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The Forrester Wave™: Enterprise Mobility Services, Q1 2013

by Liz Herbert, February 15, 2013

KEY TAKEAWAYS

Providers Don't Just Simply Provide Programmers; They Enhance Business Strategy

SVM pros must carefully weigh mobility investments in today's economy. Leading services providers can now tell you where to get the most value from mobility investments and help with building the end-to-end business case on mobility strategy. They also offer prebuilt solutions that speed time-to-value and encapsulate industry-specific capabilities.

Enterprise Mobility Services Are Evolving Quickly As Mobile Becomes More Pivotal

The enterprise mobility services market is naturally growing as mobility becomes a more critical part of enterprise technology strategy. The relative newness of these solutions drives SVM pros to seek third-party experts who can help with user experience, application development, integration, security, and ongoing support.

Breadth And Depth Are Today's Differentiators In Enterprise Mobility Services

Today's enterprise mobility market comprises many providers, ranging from the agencies that specialize in user interface (UI)/design work to development boutiques to large multinationals. However, few truly have the scale across the life cycle of services, from user experience and design skills to business acumen to mobile technology expertise.



The Forrester Wave™: Enterprise Mobility Services, Q1 2013

Analysis Of 13 Global Leaders' Capabilities And How They Stack Up

by [Liz Herbert](#)

with [Jeffrey S. Hammond](#), [Chris Andrews](#), and Ben Jennings

WHY READ THIS REPORT

Enterprise mobility is booming; organizations must connect with employees, customers, and partners in new ways and across new devices and applications. But many organizations don't know how to move to this new mobile world, and they can't afford costly mistakes like a failed investment, which could damage their reputation. These technologists need help with their enterprise mobility strategy, and they're turning to mobility services providers to design, develop, and support their mobile applications. In our 15-criteria emerging markets Forrester Wave™ evaluation of enterprise mobility services providers, we identified the 13 leading global services providers delivering enterprise mobility services — Accenture, AT&T, Atos, CGI, Cognizant, CSC, Deloitte, HCL, IBM, Infosys, PwC, TCS, and Wipro — in the category and researched, analyzed, and scored them. This report details our findings about how well each provider fulfills our criteria and where they stand in relation to each other to help mobility services buyers select the right partner for their needs.

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Notes & Resources

Forrester conducted provider evaluations in November 2012 and interviewed 13 provider and user companies: Accenture, AT&T, Atos, CGI, Cognizant, CSC, Deloitte, HCL, IBM, Infosys, PwC, TCS, and Wipro.

Related Research Documents

[The State Of Mobile Technology Adoption](#)
October 3, 2012

[Best Practices: How To Implement A Mobile Product And Service Road Map](#)
July 19, 2012

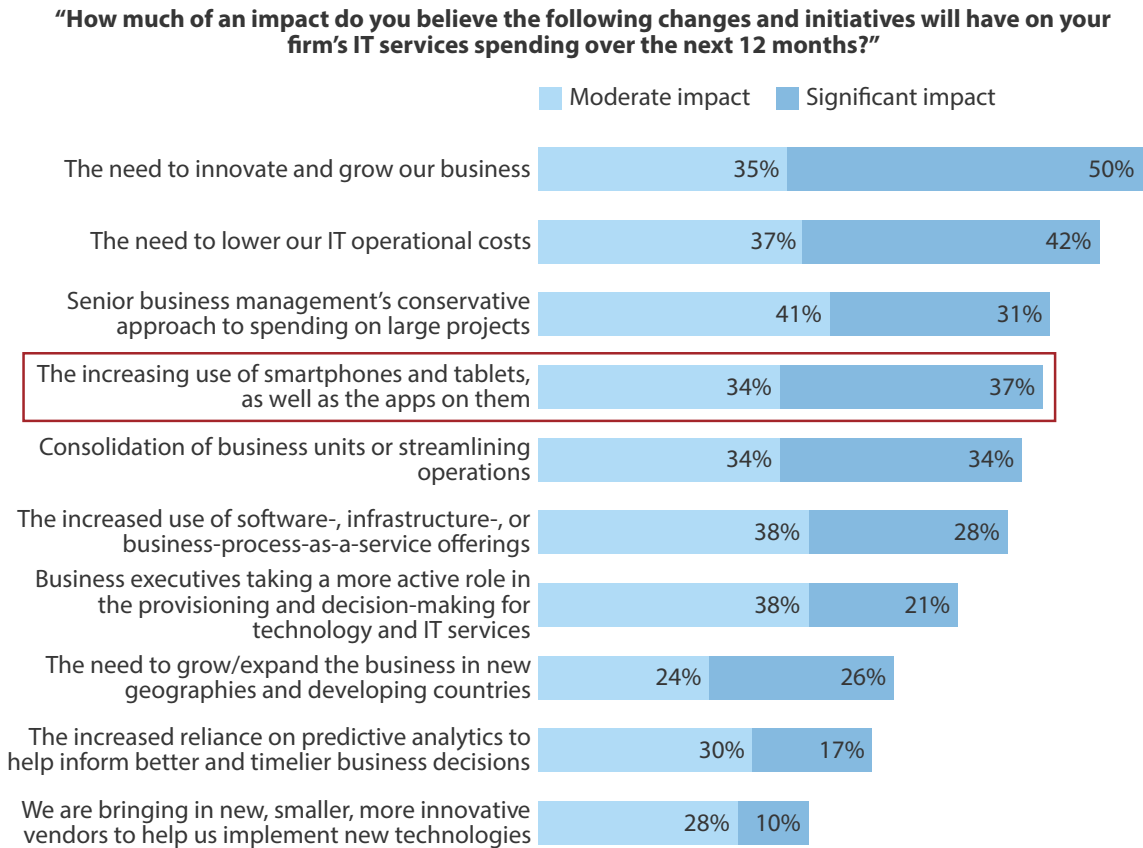
[Executing End-To-End Mobile Services](#)
May 10, 2012



THE MOBILE EXPLOSION HAS CHANGED BUYER NEEDS

The statistics are astounding. The number of mobile devices now outpaces humans on this planet, as it is estimated that there were 7.3 billion devices in the world in 2012 (compared with just under 7 billion people, according to the World Bank).¹ Mobility is driving significant changes in the way organizations source technology and technology services. Seventy-one percent of IT services executives say that increased employee use of apps on tablets and smartphones also increases services spend (in business and in IT), creates more software-as-a-service (SaaS) deployment on mobile devices, and drives them to hire more third-party services firms across multiple areas, including specialized development and security (see Figure 1 and see Figure 2).

Figure 1 Mobile Adoption Is High On The List Of Factors Affecting Services Spend



Base: 1,058 international IT executives and technology decision-makers

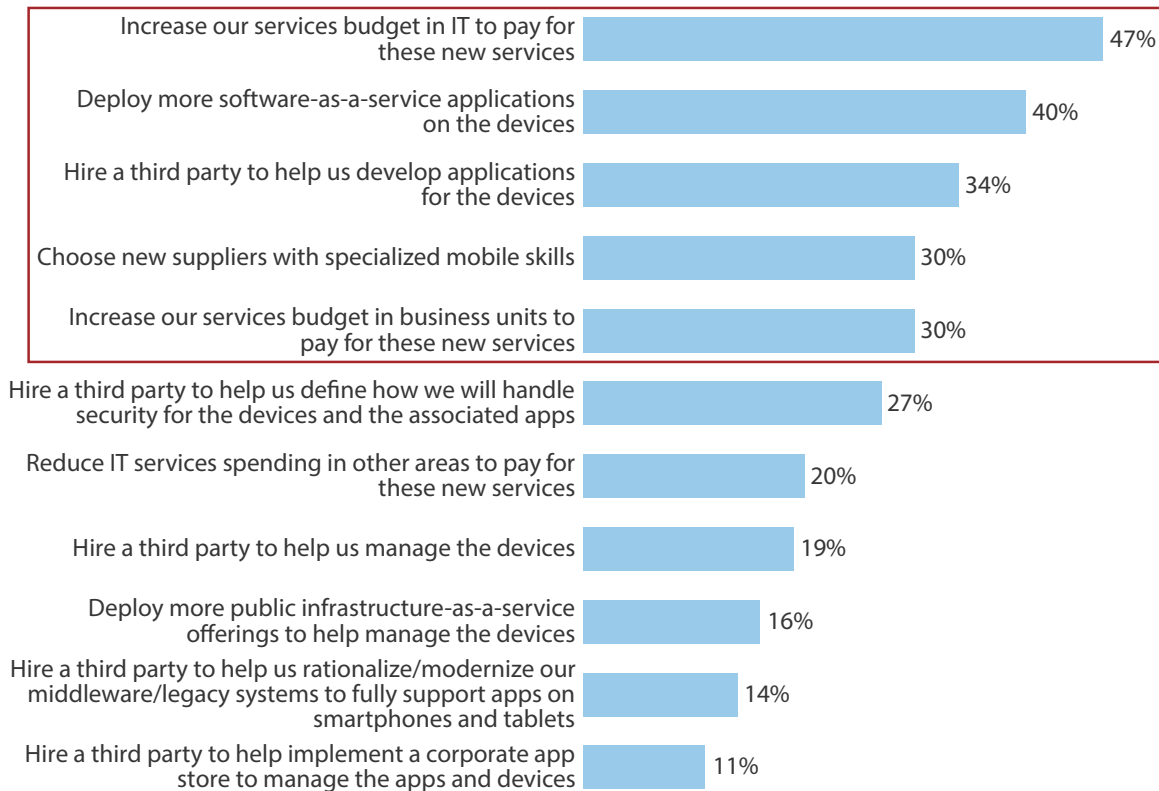
Source: Forrsights Services Survey, Q2 2012

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Source: Forrester Research, Inc.

Figure 2 Mobility Drives Services Spend On SaaS, Developers, And Security

“How will (or has) the increasing use of smartphones and tablets and the use of apps on them affect(ed) your firm’s IT services spending over the next 12 months?”



Base: 487 IT services decision-makers who believe that the increasing use of smartphones and tablets will have a moderate or significant impact on their firm’s IT spending over the next 12 months

Source: Forrsights Services Survey, Q2 2012

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Source: Forrester Research, Inc.

Delivery Of Mobile Services Must Be Fast

The services game is changing now that mobile services are a relevant part of the service delivery mix. Demand for new mobility services is rising rapidly even while the underlying mobile platforms evolve at top speed. Mobility services consultants must keep up with new devices, new platforms, and evolving buyer demands. These services teams struggle with many of the same problems traditional applications consultants face: an explosion of data, infrastructure moving to the cloud, and a need for applications to be social. They also struggle with new concerns, such as the need for mobile solutions to run on a shifting panoply of multiple devices and mobile OSes. The users of mobility solutions have little tolerance for a service interruption, an error message, or slow performance. These pressing needs are driving new technology solutions and business models into the mix:

- **Ready-to-go mobile solutions — horizontal and industry-specific.** Leading providers of enterprise mobility services are changing their game with ready-to-go platforms and app stores. More than just reusable assets, these are full-blown solutions — both cross-industry or ready for specific industries. Sample solutions include mobile wallets (from multiple providers such as Infosys and Atos), mobile point-of-sale solutions (such as TCS's solution), connected vehicles (such as the one from Atos), and app store solutions (such as Infosys Flypp and Cognizant Enterprise App Hub).
- **Reusable assets and centers of excellence that speed up projects and drive down costs.** Buyers budget for enterprise mobility projects that cost hundreds of thousands of dollars (on average) and take weeks or months, so providers must be able to get quality solutions to their clients quickly, iteratively, and cost-effectively. This means that the use of tools and prebuilt IP is a must, and not just a “nice to have” in the enterprise mobility space. Solutions like the Accenture Mobile Applications Test Lab and Wipro MobileTrust Framework are designed to speed up the security assessment and testing portions of mobility projects.
- **Flexible, outcome-driven contracts.** Mobility services buyers must prepare for the unknown: new technologies, rapidly changing business requirements, and uncharted business models. This means that they need partners who can adjust to changing project requirements through flexible resourcing requirements, changing directions, and midproject shifts in thinking. They need providers who can balance innovation with project management. Contracts in the mobility space are rarely time-and-materials-based (versus more traditional applications areas); outcome-based, revenue share, and pay-as-you-go models are common.

A CROWDED MOBILITY SERVICES MARKET GIVES BUYERS MANY STRONG OPTIONS

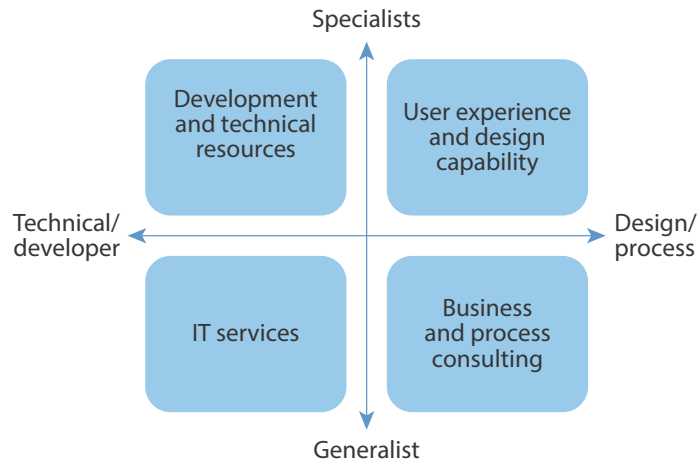
The market for mobility services gives buyers literally hundreds of options to consider, from specialist design firms to technology boutiques to large multinationals and telcos. Because of the rapid shift in enterprise computing to mobile as the new paradigm, every major services provider has made mobility a substantial focus area for investment, with growth rates in the double and triple digits. Providers are rushing to scale their enterprise mobility practices and differentiate on areas such as UI design, innovation, breadth of skills, and depth of resource pool. The market is changing at a fast pace — with providers trying to leapfrog the competition through more transformational engagements and large-scale, enterprisewide mobility deals. Significant factors to consider when selecting a provider include (see Figure 3):

- **User experience and design capability.** Special device factors — touch, small screens, Near Field Communications (NFC), camera features — mean new opportunities and new challenges for application design. Leading organizations in this domain focus on hiring talent with a mix of creative- and design-oriented backgrounds and foster a strong culture of user experience. Talent

and hiring profiles may come from gaming companies, consumer-focused businesses, and individuals with formal training in design and human factors.

- **Process and industry expertise.** Clients want to go beyond simply putting applications on mobile devices. They need to understand how mobile is driving business transformation and creating new opportunities for customer engagement. For example, financial services firms need to explore how mobile banking allows them to target new consumers (such as those who may not otherwise have access to a bank). Retailers want to see how mobility can breed customer loyalty or new ways of pricing and targeting location-specific offers. This level of insight into process change requires more than just user interface and technology prowess; clients need help with business process consulting, change management, and deep understanding of business transformation matters specific to their industry.
- **Development and technical resources.** Proliferation of mobile devices, operating systems, and platform-specific development languages means that clients lack the in-house development skills necessary to carry out their vision for mobility, and so they turn to third-party resources for help. They seek consultants with breadth and depth across Android, iOS, Windows Phone and Windows RT, BlackBerry, and Samsung bada. They seek mobile development expertise across SAP (Syclo and Sybase), Oracle, Kony, Antenna Software, Appcelerator, Sencha, and others. And they need programming skills across Objective-C, Java, C#, HTML5/CSS3/ Javascript, and others. Development expertise is still growing in the mobile services market — and is a moving target.
- **End-to-end services capabilities.** Mobility services buyers often start small with pilot projects or divisional needs. But clients increasingly find that they have broad long-term needs that span the full gamut of IT services: service inceptions to design to implementation through to deployment. With mobile services becoming a growing part of firms' technology footprint and increasingly connected to larger IT strategy, clients often need more than a point solution, so they must consider the end-to-end breadth of their mobility services' needs — including long-term support and enhancements.

Figure 3 Buyers Struggle To Find The Right Skills In A Single Provider



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Source: Forrester Research, Inc.

Buyers Must Sift Through Hundreds Of Options In This Fast-Moving, Crowded Market

When we evaluated the mobility services of the largest technology services providers, we found many leaders. While these firms differ in their specific strengths (by service line, by industry, by domain, and by geography), clients have multiple top-tier options to consider. Clients seeking to partner with a mobility services provider have a wide range of options to consider, from specialists and boutiques to creative/design agencies to outsourcers to telcos. Larger firms (the former Big Four multinational consultancies, tier 1 India-based consultancies and outsourcers, and telcos) have jumped ahead in terms of scale, breadth, and depth. These firms have deep pockets to invest in talent, R&D, and acquisitions to compete in the enterprise mobility services. However, many clients still prefer smaller, more specialized firms, who they see as more nimble, flexible, and price competitive. The types of firms that have skills in this market include:

- **Design firms and agencies, which focus on user experience.** Organizations that seek highly creative, innovative mobile projects — especially for consumer-facing apps— should consider agencies and design-oriented consultancies. These firms pride themselves on hiring highly skilled, creative developers and the best design talent they can find. In reality, the lines between creative developer and technologist are not neatly drawn, and many creative developers have some technology expertise as well (or live within a larger technology shop, such as IBM’s design agency or Deloitte’s Übermind). Examples include Chaotic Moon, Cynergy Systems, Double Encore, Effective-UI, Isobar, Mutual Mobile, Roundarch, Sapient, and Siteworx.

- **Technology boutiques, which excel at mobile development and focus on flexibility and value.**
Smaller mobility practices provide more nimble, flexible, and lower-cost alternatives to large technology consultancies. With mobility moving so quickly and taking a high priority at many organizations, mobility services buyers may want to consider a smaller shop where they can have attention from top executives and more flexibility in pricing and delivery models versus larger peers who will be more tied to corporate policy. Some leading examples of boutique mobility providers or technology boutiques with strong mobility capabilities include Cantina, CapTech Ventures, Ci&T, ThoughtWorks, UST Global, and Virtusa.
- **Global multinationals and outsourcers, which provide breadth and depth of mobility services.**
Global technology consultancies have deep pockets to invest in building mobility resources (organically and inorganically), global resources, and a broad range of technology expertise. They are a strong choice for many larger-scale mobility initiatives, especially ones that require broader technology expertise that smaller firms lack, such as mobile initiatives that touch SAP or heavy analytics initiatives. The Forrester Wave analysis in this report primarily concentrates on a selection from this group. Additional providers in this group that are not in the Forrester Wave but have strong mobility capabilities include Dell, Fujitsu, HP, and Tech Mahindra.
- **Telcos, which provide highly managed services and extensive network integration.**
Telecommunications providers offer the broadest range of mobility solutions, especially in categories including device and network management. Leading telecommunications options for mobile solutions also have a strong heritage in enterprise applications and consumer applications so that they can deliver an end-to-end mobility solution to customers. Examples include AT&T, BT, T-Systems, and Verizon.

ENTERPRISE MOBILITY SERVICES EVALUATION OVERVIEW

To assess the state of the enterprise mobility services market and see how the providers stack up against each other, Forrester evaluated the strengths and weaknesses of top global enterprise mobility services providers.

Comparing Global Services Providers' Enterprise Mobility Capabilities

After examining past research, user need assessments, and provider and expert interviews, we developed a detailed set of evaluation criteria. We evaluated providers against 15 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess the current offerings, we considered five criteria. First, we looked at user experience and usability capabilities. Second, we analyzed process and advisory capabilities to understand how providers can help clients navigate the business goals, industry, and domain needs that surround their mobility projects. Third, we looked at the strength of the technology

practice — in terms of numbers and breadth and depth of tools, industry resources, IP, and technology prowess. Fourth, we evaluated the end-to-end capabilities of the provider's ability to deliver mobility services from strategy to implementation to testing and QA through to hosting and cloud options and ongoing support. And finally, we considered the overall strength of the provider in enterprise applications and how the mobility practice ties into other relevant practices. To score well on this item, providers had to demonstrate not only the existence of strong practices across enterprise applications areas but also the relevance of those practices in real-world client situations where they deployed mobility services.

- **Strategy.** To analyze providers' strategies for enterprise mobility services, we evaluated R&D areas and metrics such as dollars of investment, dedicated centers of excellence, and patents. We interviewed providers to understand their go-to-market strategy, how they differentiate, and how they tailor marketing, sales, and solutions for well-defined target markets. We also considered how focused the provider is on mobility services. Finally, we looked at pricing and business models.
- **Market presence.** For market presence, we rated mobility services revenues, mobility services customers, mobility revenue growth, mobility employees, and overall financials for the corporation. This shows a mix of both the size of the mobility practice and the health of the overall provider.

Analysis Includes Global Providers With Enterprise Mobility Capability And Scale

Forrester included 13 providers in the assessment: Accenture, AT&T, Atos, CGI, Cognizant, CSC, Deloitte, HCL, IBM, Infosys, PwC, TCS, and Wipro. Each of these providers has (see Figure 4):

- **A global enterprise mobility practice with deep industry and process knowledge.** This report focuses on providers with worldwide capabilities across multiple industry sectors that have the capability to provide industry and process knowledge in the context of mobility. We also narrowed in on those with a significant focus on enterprise (versus consumer and versus small and medium-size business [SMB]) mobility.
- **Size and scale of enterprise mobility services practice.** Providers that qualified for this report generate \$40 million or more in annual revenue from enterprise mobility services. They each have more than 300 employees dedicated to enterprise mobility services; most have many, many more who touch mobility in some way, shape, or form.
- **End-to-end strength that spans design work, process consulting, development, and support.** The providers that made the cutoff for inclusion all have breadth of services capabilities. Each one is strong in design work, process consulting, technical development and integration work, and ongoing support. We did not include providers that are strong in only a subset of these areas, such as design specialists or developer shops that do not have design and process consulting capability.

Figure 4 Evaluated Providers: Provider Information And Selection Criteria

Vendor	Mobile services area
Accenture	mCommerce, M2M, mobile healthcare
AT&T	M2M, mobile application development, mobile device management
Atos	Enterprise mobility, automotive — connected vehicles, MyCity — mobile services for cities
CGI	Application development, mobile workforce/asset management, mobile security
Cognizant	BFS — wealth management, life sciences — sales force, tech — independent software vendor
CSC	Device and data management, application design and development, mobile consulting
Deloitte	Consumer-facing/commerce, field service enablement, back-office/enterprise enablement
HCL	Mobile consulting, mobile testing, managed mobility
IBM	Banking, healthcare, distribution
Infosys	Mobile as a channel for customer engagement, mobile-based sales force automation applications, mobile-based enterprise workforce productivity applications
PwC	Mobile user engagement, mobile development, mobile security, mobile strategy
TCS	Mobile application development and maintenance, mobile application testing, mobility strategy development
Wipro	Mobility advisory services, user experience, mobility managed services, mobile testing

Selection criteria

1. Annual mobility services revenues of more than \$40 million
2. More than 300 mobility services employees
3. Global capabilities in mobility services across a wide range of industries

Source: Forrester Research, Inc.

MANY LEADERS, BUT STRENGTHS VARY BY GEO, INDUSTRY, AND SERVICE LINE

Our evaluation of 13 leading options in the enterprise mobility market shows that many of the large global consultancies have invested rapidly to offer leading enterprise mobility solutions to clients. Nearly all of these firms have identified mobility as a top strategic initiative, as it has become a critical element of their client work across multiple domains — from ERP implementations to cloud solutions to customer experience transformation projects. This means that these firms are rapidly scaling capabilities across areas required for success in enterprise mobility services, such as

mobile design, mobility strategy, mobile application development, testing, security, and support. Key differences across these leaders are most pronounced at an industry-specific, geographic, or process (i.e., HR or CRM) level. The evaluation uncovered a market in which (see Figure 5):

- **IBM, Accenture, and Infosys lead the pack.** Breadth and depth of capabilities today — and deep investments into future areas — make IBM, Infosys, and Accenture leaders in today's enterprise mobility services Forrester Wave. These providers have strong capabilities across user experience, process consulting, development, and end-to-end capacity to support clients across a broad spectrum of mobility needs. They also have heavy investments in prebuilt IP to jump-start mobility projects. And they each have broad practices in enterprise applications, social, cloud, analytics, and other relevant areas that take mobility from a standalone discipline to a transformational investment for clients.
- **Wipro, Deloitte, Cognizant, TCS, HCL, and PwC have established strong, growing practices.** This next cluster of providers offers breadth and depth of enterprise mobility services — and strong growing practices. While this group has capabilities across the full spectrum of skills, from user experience to process consulting to technical development to support, some skew more toward process consulting (PwC and Deloitte), whereas others have a heavier mix of technical skills spanning development areas and testing (Wipro, Cognizant, TCS, and HCL). They have built some productized IP and solutions and started to pioneer new and innovative pricing models — but not to the same degree as some of their peers who are ahead in these areas.
- **AT&T, Atos, CGI, and CSC are strong choices for specific buyer needs.** AT&T, Atos, CGI, and CSC cater to specific needs, such as vertical, company size, type of service, or geography. Atos and CGI skew toward European-centric deployments and have a heavier mix of experience and offerings for certain industry verticals. AT&T has broad and horizontal offerings but capitalizes most on its own client base where it has added benefits such as owning the device management and the network. CSC is strongest in deals that align with its broader portfolio, such as converged cloud and virtualization, and in industries such as transportation, manufacturing, financial services, and healthcare.

This evaluation of the enterprise mobility market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based provider comparison tool.

Figure 5 Forrester Wave™: Enterprise Mobility Services, Q1 '13



The Forrester Wave™
 Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Enterprise Mobility Services, Q1 '13 (Cont.)

	Forrester's Weighting	Accenture	AT&T	Atos	CGI	Cognizant	CSC	Deloitte	HCL
CURRENT OFFERING	50%	4.80	3.20	3.40	3.40	4.00	3.80	4.40	4.00
Creative design and user experience	20%	4.00	2.00	3.00	2.00	4.00	3.00	4.00	3.00
Process consulting and advisory services	20%	5.00	3.00	4.00	3.00	3.00	3.00	5.00	3.00
Breadth of mobile technology skills	20%	5.00	5.00	4.00	4.00	5.00	5.00	4.00	5.00
Mobile technology competencies	20%	5.00	3.00	3.00	4.00	4.00	4.00	4.00	5.00
Link to other technology practices	20%	5.00	3.00	3.00	4.00	4.00	4.00	5.00	4.00
STRATEGY	50%	4.40	4.40	3.80	3.20	4.20	3.20	4.20	4.60
R&D	20%	5.00	5.00	3.00	3.00	4.00	3.00	4.00	5.00
Go-to-market	20%	4.00	4.00	4.00	3.00	5.00	4.00	4.00	5.00
Focus	20%	4.00	4.00	3.00	3.00	4.00	3.00	4.00	4.00
Target market	20%	5.00	5.00	4.00	5.00	4.00	4.00	5.00	5.00
Pricing models	20%	4.00	4.00	5.00	2.00	4.00	2.00	4.00	4.00
MARKET PRESENCE	0%	4.70	3.15	2.50	2.55	3.20	1.60	3.80	3.15
Installed base	10%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00
Mobile services revenue	35%	5.00	3.00	1.00	3.00	2.00	0.00	4.00	3.00
Mobile services revenue growth	10%	2.00	4.00	5.00	2.00	4.00	3.00	2.00	3.00
Employees	35%	5.00	2.00	3.00	2.00	4.00	2.00	4.00	4.00
Total company size	10%	5.00	5.00	1.00	1.00	2.00	1.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Enterprise Mobility Services, Q1 '13 (Cont.)

	Forrester's Weighting	IBM	Infosys	PwC	TCS	Wipro
CURRENT OFFERING	50%	5.00	4.40	4.00	4.20	4.20
Creative design and user experience	20%	5.00	4.00	3.00	3.00	3.00
Process consulting and advisory services	20%	5.00	4.00	5.00	4.00	4.00
Breadth of mobile technology skills	20%	5.00	5.00	4.00	5.00	5.00
Mobile technology competencies	20%	5.00	5.00	4.00	5.00	5.00
Link to other technology practices	20%	5.00	4.00	4.00	4.00	4.00
STRATEGY	50%	4.60	4.80	4.00	4.20	4.40
R&D	20%	5.00	5.00	5.00	4.00	5.00
Go-to-market	20%	5.00	5.00	4.00	5.00	5.00
Focus	20%	4.00	4.00	3.00	4.00	4.00
Target market	20%	5.00	5.00	5.00	4.00	4.00
Pricing models	20%	4.00	5.00	3.00	4.00	4.00
MARKET PRESENCE	0%	3.75	3.45	3.05	4.30	3.20
Installed base	10%	5.00	3.00	5.00	5.00	5.00
Mobile services revenue	35%	3.00	2.00	2.00	3.00	2.00
Mobile services revenue growth	10%	3.00	4.00	5.00	5.00	3.00
Employees	35%	4.00	5.00	3.00	5.00	4.00
Total company size	10%	5.00	3.00	3.00	5.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

PROVIDER PROFILES

Leaders Showcase Greatest Breadth And Depth Of Enterprise Mobility Skills Globally

As noted, this evaluation focused on large technology services providers; these are the ones who have the greatest breadth and depth of enterprise mobility services capability worldwide. Scores overall are strong on current offerings relative to where the market is today and what client needs are today; pools of dedicated enterprise mobility resources are in the low thousands. Scores on strategy are highest (versus current offering and market presence), as vendors have prioritized their efforts and investments to win in this highly competitive marketplace.

Clients will find that these providers differ in their individual strengths and weaknesses by industry, domain, geography, and service line (i.e., creative design versus process consulting versus technical developer services). But, when considering scores in aggregate, each of the providers in this

elite group of providers selected for this evaluation has significant strengths that balance out the weaknesses when evaluating their overall approach to enterprise mobility services. This means that clients have a large group of Leaders from which to choose, including:

- **IBM.** IBM brings clients a world-class design agency (IBM Interactive) combined with breadth and depth of enterprise mobility consulting — both in terms of technology capabilities and global presence. IBM has invested significantly in R&D to drive bleeding-edge mobility solutions to its client base and boasts more than 200 patents in the space. Clients also benefit from IBM's range of domain and industry consulting skills and practices across technologies such as analytics, cloud, and social, which IBM cross-skills into many of its mobile engagements.
- **Accenture.** Global 2000 companies can assume that Accenture has an offering, either prebuilt or tailor-made, for most of its mobility needs. From its global user experience practice with portable usability testing labs to design, architecture, security, and implementation consultants to its test factory and innovation centers around the world, Accenture has a wide range of prebuilt and custom-made solutions. Buyers in industries including financial, automotive, and retail should look at Accenture's prebuilt IP to jump-start their mobility initiatives; buyers in banking or automotive or energy can go a step further with fully baked solutions such as mobile banking/wallets and connected vehicle and connected home solutions.
- **Infosys.** Clients can look to Infosys as one of the leading providers of ready-to-go mobile solutions. With solutions ranging from mobile banking to mobile app store to a mobile catalog for retailers, Infosys has invested substantially in creating solutions that speed time-to-value for its clients. Infosys excels most at technical development but has also invested in creative and UI resources to help clients with the prototyping and design of the user experience for mobile.
- **Deloitte.** Deloitte helps clients with a unique mix of user interface and design focus (which it further enhanced through the 2012 acquisition of Übermind) and deep business process advisory services. Deloitte also has leading-edge (and bleeding-edge) technology research to help clients understand new areas of mobility technology that will transform business models. This combination means that Deloitte is well-suited for companies looking for transform-the-business consulting expertise that uses mobility as a vehicle to becoming a game-changer in the industry.
- **HCL.** HCL mobility solutions come in a variety of flavors, including custom mobility solutions to address client needs in industries such as airlines, CPG, and public sector as well as a set of ready-to-go mobile solutions for tablets and smartphones. These prebuilt solutions can be used in standalone settings or integrated for common enterprise applications use cases in solution lines including Oracle and SAP. HCL has a deep heritage in device engineering which contributes a significant portion of the firm's overall mobility services. HCL has also invested in UI design capabilities to round out its end-to-end solution offerings to clients and give clients the full end-to-end services typically required when they are investing in enterprise mobility.

- **Wipro.** Wipro's mobility consulting solutions are best suited toward larger, more complex needs, especially in financial services and insurance, pharmaceuticals and life sciences, and manufacturing. Clients will benefit from Wipro's impressive developer pool with skills across major mobility platforms and languages, including an Android center of excellence and Windows 8 center of excellence and a large design practice to work with clients on the user interface elements of mobility. Clients can also gain access to prebuilt assets and accelerators across critical areas of a mobility rollout, such as its MobileTrust security framework and its mobile application automation tool for testing. Wipro is not a design specialist, which means that some buyers may need to find a separate partner depending on what level of creativity they are looking for in their mobility project.
- **TCS.** TCS provides end-to-end mobility solutions that are strongest in technology and mobile application development, including areas where technology is on the leading edge, such as sensor-based or location-based computing. TCS is innovating in areas such as transportation (sensor-based monitoring), energy (Smart Grid), retail (indoor location detection), healthcare (stress detection), and insurance (driving behavior analysis). TCS has a strong pool of technical developers and integration experts. TCS has dedicated focus on user interface and user experience work — including a customer collaboration center and usability test lab in Silicon Valley — but lags agencies and specialists in creative design.
- **Cognizant.** Cognizant gives clients a strong mix of user interface design and breadth of developer expertise across leading-edge mobile technologies (including a recently launched testing center of excellence that speeds up mobile application testing across multiple devices). Cognizant also invests significantly in innovation, researching and codeveloping with clients in areas such as Near Field Communications, augmented reality, and machine-to-machine technologies to drive new use cases. Cognizant is an especially strong choice for mobility projects in life sciences and financial services, where it has extensive industry expertise. Cognizant is also a strong choice for any industry that is looking for technical expertise, technology innovation, and testing expertise in mobility. Cognizant has user experience capabilities but is not a design specialist, which means that some firms may want to partner for this element, depending on their needs.
- **PwC.** PwC is an excellent choice for clients who want third-party help with business strategy and process consulting and industry expertise combined with security, risk and compliance, strong program management, and governance as part of their enterprise mobility initiative. Acquisitions such as Ant's Eye View augment the PwC skill set with specialist talent for mobile. PwC has strong mobile offerings for mobile banking (consumer and commercial), mobile payment (NFC and digital wallets), telco, retail, pharmaceutical (drug management), mobile device manufacturing, and mobile patient health management, as well as other domains. Clients of PwC should expect a strong, robust, and holistic approach to enterprise mobility; however, PwC has a smaller pool of pure technical application developers than some of its leading competitors in enterprise mobility services.

- **AT&T.** AT&T has strong end-to-end mobility services offerings, especially for buyers in healthcare, financial services, energy, manufacturing, retail and consumer packaged goods, public sector, travel, and hospitality. As a telecommunications provider, buyers will benefit from being able to get bundled services that stretch into device and network management; on the downside, this differentiation only applies for its own telecommunications customers (and *can* only apply to geographies where it is an option in the market). Its position as a telecommunications provider also gives it extremely broad reach into a diverse market segment that includes enterprise and SMBs; AT&T has had more than 27,000 customers purchase an app of some kind since 2011.
- **Atos.** Atos takes a heavily industry-specific approach to mobility and has invested substantially in developing its own solutions. Key examples include its automotive solution for connected vehicles, its MyCity solution for local government, and mobiRet for retail/commerce. Atos also operates multiple design studios, including one in Spain, one in France, and one in India. In addition to its significant investments in IP, Atos also differentiates in this market through innovative pricing models, such as pay-per-use pricing for its solutions. Atos operates globally but its heaviest concentration of resources and client experience comes from Europe.

Strong Performers Excel In Target Markets — By Region And Industry Specialization

- **CSC.** Clients in industries such as insurance, transportation, manufacturing, and healthcare should consider CSC — especially those with longer-range needs for support or managed services, virtual desktop, or cloud. CSC has invested significantly in helping clients understand and transition to the workplace of tomorrow, which will be a more mobile, virtual, and cloud-based workplace. Its mobility solutions — from user experience design (with its Vis-EDGE methodology) to strategy (at the mobility center of excellence) to implementation — help clients make this transformation. CSC also integrates its strong security consulting into its mobility consulting, bringing together areas such as cyber security, intrusion protection, and data protection.
- **CGI.** CGI's mobility solutions and strength come largely from its 2012 acquisition of Logica. European clients, especially those with broader outsourcing initiatives or cloud initiatives where mobile is a component, should consider CGI. Industries where CGI has a concentration of IP and client experience include manufacturing, distribution, transportation, retail, utilities, banking, financial services, telco, and healthcare. While the Logica acquisition will make CGI a more global outsourcer and more cross-industry in the longer term, in the near term clients can expect some bumps in the road and turnover during integration.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 5 is an Excel-based provider comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Provider surveys.** Forrester surveyed providers on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed provider surveys, we conducted follow-up where necessary to gather further details of provider qualifications.
- **Executive briefings.** Forrester interviewed executives at each of the included services providers to understand their vision and strategy for the enterprise mobility services market.
- **Customer reference calls.** To validate product and provider qualifications, Forrester also conducted reference calls with two of each provider's current customers.

Survey Methodology

Forrester's Forrsights Services Survey, Q2 2012 was fielded to 1,058 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from enterprise companies with 1,000 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during May and June 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

The Forrester Wave Methodology

We conduct primary research to develop a list of providers that meet our criteria to be evaluated in this market. From that initial pool of providers, we then narrow our final list. We choose these providers based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate providers that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and provider and expert interviews, we develop the initial evaluation criteria. To evaluate the providers and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the providers for their review, and we adjust the evaluations to provide the most accurate view of provider offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the providers based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update provider evaluations regularly as product capabilities and provider strategies evolve.

ENDNOTES

¹ Source: Sarah Perez, “The Number Of Mobile Devices Will Exceed World’s Population By 2012 (& Other Shocking Figures),” Tech Crunch, February 14, 2012 (<http://techcrunch.com/2012/02/14/the-number-of-mobile-devices-will-exceed-worlds-population-by-2012-other-shocking-figures/>).

Source: World Bank (http://www.google.com/publicdata/explore?ds=d5bncppjof8f9_&met_y=sp_pop_totl&tdim=true&dl=en&hl=en&q=how%20many%20people%20are%20on%20the%20earth).

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