivity gateway and data traffic management functions. This is a result of the advantage IoT connectivity brings in terms of a smaller number of vendors to connect to and a less incremental effort in adding a new CSP using the same IoT connectivity platform (see "TEM Providers Can Leverage Their Core Business to Expand Into Value-Added IoT Opportunities"). Navita also has a channel partner program to reach all company sizes. The SMB market has been covered through a network of local SIs and carriers. Large enterprises and global projects are executed in partnership with global SIs such as Telefónica Business Solutions unit. Navita is expanding through other channel partners, mainly in Latin America, Europe and Australia.

Vodafone

Market Overview

Headquartered in Newbury, Berkshire, U.K., Vodafone is a global CSP that is expanding into broader mobile-centric, value-added services. Leveraging its geographical reach, the company

focuses on managed service related to mobility and various professional services. The company goes to market as a direct service provider. Vodafone also engages partners for private-labeled service delivery to complement its global reach.

How Vodafone Competes

Vodafone provides MMS as a packaged or a stand-alone service. To address the traditional challenges CSPs face in building and operating MMS, it has structured its MMS organization into a sell, build and run model. Along with EMM platform reselling for small enterprises, Vodafone's mobile-first digital consultants claim to align business stakeholders within the customer enterprise (finance and HR, among others) to define policies on BYOD and to optimize the total cost of operation.

Vodafone's Professional Services is a value-add to its MMS proposition, with its acquisition of the consulting firm Bluefish. More than 100 consultants focus on mobile-first digital transformation, including MMS that forms a part of the MMS practice model. It has created a "mobility as a service" solution that offers predefined MMS hard bundles in an "as a service" model that includes Vodafone Red mobile tariff and its Device Lifecycle Management (DLM) propositions. The business model for mobility as a service is based on persona-based pricing across the mobility life cycle that includes tariff, device, security and overall managed services. To determine the employee's persona and mobility usage, it has identified user personas to predefine its packages. Examples are field worker (high mobility and usage), regular traveler (high mobility and usage with roaming), flexible worker (medium mobility and usage) and fixed worker (low mobility and usage).

References and Methodology

This research is based on vendor briefings, survey responses from various MMS vendors, and inquiries and secondary research on the MMS market and providers.

Appendix

Table 2 depicts the Gartner-defined MMS components.

Table 2. MMS Components

Component	Gartner Definition
Sourcing and Logistics	This comprises the systems and services used to purchase, provision and activate network services, applications and devices — in addition to what is delivered through an expense management or EMM platform. Forward and reverse logistics support includes staging and kitting, depot repair, advanced replacement, recycling and device cascading.
Managed EMM	EMM suites comprise five core technical capabilities to support enterprises with the management of mobile devices. These include mobile device management, mobile application management, mobile identity, mobile content management and containment. In the context of MMS, this capability is delivered through a third-party platform, such as release management and support of EMM servers.
Security Management	This includes the systems and services that are beyond those available through EMM platforms. It secures access and consumption of corporate resources and content through authentication, encryption, containerization, and enterprise cloud file synchronization and sharing, as well as content and domain filtering and anti-malware functionality. For example, this includes mobile threat defense solutions and professional services capabilities related to mobile security management.
Financial Management	This is the expense management capability that includes the following elements — sourcing management, ordering and provisioning management, inventory management, invoice and contract management, usage management, dispute management, and reporting. In the MMS context, the capability is either to have a proprietary platform, or to manage the platform of a third-party expense management provider.
Program Management (Including Professional Services)	This is the ability to manage the other capabilities cohesively and effectively, including governance across the included set of third-party providers (such as EMM, device OEMs and logistics, among others), account management, support and SLAs. This service category also includes associated 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. This also includes professional services capabilities related to MMS other than those specific to individual capabilities and the ability to act as an agent on behalf of customers to conduct services on behalf of the user.

Source: Gartner (March 2018)

Gartner Recommended Reading

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

"CSPs Need to Rethink Their Structure to Sell and Operate a Winning MMS Proposition"

"Four Managed Mobility Service Bundling Strategies for Communications Service Providers to Gain Differentiation"

"Magic Quadrant for Managed Mobility Services, Worldwide"

"Critical Capabilities for Managed Mobile Services, Europe"

"Market Insight: CSPs Should Rethink Mobile Services Bundling to Improve Retention and Build New Growth"

"Market Guide for Mobile Services, Europe"

"Market Guide for Telecom Expense Management Services, 2017"

"How to Negotiate and Evaluate Telecom Expense Management Prices, North America"

"TEM Providers Can Leverage Their Core Business to Expand Into Value-Add IoT Opportunities"

Evidence

This document is based on vendor briefings, inquiries, surveys and research. Gartner works with various MMS providers and customers on an ongoing basis. This research is a result of our regular dialogue with these constituents, supplemented with information from topic-specific interviews and other relevant existing Gartner research.

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GARTNER HEADQUARTERS**Corporate Headquarters**

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

Regional Headquarters

AUSTRALIA
BRAZIL
JAPAN
UNITED KINGDOM

For a complete list of worldwide locations,
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