Global Enterprise Mobility Services: Competitive Landscape Assessment

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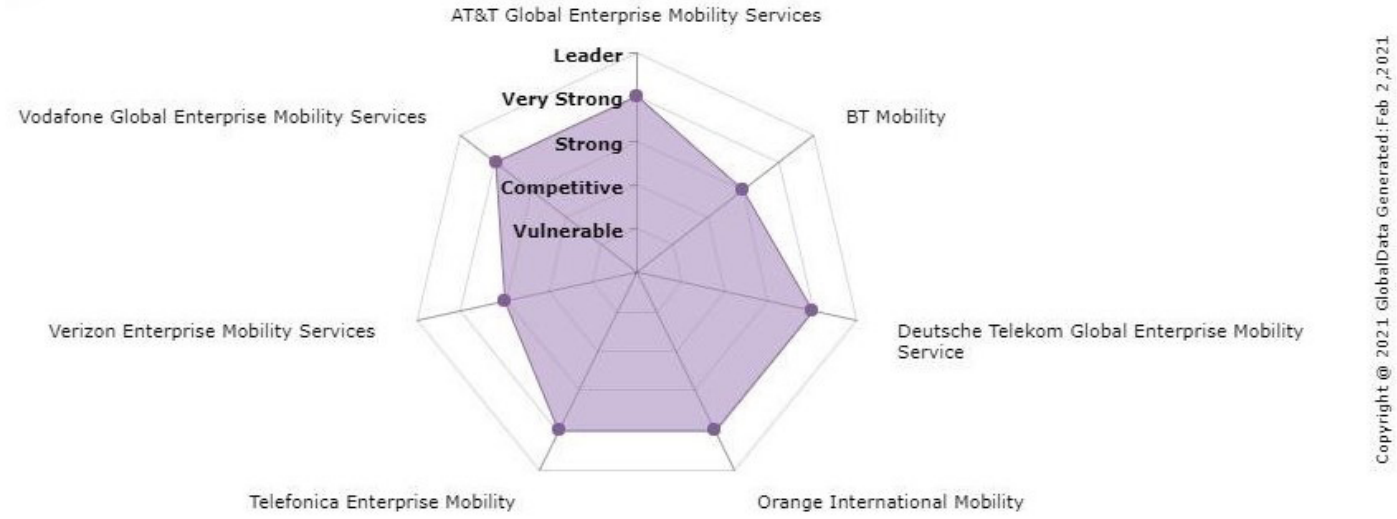
COMPETITIVE LANDSCAPE ASSESSMENT - GLOBAL ENTERPRISE MOBILITY SERVICES

REPORT SUMMARY

In 2020 service providers continued to up the ante in mobility services from productivity tools to security, application enablement, consulting, and managed services to ensure differentiation.

PRODUCT CLASS SCORECARD



MARKET OVERVIEW

Product Class	Global Enterprise Mobility Services
Market Definition	Global enterprise mobility services are offered by telecommunications and IT service providers to businesses to enhance their ability to leverage mobile technology for internal and external communications, remote data access, and mobile applications. As smartphones and tablets have increased enormously in processing power, and wireless communications have increased in reliability and speed, enterprise mobility has become a mainstream but still very important element of service providers' portfolios. Services designed to attract and retain global business customers that are increasingly dependent on mobility have produced a very competitive market. In addition to enterprise-focused voice and data plans and devices, service providers offer mobile productivity tools, security, application development and enablement, consulting, managed and professional services, and other enhancements to ensure differentiation.

MARKET ASSESSMENT

Enterprise mobility services have been a mainstay of service provider portfolios for over ten years. Core capabilities (mobile devices, lifecycle management, mobile device management, enterprise voice and data plans, device- and application-level security management, application development/enablement, telecom expense management, and business and technical consulting) are table stakes. But service providers generate substantial revenues from enterprise mobility and services need to remain fresh and relevant.

What's New in the Market?

Most operators have added new capabilities over the past 12 months: all providers have evolved their MDM services to unified endpoint management, following their platform vendors' upgrades. Most operators have launched 5G networks and devices, using different spectrum bands to appeal to different target segments. Mobile private networks, using dedicated or hybrid public/private 4G/5G are considered a major opportunity; many operators launched productized private network portfolios and are allying with infrastructure vendors such as Nokia and Ericsson for particular deals or regions. The use of unlicensed or lightly licensed spectrum such as CBRS in the US provides additional resources for both 5G in general and private networks in particular. Many operators also upgraded to the latest GSMA specification for RCS Mobile Business Messaging in 2020, partnering with Mavenir or Google.

It is hard to call out a leader in the enterprise mobility segment, as operators may excel in some areas but have relatively smaller footprints and therefore fewer devices under management. Others offer few standardized services. Some service providers generate the most revenue from complex solutions in which mobility may be a small part, with less traction for standardized offerings that depend on reseller agreements, such as MDM or TEM. Some of these core offerings have been disbanded due to lack of decent margins; a number of providers now leave TEM and mobile enterprise application enablement or development to partners. Even UEM may be left to partners, and is viewed as a pure resell option, or one with optional managed or professional services. Most service providers have also converged, combined, or explicitly bundled mobility with other strategic services such as cloud, UCC, app development, big data analysis, and IoT, offering multiple services with technical inter-dependencies; this makes it difficult to evaluate mobility traction in isolation.

There clearly remain areas of growth. While MDM/EMM is now table stakes (and has evolved to UEM), mobile security solutions for identity management and real-time threat management continue to evolve along with tiered services and bundles. Many service providers have streamlined their enterprise mobility portfolios, for a simpler and easier to buy solution set. End-to-end vertical packages and productized consulting deliverables help service providers appeal to businesses trying to sort through and assemble the right pieces to custom-fit their requirements. The need for a holistic view of enterprise mobility as a driver of digital transformation, along with other capabilities such as big data analysis and unified communications, is a common theme among service providers. Enterprise mobility has been energized by the advent of private wireless network opportunities, and by the launch of 5G, which, along with multi-access edge computing, has the power to enable innovative solutions that power high bandwidth low latency use cases of the future.

MARKET DRIVERS

- **EM and IoT Convergence:** EM and IoT are increasingly linked, with consulting and services groups responsible for both areas, and technical solutions that provide management and app development for both segments. App platform vendors and MDM providers have added IoT app dev/device management to their capabilities but there remain separate IoT and mobility ecosystems.
- **EM and Digital Transformation:** Managed mobility is often not a discrete offering within telecoms portfolios. Rather, it has been baked into strategic offerings, often combined with a larger set of digital transformation capabilities that include big data analytics, UC, cloud services, and application development
- **Focus on User Experience:** Service providers are on a quest to make the enterprise mobility user experience more consumer-like, while securing and hardening it behind the scenes. The BYOD phenomenon was one example of this but it has expanded to a focus on user interface technologies to help companies/brands develop B2C applications, as well as more self-service options.
- **Service Portfolio Restructuring:** Many service providers have removed complex or overlapping plans and services from their portfolios. Others have repackaged or bundled offerings, to make it easier for their salespeople to sell and for customers to buy. Bundling of what had been stand-alone offerings or tiered services ranging from basic to more feature-rich solution bundles, are other ways they have streamlined portfolios.
- **Footprint Expansion:** It had been difficult for operators with limited wireless assets to expand beyond their home countries or regions even though they have voice and data roaming agreements. Reciprocal roaming (AT&T with China Telecom, Orange with The Bridge Alliance, Telefonica with Hutchinson and BT and T-Mobile USA as part of the FreeMove Alliance), has helped operators court MNCs more effectively.
- **5G Disruption:** 5G is still rolling out and is still a nascent technology, but it has energized the enterprise mobility and IoT markets with the promise of innovative use cases. Not only are 5G mobile private networks considered a major opportunity, but in the future, the low latency and high bandwidth of 5G, with the addition of edge computing and network slicing, will make it a truly disruptive technology.

BUYING CRITERIA

- **Partners and Footprint Fundamental:** Service providers need to pick a range of high-impact solution and platform partners to cater to different requirements. Footprint remains a key decision-making factor for customers' global deployments, with operators responding with partnerships and roaming agreements.
- **Managed Mobility Matters:** A comprehensive managed mobility portfolio remains important to customers, and generally includes mobile device management and other security offers, telecom expense management, app enablement, and device lifecycle management.

- **Operations Key to Customer Productivity:** Service providers must be able to relieve customers of time-consuming processes such as kitting, staging, testing, moves/add/changes, and device end of life management.
- **Mobile Apps are Essential Tools:** Businesses may do their own app development but many count on operators and ITSPs to provide custom development, a range of self-help development tools, and/or third party "pre-shrunk" apps for particular processes or verticals.
- **Professional Services are Key Differentiators:** The service wrap remains a key value-add in engagements that also include commoditized services such as MDM and TEM. The ability to provide advice on and procurement of mobile devices, apps, security, policies, and BYOD and to relieve customers of the management of devices, service plans, and applications makes a big difference.

VENDOR RECOMMENDATIONS

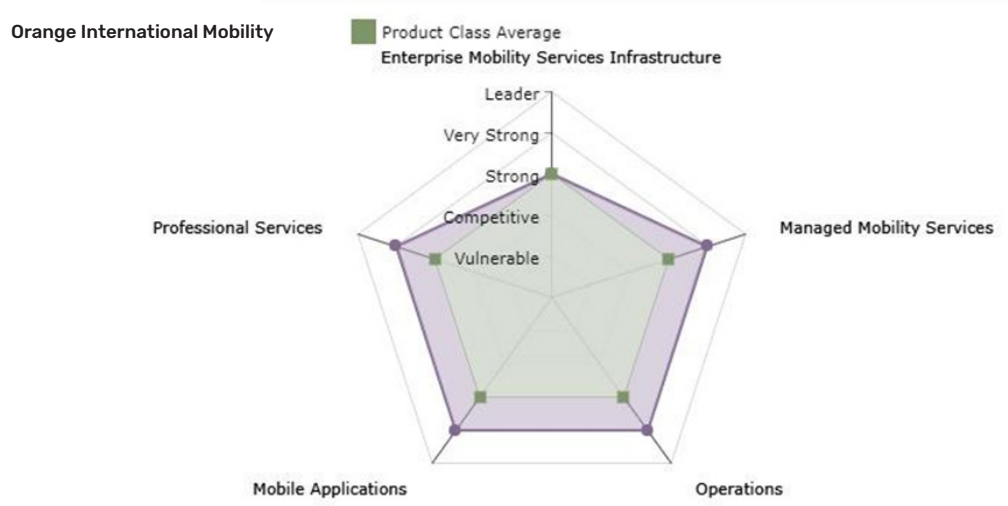
- **Spread Out:** Operators with their own wireless footprint are often favored for global deals. The next best thing is a set of strategic partners that extend their footprint and use the same core management platforms and expense tools. Joining a formal alliance like FreeMove takes care of many of these kinds of problems.
- **Throw Out the Old:** Adding platforms may result in a set of redundant and confusing offers that are difficult to buy and sell. Rationalization and restructuring of mobility portfolios into a simpler, logical, easy to understand product set is good practice. Self-service options and dashboards, device self-enrolment and other ways to improve the customer experience are also emerging.
- **Custom OK but Replayable Better:** Customers may sometimes need custom applications and services but service providers benefit from standardized, productized, repeatable offers that provide recurring "as a service" revenues to businesses with common processes or the same vertical focus. This is playing out in the private network space.

BUYER RECOMMENDATIONS

- **End-to-end Benefits:** Businesses often start out buying different software solutions from specialists only to find that they don't interoperate and the management overhead is significant. Using an integrator, ITSP, or global operator may provide both cost-savings and more interoperable solutions.
- **Out-Tasking Logic:** Service providers generally provide outsourcing options so that businesses can keep control of what they deem important or proprietary but can offload the headaches of logistics and operational management to a trusted third party.
- **Operators' Value-add:** Businesses should make sure to investigate what their wireless operator can offer beyond connectivity. Most are able to provide custom solutions, managed and professional services, and technical advice and integration.
- **Private Network Benefits:** Industrial sites such as factories, ports, airports, mining and oil and gas fields are good candidates for private 4G/5G networks that provide dedicated bandwidth, security, and high capacity for applications from sensor-based IoT to AR/VR enabled machine maintenance, as well as surveillance with video analytics.

Company Name	Orange Business Services
Product Name	Orange International Mobility
Current Perspective	Orange Business Services is very strong in global enterprise mobility, with comprehensive offerings from connectivity to managed mobility, cost, contract, endpoint and incident request management, and professional services. Orange has an International Mobility Services team dedicated to mobility, with skilled people, a central contract model, governance structure, and integrated account and service management. Orange offers mobile connectivity along with partners FreeMove and the Bridge Alliance in 80 + countries across Europe, Asia-Pacific, the Middle East, and the Americas. With alliance partners, Orange provides centralized procurement, customized plans and bundles, and mobile services management and support. Orange supports the top UEM solutions (Ivanti, VMWare, and Microsoft) as well as other mobile eco-system products such as Apple Business Manager, Google Zero-Touch, Play console, and Zebra StageNow. Target devices include knowledge workers' and frontline workers' devices such as scanners or kiosks. It also offers Mobile Threat Protection via Orange Cyberdefense. The Orange UEM portfolio is aimed at providing "à-la-carte" out-tasking of Mobile IT design, implementation and/or management so that customers can focus on their core business activity. Orange applies its supplier-agnostic Multisourcing Service Integration (MSI) approach to managed mobility to help global businesses deal with the complexity of contract management, SLA reporting, and performance and cost management in multiple countries with multiple vendors and operators. It provides centralized management, visibility, monitoring, automation, and security as well as a service catalogue, deep level dashboards, and business reviews and is vendor and carrier-agnostic. MSI for Mobility can follow its customers everywhere, even beyond the FreeMove footprint. Orange centrally orchestrates customers' mobile service providers, providing single point of ownership, 24/7 proactive monitoring, technical service desk, level 2/3 support, third-party coordination, automation of incident reporting, performance tracking, and a Service Catalogue. In H1 2020, Orange Business Services launched a specially adapted ServiceNow solution for managing the mobile services used by its MNC and Large Account customers. By integrating (eBonding) the customer ITSM with Orange's ServiceNow platform, customers can digitize and out-task processes to Orange in order to improve end-user experience and reduce operational costs. The platform is the result of a joint, collaborative effort between the International Mobility Services team, Orange's Enterprise Services Business Unit, and the Orange Business Services IT team in Cairo. The platform is a key enabler in the future development and deployment of Orange Business Services' MSI for Mobility and IoT suites. References for managed mobility and MSI include: Amcor, Ministry of Foreign Affairs of the Kingdom of Belgium, and Nestlé.
Buying Criteria Rating	**Enterprise Mobility Services Infrastructure** Strong **Managed Mobility Services** Very Strong **Mobile Applications** Very Strong **Operations** Very Strong **Professional Services** Very Strong

Product Scores	Very Strong



Strengths

- Orange has consistently had high retention and new customer acquisition rates for its managed mobility services, with actual win rates significantly higher than targets for these periods.
- International Mobility Services has extended its portfolio of professional services with supplier agnostic offers, processes for cost management, and end-to-end expertise in multiple solutions for EMM/UEM and mobile security (including consulting deliverables for GDPR, Windows 10 management, cloud security, and malware and threat protection).
- International Mobility Services has focused on its Multi-sourcing Service Integration strategy to add transparency into governance processes with packaged and a la carte services for mobile service management, budget control, agnostic TEM, contract management, cost optimization, process automation, incidents and requests management, IT service integration, device lifecycle management, and mobile security.

Limitations

- While Orange has a vertical approach in IoT and offers some vertical B2B apps in accounting, audit, commerce, etc., it has not set up a formal vertically oriented organizational or product structure to add focus to its mobility offer.
- Orange still faces significant competition from providers such as Vodafone with the latter's heritage as a mobile-first provider with the most widespread global wireless connectivity. This remains important for enterprises with far flung facilities.