

Magic Quadrant for Managed Mobility Services, Global

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Managed mobility services have evolved into two themes, one on sourcing and logistics, the other centered on full outsourcing and geographic coverage. SPVM leaders should combine their technical, commercial and operational requirements to identify a provider that meets these needs most effectively.

Market Definition/Description

Managed mobility services (MMS) comprise the vendor-provided IT and business process services required to plan, procure, provision, activate, manage, secure and support mobile devices, 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. This Magic Quadrant does not currently evaluate the management of laptops or other end-user compute devices. Longer term, the scope of this research may be broadened to include such devices. However, we currently do not see sufficient laptops sourced and managed together with mobile devices, although the trend for jointly managing these devices is notably increasing, as is the exploratory interest for joint sourcing. A companion to this research covers critical capabilities for mobile devices, mobile network services and related managed services, including three regional use cases (see [Critical Capabilities for Managed Mobile Services, Global](#)).

Gartner’s coverage of MMS focuses on a provider taking over the responsibility for device acquisition, day-to-day IT management administration and support routines for mobile devices. MMS also includes 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 tools, skills, process, governance and discipline related to MMS to ensure that their mobile devices are operationally effective and managed at a competitive price. However, last year’s consistent message relayed in hundreds of Gartner inquiries still prevails. Regardless of continued maturity made by many providers, enterprise clients remain concerned that the delivery of MMS services by providers often fails to meet enterprise requirements 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). This past year, largely driven by the COVID-19 pandemic and many users' distributed locations, a new requirement for sourcing and distributing devices across a geographic requirement has emerged.

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. It 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](#)).

For 2021, Gartner maintains 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. 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 the following elements: 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. However, some MMS proposals 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. 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 (such as help desk services).

Magic Quadrant

Figure 1: Magic Quadrant for Managed Mobility Services, Global



Source: Gartner (April 2021)

Vendor Strengths and Cautions

Calero-MDSL

Calero-MDSL is a Visionary in this Magic Quadrant. With its roots in telecom expense management (TEM), Calero-MDSL is a Rochester, New York-based MMS provider offering expense management utilizing its own platforms, and other core services both directly and in partnership with major MMS competitors. The privately held company, the result of a merger in 2019, serves a global market focused on large North American and Europe-based customers, with emphasis on banking and finance, food and beverage, automotive, education, and technology businesses. Gartner estimates that Calero-MDSL had 3.36 million devices under management at the end of October 2020, including MDSL-managed devices it gained from the merger. About 80% of devices are in North America, with Europe accounting for about 15.5% and the remainder in Asia/Pacific (APAC), the Middle East and Africa (MEA), and Latin America combined.

Strengths

- **Calero-MDSL merger helping expand customer reach:** Completion of the Calero-MDSL merger, and organic client growth has expanded the combined company's reach into Europe, while making its device logistic capabilities more scalable in the North America, EMEA and APAC regions.
- **Mobility best practices:** Calero-MDSL launched a mobility center of excellence to advise customers on best practices as part of its managed services package. This includes mobility management implementation plus ongoing consulting to engage operations such as HR, finance or security relevant to the mobile policy and strategy, and management of the mobile estate.
- **Unified SLA visibility:** Calero-MDSL's customer dashboard provides centralized SLA reporting, reflecting its standardization of SLAs across all partners, and the ability to view all data through a single portal. This includes SLAs relevant to invoice and mobile order processing, call abandon rate, average speed of answer, and call, chat and email volume metrics.

Cautions

- **Global performance still developing:** Calero-MDSL still relies on North America and Europe for the majority of its business. Customers with requirements outside of those regions must watch the vendor's progress in its global strategy and confirm that it can meet its requirements in other regions.
- **Reliance on partners and competitors:** While making its logistics offerings more globally scalable, in most regions Calero-MDSL must utilize partnerships with MMS competitors DMI, Honeywell Enterprise Mobile and Vox Mobile. While this enhances the vendor's capabilities, it also makes it reliant on its partners' abilities to meet customer requirements and SLAs.

- **Device as a service (DaaS) still a niche offer.** Calero-MDSL still offers DaaS as a custom scope of work and only for North American customers. Given the proliferation of DaaS offerings by MMS providers and other IT service providers, such as technology value-added resellers, this could put the vendor at a competitive disadvantage with clients that prefer a single source for the solution.

Cass Information Systems

Cass Information Systems (Cass) is a Challenger in this Magic Quadrant. Headquartered in St. Louis, Missouri, Cass provides MMS services using a single customer platform, ExpenseSmart, in all evaluated regions, from operations based in the U.S., U.K., the Netherlands and Singapore. It has a vertical emphasis on large enterprises in the high tech, financial services and automotive sectors. Gartner estimates that Cass had 2.55 million mobile devices under management at the end of October 2020, up about 16% from a year earlier. About 75% of devices are in North America, with Europe accounting for another 13.6% and smaller numbers in Latin America and MEA. Cass has a direct sales force complemented by an indirect channel focused on large system integrators such as HCL Technologies and CompuCom.

Strengths

- **Focusing effectively on outsourced management:** Cass provides the full MMS stack as an outsourced manager, rather than licensing capabilities such as financial management as SaaS. This more in-depth engagement has helped support a reported client retention rate of 99.7% over the past decade.
- **GDPR-compliant capabilities in place:** Cass now can deliver services while maintaining EU end-user data residency in Switzerland, Germany, France and the U.K., a key consideration for clients evaluating GDPR-compliant vendors.
- **Carrier agent role without carrier commissions:** Cass acts as the client's agent to procure carrier connectivity and other services with compensation solely from the client. The sales strategy supports improvement in vision by addressing clients that may be concerned about potential conflicts of interest they perceive from such arrangements.

Cautions

- **Presence in Latin America is nascent:** Although Cass has expanded globally – for example, adding program management and financial management capabilities in Latin America through Argentina-based partner TNX – it still reports limited growth in the region. Clients with MMS requirements in Latin America should ensure that the vendor and its partners can meet their requirements in the region.
- **Lagging in artificial intelligence (AI):** Cass has indicated that it continues to explore expanding its use of AI to drive greater efficiency and improve customer experience in additional areas such as optimization processes, but lags larger competitors' improvements in that respect. Clients should challenge Cass regarding its process for optimization using AI.

- **Regional limitations for device as a service:** Cass' launch of a DaaS offering in North America was delayed in 2020 partly due to pandemic-related factors, and it did not yet offer the product in other regions during the evaluation period for this research. Clients interested in a DaaS option for device and possibly mobile service procurement must ensure that Cass can meet their requirements outside of North America.

DMI

DMI is a Leader in this Magic Quadrant. Headquartered in Bethesda, Maryland, DMI is a global MMS provider that focuses on enterprise-grade mobility and delivers through a combination of its own resources in key markets and partners in other regions and markets. DMI has a strong presence in the retail, manufacturing, financial services, utilities and U.S. federal sectors. Gartner estimates that DMI managed more than 3.1 million mobile devices (up 19%) from over 300 enterprise clients as of the end of October 2020. Several customers have more than 100,000 devices under management; 66% of devices are in North America, 14% in MEA and 11% in Europe.

DMI's market strategy is built on a combination of security, automation, analytics, ROI and process aimed at managing any type of device – both with or without connectivity. Investments are geared toward more robust inventory management and leveraging AI and robotic process automation (RPA) for an enhanced customer self-service experience.

Strengths

- **Continued investment in products and capabilities:** DMI continues to demonstrate strong understanding of the business challenges facing its clients. It continues to invest in software and platforms to increase both analytical capabilities and the level of automation through bots and AI/machine learning (ML).
- **Strong service execution:** Service execution remains strong, and DMI is able to consistently meet or exceed its generally high (by industry standards) service-level commitments for response times. DMI frequently receives high customer satisfaction scores. DMI also now characterizes its metrics for both business value and financial value.
- **Complete offering:** DMI has a strong ability to deliver a “one-stop shop” experience, including mobile strategy consulting and integration into enterprise applications and processes.

Cautions

- **Growing geographic coverage:** 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. Customers should challenge DMI when going into new countries/regions to ensure that adequate coverage is in place when needed, and that potential partners are fully quality-assured.
- **Pricing is at the higher end:** DMI's pricing can be slightly higher than average for comparably quoted services, especially for help desk and UEM management. DMI is also the only provider with regional price uplifts, though related to region-specific components.

- **Dependency on local delivery partners:** With a presence of its own in only seven countries (the U.S., Canada, Spain, the Netherlands, the U.K., India and China [Hong Kong]), DMI is heavily reliant on fulfillment partners for TEM, just like most of its competitors. Customers should verify adequate coverage of their footprint by insisting on checking with DMI reference clients with identical or similar footprints.

DXC Technology

DXC Technology (DXC) is a Niche Player in this Magic Quadrant. Headquartered in Tysons Corner, Virginia, DXC is a global IT services company that offers MMS that sits in its managed workplace services (MWS) offering, DXC Modern Workplace, but is sold separately. DXC provides a comprehensive multiregional mobility services portfolio. DXC's Modern Workplace encompasses a managed mobile device base of an estimated 1.2 million globally by the end of October 2020, flat from the previous year (lower than average). Nearly 50% are in EMEA, 37% of those are in the Americas and the remainder in Asia/Pacific. 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, JAMF, Microsoft and VMware.

Strengths

- **Investments into security and business agility:** DXC is investing in zero-trust solutions, more data and application protection, and additional compliance solutions for regulated industries. DXC drives intelligent AI automation for faster deployment and more data-driven insights during the device life cycle.
- **Agile development:** DXC has adopted agile methodologies throughout the product life cycle management of its products and services. This enables DXC to be more responsive to changing client needs.
- **Breadth of customer support services:** DXC offers a single entry point for services and support, presented as an intelligent personal assistant, and experience-level agreements (XLAs) based upon outcomes. DXC also delivers support in 56 languages from 60 delivery locations, which is the highest number among its peers in this research.

Cautions

- **Strong focus on large clients:** DXC is focusing on large clients, which means that clients not meeting this criterion will need to negotiate hard to get access to new features, functionality and services, and top talent.
- **Lack of growth:** DXC has been unable to keep pace with the rest of the market, as evidenced by the lack of growth in its number of devices managed globally. This is despite a broad portfolio, although with limited investments in it while the unit was under a 12-month strategic review

process. In December 2020, DXC announced partnership with Microsoft for a new Modern Workplace solution.

- **Plagued by a yearlong uncertainty for the MWS business area:** In November 2019, DXC announced that it was looking for “strategic alternatives” for three of its business areas, including its workplace and mobility business. In November 2020, DXC announced it will retain the MWS business and presented a new strategy and a new solution for this business area. Clients need to ensure the new strategy aligns with their own requirements and carefully assess delivery capabilities.

GEMA

The Global Enterprise Mobility Alliance (GEMA) is a Visionary in this Magic Quadrant. Based in Baar, Switzerland, GEMA is a pure-play MMS organization offering services in more than 100 countries through 21 licensees globally, serving 83 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 (member) sales forces and its indirect channel, which includes large value-added resellers and workplace solution service providers such as NTT and Ricoh. Gartner estimates that GEMA managed about 8.4 million devices by October 2020, of which some 30% are managed in APAC and 30% in Europe, followed by 18% in MEA and 11% in North America. The strategic direction is toward offering all end-user devices (including multiple devices per user), connectivity licenses and tariffs under a single monthly invoice, with onboarding and offboarding additional devices and services through portals, including breach reporting of security tools.

Strengths

- **Effective global and local coordination:** GEMA shows a relentless drive for global processes, terminology and consistency while maintaining local language, local presence and local contact points. This is attributable to strict governance and discipline.
- **Centralized procurement for multicountry logistics:** Centralized procurement has become a key requirement, and GEMA showed early appetite for and understanding that this is a problem, which, once solved satisfactorily, will likely serve as a precursor to a requirement for more management capabilities.
- **A strong set of its own global depots:** GEMA clients have access to the depots of their licensees, where in the last year at least 10 depots have had to scale to 10,000 devices regularly. Ensured access to depots is key to fulfilling the logistics challenge. Still, clients should always ensure the depots are within realistic reach of meeting the SLA.

Cautions

- **Fragmented sales strategy:** GEMA’s sales strategy, where the direct sales force of the licensees is complemented with GEMA business development teams and a growing network of channel partners including TEM providers, UEM providers and carriers, could dilute focus.

- **Have only recently selected one global TEM partner:** As of October 2020, GEMA was still in the selection process for a global partner to use for standard deployment. That decision has now been made.
- **Portfolio structure hinders rather than helps:** The seven portfolio areas (consult, procure, deploy, assist, manage, secure, control) and thereby seven entry points are too many to both focus the conversation and to make the immediate problem sufficiently critical. This has made it difficult for clients to understand what to buy and focus on. The portfolio is being restructured.

HCL Technologies

HCL Technologies (HCL) is a Visionary in this Magic Quadrant. Headquartered in Noida, India, HCL's MMS offering is part of its digital workplace practice. The strategy remains focused on delivering a business-enabling, consumer-comparable experience. HCL pursues a consultancy-first approach toward creating a well-integrated mobility ecosystem, ideally enabling transformation. HCL serves customers from more than 40 global delivery centers, with new service centers in Vietnam, Lithuania, Germany and Canada. HCL has a total of 30 help desks offering support in 45 languages. HCL manages an estimated 3.7 million devices globally, with 85% split between North America and Europe. Beyond program management, UEM is the category that HCL most often delivers, with a minimum 75% takeup across the regions.

HCL's 24-month roadmap includes adding more use cases for device-heavy sectors, such as healthcare and retail, and to extend device as a service (for RFID readers, scanners and so on).

Strengths

- **Fully embraces XLAs:** More than 55% of new customers now have XLAs and outcome-based pricing. In addition, 70% of large customers have a dedicated team to benchmark experience. HCL's initiatives for analytics, automation and cognition illustrate a strong commitment to mobile enablement of users.
- **Drives automation and a shift-left support model:** DRYiCE Lucy, HCL's mobile chatbot, now accounts for nearly half the mobile contacts, up from 32% one year ago. HCL's WorkBlaze tool monitors data to deliver a User Experience Index that can help preempt incidents and improve remediation rates.
- **Succeeds in delivering its managed security:** More than 50% of its customer base buys managed security services from HCL. This is a focus area where partners such as Lookout and Broadcom (Symantec), as well as HCL's security consulting operation and a well-articulated mobile context, have worked well.

Cautions

- **Focus on large organizations:** HCL's focus on larger clients, along with its appetite for transformation, potentially implies that organizations that are either small, cost-centric or planning to evolve their managed mobility services engagement over time may not be a perfect

fit for HCL. To overcome this issue, HCL launched an offering in 2020 that focuses on small and midsize businesses (SMBs).

- **Pricing is higher than the average:** Pricing is on the higher end, especially for implementation and help desk. HCL is also flexible with its pricing options, such as persona-based, fixed, full-time equivalent (FTE)-based, outcome-based, per-instance or project-based – to the point where it can be confusing to both assess pricing and to evaluate the correct service offering.
- **Fragmented financial management component:** HCL's managed financial component has the least traction among its customers; it is offered through vendors such as Calero-MDSL, Cass Information Systems and Tangoe. This is further complicated by Tangoe and Calero-MDSL offering multiple platforms.

Honeywell

Honeywell is a Challenger in this Magic Quadrant. Headquartered in Charlotte, North Carolina, Honeywell Enterprise Mobility (HEM) is a part of Honeywell International. It provides MMS on a global basis, and 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 and has a strong presence in retail, manufacturing, logistics and warehousing. Gartner estimates that the vendor manages over 8 million devices (up 100%), of which a substantial part are field service devices; 71% are in the U.S. and a further 14% in Europe. HEM provides global logistics services and support out of 24 centers, with its own physical presence on all continents.

Honeywell's strategy going forward is built on being positioned to be the manager of entire mobile fleets. Its aim is to combine the ruggedized devices for verticals like transportation and logistics and healthcare as well as smartphones and tablets used in general settings. The objective is for all users to be both safe and productive.

Strengths

- **Strong focus on productivity enablement:** HEM is focused on productivity solutions aimed at maximizing device uptime and availability, and reducing wait time for service and support.
- **Proven scalability:** HEM has very strong depot and on-site repair services, and has several customers with hundreds of thousands of devices under HEM management.
- **Broad set of devices supported:** HEM provides hardware procurement, management and support solutions not only for widely deployed iOS, Android and Windows 10 devices, but also for non-Honeywell ruggedized and purpose-built field workforce devices.

Cautions

- **Proceed carefully when leveraging HEM outside of its core comfort zone:** HEM has a strong focus and background in managing mission-critical devices for frontline workers. Many of

these core competencies can be leveraged when managing devices of knowledge workers as well, but additional services may not be so well-integrated into a homogeneous service delivery.

- **Not able to deliver everything everywhere:** HEM extends its own footprint with partners, some working exclusively for HEM, to be able to deliver most of its services on a global basis. However, there is only limited support in Latin America, and no support at all in Asia/Pacific or MEA for device lease financing, on-site device repair/return and device recycling.
- **Room for improvement in DaaS:** Enterprises should carefully assess HEM's capabilities in the area of delivering a seamless and flexible DaaS solution, which clients continue to cite as needing improvement. Currently this is delivered as a customized solution.

IBM

IBM is a Leader in this Magic Quadrant. IBM, headquartered in Armonk, New York, is an IT service provider with a comprehensive global MMS portfolio as part of its broader Digital Workplace Services (DWS), covering all regions with its own resources. In October 2020, IBM announced it planned to spin off its Managed Infrastructure Services unit, which includes its MMS business, into an independent company (currently referred to as "NewCo") by late 2021. Gartner estimates IBM had 9.21 million devices under management globally by the end of October 2020, up about 10.8% from a year earlier. About 58.3% of devices were in North America, with Europe and APAC accounting for 20.7% and 14%, respectively. IBM positions its MMS capabilities as industry-agnostic, but cites healthcare, financial services and distribution as key verticals during the past year.

Strengths

- **NewCo still a large-scale provider:** Post-spinoff, NewCo will be a roughly \$19 billion revenue company. NewCo will have the opportunity to maintain existing long-term agreements with business assets that remain with IBM after the spinoff, and intellectual property that is owned by DWS, such as the MMS offering Device Health with Watson, will remain with DWS as part of NewCo.
- **Digital experience management enhancements:** IBM updated the digital experience monitoring solution of its managed UEM portfolio to enable "self-heal" proactive remediation of user incidents related to device and application issues. Its aim is to reduce events that drive negative user experience.
- **Single architecture provides differentiation:** With MMS, a subset of IBM's broader Digital Workplace Services business, the vendor leverages DWS tools for MMS functions critical to customer support, device life cycle management and other mobility services.

Cautions

- **NewCo transition warrants attention:** NewCo will not be independent until YE 2021, and IBM has announced significant layoffs during the transition. Clients should be aware of the potential for transitional service issues that sometimes accompany transactions such as spinoffs.

- **MMS frequently part of larger engagement:** Many IBM clients opt to purchase MMS as part of larger IBM engagements, typically large outsourcing agreements. While the vendor demonstrates the capability to bid for and win pure-play MMS deals, clients should ensure IBM will effectively meet these smaller requirements.
- **Partnerships utilized for expense management:** IBM will partner with competitors for some elements of its expense management offerings. Clients should ensure that they discuss with IBM any concerns over IBM being overly dependent upon partner innovation for continuous improvement and innovation for expense management.

MOBILITY MEA

MOBILITY MEA is a Niche Player in this Magic Quadrant. Headquartered in UAE, MOBILITY MEA is a GEMA alliance partner and has its own MMS operations in UAE. It covers an additional 12 countries in the MEA region (Bahrain, Egypt, Jordan, Lebanon, Kenya, Kuwait, Morocco, Nigeria, Oman, Pakistan, Saudi Arabia and South Africa) through its network of 16 partners, and covers other regions through GEMA partners. Gartner estimates that MOBILITY MEA had 1.75 million mobile devices under management by the end of October 2020. The majority of devices are in MEA, with a moderate number of devices in Europe and Latin America. MOBILITY MEA has a direct sales force that is complemented by selling via its MMS partners, carriers, technology partners and GEMA alliance partners.

Strengths

- **Strong team with MEA experience:** The management team has a strong and long track record in the Middle East and Africa in enterprise mobility, which has been complemented with recruiting local top talent. The team has been able to leverage its prior success in previous companies to build strong partnerships with companies such as VMware and Google. MOBILITY MEA is the only Android Enterprise Recommended MSP in the MEA region.
- **Regionally focused execution:** MOBILITY MEA is driving development of best-practice processes, automation, partnerships, R&D and presales out of UAE while leveraging core components of GEMA for its own use, as well as for use by its regional partner network. Due to its leading position as an MMS provider in the Middle East and Africa, MOBILITY MEA is also a fulfillment partner of other MMS providers.
- **Consultative approach:** MOBILITY MEA goes to market with a consulting-led approach, which is how many clients prefer to procure products and services in the region. The consultation first assists the client/prospect to design a solution, and then the second phase pulls together technology and services in an offer to meet client requirements.

Cautions

- **Consultative selling may prove difficult to scale:** The consultative selling approach that has served MOBILITY MEA well in the MEA region may prove difficult to scale, and be less relevant when the provider expands into adjacent regions. Clients should increasingly look for

references in their own verticals where a standardized approach has been deployed for improved economies of scale and cost-efficiency.

- **In-region partnering requires firm governance:** MOBILITY MEA leverages partners, which may lead to inconsistent service delivery unless firm governance and certification is in place. Clients should request references that have as similar a footprint as possible to ensure the same service experience can be delivered across the entire footprint.
- **Patchy international coverage:** MOBILITY MEA currently has hardly any devices under management in North America and APAC. Clients requiring support for these regions need to understand what external partners will be used and any potential differences in service delivery.

One Source

One Source is a Niche Player in this Magic Quadrant. Based in Greenville, North Carolina, One Source is a pure-play MMS provider, driving a communications life cycle management proposition with a vision to become the leading provider of fully managed connectivity, computing and security services to midsize and large enterprises. This encompasses a combination of processes (for adding peripherals including mobile policies, SaaS and device kitting), security and financial discipline, including traffic shaping and carrier negotiations.

One Source focuses on the banking, healthcare, retail and industrial verticals – all sectors with either high employee turnover, geographic diversity or growth potential. In June 2020, One Source acquired Alliance Communication Management, which complemented its MMS offering and added kitting capabilities. Gartner estimates that One Source manages 2.9 million devices, of which approximately 75% are held in the U.S., followed by 18% in Europe and a negligible percent among the remaining three regions.

Strengths

- **Strong SLA targets:** With consistent 12-month outperformance across the range, One Source aims to raise the bar for consistency, reliability and predictability, although it has not yet standardized its XLAs. This is in combination with competitive pricing generally, including for help desk.
- **Strong security focus:** One of the most security-focused providers on this Magic Quadrant, One Source aims to protect against mobility as a conduit for incidents and has added Cisco, Proofpoint, Firefox (for endpoint) and Cofence (for email) as partners for security. This is the fastest-growing area for One Source.
- **Customer experience:** All customers, regardless of spend, have a dedicated customer success manager. These resources provide ongoing consultations to get the best value out of One Source. For larger customers, it also offers technology adoption plans and quarterly business reviews for strategic and tactical alignment.

Cautions

- **Currently very U.S.-centric:** All of One Source's direct sales resources are based in the U.S., as are its depots (albeit with plans for expanding into Europe). Its security operations centers offer support in only English and Spanish.
- **Client success is largely measured in traditional metrics:** These include monetary savings, time to resolve and timeliness. Clients should challenge One Source to deliver into end-user experience agreements or outcome-based SLAs.
- **Cautious investment plans:** While growth plans are ambitious, One Source's underlying strategy is based on market education and established core components such as security and cost optimization. Automation and geographic distribution come further down the line. Clients looking for more transformational initiatives or full mobile outsourcing across regions need to carefully validate One Source's ability to execute effectively.

Orange Business Services

Orange Business Services (Orange) is a Visionary in this Magic Quadrant. Headquartered in Paris, Orange is a global communications service provider (CSP) offering a broad managed mobile services portfolio. Its Multisourcing Service Integration (MSI) for Mobility is the foundation of its 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 Cloud. Orange goes to market as a direct service provider. Gartner estimates that the vendor manages around 2.75 million devices across all five regions, up 10% from last year, with the majority in Europe.

Orange's sales strategy is focused on its 3,000 clients, with a key target on the top 500 accounts based in Europe. Orange is also working with its FreeMove partners to digitize the service journey for customers.

Strengths

- **Strong partner relationships:** Orange recognizes that successful MMS relies significantly on partners, with a consequential effort on ensuring strong governance. As MMS evolves, this skill will be key. Orange's governance proposition is both vendor- and connectivity-agnostic, which, for a carrier, is refreshing.
- **Cost-savings calculator for quantifying the cost benefits for MMS:** This feature adds significant value for clients. With a sales strategy that has been refocused on existing large global customers, the tool has been tailored to this specific customer segment and consequently is not as general as some others.
- **Unified service management platform:** Orange's specially adapted ServiceNow ITSM platform for enterprise mobility combines workflow automation, customer experience (leveraging the ServiceNow CSM module), internal efficiency (configuration management database as source of truth, IT service management module for internal operations) and multicustomer support. It

enables the consolidation and digitization of key processes that support mobile services (such as request, change and incident management) onto a single service management platform.

Cautions

- **MMS strategy for growth is cautious:** Orange's strategy is now more centered on growth in mobile connectivity, including 5G. Consequently, clients that look for transformational deals should ensure that Orange is the right provider for them.
- **No device depots of its own:** Orange engages partners for all its device depots. This means Orange could be using the same depots that other providers are using, and will have to ensure that its devices under management are the top priority in unforeseen eventualities, which could lead to depot capacity constraints.
- **Lags in automation or shift-left support:** Orange has made little progress, compared with its peers in this research, in the use of bots, self-serve guidance, and (with the exception of UEM) initiatives for remote diagnostics and efforts to preempt incidents.

Sakon

Sakon is a Visionary in this Magic Quadrant. Based in Concord, Massachusetts, Sakon provides a complete MMS solution globally and manages an estimated 1.5 million devices in all five regions, with 60% in the U.S. The vendor delivers its capabilities via 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 estates, orders, tickets and SLAs. In 2020, Sakon also added industry-focused partners into its ecosystem, as well as further certifications, especially related to security.

Sakon's vision is to address this challenge of disparate systems and unify the IT profile of employees. Sakon's platform allows for integration with other systems, and its data management capabilities enable normalization of data to provide a single view. The objective is to deliver one view that companies can use to better understand the usage, cost and sentiments of their workforce.

Sakon offers MMS around device ownership structures such as full or lite MMS for corporate-liable environments, BYOD, hybrid or mobile device as a service (MDaaS). A la carte offers are also available.

Strengths

- **Strategy for unification** of the user profile related to MMS of employees through a central platform with data related to consumption, devices, support, subscription and licensees and associated cost.
- **Flexible device leasing:** Sakon has one of the most flexible device-leasing offers among its peers in this research, with time frames such as month-to-month or 12-, 24- and 36-month

options. As an evolution, Sakon launched its device-as-a-service offer in mid-2019 and currently has customers for this offering in North America and Europe.

- **Innovation teams focused on end users and verticals:** At the end-user level, Sakon offers enhanced ServiceNow integration and virtual credit cards for BYOD stipends. As a consequence of the pandemic, Sakon also focuses on three verticals: healthcare, transport and logistics, and fintech.

Cautions

- **Reliant on a network of integrated service providers:** Sakon's business model relies heavily on a provider network for device kitting and staging, finance help desk, and all depot services. While not uncommon, this may expose Sakon to capacity constraints for enterprises, if multiple clients want to use any one partner at the same time.
- **May be less committed to channel sales:** Sakon has now offered its capabilities directly for three years and is increasingly recognized as a potential direct provider. This also changes the dynamics as the channel begins to see Sakon as a competitor. Channel clients must confirm the channel's commitment to Sakon.
- **SLA environment is basic, with no standard XLAs:** While mostly meeting or exceeding the current targets, the environment is financial-management-centric.

Tangoe

Tangoe is a Visionary in this Magic Quadrant. Tangoe, headquartered in Indianapolis, Indiana, has its roots in the TEM business. As a result of numerous acquisitions, Tangoe has had its customer base spread onto different platforms, but has worked to rationalize its portfolio and platforms. These programs have continued into 2020. In the past year, Tangoe centered its mobile offering around Tangoe One Mobile. It has also added several enhancements, integrations and data reconciliation capabilities with UEMs, integration with recycle partners (Reconnect), an integrated partnership with Apple, modern process enhancement with orchestration capabilities (workflows), and dynamic live chat.

Gartner estimates that Tangoe manages more than 9 million devices, of which 50% are in Europe, a further 46% in North America and the remaining 5% are split across the other regions. For 2020, Tangoe shows growth of about 3% year over year in a number of managed devices, which is lower than average among the providers in this research.

Over the next 24 months, Tangoe will further enhance Tangoe One to offer functionality, integration and analytics for large global customers.

Strengths

- **Strong global expense management capabilities:** This capability is Tangoe's forte, with its depth of experience and further investments, such as a claims manager for advanced billing disputes. It is also investing in automation, where 88% of all orders globally are accurately

processed automatically. For MMS clients with a financial requirement, Tangoe will make it to the shortlist in the vast majority of cases.

- **Tangoe's pricing now more competitive:** Pricing is competitive in general, and there are no specific implementation fees. There are no longer any regional uplifts. The depot service is subscription-based and includes kitting, staging, recycling and hot swaps. Actual repair costs are charged separately.
- **Focused on customer experience:** Tangoe has launched several initiatives to improve its customer focus. These include a mobile customer user group that meets monthly, as well as an operational enablement team, an executive sponsor program, and a tracking mechanism for strategic business review and surveys.

Cautions

- **SLAs are lower than the market average:** Tangoe's track record for areas such as abandoned calls and speed of answer has been varied, in part due to a transition period in 2019. There are no end-user experience agreements or productivity metrics. However, Tangoe offers 10 live help desk languages.
- **Delayed launch of device as a service until 2021:** Tangoe is now one of the few providers in this Magic Quadrant without such an offer. The delay was attributed to the pandemic, and a strategic partner has been engaged.
- **Conservative growth plan:** Tangoe's growth plan in terms of device growth is more conservative than the Leaders in this research. Geographically, it is based on a sales force of only a handful of FTEs outside North America. This is expected to grow, yet clients that are sourcing from outside of the U.S. may want to confirm Tangoe's commitment to maintaining and growing the non-North America-based sales force.

Telefonica

Telefonica is a Visionary in this Magic Quadrant. Headquartered in Madrid, Telefonica is a global network service provider offering a full suite of MMS, primarily in Spain, the U.K., Germany, Brazil and Latin America, with key verticals in banking, retail and technology. Gartner estimates that Telefonica's devices under management totaled about 18 million as of August 2020, down about 4.9% year over year. This was due partly to line attrition as clients reduced their mobile deployments during the COVID-19 pandemic. Despite the reduction in the total number of devices, Telefonica's UEM installed base has increased by 21% in total, 29% in Latin America and 10% in Europe. About 58% of managed devices are in Latin America, with Europe accounting for another 42%.

Strengths

- **Global capabilities continue:** While focused on four key markets, Telefonica can provision mobile connectivity in most countries globally via its alliance with 18 major carriers, including

AT&T, Claro, Telenor Group, Singtel, MTN and Telstra. The vendor can leverage the capability with its device-as-a-service offer, which is now available in all regions.

- **Execution on UEM growth during pandemic:** While its overall managed device total declined, Telefonica increased its installed base of managed UEM devices. The vendor's effectiveness at addressing customer needs for updating its management of devices that shifted from the corporate workplace to work from home (WFH) reflects its general strengths in that capability.
- **Keeping pace with AI for IT operations (AIOps):** Telefonica has integrated an AI module to better leverage its LUCA big data engine for providing additional proactive management insights for cost optimization and device usage, such as warnings when a device has hit 80% of its tariff allotments.

Cautions

- **The restructuring may impact consistent global MMS deployment:** Telefonica's restructuring in November 2019 to focus on Spain, the U.K., Germany and Brazil, with operational spinoff of businesses in Latin America, may lead to clients with requirements for those markets to seek evidence that consistency for MMS deployment will not be impacted.
- **Limits on geographical willingness to bid:** Although Telefonica will bid for MMS opportunities globally, it may be less likely to do so if all customer requirements are "off net" from its network or if specific geographies want to serve only a small number of devices.
- **Less focus on Asia, the Middle East and Africa:** Telefonica has very few FTE in sales in Asia and none in MEA. Telefonica does not manage any devices in MEA and few in Asia. Clients with requirements in these regions should seek evidence of commitment to the region.

Vodafone

Vodafone is a Visionary in this Magic Quadrant. Headquartered in London, Vodafone is a global CSP with a strong mobile heritage. Its largest deployment for a single customer spans 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.

Vodafone goes to market as a direct service provider through local operating companies, Vodafone Global Enterprise (VGE) and partner markets. Gartner estimates that Vodafone managed approximately 10.5 million devices by the end of October 2020 in all geographic regions except Latin America, and with hardly any in North America, representing about a 38% year-over-year growth.

Strengths

- **Strong evolution of offering:** Vodafone continues to expand its offerings, and in the last 12 months has added support for ruggedized and other types of devices in its DLM program.

- **Increased automation speeds up the processes:** Vodafone continues to invest heavily in digital tools and automation in support processes, and chatbots and AI are used in the help desk to resolve issues. The number of automatically generated bids (including customer self-generated proposals) for mobility reached about 50% at the end of October 2020, resulting in reduced turnaround times for bids.
- **Investments in customer experience (CX) are paying off:** The work by Vodafone Business to improve CX has translated to improved metrics like Net Promoter Score (NPS) and mean time to repair (MTTR) across the product set, which is also supported by direct customer feedback from Gartner clients.

Cautions

- **Geographic differences remain:** Several products, offerings and services are not available across the complete footprint, such as the DLM product, which is currently available in the majority of European markets plus the U.S., albeit with expansion planned. Customers need to carefully evaluate Vodafone's current and planned services footprint against their own requirements.
- **Slow to embrace UEM:** Vodafone has been slow compared to many other vendors in this Magic Quadrant when it comes to migrating to support modern, cloud-based versions of UEM products. However, Vodafone provides professional services to support configurations, migration and ongoing deployments.
- **Bundled pricing makes comparisons difficult:** Vodafone breaks down the device fee from the services fee, which bundles the cost for activities like device staging, kitting and shipping into the monthly charge by amortizing these costs over the time of the contract. However, most other MMS providers will charge for these services upfront, followed by a lower monthly charge. Clients engaged in a competitive bid situation need to carefully study the charging models to end up with a true total cost of ownership (TCO) estimate for the respective bids.

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

MOBILITY MEA and One Source have been added to this Magic Quadrant.

Dropped

Zensar was dropped due to insufficient data available to confirm inclusion thresholds.

Inclusion and Exclusion Criteria

Providers must meet all of the following inclusion criteria:

- Have at least 1.25 million smart mobile devices (exclusive of “dumb” phones) under management globally by the end of October 2020.
- Support at least 25% of their installed base outside their home region by the end of October 2020.
- 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 Mention

Additional vendors that frequently come up in Gartner inquiry but did not meet one or more of the current inclusion criteria are:

- **Insight:** Insight is a GEMA partner that represents the U.S. but has its own presence in several international markets. Insight provides full MMS services in North America, including managed endpoint, life cycle services, mobility service desk and expense management services. This portfolio supports the existing UEM market needs for Windows 10 and macOS for commercial, enterprise and government clients.

- **ISEC7 Group:** Germany-based full MMS provider ISEC7 Group has global reach and a specific focus on security.
- **Mobile Solutions:** Mobile Solutions is a SaaS provider of MMS based in Centennial, Colorado. The company's product suite enables organizations to reduce mobility spend, providing a tangible ROI while also streamlining internal workflows within a single portal to monitor mobility.
- **Techstep:** Techstep is based in Norway, serving 550 Nordic companies with a complete MMS portfolio based on its platform, Flow.
- **WidePoint:** Headquartered in Fairfax, Virginia, WidePoint offers a complete set of scalable MMS capabilities supporting global deployments. With a focus on the public sector and highly regulated industries, WidePoint's Trusted Mobility Management (TM2) places a strong emphasis on enhanced security.

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 2021)

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 2021)

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, 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 services or outsourcing relationships that span tactical and strategic user requirements.

Niche Players

Niche Players are typically specialists with more focused service portfolios, and they service relatively few vertical markets or focus on limited mobility platforms (for example, field service equipment). In addition, Niche Players are typically emerging service providers or providers that are currently focused on a segment of MMS or on a specific geography yet meeting the inclusion criteria.

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, 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 2020
- 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 15 providers of MMS worldwide.

Market Overview

As the world adapted to the pandemic with such an unprecedented and very rapid move to home working for large populations of employees, there were some market aspects either emerging or manifesting themselves further. The market is composed of many providers with various "foundations" such as TEM-based, IT service providers, carriers or pure players.

A Strong Logistics Requirement

As users went home, the already oft-challenging process of managing such basic logistics as getting devices out to users became an even greater challenge. Gartner inquiries show a growing number of multinational companies specifically that are looking for providers to just ensure that their users have a device in hand, and expect that the rest will follow. This requirement evolved as 2020 progressed, and now into 2021, as we see more references regarding reverse logistics and more effective asset tracking, staging and kitting.

More Focus on Automation and Security

Over the past 12 months, we have seen ongoing initiatives from several providers in automation, with service and support bots, virtual assistance, and self-service assistance. 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," "all you can eat" for all users, or priced at a predetermined incident rate. Overall, this means that enterprises now have more choices 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 mobile threat defense, prevention and real-time asset tracking to monitor whether behavior related to the device diverts from the norm.

In 2020, Pricing of MMS Varied Greatly

During reviews of customer bid documents and vendor pricing submissions as part of the due-diligence process for this research, Gartner noted that the range of price points for MMS have widened. Pricing has also become more granular, with several options to choose from, such as flat rate for a bundle or price per individual capability. Yet some providers have worked to simplify pricing (across regions, for example) or to bundle pricing 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 within the market landscape (for example, Orange Business Services' role as a mobile MSI provider). Enterprises of all sizes and public organizations increasingly recognize the opportunity inherent in transitioning the operations and administration of an increasingly complex mobile estate to third-party service providers. However, there are several types of MMS providers, and no specific type that dominates the landscape or fares significantly better than the others. System integrators and carriers take a 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 MMS from device manufacturers, but based on Gartner inquiries, those offers are rare. Clearly, TEM providers, value-added resellers and pure-play MMS providers 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 all 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 hundreds of Gartner inquiries cite that the prime reason is to combine reduced costs with enhanced operational efficiencies. This is especially the case since so many users are now working remotely, and a portion will likely remain working at least partially remotely. Cost containment and cost control remain important considerations, and there is emerging focus on more granular TCO models.

Evidence

Gartner received submissions from all 15 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 2020 up to the cutoff date of 31 October 2020.

Evaluation Criteria Definitions

Ability to Execute

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

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business

unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

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

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

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

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

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

Completeness of Vision

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

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

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

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

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

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

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

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

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