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MarketScope for the Enterprise Mobile Communication Gateway

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The technology to support mobile devices onto enterprise systems is widely available, but only a small percentage of companies are deploying it. Gartner expects that mobile integration will happen as UC platforms that support mobile UC are deployed, versus using stand-alone EMCG platforms.

What You Need to Know

Although Gartner continues to see interest in combining mobile wireless phones with the enterprise telephony system, the uptake was slow during the past year. In many cases, companies have a difficult time defining a business case for this technology, even though there are agreed-upon soft returns like productivity and convenience. Consumer-oriented Internet Protocol (IP) technology that supports mobile voice over IP (VoIP), like Skype and Fring, is widely adopted by many corporate users. This technology isn't widely supported by enterprise IT, and is mostly overlooked in its corporate use. Many companies continue to evaluate the use of Enterprise Mobile Communication Gateway (EMCG) technologies, but also are waiting as their traditional unified communications and collaboration (UC&C) vendors have mostly integrated mobile capability into their support for IP PBX systems. Gartner believes that mobile applications will be a big part of the increase in adoption of UC&C, and will be supported more widely in integrated UC&C suites during the next two years.

Strategic Planning Assumption(s)

By 2016, 75% of mobile unified communications (UC) solutions will be integrated into the enterprise telephony infrastructure.

MarketScope

The rapid pace of adoption of the mobile smartphone has still not abated. However, support for that smartphone, and now tablet, for integration into the enterprise telephony system has seen low adoption: fewer than 10% of enterprise users (this varies by region, but not by much). Most users are content to use the handset manufacturer and telco-provided voice functionality. One reason is that mobile voice traffic is declining, while data traffic, primarily driven through messaging and other

applications, is increasing. As demand for voice services diminishes, communications is being done via email and text messaging — services already integrated into enterprise systems. Third-party platforms for mobile messaging, like the BlackBerry Enterprise Server and Good Technology, are already widely adopted. Support for more-advanced voice support is just not a priority at many companies.

As mobile voice and data UC&C functionality continues to grow, Gartner believes mobile integration will begin, especially as most enterprise UC&C suites support mobile integration. Some key features for support that will help drive EMCG and mobile UC adoption are:

- Wi-Fi support — Wi-Fi has become prevalent in many enterprises, offering in-building wireless connections for voice and data. Most mobile devices support Wi-Fi for in-building connections at home, in the office and while traveling — where cellular doesn't reach or doesn't work well. Not all EMCG vendors offer handoffs between a private Wi-Fi network and the cellular network. Companies, especially in North America, will continue to request this, because cellular in-building coverage still isn't satisfactory for their in-building needs. However, companies or regions with stronger in-building cellular, microcellular solutions or those that have built out distributed antenna systems will only need to evaluate cellular extension capabilities. Support for multiple IP PBX types, mobile platforms and wireless LAN (WLAN) systems are all elements intrinsic to EMCGs. Cellular carriers will also influence this, as the use of Wi-Fi, especially in the U.S. and Western Europe, is becoming part of their network strategies.
- UC&C functionality — This brings presence or collaboration capabilities to mobile devices, which is still needed and has value for many users. One example is the ability to connect to a conference call by simply clicking in the calendar entry. Joining a conference call via a mobile device is still difficult to do.
- Mobile video — As desktop video continues to expand, companies are looking to extend that capability to mobile devices. This is done primarily through consumer-oriented applications, but more robust and secure enterprise capabilities need to be brought to this application.
- Support for voice over wireless WAN (WWAN) — Many enterprises are looking to support voice over WWAN, especially third-generation (3G) data networks. The hope is that this will reduce roaming costs, but the quality of the voice service, especially on heavily utilized systems, will inhibit use and growth.
- Regulatory support — Regulations around voice recording or text messaging logging will drive some companies and industries (financial services, for example) to adopt extended solutions.

Many companies are still cautious about supporting EMCGs and mobile UC, because they don't understand the business case. Companies need to be aware of the benefits of mobile UC and fixed-mobile convergence (FMC), the maturity of the products available and how mobile UC will drive the adoption of UC and the replacement of wired telephony for mobile users during the next five years, converging the number of devices supported and eliminating redundancies or little-used technologies. Instead of being chained to the desk, users will be free to conduct business in a mobile environment, yet maintain enterprise functionality on wireless devices.

The future of stand-alone EMCGs is limited. As many companies are moving their communications assets off-premises, mobile UC offerings are also going in the cloud. Already, communications service providers have mobile UC offerings, although they are limited by region, pricing isn't stable and offerings are considered immature. For on-premises, most IP telephony vendors are offering this functionality as part of their UC solutions,

even FMC (which offers network handoff). As more of these functions are built in, the need for stand-alone EMCGs likely will diminish during the next two to three years. Figure 1 and Figure 2 present some of the more important EMCG features, by vendor.

Figure 1. EMCG Features by Vendor

Company	Product Name	EMCG Segmentation	Product Delivery	Integration: Please describe: line-based, trunk-based, PBX-based, other?	QOS Support	Wi-Fi Only Support	Dual-mode Phone Support	OS Support	Support for Voice over LTE	Least Cost Routing	Telephony Presence	Call Recording	Number of Users System Can Support?
Aastra Technologies	Aastra Mobile Client (AMC) & AMC Controller (AMCC)	Vendor Specific-stand-alone	In most cases AMC is delivered as a software only solution. For dual-mode an AMC Controller is needed and can be delivered as a self-contained appliance with the AMC software pre-installed or as a SW only image for a virtualized server environment.	PBX based & trunk-based	Yes	No	Yes	Symbian S60 third/5 ed, BlackBerry, iPhone & Android	Yes	Yes	Yes	No	4,000 AMC users on single server (AMC Controller/HP G6)
Alcatel-Lucent	8600 My Instant Communicator Mobile Edition	Vendor Specific-bundled	My Instant Communicator Mobile Edition is a software application of the OmniTouch 8400 Instant Communicator Suite, an appliance platform that serves as the platform for ALUs UC portfolio.	PBX-based	Yes	Yes	Yes (for Nokia E series)	Windows Mobile, Nokia e Series, Blackberry, iPhone	No	Yes	Yes (on some devices)	No	20,000
Avaya	Avaya one-X@ Mobile	Vendor Specific-bundled	SW, server software & mobile client software	Server -ased with line & trunk capabilities	Yes, embedded in PBX	No	No	Includes: • Android 2.2 • RIM OS 4+ • iPhone OS4+ • Symbian S60, 3rd Ed, FP1,2	No	Yes	Yes	Yes	12,000 per Avaya Aura Communication Manager stations supported
Cisco	Cisco Unified Communications Manager/Unified Communications Manager	Vendor Specific-bundled	Software, appliance, cloud (via Cisco Hosted Collaboration Solution)	Trunk and line-based	Yes	Yes	Yes	Android, BlackBerry, iOS and Symbian	No	Yes	No	Yes	60,000 per cluster, >1,000,000 per system
CounterPath	Enterprise Mobility Gateway	Vendor Neutral	Software, appliance	PBX based & trunk-based	Yes	Yes	No	Windows Mobile, Nokia Symbian, RIM BlackBerry	No	No	No	No	N/A
Motorola Solutions	Motorola Total Enterprise Access & Mobility (TEAM) VoWLAN and FMC solution	Vendor Neutral	Appliance and Software. Premise-based	line-based or trunk based	Yes	Yes	No	Windows Mobile	No	No	No	No	45.00 users per appliance

Source: Vendor-Provided Information

Figure 2. EMCG Features by Vendor, Continued

Company	Product Name	EMCG Segmentation	Product Delivery	Integration: Please describe: line-based, trunk-based, PBX-based, other?	QoS Support	W-iFi Only Support	Dual-mode Phone Support	OS Support	Support for Voice over LTE	Least Cost Routing	Telephony Presence	Call Recording	Number of Users System Can Support?
NEC	UNIVERGE Spherical UC&C software	Vendor Specific-bundled	Software, appliance, cloud	PBX-based & trunk-based	Yes	Yes	Yes	iOS	No	Yes	Yes	Yes	30,000 ports across multiple locations
Research In Motion	Mobile Voice Server	Vendor Neutral	Software	PBX-based & trunk-based	Yes	Yes	Yes	RIM OS	No	No	No	No	3,000 users per server
ShoreTel	ShoreTel Mobility	Vendor Neutral	Appliance and Software. Premise-based and cloud (via service provider partners)	PBX based & trunk-based	Yes	Yes	Yes	Apple iOS, BlackBerry OS, Nokia S60, and Android 2.1 or later.	Yes	Yes	Yes	Yes	- 2000 Series (10-100 users) - 4000 Series (10-1,000 users) - 6000 Series (10-5,000 users)
Siemens Enterprise Communications	OpenScope MobileConnect OpenScope UC Server OpenScope Mobile	Vendor Specific-bundled	Software, appliance, cloud	PBX-based	Yes	Yes	Yes	Android 2.1 and higher Apple iPhone 3G, 3GS, 4G (OS 3.x, 4.x) Symbian Platform RIM BlackBerry Windows Mobile 6.1 and 6.5	No	Yes	Yes	Yes	MobileConnect 50 - 50 users MobileConnect 250 - 250 users MobileConnect 1500 - 1,500 users OpenScope Mobile: OpenScope as many as 100,000 mobile users
Tango Networks	Abrazo Mobile Unified Communications Abrazo SIP Trunking Controller	Vendor Neutral	Appliance Software Cloud (Hosted)	PBX-based & trunk-based	No	Yes	No	iPhone, Blackberry, Windows Mobile 5/6, Symbian.	Yes	No	Yes	Yes	Up to 15,000 users per enterprise node.
TeleWare	Private Mobile Network (PMN) - a secure private GSM network for fixed mobile convergence	Vendor Neutral	Appliance, Software		No	No	Yes	Symbian, BlackBerry	No	Yes	Yes	Yes	
Varaha Systems	uMobility	Vendor Neutral	Software (client and server)	Trunk and line-based	Yes	Yes	Yes	iPhone, Blackberry, Windows Mobile 5/6, Symbian.	Yes	Yes	Yes	No	5 user system to carrier grade 100,000 users per Node

Source: Vendor-Provided Information

Note: This is a selected review of features and is not exhaustive.

A number of vendors in last year's EMCG MarketScope are no longer covered here because their sales or platforms are provided exclusively via a communications service provider or hosted through another third-party provider. These include Telepo and QuesCom. DiVitas Networks was dropped, as it is no longer in business.

Market/Market Segment Description

EMCG vendors primarily support enterprise-deployed gateways, which integrate mobile devices (smartphones, mobile Internet devices [MIDs], PDAs and handsets) into corporate communication systems to support voice and, possibly, data communication services with LAN/WAN roaming. Hosted or managed services bought by subscription are also covered if they don't involve integrated carrier network support; these can be multitenant platforms or deployed selectively on a per-customer basis. There are basically three types of platforms:

- Vendor-neutral, stand-alone systems that work with any IP PBX vendors.
 - Carrier integration-focused — These are not covered in this research.
 - Enterprise premise-focused
- Vendor-specific, stand-alone — These are separate servers, developed by specific vendors, which are not part of a UC&C bundle.
- Vendor-specific, part of UC bundle — These are separate servers, developed by specific vendors, which are part of a UC&C bundle. These are becoming dominant for mobile support and are standard by all the major vendors.

Inclusion And Exclusion Criteria

Vendors included in this research support the integration of mobile devices into IP PBX systems.

They should also include:

- Open-standards and Session Initiation Protocol (SIP) support
- Support at least one IP PBX vendor
- Voice call continuity (among wireless and/or wired networks)
- Telephony user interface applications
- Support for at least three mobile OS platforms
- Access support for WAN (cellular), WLAN (wire voice over IP [wVoIP]) and/or wired LAN
- At least five named accounts
- Companies only supporting carrier-based systems are not included

Rating for Overall Market/Market Segment

Overall Market Rating: Caution

Adoption of stand-alone EMCGs has been low, and interest has been waning, if looked at through the number of Gartner inquiries in this area in the past year. No company can provide a completely turnkey solution that includes infrastructure, handsets and, potentially, service, so it takes many vendors to cooperate, in most cases, to supply the needed components, and carriers are only beginning to support a more comprehensive service. Adoption of these systems is also part of the IP telephony and UC&C evolution in the enterprise, and will follow that adoption path (see Table 1 and Figure 3).

Evaluation Criteria

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Market Understanding	Ability of the vendor to understand buyers' wants and needs, and to translate those into products and services for an emerging market. Vendors that score high understand the telephony progress is different for each company and is a full mobility solutions expert.	high
Marketing Strategy	A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements that will help define an emerging market. Appealing to the mobile needs and business case is important.	low
Innovation	Expertise or capital for investment, product enhancements, R&D and differentiation. What are the product release/upgrade cycles? How do these match and compare with consumer-oriented mobile product investments?	high
Sales Strategy	The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extends the scope and depth of market reach, skills, expertise, technologies, services and customer base.	low
Overall Viability (Business Unit, Financial, Strategy, Organization)	Some of the companies are small and rely on a narrow product base for revenue. Viability includes an assessment of the organization's overall financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.	high
Product/Service	Focusing and supporting mobility is key. Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/ partnerships as defined in the market definition and detailed in the subcriteria.	high
Offering (Product) Strategy	The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements and track closely with adoption of mobility in the enterprise.	high

Source: Gartner (September 2011)

Figure 3. MarketScope for the Enterprise Mobile Communication Gateway

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Aastra Technologies			X		
Alcatel-Lucent				X	
Avaya				X	
Cisco				X	
CounterPath			X		
Motorola				X	
NEC			X		
Research In Motion				X	
ShoreTel				X	
Siemens Enterprise Communications				X	
Tango Networks			X		
TeleWare			X		
Varaha Systems			X		

As of 7 September 2011

Source: Gartner (September 2011)

Vendor Product/Service Analysis

Aastra Technologies

Aastra Technologies has consolidated its enterprise mobility solutions for its MX-ONE and Aastra 5000 platforms with the Aastra Mobile Client (AMC) and Aastra Mobile Client Controller (AMCC) for dual-mode environments. The appliance server architecture relies on a partnership with Comdasys for the core infrastructure, and customized client interfaces to support Symbian Series 60, BlackBerry, iPhone and Android Smartphone OSs. Aastra has partnerships with HP, Meru, Extreme, Aruba and Juniper to provide the voice over wireless LAN (VoWLAN) component of the solution, where required. With the launch of the BluStar client, the development direction will see the AMC client evolve into BluStar to offer a common look and feel across the Aastra UC portfolio. Although it has a global presence, Aastra's strength is primarily in European and South American markets, but is a good choice for organizations that have selected Aastra platforms for their telephony solutions.

Rating: Promising

Alcatel-Lucent

Alcatel-Lucent's Omnitouch 8600 My Instant Communicator Mobile Edition is the mobility solution for its OmniPCX Enterprise Communications Server platform. MIC Mobile Edition is a software application of the OmniTouch 8400 Instant Communicator Suite and OpenTouch Communications Suite, appliance platforms that

serve as the platform for Alcatel-Lucent's UC portfolio. MIC Mobile Edition supports Windows Mobile, Nokia E Series, BlackBerry, iPhone and Android OSs. Most of the mobility features are common to all smartphone OSs; there are some discrepancies in terms of VoWLAN support (Nokia E-Series only) and rich presence (no telephony presence with Nokia E Series, only IM presence with Windows Mobile). The Alcatel-Lucent Advanced Cellular Extension application is a more basic capability that enabled a smartphone to become an extension of the OXE platform, and supports Windows Mobile, Nokia E-Series (with Intellisync Call Connect) and BlackBerry. Alcatel-Lucent is an established provider of UC, with strong market share in Europe. MIC Mobile Edition is a strong choice for organizations that have implemented the 8400 ICS platform for UC. Alcatel-Lucent has announced a potential sell-off of its enterprise business. Because mobility is so integral to the telephony business of the future, Gartner believes product support and development will continue.

Rating: Positive

Avaya

The use of mobile UC fits well into Avaya's vision for context-driven collaboration through its UC&C products. With its one-X clients, Avaya has expanded its broad support for a number of mobile platforms, including voice and video and seamless handoffs between network technologies, which Avaya didn't do on its own in the last report. Avaya has done a good job of incorporating mobile elements into its suite of solutions, including the new Avaya Flare experience for mobile communications and collaboration (into which the one-X clients will evolve), and provides a UC communications bundle as part of Avaya Aura Communications Manager, with no extra costs for those that have the Enterprise Edition. Many of the basic UC elements, like presence, for example, are already included in the Standard and Enterprise Editions. User awareness of this capability is growing, but still isn't strong. Many companies don't have the business case for a large investment in this area, and Avaya could do better at marketing and segmenting its user base to provide customized and cost-effective solutions. Companies should pick Avaya if already invested in Avaya voice and UC&C infrastructure, and are looking to add mobile components and an integrated solution to their portfolio.

Rating: Positive

Cisco

Cisco Jabber (recently renamed from Cisco Mobile) is the mobility solution for Cisco's Unified Communications Manager platform. Cisco Jabber clients are Cisco's second-generation offering in the mobile space and are currently available on the Apple iOS, Google Android and Nokia Symbian OSs. These clients connect directly to Cisco's UC infrastructure, including Cisco Unified Communications Manager and Unity Connection. The clients also integrate into existing corporate LDAP directories, allowing users to use a single set of credentials across all devices. Unified CM features are extended to remote users via VPN. Cisco also offers support for Nokia Call Connect solution, which interoperates with Cisco Mobile/Jabber for Nokia and provides support for VoWLAN and VoIP over 3G mobile networks. In partnership with Research In Motion (RIM), Cisco supports BlackBerry Mobile Voice System (MVS). In addition to Cisco's fully integrated dual-mode service, Cisco provides open interfaces for partners, like Varaha Systems, to integrate its dual-mode service for handoffs between cellular and WLAN

networks. Cisco is a global provider of UC. Organizations that have standardized on Cisco's Unified Communications Manager portfolio should consider adopting Cisco's mobility solution.

Rating: Positive

CounterPath

CounterPath provides products for desktop and mobile VoIP solutions, and recently released its iPad support with the Bria iPad Edition Version 1.0 via the Apple iTunes App Store. Bria is a standards-based, service-agnostic softphone for making and receiving calls over a Wi-Fi or a 3G/4G mobile connection on the iPad. Through its Enterprise Mobility Gateway solution, CounterPath supports a software-based enterprise mobile UC solution driven by its IP telephony, client VoIP products. The company's product suite includes SIP-based softphones, server applications and FMC solutions that enable service providers, enterprises and OEMs to integrate voice, video, presence and IM applications into its VoIP offerings and extend functionality across fixed and mobile networks and on numerous mobile platforms, including Android and Apple iOS support in the last year. However, CounterPath still has limited visibility in the enterprise market space and needs to work closer with IP PBX vendors beyond its partnership with NEC, which was announced last year. CounterPath offers strong mobile extension capabilities. Enterprises looking for a total VoIP solution from a vendor-neutral provider outside of what may be available from the IP PBX vendors should consider CounterPath.

Rating: Promising

Motorola

Through its Motorola Total Enterprise Access & Mobility (TEAM) VoWLAN and FMC solution, the newly created Motorola Solutions Inc. (MSI; from the breakup of Motorola this year) is still the only provider that can supply servers, software, devices and Wi-Fi access points. However, it cannot supply the cellular service and the IP PBX. Though fairly well-known in more vertical-oriented solutions like retail, manufacturing and healthcare, MSI has yet to break into more horizontal markets. Its TEAM supports cellular and voice over Wi-Fi, and across a number of device platforms and third-party IP PBXes. It has one of the largest installed bases of voice over Wi-Fi users. However, it still does not support soft handoff between cellular and Wi-Fi networks outside its own devices. It does support IM and push-to-talk presence, but it doesn't yet support telephony-based presence. Consider Motorola for deployments in VoWLAN implementations, especially those needing Wi-Fi-only devices in ruggedized environments in the U.S. and when you want to extend some capabilities of your enterprise mobile devices. Motorola's strength is primarily limited to North American markets. Although its experience is predominantly on ruggedized devices, it is a good choice for organizations looking to support both ruggedized and consumer-focused devices.

Rating: Positive

NEC

NEC's mobility capability is now available as an embedded application of the Univerge Spherica UC&C software, supporting a range of UC applications with a common look and feel across mobile and desktop OSs.

Sphericall also supports fixed mobile convergence across the WLAN. While the Univerge MC550 provides single number between wired handsets and cellular. Sphericall smartphone clients supported focus on Apple iOS for iPhone and tablet, with Android support planned for later in 2011. Bundling mobility as part of Unverge Sphericall is useful if organizations are committed to that platform direction. Midsized to large companies that have already invested in an NEC voice platform should consider NEC.

Rating: Promising

Research In Motion

RIM has continued to invest in its EMCG server MVS, for integration into numerous IP/PBX environments to extend desk phone functionality to BlackBerry devices. With MVS 5.1, it now enhances voice over Wi-Fi by including automatic handoff (dependent on the device OS supported) and some additional UC features. Additionally, it has launched BlackBerry Mobile Conferencing, which supports direct-to-dial conference bridging across six to seven of the leading conferencing bridges. This allows users to click to connect to their conference calls, right from their calendars. It continues to offer a low-cost mobile UC alternative. However, it still is limited in its support of non-BlackBerry devices where it supports fewer UC features than its own handsets (VoWLAN, for example). To date, MVS is still recommended for enterprises that will continue to predominantly use the BlackBerry device, and are looking for a low-cost mobile UC solution but want an IP/PBX-agnostic vendor. For enterprises with heterogeneous mobile environments, a best-of-breed approach can be employed, whereby the benefits of MVS are enjoyed by BlackBerry users, and alternative UC solutions are applied to non-BlackBerry devices. This does not apply to companies that have a majority of non-BlackBerry mobile devices.

Rating: Positive

ShoreTel

ShoreTel entered the EMCG space through its acquisition, in late 2010, of Agito Networks, which was rated a Positive in the 2010 EMCG MarketScope. ShoreTel is a telephony provider supplying UC solutions based on its IP business phone system, while Agito is focused on enterprise mobility, extending voice and UC to mobile phones. The acquisition of Agito allows ShoreTel to offer native UC support for mobile devices, including BlackBerry, iPhone, iPad, Nokia and Windows-Mobile smartphones. ShoreTel has stated it will continue to support non-ShoreTel IP PBXes with Agito's Roam Anywhere mobile product, now called ShoreTel Mobility Router. Gartner thinks deep partnerships with other telephony vendors will become increasingly difficult, and it only will be a matter of time before third-party support for distribution wavers, especially as partners move to their in-house-developed solutions. With the acquisition, there hasn't been the same development cycle as in the past (fewer updates), but support for the emerging OS platforms continues. Customers report a continued positive business experience, an ease in scaling to and from small rollouts, and a consistent user experience across platforms. ShoreTel is a good choice for enterprises looking for roaming across multiple networks (wired, wireless, LAN, WAN), but enterprises should closely monitor how ShoreTel continues to support its product for non-ShoreTel systems.

Rating: Positive

Siemens Enterprise Communications

Siemens Enterprise Communications' OpenScape Mobility portfolio is composed of two solutions: (1) OpenScape MobileConnect is a mobile FMC/UC solution that integrates a range of smartphone OSs from Apple iOS, Symbian, Windows Mobile and RIM; and (2) OpenScape Mobile delivers VoIP and mobile UC for next-generation Android and Apple iOS devices. For OpenScape MobileConnect, the MobileConnect Server manages the multiple devices, while the MobileConnect Client provides the user interface for the different mobile handsets, as well as application integration and IM and presence via Open Fire and support for Extensible Messaging and Presence Protocol (XMPP). OpenScape Mobile — due for launch in 3Q11 — features a new software client and a software application that resides on the OpenScape UC Server in place of the separate appliance, as with MobileConnect. This simplifies the implementation of mobility through an intuitive user-based app store deployment model and reduces management complexity, treating mobile clients as standard extensions of the OpenScape UC Server. Access through the OpenScape SBC provides secured remote connectivity to the OpenScape UC Server. Siemens Enterprise Communications is an established player with a strong mobility proposition for organizations that have standardized on their OpenScape and HiPath brands of telephony platform. It is a strong choice for companies looking to mobilize their users and companies that have already invested in OpenScape and HiPath.

Rating: Positive

Tango Networks

Tango's Abrazo-E solution uses a unique hybrid design that places an EMCG in the enterprise and connects with a carrier mobility convergence gateway (CMCG). This means availability depends on carrier support, while call control is shared between the carrier and the enterprise. Although it optionally supports voice over Wi-Fi, cellular in-building coverage is also controlled by the carrier, mainly through adequate macro coverage or the use of distributed antenna systems. The solution offers a differentiated set of policy rules that enables enterprises to customize mobile policies on a corporate, departmental and end-user basis. It currently functions on two carriers in the U.S. (Sprint Nextel and nTelos), and is looking to launch on another major provider in the U.S. and one in Europe. The company partners with a number of device clients (MobileMax and HelloSoft) that connect directly to the enterprise's EMCG, if a carrier gateway is not available. Tango supports Voice Call Continuity (VCC), which allows automatic cellular to Wi-Fi and Wi-Fi to cellular switching. This enables employees to use any carrier if they have a smartphone with mobile data and, optionally, Wi-Fi. Companies that have the majority of their customers on a Tango-supported provider (like Sprint Nextel in the U.S.) and are looking for a vendor-neutral system should consider Tango Networks.

Rating: Promising

TeleWare

For a full enterprise mobile solution, companies must pair TeleWare's Private Mobile Network (PMN) with its Mobile Office (as well as most of the major telephony vendors like Cisco and Microsoft). Its technology is limited primarily to European providers, as its delivered through the U.K. reseller and operator channels. It supports all

Global System for Mobile Communications (GSM) handsets, including iPhone with additional functionality on Symbian, Microsoft and BlackBerry handsets. Although it supports mobile UC, seamless network handoff is OS-dependent. It also does not support voice over 3G. TeleWare Mobile interfaces with any SIP-compliant IP PBX and has been tested with products from Cisco, Avaya, Alcatel-Lucent, Siemens, Panasonic and more than 30 IP PBX vendors. Because of these network limitations and a greater focus on the operator channel and Europe as a market, it is recommended for companies looking for a mobile UC solution, and companies that are based outside Europe.

Rating: Promising

Varaha Systems

Varaha Systems delivers its uMobility client and server product via software, versus an appliance that can potentially scale up to 10,000 users. It distributes its offerings mostly through partners like NEC and service provider relationships. uMobility supports line-side and trunk-side connections between server and call manager. Call control is maintained by the call manager, uMobility Controller, which performs SIP-standards-based, third-party call control for managing mobility. The mobility is supported through the device's native interface and on most mobile platforms, including BlackBerry, Apple iOS (iPhone and iPad) and Android. It supports VoIP over Wi-Fi, as well as over 3G services. Varaha Systems rates a Promising because it lacks full UC suite integration, but should be considered for a platform-neutral, dual-mode system needs.

Rating: Promising

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Gartner MarketScope Defined

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's

criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

In the below table, the various ratings are defined:

MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

Caution

Faces challenges in one or more areas.

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas.

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

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