Magic Quadrant for Managed Mobility Services, Global

Published 1 April 2020 - ID G00389577 - 49 min read

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Over this past year, enterprises continued to broaden the scope and the geographic requirements for managed mobility services. For best outcomes from MMS deployment, I&O leaders should match their technical, commercial, operational and regional requirements to the provider that meets these needs.

Market Definition/Description

This document was revised on 3 April 2020. The document you are viewing is the corrected version. For more information, see the Corrections page on gartner.com.

Managed mobility services (MMSs) comprise the vendor-provided IT and business process services required to plan, procure, provision, activate, manage, secure and support mobile devices, mobile network services, related mobile management systems and mobile applications. For this Magic Quadrant, “devices” include smartphones, tablets, purpose-built field service equipment with embedded equipment and wearables. This research applies to both corporate-liable and individual-liable (or “bring your own device” [BYOD]) devices. However, this Magic Quadrant does not evaluate the management of laptops or other end-user compute devices. Longer term, the scope may be broadened to include such devices; however, for now, we do not see these devices as a common component of the same request for proposal. Companion positioning documents for mobile devices, mobile network services and related managed services, including three regional uses cases, can be found in “Critical Capabilities for Managed Mobile Services, Global.”

Gartner’s coverage of MMSs focuses on a provider’s assumption of day-to-day IT management administration and support routines for mobile devices. MMSs also include business process services (such as expense management, asset management and logistics, including forward and return logistics and recycling, ordering and provisioning) as well as help desk services.

Enterprises seek proficient skills and expertise related to MMS to ensure that their mobile devices are operationally effective and managed at a competitive price. However, a consistent message continues to be relayed in hundreds of Gartner inquiries. Despite progress made by many providers, enterprise clients remain concerned that the delivery of MMS services by providers often fails to meet enterprise requirements and outcomes because of inconsistent capabilities both regionally and globally. Consequently, enterprises’ requirements may necessitate the sourcing and vendor management of multiple providers, or the use of third-party program management (for example, multisourcing service integration).

Gartner differentiates between the unified endpoint management (UEM; previously covered as enterprise mobility management [EMM]) software market and MMS. The latter is generally consumed as bundled IT and business process services in combination with UEM software (which includes mobile device management [MDM] software). The UEM "stack" (of which MDM software is only one part) is a key component of MMS. Its function is similar to the way that the IT operations and service management software is used in the delivery of the broader IT managed services and outsourcing contracts (see "Magic Quadrant for Unified Endpoint Management Tools").

For 2020, Gartner maintains its five categories for core MMS deliverables:

- **Sourcing and logistics management:** 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 UEM platform. Forward and reverse logistics (of devices out to users and then back from users) support includes staging and kitting, depot repair, advanced replacement, recycling, and device cascading.

- **Managed UEM:** UEM suites comprise five core technical capabilities to support enterprises with the management of mobile devices. Those are mobile device management, mobile application management, mobile identity, mobile content management and containment (separating corporate and personal data). In the context of MMS, this capability is delivered through a third-party platform, such as release management and support of UEM servers.

- **Security management:** This includes the systems and services — beyond those available through UEM platforms — to secure access and consumption of corporate resources and content through authentication, encryption, containerization, and cloud-based enterprise file synchronization and sharing (EFSS). Security management also covers 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, which includes sourcing management, ordering and provisioning management, inventory management, invoice and contract management, usage management, and dispute management and reporting. In this MMS context, the capability is either to have a proprietary platform or to resell somebody else's.

- **Program management (including professional services):** This is the capability to manage the other capabilities cohesively and effectively, including governance across the included set of third-party providers (such as UEM, device OEMs and logistics), 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), as well as to support 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 a customer to conduct services on behalf of the user.

All providers in this Magic Quadrant offer all of these service segments in full.

MMS providers typically price their offers as a monthly recurring charge per device or per user. Some providers also bundle project-based services (such as consulting), which generally are nonrecurring charges, into the monthly recurring charge. It is quite typical for MMS proposals to come in the form of a bill of materials, where each discrete service charge is presented as an individual charge. For example, help desk, kitting, and sourcing and software release management may be presented as a separate charge item from a vendor. This remains our preferred model, as it offers price transparency. However, the majority of offers in 2019 were priced in bundles of services, and early 2020 sees a continuation of that trend, albeit with some ability to pick and choose also at a very granular level. The options range from sourcing a basic service to options with higher specifications, such as additional features or support. Different users within an organization may also be offered different options of services (e.g., help desk services).

Magic Quadrant

Figure 1. Magic Quadrant for Managed Mobility Services, Global

Source: Gartner (April 2020)

Vendor Strengths and Cautions

Calero

Calero is a privately held company based in Rochester, New York, that provides comprehensive MMSs primarily in North America and Europe. Of its 1.38 million devices under management globally, 72% are in North America, with Europe representing another 23%.

Calero's offerings have been extended from its core telecom expense management (TEM) business to comprehensive mobility management software and services, including procurement, deployment, forward and reverse logistics, help desk and support, expense management, and UEM services. Its integrated TEM solutions range from SaaS to fully managed BPO engagements, with service programs encompassing multilingual support for managed mobility, expense management and usage management.

Calero provides the software, data and analytics for its own TEM and UEM management. It partners with DMI for device life cycle management solutions such as financing, on-site or depot repair, and return services and warrant work, as well as remote device and UEM server monitoring and management.

After the close of the evaluation period for this research, the private equity (PE) firms backing Calero and TEM-provider MDSL announced plans to merge the two. The PE firms will provide additional investments into the recapitalized company, and will continue operating from current facilities globally. MDSL CEO Charles Layne will head the merged company, with Calero CEO Joe Pajer moving to its board of directors.

Calero is well suited to both North America-centric enterprises with financial management requirements and to those with a requirement for managed devices in Europe.

Strengths

- Calero utilizes predictive customer analytics based on data such as customer call volume, enabling identification of emerging service issues in advance of an actual trouble ticket, thereby reducing downtime for customers.
- The Calero-MDSL merger expands the combined company's presence in Europe, which accounted for almost one-third of Calero's 2019 customer activity. It also provides additional capital from the two companies' private investors to support continued expansion of capabilities beyond its core sourcing and logistics solutions.
- Client feedback regarding Calero's mobile capabilities is generally positive, with enterprise-size customer references for this research rating their experience across all primary MMS areas as "satisfied" with no particular areas of weaknesses.

Cautions

- Calero's device as a service (DaaS) program requires a custom scope of work and has provided device financing only to North America-based clients. Customers whose requirements entail using a single vendor for DaaS and other MMS solutions must confirm that Calero can cost-competitively meet their DaaS requirements.
- Calero and MDSL must effectively integrate in future years and utilize the multiple company platforms to provide powerful analytics for customer insight. Use of SLAs is recommended to protect against changes in service delivery quality that may be impacted by the merger.
- Some Gartner reference survey clients gave Calero lower-than-average ratings for areas such as its geographic scope, program and project management services, and ability to pursue and achieve worker performance improvement initiatives.

Cass Information Systems

Publicly listed Cass was founded in 1906 and is headquartered in St. Louis, Missouri. In 2004, Cass began delivering managed TEM and MMS services with its hosted platform, ExpenseSmart. Since 2017, Cass has geographically grown its MMS capabilities and devices under management to now meet the requirements of this Magic Quadrant. Gartner estimates that Cass has more than 2.2 million devices under management, up by nearly 30% year over year, 72% of which are in North America. Cass has API integration with Citrix Workspace, Microsoft Intune, MobileIron, ServiceNow and VMware Workspace ONE to enable bidirectional report and workflow automation.

Cass has regional service delivery centers in North America (NA), EMEA, Asia/Pacific (APAC) and Latin America, and now also offers device depot services such as advanced exchange and reverse logistics across Western Europe. Its 24/7 global help desk has native coverage in English, German, Spanish, French, Chinese and Japanese. Cass has around 1,200 full-time employees based in the U.S., Europe, Singapore and Brazil. Cass also uses partner TNX in parts of Latin America. Cass prides itself on its customer retention track record with a 99.7% customer retention rate since 2011. Cass is GDPR-compliant and Privacy Shield-certified.

With its banking and financial transactions capabilities, Cass is well suited to enterprises with a strong requirement for financial components such as financial management services, BYOD payments or device leasing.

Cass is a suitable provider for enterprises with a strong focus on financial management and logistics in the U.S., Europe and Latin America, specifically.

Strengths

- Cass has a strong service-level agreement environment and pays strong attention to customer service with end-user satisfaction of 4.85 out of 5.0, 99% of orders submitted within four business hours and an SLA for monthly governance reports.
- Cass recognizes that customer experience is a significant competitive differentiation and offers a global account director for all customers with a minimum of two regions under management, plus a regional account manager for each region.
- Customer references strongly praise Cass for its program management, its timeliness and for being “easy to do business with.”

Cautions

- Because of its financial status (bank license), Cass is prohibited from providing telecom connectivity services and, therefore, cannot bundle in airtime with its solutions. However, Cass does provide global sourcing solutions to help customers identify, select and negotiate contracts with vendors in over 90 countries.
- Cass is strongly focused on delivering services in NA, Europe and APAC, and has very limited capabilities in the Middle East and Africa (MEA) and Latin America with no firm plans to expand

its device disposal options. This may cause issues for large enterprises looking for a complete global solution.

- Customer references suggest that Cass can do more to more effectively pursue, and also achieve, technology performance improvement initiatives.

DMI

Headquartered in Bethesda, Maryland, DMI is a global service provider that focuses on enterprise-grade mobility. The company delivers end-to-end capabilities including managing devices and mobile services. The services offered expand beyond the basic MMS services and also include custom mobile app development and maintenance, as well as mobile strategy development and management of IoT devices. The vendor has aligned all of its MMS offerings with ITIL best practices. The life cycle management service is customizable to meet each customer's requirements and aligns them to DMI's established processes, as well as to the established SLAs that DMI monitors in real time and reports on monthly.

Gartner estimates that DMI manages more than 2.6 million mobile devices (smartphones, tablets, ruggedized devices and field devices), more than 35% of which reside outside North America, and several customers have more than 100,000 devices under management. DMI has a very strong footprint with U.S. federal entities including defense. DMI shows a modest growth of about 5% year over year in number of managed devices across more than 60 countries. Over the past year, DMI has continued to invest in its portfolio of security-related services and products, as well as its operational capabilities.

DMI should be evaluated for global MMS opportunities and also for estates primarily focused in the U.S.

Strengths

- Service execution remains strong, and DMI is able to meet or exceed service-level commitments consistently. The vendor's SLAs are also generally strong, and it receives high customer satisfaction scores.

- DMI continues to demonstrate strong understanding of the business challenges facing clients and the ability to translate its clients' business needs into an offer based on desired business outcome. Customers and prospects also continue to praise the sales and presales professionalism.

- DMI has a strong ability to deliver a "one-stop shop" experience including development of custom mobile applications and integration into enterprise applications and processes. Customers continue to report that the vendor aggressively pursues and achieves strong technology performance and improvements.

Cautions

- The DMI geographical expansion model is to "follow the customers" as opposed to a strategy based on engineering the strategic coverage to anticipate customer need. This means that customers need to challenge DMI when going into new countries/regions to ensure adequate coverage is in place when needed and fully quality is assured.

- Some DMI customers still find the vendor's pricing to be slightly higher than average for comparably quoted services.

- Some DMI customers have reported that they're not getting the level of proactivity they expect from the vendor when it comes to evolving their respective mobile strategies. In response, DMI has expanded its business reviews and created mobile consultant groups for MMS clients to help them expand their current mobile ecosystem and build roadmaps for full end-to-end capabilities.

DXC Technology

In November 2019, DXC Technology announced that it is looking for "strategic alternatives" for three of its business areas including its "workplace and mobility business." DXC Technology has elected not to participate actively in the evaluation of its managed mobility services portfolio.

DXC Technology is a global IT services company based in Tysons Corner, Virginia. DXC offers MMSs as part of the DXC Workplace and Mobility Services portfolio, also known as DXC MyWorkStyle. DXC provides a comprehensive mobility services portfolio in the broader context of its multiregional digital workplace service business. The DXC MyWorkStyle brand encompasses a managed mobile device base of an estimated 1.2 million globally, down 20% from the previous year and located primarily in major countries of Europe and North America. Its MMS solutions include, either directly or through partnerships, a full spectrum of device life cycle management, UEM and mobile business solutions, including user experience design, mobile application development and support for augmented reality and virtual reality applications.

DXC's managed UEM software solution partners include Citrix, Microsoft and VMware.

DXC is likely a best fit for existing customers given the uncertainty related to its future ownership.

Strengths

- DXC has adopted a lean product life cycle management (PLM) methodology to develop its workplace capabilities. This generates an agile methodology approach to services, enabling DXC to be more responsive to changing client needs.

- DXC delivers support in 56 languages from 60 delivery locations and has more than 150 walk-in centers.

- DXC has a set of industry solutions that is appreciated by clients, for instance Smart factory with wearables

Cautions

- With the announcement about seeking strategic alternatives, enterprises should seek clarity around the timing and likely outcome from this business unit before investing further or deepening relationships.

- DXC has failed to keep pace with the rest of the market as evidenced by the decline in its number of managed devices globally. This is concerning and disappointing since its sales and negotiation process is well received, and its portfolio is broad. Some enterprises indicate that DXC can do better in articulating and delivering on the expected value proposition.

GEMA

The Global Enterprise Mobility Alliance (GEMA) based in Baar, Switzerland, is a pure-play MMS organization offering services in more than 100 countries through 21 licensees globally, serving 45 countries directly. Customers contract with the organization itself and the relevant licensee in the customer's region or regions fulfill their requirements with GEMA-branded services. The organization relies exclusively on its licensee sales forces and its indirect channel that includes large value-added resellers and workplace solution service providers such as NTT and Ricoh.

GEMA's global base of total devices under management rebounded in 2019 to about 6.98 million with the onboarding of a new North America licensee, the value-added reseller Insight. GEMA also acquired a significant number of new devices under management in the MEA region, which accounted for 16% of total devices under management.

The organization's licensees provide a full portfolio of MMS capabilities, leveraging an ecosystem of solution provider partners to fulfill requirements such as device lease financing for its DaaS offering, security software/service solutions and TEM. Managed UEM services are provided internally or via established solution partners such as BlackBerry, MobileIron, SOTI and VMware.

GEMA expanded the unified solutions available to licensees to include a device life cycle management price calculator tool, enabling all licensees to more effectively calculate price estimates for multinational deployments to account for regional price differences.

GEMA is suitable for both regional and global deployments.

Strengths

- GEMA has filled its geographic gap in North America with its new partner Insight and provides local representation in all of its served countries. The organization continues to unify its branding among licensees across its global footprint, ensuring a converged naming convention worldwide.

- The organization's globally diversified licensing model provides flexibility to invest in lengthy business development in slowly developing economic regions by essentially subsidizing development with its more stable or faster-growing regions.

- References cite that GEMA's licensees provide consistently high operational performance, exceeding SLAs for areas such as device staging and kitting accuracy. GEMA also meets time frames for new orders or break/fix replacements, and quick initiation of repair work by Level 2 or Level 3 technicians.

Cautions

- GEMA continues to revamp TEM capabilities into the organization's single, unified platform. Clients with multinational requirements must verify the differences in capabilities from one region to another while this process continues.
- GEMA only recently shifted its priorities to focus on user experience (UX), following a 2019 global customer survey. While this shift will make GEMA more competitive, UX has already been the stated strategic focus for GEMA's larger competitors, underscoring the vendor's need to catch up with the competitive landscape in this regard.
- GEMA continues to introduce artificial intelligence (AI) into its support systems but remains behind its larger competitors in doing so to provide more proactive, preventive data analytics and less reliance on human agents to quickly resolve issues.

HCL Technologies

Headquartered in Noida, India, HCL's MMS offering is part of the digital workplace practice. The strategy is to deliver a business-enabling, consumer-comparable experience. HCL continues to pursue a consultancy-first approach to create a well-integrated mobility ecosystem. Following a mobile maturity assessment, the portfolio is structured into three suites: Silver, Gold and Platinum, with possible options for mobile device as a service as well as three support plans. HCL serves its customers from more than 40 global delivery centers with new depot locations in the U.K., Canada and New Zealand. Both of its Bulgarian centers also now offer depot, staging and kitting support for mobile devices, and HCL has a total of 30 help desks offering support in 43 languages. Its Managed Workspace Services portfolio is divided into four areas called the SMART Digital Workspace Model: SMART IT — consulting and analytics; SMART Device — smart healing with the OptiBot; SMART User — with Lucy the SMART Bot; and SMART Spaces.

HCL manages an estimated 2.5 million devices globally, up more than 30% over the previous year, with the vast majority located in North America and Europe. HCL has devices under management in all regions and still manages more wearables than any other provider in this Magic Quadrant. The most commonly served segments are program management, managed UEM and security.

HCL is an option for globally diverse organizations with a need for significant self-serve capabilities.

Strengths

- HCL has a User Experience Office and a "shift-left" focus for its support model. This includes proactive support, self-heal, optimization and automation. Its focus is also on self-serve using its OptiBot mobile application and Lucy mobile chatbot combined, which now accounts for 32% of all interactions for user/employee issues related to service desk, HR and finance.

- HCL has a strong and comprehensive service-level agreement structured with a balance of user experience and operational metrics, which are then weighted to create an X score that can then be used to influence the monthly invoice through credits. HCL also offers ticket-based pricing.
- HCL references give praise generally, but specifically cite its geographical scope and scale, and its mobile-application-specific expertise.

Cautions

- Many of HCL's managed mobile customers also consume other parts of its digital workplace offers and focus on enabling outcomes through mobility. Enterprises with strictly mobile (smartphones, tablets and wearables) requirements should validate HCL's appetite for that MMS scope.
- Despite HCL price decreases of up to 50%, current pricing from HCL remains at the higher end of the competitive bracket. Enterprises should consider HCLs new pricing options for the most effective commercial model. Still, customers deem HCL to be good value.
- Customer references indicate that HCL does not always meet all service-level commitments. Enterprises should obtain SLA compliance rates for the metrics that matter most.

Honeywell Enterprise Mobility

Headquartered in Plano, Texas, Honeywell Enterprise Mobility (HEM) is a wholly owned subsidiary of Honeywell International, a Fortune 100 company. HEM focuses exclusively on mobility solutions for the enterprise, spanning all smart devices from smartphones and tablets to field service devices. HEM operates as a blended direct and indirect service provider. HEM has very strong depot and on-site repair services across a broad range of devices. Gartner estimates that the vendor manages over 4 million devices (of which a substantial part are field service devices), with about 25% residing outside North America, including sizable device numbers in Europe, the Middle East and Africa, and Asia. HEM provides global logistics services and support out of 26 centers with its own physical presence on all continents.

HEM should be assessed for MMS clients with a large base of smartphones, tablets and, especially, field service devices across North America, specifically, but also for MMS clients with global requirements.

Strengths

- Honeywell's device procurement platform integrates with existing customer ordering or ITAM systems including Remedy, Salesforce and ServiceNow.
- Rather than position its MMS as a subset of a broader digital workspace portfolio, Honeywell focuses the business on productivity solutions aimed at maximizing device uptime and reducing or eliminating wait times for mobility service or support resolution.

- Hardware procurement, management and support solutions are available not only for widely deployed iOS, Android and Windows 10 devices, but also for non-Honeywell ruggedized and purpose-built field workforce devices.

Cautions

- Honeywell has expanded its UEM capabilities to include managed mobile threat defense (MTD), application platform management and content management, but the vendor lacks UEM software trial and integration services.

- Clients need to check to ensure the vendor can meet their requirements in several regions as HEM does not directly manage devices in Asia or MEA.

- Honeywell has a global reach directly or via partners for most services, although it provides no support in Asia/Pacific or MEA and limited or no support in Latin America for device lease financing, on-site device repair/return and device recycling.

- Enterprises should carefully assess HEM's capabilities in the area of delivering a seamless and flexible DaaS solution, which clients have cited as needing improvement.

IBM

IBM, a global IT services provider headquartered in Armonk, New York, provides a comprehensive, global MMS portfolio as part of its broader Digital Workplace Services (DWS) business. From October 2018 through October 2019, the vendor grew its global managed device base by about 8.7% to more than 8.3 million devices primarily in North America, which accounted for nearly 58% of the total.

IBM has an industry-agnostic approach to MMS. However, IBM also has its own UEM platform, the MaaS360, which is supported along with Microsoft Intune and VMware Workspace ONE. It focuses instead on using its DWS capabilities across industry requirements such as supply chain tracking or intelligent campus solutions as its customer entry point for additional services such as MMS to support digital transformation. During 2019, IBM expanded its use of data analytics and device performance benchmarking to integrate more automation into support and service delivery to improve user experience.

The vendor also updated its service delivery organization, giving customers the ability to choose a primary delivery center for providing all MMS services rather than supplying different services from among a multiple of the company's 41 global mobility delivery centers.

IBM is a primary provider of sourcing, financial management and UEM management services, utilizing partners such as Sakon and Tangoe for mobile TEM software; Code 42, Druva and Microsoft for mobile security solutions; and Jamf, Microsoft and VMware for UEM software. IBM can provide direct procurement of mobile connectivity as an agent for customers using its DaaS offering. The offering can bundle together the connectivity and leased device with TEM, inventory management and UEM, for corporate-liable BYOD handheld and laptop or desktop devices.

IBM's global delivery capabilities make it an option to consider for all large enterprise mobility management proposals across all geographies.

Strengths

- IBM takes a unified approach to leverage tools from its DWS business, where Gartner evaluates IBM as a Leader in several regional Magic Quadrants, for MMS functions critical to customer support, device life cycle management and other mobility services. Aggregating its capabilities (from strategy to security to logistics) enables an effective single architecture and go-to-market model.
- Integration of the vendor's flagship Watson AI technology into MMS areas like device life cycle and account management, including a proactive Device Health monitoring solution, aligns well with CX requirements for faster, more automated and agile responsiveness to ongoing support needs.
- Client feedback to Gartner regarding IBM's mobility management is generally positive, consistent with its overall standing as a managed workplace services (MWS) provider. Perceived areas of strength include technological innovation, service reliability and scalability as the mobile deployment expands.

Cautions

- IBM's total devices under management in Europe and Asia, which account for 35.3% of its global total, declined by 23% and 14.4%, respectively, during the 2019 evaluation period for this research. However, other regions grew substantially (e.g., NA grew over 40% and MEA grew over 70%).
- MMS is a key element of IBM's overall Digital Workplace Services portfolio, and the breadth and depth of the company's global services may not align with a customer's immediate, often narrower needs that a pure-play MMS provider might meet.
- Although IBM reports a more than 99.7% compliance rate with its SLAs for MMS, the vendor does not disclose results of its now-implemented Net Promoter Score (NPS) scoring. Clients should require the vendor to provide customer referrals closely aligned with their own use cases.

Orange

Headquartered in Paris, France, Orange is a global communications service provider (CSP) offering broad mobile-centric, value-added services. In 1Q19, Orange restructured its organizational unit and MMS offering to "MSI for Mobility," which is the foundation of Orange's MMS strategy and includes modular components such as incident and request management, cost management, contract management, and global service desk. The MSI proposition is carrier-agnostic, and the complementary managed UEM solution is based on strategic provider MobileIron. Orange also supports Microsoft Intune and VMware and is integrated with

ServiceNow. Orange goes to market as a direct service provider. Gartner estimates that the vendor manages approximately 2.5 million devices, up 7% from last year, across all five regions.

The vendor's sales strategy has become more modular and is now based on modular bricks of services that can be combined according to client requirements. Examples of bricks include mobile connectivity, devices, TEM, central request and incident management, and contract management. Orange also offers predefined combinations such as:

- Connectivity and central services (ordering, reporting, service desk) with the benefit of controlling centrally and increasing the governance over the local organization.
- Mobile workspace staging and technical support with the benefit of having a single point of contact and end-to-end support.
- TEM and mobile device control (e.g., Wandera).

Operationally, Orange has, since October 2018, integrated its professional services capabilities into its MSI for Mobility portfolio to create a consistent global service desk aligned with ITIL recommendations. The global service desk covers the life cycle for mobile connectivity, devices, MDM and UEM managed services.

Orange should be considered primarily for managed mobile deployments with a strong focus in Europe; however, with its MSI carrier-agnostic role, other regions are now being served more effectively.

Strengths

- Orange recognizes that MMS is highly dependent on strong governance and pursues its multisourcing service integration (MSI) strategy, adhering to the need for a complete solution. This strategy has been extended to include a wider range of management over its customers' mobile providers to oversee and control service delivery on their behalf. The solution is vendor-agnostic and carrier-agnostic.
- Orange is taking a stronger role in managed UEM with its strengthened capabilities around MobileIron for which Open Broadcaster Software OBS has developed a zero-password solution. It has added professional services capabilities to manage policies and to co-innovate.
- References strongly believe Orange has profoundly influenced their corporate mobility strategy, allowing them to transform business processes and to enable growth.

Cautions

- Orange pursues a hybrid model for financial management, partnering with telecom expense management providers while also building out its own capabilities for dispute management. That may create an unnecessary delay in available capabilities.

- Orange does not have any device depots of its own, and it's consequently partnering. This means Orange could be using the same depots other providers are using, and Orange will have to ensure the devices it is managing are top priority in unforeseen eventualities, which could lead to depot capacity constraints.
- References indicate that Orange can become easier to conduct business with and improve adherence to SLAs.

Sakon

Sakon is based in Concord, Massachusetts. It has provided mobility managed services directly to enterprises for two years and has augmented the mobility solutions of several MMS providers for over 10 years. Sakon provides a complete MMS solution globally and manages an estimated 1.3 million devices in all five regions, though most are in the U.S. The vendor focuses on the evolvement of the Sakon Mobile platform and continuously expands its integrations with mobility service providers, independent software vendors (ISVs) and OEM platforms to facilitate real-time updates about the estates, orders, tickets and SLAs. Sakon has also introduced Sakon service orchestration, a workflow tool that allows requests and tickets to be routed to alternative service providers anywhere (rather than being tied to a specific provider) and have services dynamically routed based on factors such as price or performance.

Sakon offers a menu-based service but has structured its capabilities into a full MMS solution as well as an MMS light version (without procurement/fulfillment, mobile app or help desk). Its mobile device as a service (MDaaS) offer is an operating-expenditure-based solution including a device plus a set of managed services such as UEM integration and support, bill pay, provisioning and help desk (with chat support in 14 languages).

Sakon also offers capabilities for full BYOD or hybrid (corporate-liable and BYOD) deployments. Sakon deploys a 10-element, total cost of ownership (TCO)-based sales approach.

Sakon is suitable for enterprises with a global requirement and/or a strong U.S. requirement and, ideally, a financial management component.

Strengths

- Sakon has a focused target market (Fortune 1000). The vendor underpins its offer with a single platform from which to orchestrate mobility globally, which is readied for a growing number of types endpoints such as laptops, ruggedized devices and wearables.
- Sakon has a three-tiered approach to customer and account management to manage the customer at several levels of the organization. To support this, Sakon has developed a health monitoring program, and SLAs and KPIs are proactively reported.
- Sakon's references show appreciation for its large global footprint, strong mobile device capabilities and being easy to do business with.

Cautions

- The Sakon business model relies heavily on a network of integrated service providers for device kitting and staging, help desk, and depot services. While not uncommon, this may cause capacity constraints for enterprises if multiple partners want to use any one partner at the same time.
- Since Sakon entered the market as a *direct* provider 24 months ago, it lacks some market awareness among enterprises for its MMS capabilities.
- Customer references suggests Sakon can do more to exert influence on their mobile strategies for transforming their business processes and enabling growth.

Tangoe

Tangoe, headquartered in Parsippany, New Jersey, is a provider of expense and mobility management solutions with roots in the TEM business. Tangoe has to a great extent been growing by acquisitions like MOBI (end of 2018) and Asentinel (middle of 2017). As a result, Tangoe has ended up with its customer base spread on different platforms/products and has been going through a phase of product rationalization and employee integration. The Tangoe Platform has telecom, mobile and cloud applications. Rivermine supports TEM and MMS as well. In 2019, Tangoe launched a number of improvements and new features like enhanced usability, advanced analytics and UI/UX, automation of workflows through AI/ML (frequently referred to as bots), RPA, and improved carrier integrations.

Gartner estimates that Tangoe manages more than 9 million devices, including some wearables, more than 50% of which reside outside North America. Tangoe shows growth of about 3% year over year in number of managed devices, which is significantly lower than average.

In 2019, Tangoe continued to invest in the acquired MOBI bots to strengthen operational quality through automation. It introduced the following enhancements: “Audrey” (a chatbot that fields, supports and resolves 25% of all chat interactions with end users without live agent intervention) and “Rosie,” a bot that is available for Verizon and AT&T.

Tangoe should be considered for large, global opportunities and for deals that include financial management aspects. Last year’s acquisition of MOBI also makes Tangoe an option for deals that focus on managing the life cycle of the mobile estate.

Strengths

- Tangoe’s forte is its global capabilities for and experience with expense management, which make Tangoe still the broadest and deepest of all providers in this Magic Quadrant, and customers show appreciation for that. Support is available in 14 languages.
- Tangoe continues to pursue investment in RPA/automation that generates benefits such as reduced overage charges due to prescriptive actions and automation of invoice processing to reduce error rates.

- Tangoe's customers like the vendor's understanding of business requirements, including vertical aspects, regarding some of the regulatory challenges its clients have navigated through.

Cautions

- Tangoe's MMS portfolio capabilities are not seeing as much evolution as some of its peers on this Magic Quadrant. For instance, its complete device life cycle management capabilities are not growing, and it's missing an MDaaS offering.

- Some clients continue to be frustrated with Tangoe's lack of consistency in customer centricity, particularly related to the role of the account management teams and especially with non-North American deployments. Those deployments are slower or more challenging, and Tangoe's relationships with the carriers are not as strong.

- Some Tangoe clients note that the vendor could do more to articulate the value delivered during the engagement and explain how to better leverage, for example, reporting to make sound financial decisions.

Telefónica

Headquartered in Madrid, Spain, Telefónica is a global CSP. The company's MMS portfolio strategy remains consistent with last year's and centers on offering a balance between agility, value creation and protection of business where propositions aim to convert capital expenditure into operating expenditure. Examples include mobility as a service (MaaS; logistics services, extended warranty, swaps) or DaaS (hardware sold on leasing models). In 2019, Telefónica has deepened its vertical focus to align capabilities to business transformation, and new vertical sectors launched this year were FMCG — Beverage and FMCG — Cosmetics.

This vendor remains the largest and also one of the faster-growing providers in this Magic Quadrant in terms of devices under management, which were up more than 25% during the last year. Telefónica is the largest provider, in both Europe and Latin America.

Telefónica has launched a new customer support model, deploying a shift-left strategy, with five levels (replacing three levels), where the two new levels called Level 0 and Level –1 represent self-management and proactive monitoring.

In the last year, Telefónica revamped its DaaS proposition to homogenize its global capabilities through a new relationship with Ingram Micro as the main DaaS provider. The vendor has also boosted its insurance capabilities around devices with internal capabilities from its subsidiary Telefónica Insurance.

Telefónica should be considered for global deployments for both partial and fully scoped managed services. It is especially suitable for large companies with operations across Europe and Latin America.

Strengths

- Telefónica is evolving its MMS portfolio toward a digital workplace concept, extending its scope to any IT device. Telefónica is also the first provider to disconnect a TEM offer that is no longer relevant because of the transparent, unlimited connectivity offer. However, the service remains in place for customers with significant roaming or tailor-made plans.
- In addition to NPS, Telefónica pursues customer satisfaction metrics at several levels — account team, commercial offer, price delivery, operation, troubleshooting and billing. This helps Telefónica to understand customer expectations and determine where to prioritize investments.
- Customer references praise Telefónica for fully understanding the specific business requirements of their respective industry/sector and applying these requirements to how it delivers services.

Cautions

- Telefónica's Device Lifecycle Management (DLM) and MaaS offerings are now consistent although they are not available in all markets.
- Telefónica does not have any sales or operational staff in the Middle East, and they are currently managing no devices in the region.
- Reference customers suggest that Telefónica should strengthen its influence on an organization's use of its corporate mobility strategy to transform business processes.

Vodafone

Headquartered in London, England, Vodafone is a global CSP with a strong mobile heritage. Its largest deployment for a single customer spans across more than 70 countries. The company's Device Lifecycle Management (DLM) solution is at the core of the MMS offering. It is frequently bundled with UEM and/or connectivity offers such as Vodafone Red and local or off-net tariffs, and also with Vodafone Telecoms Reporting (VTR), which is always included free of charge and available for 39 markets globally. The new DLM financing option offers 12-, 18- and 24-month terms.

Vodafone goes to market as a direct service provider through the local operating companies, Vodafone Global Enterprise (VGE) and partner markets, and is increasingly focused on outcome-based propositions. Gartner estimates that Vodafone manages approximately 7.5 million devices in all geographic regions except Latin America, representing about a 200% year-over-year growth. The growth in number of connected devices is the highest of any vendor in this Magic Quadrant in both absolute numbers as well as percentage.

In 2019, Vodafone launched its DLM service in Austria, Switzerland, and the U.S., as well as significantly stepped up its activities in the Asia/Pacific region. Financing (through a financial services partner) and the ability to handle an on-site stock swap were also introduced in 2019.

Vodafone should be considered in all regions for global MMS deployments, including managed UEM, sourcing and provisioning services, and for device life cycle services in large global opportunities for smartphones and tablets.

Strengths

- Vodafone has matured its MMS offering, and it's resonating with prospects as evidenced by the tremendous growth in number of devices managed.
- The self-service opportunities have improved in the VGE Central Ordering portal, with more functions available. As part of the Velocity initiative to leverage AI and machine learning, customers can get recommendations and self-generate proposals.
- As witnessed by clients, Vodafone has become easier to do business with. Proposals arrive faster and are of higher quality. It's easier to contract with Vodafone and, at the same time, its pricing has become more competitive.

Cautions

- Despite Vodafone's global ambition, several of its capabilities are not available in several important regions. These include the DLM product (currently only available in 24 European markets and the U.S.).
- VTR currently covers only 39 operators in 39 countries, which are all basically either Vodafone operating companies or Vodafone partner markets. Clients that want reporting in a bigger footprint or full TEM functionality need to either leverage Tangoe through their partnership with Vodafone or use a third-party TEM provider.
- Client feedback indicates that it's not a seamless experience to get DLM, UEM and connectivity services bundled into a single deliverable.

Zensar

Zensar, a digital solutions and technology enterprise based in Pune, India, offers MMS as a solution set integrated into the company's managed workplace and digital workplace services portfolio, not as a stand-alone offering. Zensar did not provide a detailed update on its business. Its positioning is based on public information, Gartner analysts' judgments and information available to Gartner through other sources (vendor briefings, other Magic Quadrants and inquiries with customers). Zensar's MMS portfolio includes initiatives aimed at meeting targeted mobility outcomes by improving user experience through responsive, data-driven, automated life cycle management capabilities and managed EMM. It also includes analytics/reporting such as a digital UX index dashboard leveraging Zensar's The Vinci autonomics and orchestration platform.

The company's MMS business, which generates about 20% of its MWS revenue, remains concentrated in North America and Europe, which continue to account for more than 75% of its mobile devices under management. Enterprises with requirements in those regions that desire MMS from the same vendor providing their MWS can consider Zensar as an option.

Zensar did not actively participate in this evaluation.

Strengths

- Zensar focuses on differentiating its MMS capabilities with analytics and automation for improvement, utilizing analytics and reporting via The Vinci platform, to provide a user-experience-driven approach to improve mobile deployment productivity.
- The vendor provides field support — such as service delivery, inventory management, depot services and recycling — via more than 180 forward-stocking location depots placed throughout its business regions.
- Zensar's MaaS offering in the U.S. and the U.K. bundles iOS or Android mobile devices with UEM and life cycle services, program management, and Microsoft productivity applications.

Cautions

- The vendor's focus on providing MMS as a secondary offering of its MWS portfolio limits its appeal to enterprises that do not want to concentrate both service areas with a single vendor.
- Zensar's geographic strategy provides low MMS presence outside of North America and Europe, so clients with requirements based in other regions should validate any relevant processes and governance for those regions and any local markets there.
- Zensar generates little Gartner client feedback for MMS, indicating shortcomings in both its vision and execution of the marketing of those services in its targeted markets.

Vendors Added and Dropped

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

Added

- Calero, Cass Information Systems and Sakon were added to this Magic Quadrant.

Dropped

- Fujitsu was dropped as it no longer delivers MMS as stand-alone services, and MOBI was dropped as that vendor merged with Tangoe, which is evaluated in this Magic Quadrant.

Inclusion and Exclusion Criteria

Providers must meet all of the following inclusion criteria:

- Have at least 1.15 million smart mobile devices (exclusive of “dumb” phones) under management globally by the end of October 2019.
- Support at least 25% of their installed base outside their home region by the end of October 2019.
- Generate at least 25% of their MMS revenue through internal resources.
- Manage mobile assets and related processes in at least three of the geographies identified in Gartner user and vendor surveys:
  - Asia/Pacific
  - Latin America
  - The Middle East and Africa
  - Europe
  - North America
- Serve the same client in at least three regions
- Deliver all five MMS categories:
  - Sourcing and logistics management
  - Managed UEM
  - Security management
  - Financial management
  - Program management (including professional services)

Honorable Mentions

Fujitsu

Fujitsu, headquartered in Tokyo, Japan, offers its MMS customers a full range of services. Gartner estimates that Fujitsu now actively manages more than 1.1 million smart devices across all five regions; therefore, it didn’t quite meet the upgraded inclusion criteria for the number of devices managed. Fujitsu should be assessed for large opportunities, particularly in the Asia/Pacific region and Europe, but it is increasingly experienced in managing global requirements.

MetTel

MetTel is a total communications provider based in New York City, New York, and delivers a complete set of MMS services with a primary focus in North America; therefore, it did not meet the geographic criteria for this Magic Quadrant. MetTel manages significant volumes of predominantly COTS devices across virtually any vertical.

Stratix

Stratix, based in Peachtree Corners, Georgia, and a longtime vendor in this space, delivers all aspects of MMS, with a primary focus in North America, and, therefore, did not meet the geographic criteria for this Magic Quadrant. Stratix manages more than 2 million devices, of which one-third are ruggedized, as well as significant volumes of commercial off-the-shelf (COTS) devices. In terms of verticals, Stratix focuses on retail, transportation, field service and supply chain logistics. Feedback on Stratix performance is generally very good.

Telia

Headquartered in Stockholm, Sweden, Telia is suited to enterprises sourcing from the Nordics/Baltics for a European requirement. Its MMS portfolio includes life cycle services such as forward and reverse logistics from its own depot, support for CYOD/COPE/COBO/BYOD strategies, remote monitoring and management services for application delivery and remote configuration of devices, and a software license asset management (SAM) solution. Telia offers SLAs for on-target delivery, first-call resolution and NPS. Its key partners include Asavie (application usage, roaming cost control), Check Point Software Technologies (security), Microsoft, MobileIron (UEM), Palo Alto Networks, Snow Software (SAM), Zimperium, and all hardware vendors present in the Nordics, including ruggedized device vendors.

Evaluation Criteria

Ability to Execute

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (April 2020)

Completeness of Vision

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (April 2020)

Quadrant Descriptions

Leaders

Leaders must prove that they have developed and invested in systems and resources to address the growing needs of this market. They start with device-specific forward and reverse logistics and the management of customer-owned EMM instances, and grow to mobile application development and then integrate mobility into the business process when required. Leaders must consistently update their existing service products to address rapidly changing use cases so they can be relied on for enterprise-class delivery and service management. Leaders have proven technical competence and the ability to meet broad and deep user requirements.

Challengers

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

Visionaries

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

Niche Players

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

Context

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

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

Gartner interviewed the service providers that qualified for inclusion in this Magic Quadrant and participated in information collection, and then mined client interaction and peer insight data for further input for this research.

Gartner reviewed:

- The providers to characterize their current operations and capabilities, and to provide insight into their experiences of selling and providing global MMS in 2019
- Customers about their feedback and satisfaction (related to overall satisfaction, as well as satisfaction with point of service delivery) and their assessment of provider value

It should be noted that Gartner relies heavily on conversations with its own clients related to their expectations of and satisfaction with the providers in the Magic Quadrant. These data points represent many conversations involving various analysts worldwide, and these conversations contribute to the research as part of Gartner's peer review process. As appropriate, this analysis also incorporates input from Gartner Peer Insights. Lastly, we also include publicly available information related to the service providers evaluated.

Gartner's Magic Quadrant research process includes evaluation criteria that provided a comprehensive framework, which we used to analyze the Ability to Execute and Completeness of Vision of 13 providers of MMS worldwide.

Market Overview

More Focus on Automation and Security

Over the past 12 months, we have seen ongoing initiatives in automation, with service and support bots, virtual assistance and self-service assistance from several providers. Support options have broadened to be more time-specific (for example, 8/5, 12/5 or 24/7; calls only; chat only; or a combination of these). Similarly, associated support pricing is either all you can use for a fixed price for all users or priced at a predetermined incident rate. Overall, this means that enterprises now have more choices to select from when it comes to what support options should be available for their users.

Many of the providers also continued to invest in security-related capabilities such as MTD, threat prevention and real-time asset tracking to monitor whether behavior related to the device diverts from the norm.

In 2019, Pricing of MMSs Varied Greatly

During reviews of customer bid documents and vendor pricing submissions as part of the due diligence process for this research, Gartner notes that the span of pricing elements has widened. Pricing has also become more granular, with several options to choose from. Yet some providers have worked to simplify pricing across regions, for example, or to bundle managed services with other service aspects of their portfolio such as mobile airtime.

Still No Dominant Provider Type

The MMS market continues to evolve, with competitors expanding on their scope or geography, or repositioning their role (for example, Orange's role as a mobile MSI provider). Enterprises of all sizes and public organizations increasingly recognize the opportunity in transitioning the operations and administration of an increasingly complex mobile estate to third-party service providers. However, there are several types of providers, and no specific type dominates the landscape or fares significantly better than the others. System integrators and carriers take part of the share because of their geographic footprint and ability to upsell/bundle in with others' portfolio elements when that is relevant. However, for the purpose of this Magic Quadrant, they also have to be prepared to sell pure MMS deals where relevant. Interestingly, some enterprises would like to explore MMSs from the device manufacturers but, based on Gartner inquiries, those offers are rare. Clearly, TEM providers, value-added resellers and pure-play MMSs also compete effectively, even though an undertaking for a truly global requirement may be somewhat challenging for this group. In this Magic Quadrant, we have examples from these types of providers that offer global services.

In the past 12 months, we have seen yet more providers take further steps toward a more structured offer for mobility outsourcing, with device life cycle management services becoming more common.

Objectives, Buying Behavior and Satisfaction

There are several factors for deploying MMS, and the reference survey showed the prime reason is to create internal/operational efficiencies, which is the most important factor for nearly two-thirds of this population. The next most important factor is cost management (58%), followed by improve business process agility, improve customer relations/service and improve business process outcomes, each at 38%. Improve compliance and reduce risk is most important to 23%.

In terms of vendor selection, the most important influencing factor is strong service expertise. This is well aligned with the factors for deploying MMS. Other important factors are overall cost, product functionality and performance, and strong customer focus. These are all very well aligned with Gartner’s suggestion that clients evaluate providers through three lenses:

- Operational/functional (whether the requirements can be met and there is a portfolio)
- Commercial (what are the costs)
- Operational quality (how good is the provider at doing the job)

The overarching ambition is to ensure that the mobile estate is managed effectively both operationally and commercially. Many enterprises increasingly see managed mobility as fundamental to an eventual move to a UEM strategy, and several are considering whether and when to integrate MMS into their managed workplace strategy.

While the market continues to mature, there are also changes to the competitive landscape with acquisitions and new partners.

In 2019, customer references for this report indicated that 66% will be sourcing the entire contract back to their current MMS provider, up from 50% and 33% in previous years. A further 28% will recompete the contract in the open market, and the remaining 6% either will bring the work back in-house or responded “don’t know.”

Evidence

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

- Expand legacy MMS for corporate-owned devices to encompass individual-liable (BYOD) devices.
- Understand how to better enable employees through mobile access to corporate resources.
- Deploy, activate and integrate mobile assets and services to enable a connected workforce.
- Audit, inventory and optimize users’ usage of corporate mobile resources.

Gartner received submissions from 12 of the 13 service providers that qualified for inclusion in this Magic Quadrant. Providers were asked to describe their current operations and capabilities and to provide insight into their experiences with selling and providing global MMS in 2019 up to the cutoff date of 31 October 2019.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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

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

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

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

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

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