The Forrester Wave™: Mobile Enterprise Application Services Providers, Q1 2017

Leading Providers Blend Design, Tech, And Business For Transformational Mobile Enterprise Apps

by Jeffrey S. Hammond and Liz Herbert
March 22, 2017

Why Read This Report

Mobile enterprise apps for employees and partners tend to get less attention than customer-facing ones, but they are critical to a digital enterprise. Application development and delivery (AD&D) pros looking for providers to design and build these have hundreds of choices, but few options can create real disruption. In our 20-criteria evaluation of mobile enterprise application services providers, we identified and evaluated the nine most significant ones — Accenture, Capgemini, Deloitte, EPAM, IBM, Infosys, LiquidHub, Tata Consultancy Services, and Wipro.

Key Takeaways

Accenture, IBM, And Deloitte Lead The Pack
Forrester's research uncovered a market in which Accenture, IBM, and Deloitte lead the pack. EPAM, TCS, Capgemini, Wipro, and Infosys offer competitive options. LiquidHub is a Contender.

AD&D Pros Are Looking For Design, Tech, And Business Skills
The mobile enterprise app services provider market is growing because more AD&D professionals use these patterns as a way to address their top challenges. This is in large part because AD&D pros increasingly trust services providers to act as strategic partners, as well as technical partners, advising them on top decisions.

Business Acumen, Innovation, And Broad Device Expertise Are Key Differentiators
As older technology becomes outdated and less effective, improved knowledge of enterprise applications and evolving mobile capabilities will dictate which providers lead the pack. Vendors that can unlock the potential of existing enterprise applications, reimagine business processes, and develop on a wide range of devices position themselves to successfully deliver a disruptive enterprise mobile app to their customers.

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by Jeffrey S. Hammond and Liz Herbert
with Christopher Andrews, Bill Seguin, and Andrew Reese
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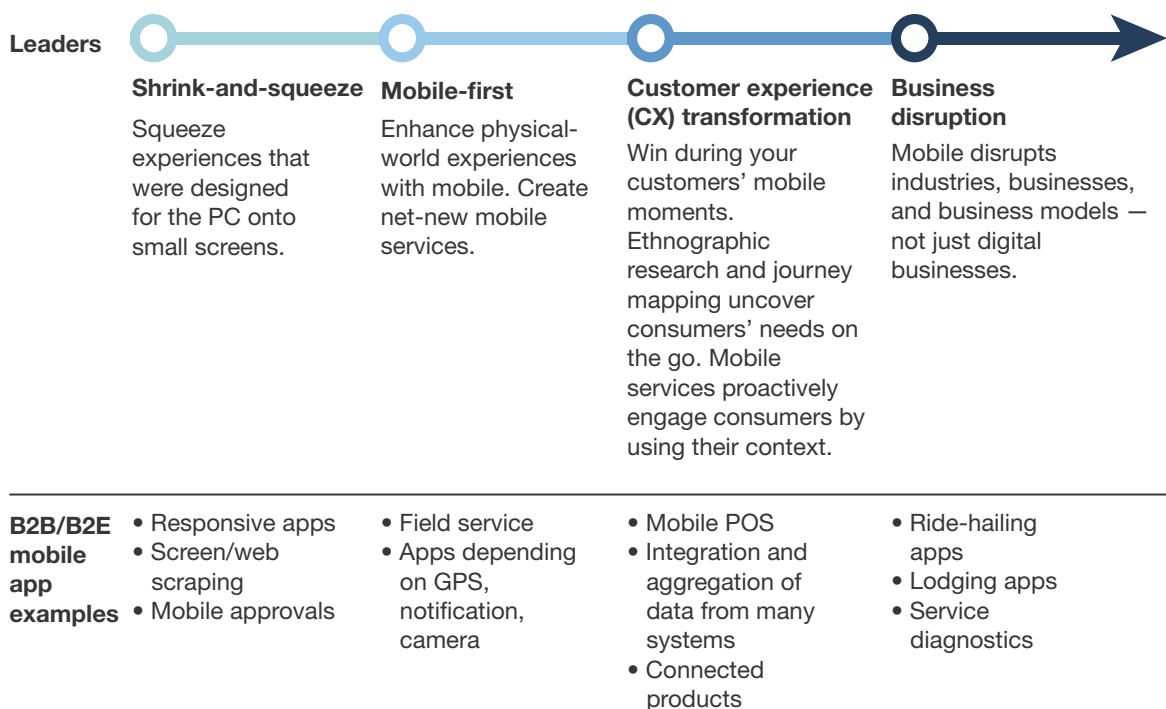**The Forrester Wave™: Mobile Enterprise Application Services Providers, Q1 2017**
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Mobile Enterprise Apps: A Critical Element Of Digital Transformation

Customer-facing mobile apps tend to take precedence over employee- and partner-facing apps when companies are in the early stages of mobile maturity (see Figure 1). But as firms move toward customer experience transformation and further into digital disruption, standalone B2C mobile apps aren't sufficient. To build great customer experiences, companies must also enable the mobile moments of internal employees and business partners, empowering them during all processes that touch the customer experience. For example, hotel staff must have up-to-date guest information, and field maintenance workers need the latest parts data and manuals for great customer experiences.

FIGURE 1 The Mobile Mind Shift Maturity Framework With B2B/B2E Examples

The mobile mind shift maturity framework

	Shrink-and-squeeze	Mobile-first	Customer experience (CX) transformation	Business disruption
Leaders →	Squeeze experiences that were designed for the PC onto small screens.	Enhance physical-world experiences with mobile. Create net-new mobile services.	Win during your customers' mobile moments. Ethnographic research and journey mapping uncover consumers' needs on the go. Mobile services proactively engage consumers by using their context.	Mobile disrupts industries, businesses, and business models — not just digital businesses.
B2B/B2E mobile app examples	• Responsive apps • Screen/web scraping • Mobile approvals	• Field service • Apps depending on GPS, notification, camera	• Mobile POS • Integration and aggregation of data from many systems • Connected products	• Ride-hailing apps • Lodging apps • Service diagnostics

Delivering Mobile Enterprise Apps Requires More Comprehensive Capabilities

Delivering mobile apps for employees and business partners requires the same skills as delivering customer-facing apps — and more. AD&D pros should consider these requirements for great mobile enterprise app developers:

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› **Deep knowledge of internal business processes and enterprise applications.** Great partners for mobile enterprise applications do more than just integrate with business applications (such as SAP, Oracle, and Salesforce): They must have a deep understanding of the limits and capabilities of the applications themselves — and know when the applications are holding their clients back. They know what the modern apps for a given category are and be able to advise you on your path to modernization.

› **Credibility in reimagining core business processes.** Many firms can create a mobile interface for your processes as they exist today or modernize them slightly. However, the standout choices in this category are thought leaders. They bring new ideas and vision — and help you execute on them. They are familiar not just with technology, but also with people and process change.

› **Experience with a wider range of devices.** Unlike customer-facing apps, which must be suitable for mobile phones and tablets, B2E apps often have to run on more complex devices that firms supply or mandate (e.g., a company-assigned field service device for technicians). These often have special features or limitations that don't constrict consumer-focused organizations. Some consulting and systems integrator (SI) firms do device testing, so you may end up finding one that has done it, which could be valuable but should not be a top consideration.

Services Firms Jockey For Enterprise Mobile App Work — But Skills Vary Widely

With the growing deployment of mobile enterprise apps, services providers from all corners of the market are racing to gain mind share and wallet share. Buyers have a diverse mix of choices from all corners of consulting, technology services, and agency markets. Enterprise mobile application efforts that transform employee and business partner engagement tend to be tend to be larger, and integrations into operations are more complex, so hourly rates become a concern as project scope grows.[1] These challenges create opportunities for service providers with deep knowledge of enterprise business processes and flexible global delivery models. We see a market in which:

› **Technology services partners bring end-to-end services and growing design chops.** Technology-focused services firms — such as Accenture, Capgemini, IBM, Tata Consultancy Services (TCS), and Wipro — are a good choice for mobile enterprise apps because they have expertise in systems of record and the integration patterns needed to connect them to mobile enterprise apps. And while these firms have historically lacked an "outside-in" design approach, that's no longer the case due to an acquisition binge of smaller digital agencies and design firms. For example, Accenture's Fjord Design and Innovation arm teamed with Lutheran Social Services of Illinois to explore how technology could eliminate fragmentation and strengthen care coordination within a network of 190 other Illinois social service organizations.[2]

› **Consultancies stand out for their transformation and business process know-how.** Business consulting firms such as Deloitte build on excellent relationships with line-of-business (LOB) executives, deep knowledge of enterprise business processes, and best-in-class industry expertise: Their consultants often have decades of experience within a specific process or industry.

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As firms shift from early-stage mobile efforts to digital transformation projects, the process transformation and change management skills of consultancies are becoming more important. For example, Deloitte worked with Diageo to mobilize the beverage company's customer management function and iron out peaks and troughs in sales by improving the understanding of customer demand and sales behavior.

› **Smaller, agile firms with both creative and tech can fit — but beware of limitations.** Enterprise clients tell us they want to work with smaller, more flexible firms within their same time zone that can quickly deliver using a fusion of experience design, Agile, and continuous delivery principles. And while many of these firms have been absorbed into larger technology services providers, consultancies, and even customers through acquisition, others are rising to take their place. Examples of nimbler mobile and digital specialists include CapTech Ventures, Dialexa, Double Encore, EPAM, LiquidHub, Mutual Mobile, Mobiquity, Skookum, Solstice, T3, ThoughtWorks, and WillowTree. For example, LiquidHub worked with Delta Air Lines to help corporate travel managers create and manage meetings while Delta reps assist with ticketing locations.

› **Agencies tend to be less suited to B2E and B2B apps work.** Agencies and digital boutiques are rightly in high demand for B2C-focused apps, and they bring deep understanding of customer journey mapping and consumer-friendly design. But successful B2E and B2B apps require more than user experience (UX) and creative design: They also mandate a deep understanding of internal business processes and workflows, enterprise systems, and integration with IT architectures — which is a gap for the agency set.

Enterprise Mobile Applications Services Provider Evaluation Overview

To assess the state of the enterprise mobile applications market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top providers in this space. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 20 criteria, which we grouped into three high-level buckets:

› **Current offering.** To assess capabilities for current offering, we researched and compared provider skills across the IDEA life cycle: identify, design, engineer, and analyze.[3] We prioritized criteria that we see matter most to successful projects — such as creative talent at scale, digital experience centers easily accessible to clients, and balance of skills between creative and technology. We also prioritized transparency in the form of referenceable work — which we see clients expect in this space.

› **Strategy.** To compare how well-positioned the providers are going forward, we focused on five key elements: partnerships and alliances; an innovation road map; employee retention; vision for this market; and pricing and commercial models. For all of these, we focused on points of differentiation above and beyond peers in the evaluation, as well as proof points in the form of supporting examples and data.

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> **Market presence.** For market presence, we focused on the size and scale of the mobile B2E/
> B2B mobile apps practice only. Specifically, we included mobile enterprise apps client base and
> associated revenues.

Evaluated Vendors And Inclusion Criteria

Forrester included nine vendors in the assessment: Accenture, Capgemini, Deloitte, EPAM, IBM,
Infosys, LiquidHub, Tata Consultancy Services, and Wipro. Each vendor has (see Figure 2):

> Received interest from Forrester client base for B2B/B2E mobile application development projects.

> A number of publicly referenceable B2B/B2E mobile projects with emphasis on projects for Fortune
> 500, Global 500, or S&P 500 firms or companies of equivalent size.

FIGURE 2 Evaluated Vendors: Provider Information And Selection Criteria

Vendors	Notable B2B/B2E mobile app clients
Accenture	AstraZeneca, BBVA Compass Bancshares, City of Paris, Ducati, Vodafone, West Midlands Police
Capgemini	HEMA, Allied Pilots Association, LCL, Caixa
Deloitte	ANZ Banking Group, Diageo, Intel, Massage Envy, Nissan, Snohomish County Public Utilities District, Syngenta, VMware
EPAM	Amway, Chevron, Datalex, Dentsply, iPipeline, Liberty Global, Merck, Nominum, Penske, Wolters Kluwer, Unify, VisiQuate
IBM	AXA, Boots UK, Bosch, Premier Farnell, National Grid, Royal Bank of Canada, RWE
Infosys	Adecco, ATP Tour, Hilti
LiquidHub	Delta, Independence Blue Cross, M&T Bank, Penske, SEI Investments, Saint-Gobain
Tata Consultancy Services	ASML, Bata, British Airways, Citi, HDFC Life, Qantas Airways, Cargotec, Public Service Enterprise Group, Qualcomm, Owens Corning
Wipro	Airbus, National Grid, Thomas Cook, US LBM Holdings

Vendor inclusion criteria

| |
| --- |
| Demonstrated interest in the provider from Forrester clients |
| A number of publicly referenceable B2B/B2E mobile projects with emphasis on projects for Fortune 500, Global 500, or S&P 500 firms or companies of equivalent size |

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Vendor Profiles

This evaluation of the mobile enterprise application services provider 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 vendor comparison tool (see Figure 3).

FIGURE 3 Forrester Wave™: Mobile Enterprise Application Services Providers, Q1 '17
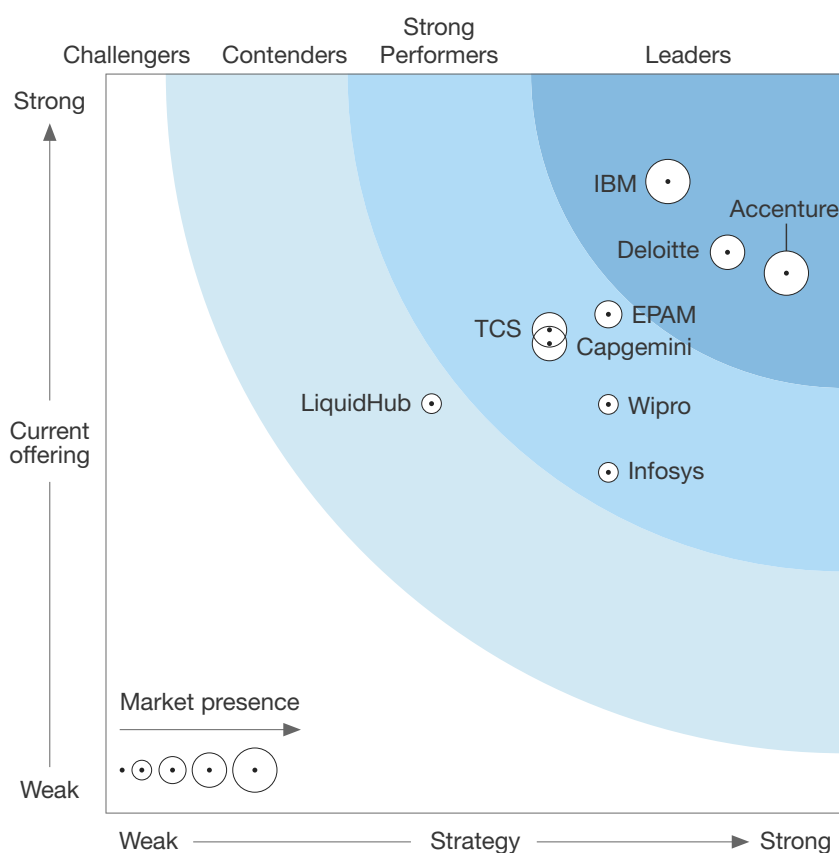
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FIGURE 3 Forrester Wave™: Mobile Enterprise Application Services Providers, Q1 '17 (Cont.)

	Forrester's weighting	Accenture	Capgemini	Deloitte	EPAM	IBM	Infosys	LiquidHub	TCS	Wipro
Current Offering	50%	3.64	3.16	3.78	3.36	4.26	2.30	2.76	3.25	2.75
Identify phase	20%	4.32	3.00	5.00	2.32	5.00	2.32	2.32	1.66	1.66
Design phase	20%	4.00	3.00	4.00	2.50	4.00	2.50	4.00	4.00	3.00
Engineer phase	20%	3.90	2.80	2.90	3.00	4.30	2.70	3.50	3.60	4.10
Analyze phase	20%	5.00	4.00	4.00	4.00	5.00	4.00	1.00	4.00	4.00
Referenceable work	20%	1.00	3.00	3.00	5.00	3.00	0.00	3.00	3.00	1.00
Strategy	50%	4.60	3.00	4.20	3.40	3.80	3.40	2.20	3.00	3.40
Partner ecosystem	20%	5.00	3.00	5.00	3.00	5.00	3.00	1.00	3.00	3.00
Service vision	20%	5.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00
Innovation road map	20%	5.00	3.00	3.00	5.00	5.00	3.00	5.00	3.00	5.00
Employee retention	20%	5.00	3.00	5.00	5.00	1.00	3.00	1.00	3.00	1.00
Commercial models	20%	3.00	3.00	5.00	1.00	3.00	5.00	1.00	3.00	3.00
Market Presence	0%	5.00	3.50	3.50	2.50	5.00	1.50	2.00	3.50	1.50
B2B/B2E mobile app client base	50%	5.00	4.00	2.00	2.00	5.00	2.00	2.00	2.00	1.00
B2B/B2E mobile app services revenue	50%	5.00	3.00	5.00	3.00	5.00	1.00	2.00	5.00	2.00

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

Leaders

› **Accenture provides design, business consulting, and mobile dev at scale worldwide.**
Accenture scores well in our evaluation due to breadth and depth on both the creative design
and the technical capabilities necessary for delivering successful mobile enterprise app projects.
It combines its world-class, global business and technology consulting with more than 5,000
developers on staff with B2B/B2E mobile experience. The result: more than 1,500 releases
of enterprise mobile applications for clients to date. Accenture's Capability Canvas includes
relationships with Apigee, Apteligent, Google, Oracle, SAP, and multiple enterprise mobility

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management (EMM) vendors. Its Digital Hubs drive high-velocity delivery of new mobile projects via App Studios and helps customers scale apps via Mobile App Factories. Talent from design agency acquisitions including Acquity, Fjord, Chaotic Moon, OCTO Technology, and MOBGEN round out App Studio talent. Accenture is well suited to handle client with large, complex, transformational mobile enterprise apps projects. Accenture is also a good selection for companies that want to leverage the Google's Cloud Platform and other services as part of their app efforts.

› **IBM brings agency skills and services capabilities.** IBM's Interactive Experience group blends agency creativity with the scale of a consultancy and the technology capabilities of an independent software vendor. IBM's Global Business Services and Global Technical Services Groups provide mobile capabilities through platforms like IBM MobileFirst, people applying its Design Thinking process, and partnerships including Apple, Box, Facebook, SAP, and Twitter. IBM applies its Design Thinking approach along with accelerators such as its Mobile Garages and 34 iX studios to get engagements off the ground quickly. With more than 6,500 employees in its mobile practice, IBM is well positioned to support the largest enterprise mobile transformation projects. IBM is a good fit for companies that have complex needs and are looking for a partner to help them transform their business or companies that need to transform their development shop culture to improve delivery velocity. It is also a good fit for firms already working with the IBM MobileFirst Platform, including those building solutions on any of the more than 100 IBM MobileFirst for iOS Apps.

› **Deloitte has a rare blend of agency skills, business acumen, and tech skills at scale.** While nearly all services providers talk about blending technology, agency, and consulting capabilities for mobile and digital transformation, Deloitte stands out for its commitment to scale in all of these critical areas and for making the right investments to pivot into new services areas such as design, mobile, and digital business. Specifically, Deloitte's acquisition binge over the past few years has added new design and mobile development skills to digital. Examples include ad agency Heat in 2016, psychology-focused consultancy Kaisen Consulting in 2015, and conceptual design firm Kid Neon in 2016. Notably, Deloitte has replicated the studio model it inherited through its 2012 purchase of Ubermind at major scale around the world. Deloitte also continues to pursue partnerships relevant to mobile B2E/B2B projects, including its innovation-focused partnership with Singularity University and its increased relationship with Apple, which it announced in 2016. Deloitte can handle a range of projects but is best suited for more transformational engagements in which clients seek to change business process and business model.

Strong Performers

› **EPAM combines its product engineering roots with a focus on creative and digital.** EPAM's origins as a software services firm were specialized around software product engineering principles, positioning it well for companies seeking a product-based approach to mobile enterprise app development. EPAM has grown to more than 19,000 engineers, designers, and consultants, in part through numerous acquisitions that have included Alliance Global Services, Dextrys, Empathy Lab, Great Fridays, InfomatiX, and NavigationArts. EPAM has a deep bench of

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mobile talent, with more than 2,800 development professionals focused on enterprise mobile apps. EPAM's approach is particularly suited to projects that include specialized hardware or integration with connected products and external sensors. European clients will also find EPAM's strong development presence in Central and Eastern Europe conducive to fast, highly interactive design, prototyping, and development, as development teams are separated from product owners by one or two time zones at most. Clients looking for a quick turnaround with an unfocused idea may also find EPAM's "innovation as a service" a good way to quickly connect with its developers using hackathon concepts.

› **TCS is strongest for application development and support in B2B/B2E mobile.** Building on its deep technology heritage and strength in enterprise applications such as SAP and Oracle, Tata Consultancy Services (TCS) has rapidly grown its mobile application services capabilities. More than 500 of TCS' experience designers have worked on B2B/B2E mobile projects in the year leading up to this Forrester Wave evaluation, and it has major hubs in Silicon Valley and Siruseri, India. Engineers continue to dominate the TCS talent pool; for example, TCS has thousands of mobile-oriented engineers, more than 10 times the number of business consultants within its digital consulting arm. TCS recognizes that the internet of things (IoT) plays a big role in the future of enterprise mobile and has placed big bets on the convergence of the two. For example, it has invested significantly in hiring from and partnering with leading IoT companies (such as wearables makers). TCS' mobile enterprise apps services are best suited to complex deals — especially IoT-oriented initiatives and those in industries where it has deep process expertise, such as automotive, financial services, and retail.

› **Europe-based Capgemini blends agency skills with consulting, tech, and outsourcing.** Capgemini has been the lead partner for a wide range of B2E and B2B mobile projects, such as creating mobile apps for field technicians and apps for financial services advisors. Capgemini focuses on helping firms use mobile as a key element in broader business transformation; the provider tends to stay away from creating point mobile solutions. Capgemini has a significant library of prebuilt IP for mobile enterprise apps, as well as deep expertise in core enterprise applications outside of mobile. French digital experience specialist Backelite remains a centerpiece of Capgemini's agency capabilities, though the provider has only minimally scaled agency capabilities outside of Europe. Capgemini has a significant productization and platform strategy, which gives its clients faster time-to-value, as well as unique pricing options such as "as a service" pricing models. The provider also partners with a Who's Who of leading technology vendors for mobile enterprise apps projects, including Amazon Web Services, Kony, SAP, Salesforce, and VMware. Capgemini is best suited for larger, transformational mobile work — especially for clients looking for a partner with deep focus in Europe, particularly France.

› **Wipro aims to disrupt mobile services with deep design — but is tech-heavy today.** Wipro has been able to build on its end-to-end enterprise applications capabilities and parlay them into services relevant for a mobile-first world. Wipro is still strongest at end-to-end technology execution related to mobile enterprise apps, including development, testing, integration, and

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backend transformation. It has also doubled down on creative and design skills, in particular through its 2015 acquisition of Designit. Wipro has a strong library of prebuilt IP that helps speed time-to-value, including testing, automation, and artificial intelligence solutions (including the flagship HOLMES AI platform) that can improve results and speed up mobile projects. With examples still limited of Designit working side by side with Wipro's enterprise applications and technology groups, Wipro today provides end-to-end mobile application services but is strongest at the technology elements of these projects.

› **Infosys has grown its creative/digital pool but remains strongest at mobile tech.** Infosys provides its clients with a growing array of creative and design services and business and industry consulting, but its biggest strength continues to be the depth of its technology capabilities, which span development, testing, and integration work. Infosys is already a leading partner for enterprise applications (such as homegrown solutions or packages from Oracle and SAP), which puts it in a strong position for B2B/B2E mobile work that will typically need to connect to enterprise systems to be valuable. Infosys continues to invest in this space, including firmwide training on design thinking, a budget of more than $500 million to invest in newer startups such as Clique Intelligence and Ooyala, and an R&D skunkworks within the mobile practice that brings innovations to customers quickly. Infosys is a strong choice for clients looking for end-to-end services from a firm with deep technology capabilities and deep enterprise applications talent — especially in industries such as retail, consumer packaged goods (CPG), and logistics.

Contenders

› **LiquidHub is fast-growing and evolving from a history of tech to strategy and design.** LiquidHub has blended its legacy skills in enterprise architecture, integration, and technical strategy with a growth strategy in experience strategy and design, digital architecture, and analytics. Headquartered in Wayne, Pennsylvania, with development centers in Bangalore and Hyderabad in India, LiquidHub has around 200 experienced design practitioners and just under 1,000 developers with experience in enterprise mobile app development. Mobile project durations are as short as 12 weeks, with six to nine months being typical. LiquidHub is a good fit for companies that are looking to expand their execution efforts and want a combination of down-the-street digital agency design talent mixed with lower-cost offshore development resources.

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Supplemental Material

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product
evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of 3 data sources to assess the strengths and weaknesses of each
solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that
they provided to us by December 20, 2016.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation
criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where
necessary to gather details of vendor qualifications.

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› **Executive strategy briefings.** We spoke with key executives at the participating companies to discuss their practice's road map and strategy. We also used this opportunity to hear about noteworthy projects and differentiating practices. We used findings from these calls to validate details of each services provider's capabilities and gain an understanding of its strategy.

› **Customer reference survey.** To validate product and vendor qualifications, Forrester also sent an online survey to at least three of each vendor's current customers

The Forrester Wave Methodology

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

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors 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 vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor 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 evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and 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 vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] See the Forrester report "What Does It Cost To Source A Mobile App?"

[2] Source: "Putting Design At The Heart Of Social Service Delivery", Fjord (https://www.fjordnet.com/workdetail/putting-design-at-the-heart-of-social-service-delivery/).

[3] For more information on The IDEA Cycle, see the "Re-Engineer Your Business For Mobile Moments" Forrester report.

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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