Product Assessment

IBM Mobile Enterprise Services

Market: Business Network and IT Services - Global Enterprise
Class: IT Service Provider Mobility
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■ Summary

Current Perspective: Leader ⭐⭐⭐⭐⭐

IBM's Mobile Enterprise Services (MES), within the Global Technology Services group, are leading the competition within the ITSP space, as IBM can leverage its substantial capabilities in managed services, global delivery, and outsourcing (and its ten-plus years in mobility) to position itself as a single-vendor solution for enterprise wireless deployment and management. The MES group was formed in 2008 and began with managed BlackBerry deployments; the group now sees its mission as providing secure and flexible managed mobility services for leading smartphone and tablet device platforms with predictable, utility-based pricing. Its services have also evolved to tackle issues relating to employee-owned devices in the enterprise.

The MES portfolio offers custom and standardized services covering the mobility lifecycle (plan, procure deploy, manage, support, refresh), specifically providing consulting and design, procurement and kitting, middleware hosting for MDM and MEAP (along with end-user services for access to corporate e-mail, collaboration, and business applications), device re-ordering and refresh, and end-user support. IBM has a unique view of its target employee segments, dividing its suite into services for 'mobile workers' (mobile task and field workers in functions such as warehouse, repair, or POS who may be using ruggedized devices and where rapid ROI from enhanced productivity are key benefits) and 'mobile professionals' (knowledge workers and professionals such as executives, managers, and sales using smartphones and tablets and wrestling with issues relating to device management, app enablement, and BYOD). The other suite components are: mobile application platform management (which extends existing enterprise applications to their employee's mobile devices across multiple device OSs and form factors) and a mobile enterprise application store (which tests, delivers, and manages existing vertical mobile applications from ISVs). These two customized services can be directed at either employee segment.

IBM's solutions for TEM and mobile security are separate services available from IBM Global Technology Services, but they may be coupled with MES for a particular customer. IBM can add value by combining customers' expense, billing, and network usage information with their mobile device usage and inventory data. However, IBM sees TEM as a very targeted offering that requires less end-user support than MDM or MEAP, so it is housed in its Integrated Communications Services (ICS) organization. IBM is also in the process of commercializing a new mobile security service to be available later in 2012, hosted mobile device security management (offered through the cloud computing managed security practice). It is a multi-platform, turnkey managed solution for securing company-owned or employee-owned mobile devices using a mobile security client app

Current Analysis
Outsmart your competitors

Product:

IIBM Mobile Enterprise Services

IT Service Provider Mobility

for popular devices, a security management platform, and management services including mobile threat analysis, monitoring and alerting, policy recommendations, and policy management.

IBM has 150 enterprise clients using MES across North America, Latin America, Europe, and Asia-Pacific, offering local support in each region. As a trusted enterprise brand with well-respected professional services, security capabilities, and economies of scale, it has been offering mobility deployment and advisory services on a custom basis to global enterprises for 10 years. However, with its new end-to-end managed services approach, it can now offer simplified per-device pricing and flexible, modular services which meet diverse customer requirements in a more predictable and cost-effective way.

IBM has significantly expanded MES' capabilities over the last two years in step with the surge in demand for enterprise mobility solutions across multiple device platforms, coupled with the rise of BYOD requirements that are explicitly taken into account within IBM's advisory, MDM, and mobile security offerings. It offers an end-to-end solution, leveraging the diverse capabilities within its sister organizations for Workplace Services and Cloud Managed Security. Compared to many other ITSPs that are still offering custom mobility services as part of larger BPO engagements, it has now standardized several offerings to a great degree, which should help broaden its appeal to more diverse customers. The number of different groups within IBM offering managed mobility components remains an issue, but while its TEM and mobile security offers are still separate from MES, the sister organizations appear to work cooperatively.

■ Strengths and Weaknesses

Strengths

• IBM's MES can be accurately positioned as a single-source solution for wireless enterprise mobility deployments, as it provides upfront advisory and analytic services, as well as a full set of mobility lifecycle management and support solutions with a structured and predictable methodology. MES has expanded significantly over the last two years to take on management of leading major smartphones and tablets, including device and application management (with different options for on-premises or externally hosted solutions).

• IBM can leverage its substantial capabilities in managed services and outsourcing (and its ten-plus years in mobility) to position itself as a single-vendor solution for all aspects of enterprise wireless deployment and management. MES already has 150 customers, including international operations.

• In addition to MES, IBM has a variety of other initiatives relating to mobility, including mobile strategy consultation, network design and management, security assessment and managed security solutions, telecom expense management, messaging and collaboration solutions (i.e., Lotus Domino, Lotus Traveler, IBM Sametime, IBM Connections), analytics (e.g., Cognos), and cloud-based services.

• Compared to carriers with managed mobility services, IBM has more experience in developing and managing behind-the-firewall applications, and it is more likely to host applications such as BES, Good, or Microsoft Exchange as well as ERP applications that can be accessed remotely by technical field and sales personnel. It can also provide an objective TEM service, and in general, it is more experienced providing high-end, complex services to enterprises than most carriers. However, IBM also has a lot to offer carriers, and there are many potential partnering options.

• Managed mobility services provided via a utility model are very aligned with the cloud computing initiatives which the company is investing heavily in developing, marketing, delivering, and delivering both directly and through business partners. IBM has opened Cloud Computing Centers

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around the world, providing customers with virtualized facilities from which they can design, test, and deploy cloud-based applications and services.

Weaknesses

• While IBM can bring in solutions from other internal groups, many other providers of managed mobility solutions more directly include TEM and mobile security as peer solutions within the same portfolio. There are natural synergies with MDM and security and with TEM and MDM that might benefit from more direct integration of capabilities both at the end-user level (i.e., access from a common portal) and in terms of being able to share a common database for value-added services such as performance monitoring.

• While it is clearly working on this problem, the fact that IBM addresses mobility in so many different internal organizations is still confusing. Customers may be confused as to what organization it should be talking to between IBM GS, IBM GTS, or the Lotus application software group, which is involved in mobilizing its collaboration software. If it is difficult for analysts to understand the company's overarching mobility strategy, it must be even more of a challenge for global enterprises.

• There is a perception that IBM is not as cost-competitive as some of its rivals in the services space; this not only keeps some SMBs and mid-market companies from signing on with the provider, but as large enterprises continue to pull back on spending, they are increasingly cost-conscious. Some of the ROIs associated with mobility deployments are based on soft returns from parameters such as increased productivity and enhanced competitiveness and are hard to quantify accurately.

• The mobile operators are becoming much more involved in the enterprise application space, hosting MEAP middleware and enabling enterprise application stores. They are also starting to deal with BYOD in new and innovative ways with services that separate personal and business personas on mobile devices. IBM may find them to be more directly competitive in large enterprise and MNC deals that are mobility focused. They also use some of the same underlying platforms that IBM uses for managed mobility components.

• Similar to many of its rivals, IBM is betting big on the cloud computing space and is no doubt coming up against a slew of new competitors from computer manufacturers and nearly all Tier 1 carriers (such as Verizon and AT&T, with which IBM also partners). The concept of providing mobility as a utility is also being addressed by all of IBM's other traditional ITSP competitors.

Product Metrics

Product: **IBM Mobile Enterprise Services**

General	Value
Product Name	Mobile Enterprise Services (MES)
Description	The IBM MES solution portfolio covers the entire mobility lifecycle: Plan - mobility consulting, architectural design, security assessment, cost optimization; Procure - procurement of mobile devices, consistent global pro-curement processes around-the-clock, self-service procurement portal, order tracking and workflow approval, flexible payment options; deploy - staging and kitting, MDM, configuration and optimization, security policies, project management; Manage - over-the-air software and security updates, centralized remote management, device status and usage reporting, gold image archiving, mobile platform management; Support - Level 2 and 3 mobile device support, remote takeover, hardware fix, device replacement and provisioning; Refresh - device refresh and replacement services, re-ordering through procurement portal, customized ordering catalog

Strategic relationships	Value
Rating	**Competitive**
Vendors	Tangoe (TEM and MDM) Sybase (MDM and MEAP) Juniper (mobile security) RIM Fiberlink Citrix (virtualization)

Service features	Value
Rating	**Threatening**
Services	Standardized services: **MES for Mobile Workers:** Mobile lifecycle services designed to help clients deploy, manage, and support end-to-end mobile solutions for mobile handheld devices. Key components: procurement, staging & kitting, device management, maintenance, and project management. **MES for Mobile Professionals:** Platforms include RIM BlackBerry, Apple iPhone/iPad, and Google Android smartphones and tablets. Key services include on-premises middleware hosting and management, mobile device management, and end-user support. End-user services include access to corporate e-mail, collabora-tion, and business applications. Intended for organizations with 300+ knowledge workers with support for both personal and corporate-liable devices. **MES for BlackBerry Enterprise Solution:** Enterprise groupware integration, wireless middleware installation and management, ongoing operations, IT policy and security administration, advanced mobile device manage-ment functions (leveraging partner Tangoe), user activation, termination and administration, Level 2 and 3 end-user support and problem resolution, self-help portal, around-the-clock BES support, and a utility cost model for predictable budgeting. Custom services include: **MES for Mobile Application Platform Management:** Helps clients extend existing enterprise applications to their employee's mobile devices across multiple device OSs and form factors. Ideal for clients who want to sup-port multiple device types, multiple mobile applications, and/or multiple backend systems. Key components: de-ployment and ongoing management of mobile enterprise application platform (MEAP) middleware and licenses, mobile application templates, and mobile application design and development **MES Vertical Application Deployment and Management** leverages existing vertical mobile applications from partner ISVs, tests them, and delivers and manages them. This includes applications for mobile profession-als and mobile task workers. The service provides customers with initial consulting services, deployment, and management of mission-critical mobile applications. Core services: mobile security assessment and consulting, architecture design, mobile enterprise apps store deployment and management, ongoing operation and man-agement, 24/7 self service portal, advanced application support, and mobile help desk.

Customer traction	Value
Rating	**Threatening**
Profile/Examples	1,500 customers, 30% of which are global; 250,000 mobile devices under management with MDM platform Customer examples: Fluor, AstraZeneca, Air Canada, Tiffany, ING, Hilton Worldwide