

Cool Vendors in Mobile App Development, 2016

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Mobility is the foundation of overall digital experiences and it is driving digital business transformation. We identify five emerging vendors with new and innovative approaches to enterprise mobile app development that you should watch out for.

Key Findings

- Demand for mobility skills is outpacing organizations' ability to keep up, resulting in mobile app development leaders facing a skills shortage. Exicon directly tackles this issue by matching suitable development partners with an organization's mobile app requirements.
- Demand for mobile apps outstrips available development capacity, thus making quick creation of front-end client apps even more challenging. This is where rapid mobile app development (RMAD) tools, such as PowWow Mobile's offering, can benefit enterprises.
- Large, regulated industries, such as healthcare, have unique back-end integration needs that cannot be met by the standard features offered by most mobile back end as a service (MBaaS) providers. CloudMine is one of the first MBaaS providers to build a platform that caters for this specific vertical.
- Geolocated information is a new area in development. As part of the digital workplace, 3D visualizations of cities and building interiors help users relate to information that would otherwise be difficult to assimilate. eeGeo has created a cross-platform mobile software development kit (SDK) to build an attractive, game-grade visualization approach for geolocated data.

Recommendations

- Leverage third-party developers and business analysts that use codeless RMAD tools to build the client portion of mobile apps.
- Devote the majority of IT assets for mobile app development to creating an MBaaS-centered mobile integration architecture that is composed of services from third parties, internal services, or a combination of the two.

- Reassess the location-based service (LBS)/real-time location services (RTLs) market. New vendors have shifted the economics of the industry, as well as pushed the boundaries for both precision and position update frequency.

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Strategic Planning Assumption

By 2020, 70% of mobile apps used in enterprises will be developed or adopted without IT involvement.

Analysis

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

What You Need to Know

Many organizations soon discover that the real power of the mobile app comes from the integration and services that allow the app to deliver value to the users. Organizations that realize the importance of these integration and service needs have begun to adopt mobile app development platforms (MADPs) that offer toolchains to address the needs of the full software development life cycle (SDLC), from design and build through to deployment and management. These MADPs include tools that offer analytics, testing and mobile app management capabilities.

The demand for large numbers of mobile apps delivered on very short timelines has also driven the demand for RMAD tools. These no-code/low-code tools allow people (that are not programmers) to build mobile apps quickly and easily in visual development environments. The adoption and use of these tools relieves the pressure on development teams to build large numbers of simple mobile apps for organizations.

Enterprises that have established tools for front-end app development, including native SDKs, still realize the importance of integration and services and, therefore, have begun licensing MBaaS offerings to deliver their requirements for integration, data orchestration and third-party services, such as location, push notifications and collaboration.

The common theme of our selection of vendors in this Cool Vendors list is "simplified mobile enablement." Each of these five vendors brings a new way to handle complex problems in mobile-friendly ways.

Exicon

Hong Kong (www.exiconglobal.com)

Analysis by Adrian Leow

Exicon's offering centers around mobile workflow management (MWM). MWM for enterprises consists of three main stages: First, the "Build," which involves defining what you need and getting the right partner to build it. The second stage is the ability to "manage" functions such as sentiment analysis across app stores, in-app analytics and data aggregation across full app portfolios, storing mobile assets, corporate governance to ensure standardization of branding, and development and competitive insights to compare app performance. The third part is the "promote" stage, which involves distributing apps to the right app stores and in the right formats to encourage organic and paid user acquisition, and to improve engagement with existing users.

Why Cool: The relentless pace of mobile technology presents significant challenges for enterprise development teams. Acquiring skilled staff is difficult, and training existing staff may end up becoming redundant as technologies evolve ever more quickly. Many organizations decide that outsourcing mobile app development is the best way to deal with these issues. Gartner fields many inquiries on how organizations can identify appropriate, reliable and skilled development partners to meet their needs. Exicon provides a unique and reliable solution to this market need; their AppBuilder tool assists enterprises with developer matching and finding quality third-party mobile development companies to build the app based on the idea. AppBuilder is composed of Exicon's internal team of app experts and a network of more than 3,000 highly qualified developers around the world to help take an app from an idea to delivery. In conjunction with AppBuilder, Exicon's App Cost Calculator is an online tool that provides an estimate on the cost of building an app based on the third-party developers selected. To manage the whole developer selection process, as well as oversee cost estimations and eventual performance management of the deployed apps, Exicon provides what it calls "Mission Control for Mobile" via their AppBoard product, which is a dashboard that has a consolidated view of all the apps in development and production, and

provides insight into how the overall app portfolio is operating, any issues with app developers and who built a particular app function.

Challenges: The mobile app development market is still volatile and maturing, which means that Exicon will have to constantly evolve to ensure that their product offerings are up to date to take into account new features, such as new integration connectors included in the AppBoard, while also developing and continuously refining recommendation algorithms to help users understand when to use the different tools/integrations, and to ensure that the best match is made between an enterprise and shortlisted developer teams. Exicon's compelling and unique offering that matches third-party developers to enterprise customers, along with its tools to help manage the mobile workflow through the entirety of the mobile app life cycle, is a relatively new concept in the market. As a result, Exicon will need to invest in more educational forms of marketing to drive growth.

Who Should Care: Mobile app development leaders, DevOps managers and business process leads who typically are responsible for the entirety of the mobile app life cycle — from designing and developing an app through to deployment and management — will benefit from Exicon's offering. IT can improve scalability and performance, business units can ensure that product/service offerings reflect business objectives, and marketing/communications can use the AppBoard to maximize acquisitions and engagement.

PowWow Mobile

South San Francisco, California, U.S. (www.powwowmobile.com)

Analysis by Van Baker

The PowWow SmartUX mobile platform is a visual, codeless mobile app development platform where customers can design new mobile experiences and then transform elements of new and existing client applications, back-end applications and databases without requiring developers or writing code.

The platform uses a three-step process (deconstruct, transform and reconstruct) to convert the assets included in Windows and Web apps into user-friendly functional mobile apps. Platform users can also create new mobile apps from scratch if needed. The first step deconstructs existing enterprise applications, breaking them down into a range of fields, controls and other components, which then reconstructs them into native mobile apps with a user interface that is appropriate for mobile apps. This process preserves all business logic, customizations and integrations with enterprise data. The PowWow mobile platform can be delivered as a hosted solution in the cloud or on-premises, depending on the enterprise's requirements. The platform utilizes scriptable APIs in their app controller to interact with components of existing Windows and Web applications, and back-end services that have been identified by their deconstruction engine.

Why Cool: PowWow Mobile allows enterprises to design new mobile experiences for their customers and employees, and rapidly deliver them as native mobile apps across multiple mobile platforms. Enterprises may use PowWow Mobile as an alternative to traditional mobile development or other delivery methods, such as virtual desktop infrastructure (VDI), in order to reduce delivery times, and provide a native mobile experience for applications.

Unlike many other tools in this space, PowWow Mobile is not constrained to elements of one application on the back end. It offers enterprises that have large, existing inventories of Web and Windows applications the ability to convert these existing applications into mobile apps using a visual drag-and-drop environment that requires no coding. New capabilities can be added to mobile apps with PowWow Mobile's new Mobile Connect feature and PowWow Studio. This can typically be completed within a few days, allowing enterprises to address the growing demand for mobile apps. The PowWow mobile platform sits between existing Windows and Web applications and a native mobile app that runs on iOS and Android platforms. The platform is especially interesting because it lets the person building the mobile app use components from multiple back-end applications to orchestrate the data and controls necessary to deliver compelling functionality to the users of the mobile apps.

Challenges: The value proposition for PowWow Mobile is simple to explain. However, because the market is crowded, it can be challenging for enterprises to evaluate the best approach to mobilize their portfolio of applications. The platform is partly a Windows and Web adaptation tool, and partly a rapid mobile app development tool. This is difficult for businesses to understand and compare to other offerings in the market. At the same time, the solution is very simple; it is a platform that breaks down existing applications into reusable components for mobile app development, and does not require programmers to build the resultant mobile apps. Additionally, the mobile app market is fragmented and confusing to enterprises that have mobile app needs. The number of vendors in the market and the wide variety of tools and methodologies employed in the market make it challenging for enterprises to identify the appropriate tools that address their mobile app needs.

Who Should Care: Enterprises with a large portfolio of Web and Windows applications that can be leveraged to address greater demand for mobile apps will find PowWow Mobile a valuable tool for delivering mobile apps to demanding line of business (LoB) employees.

CloudMine

Philadelphia, Pennsylvania, U.S. (www.cloudmineinc.com)

Analysis by Van Baker

CloudMine is an MBaaS provider that offers a range of hosted services, including data hosting, authentication and push notifications, as well as a series of integration services. In addition, the platform offers data management features to support analytics. Recently, CloudMine has launched Connected Health Cloud, which is focused on the needs of healthcare payers and providers, as well as Pharma and Biotech companies. CloudMine is a multichannel MBaaS provider, serving the needs of enterprises with Web and mobile apps, including the growing market for wearable technologies in the healthcare field. The CloudMine platform has four major parts: an interoperability engine, developer tools, cognitive analytics and compliance and security measures.

Why Cool: CloudMine is one of the first MBaaS providers to build a platform that caters to a very specific industry with unique needs that cannot be effectively met by the typical MBaaS platform providers. The healthcare industry has very specific regulatory requirements regarding the handling of health information. CloudMine complies with all regulations of the Health Insurance Portability

and Accountability Act (HIPAA), and has signed the Business Associate Agreement (BAA) — something that many other technology providers are unwilling to do. The company also has certification from the Health Information Trust Alliance (HITRUST), which incorporates the healthcare compliance requirements of PCI, HIPAA, ISO 27001/27002, Control Objectives for Information and Related Technology (COBIT), and the National Institute of Standards and Technology (NIST). CloudMine also complies with the regulatory requirements of Title 20 CFR 11 regarding their handling of electronic health records. The CloudMine platform integrates with several electronic health record (EHR) providers, including Epic, Cerner and athenahealth. In addition, CloudMine offers a connector to healthcare middleware, Infor Cloverleaf, for a wide range of healthcare system integrations. CloudMine's digital health platform also supports Apple ResearchKit, making it much easier to expand and engage the patient research population. In short, the platform offers members of the healthcare industry the tools needed to build secure and compliant Web, mobile, and Internet of Things (IoT) applications and solutions, thus enabling the digital transformation of the healthcare industry.

Challenges: CloudMine did not start out as an industry-focused solution for the healthcare sector. The company entered the market as a generic MBaaS provider, but increasingly found themselves addressing the needs of companies in the healthcare market and, therefore, began to develop the unique services required by that industry. As such, the company faces the challenge of transitioning from a generic MBaaS provider in the market to the provider of the Connected Health Cloud service, a healthcare-specific offering. The company needs to do this without losing its existing customers that are not part of the healthcare industry. Additionally, the MBaaS market is relatively small; mobile app development platforms are just beginning to accelerate. CloudMine is not a large company at this time either, but it has made efforts to counterbalance this by partnering with larger, best-of-breed healthcare vendors such as Infor.

Who Should Care: Healthcare providers, payers and companies in the pharma and biotech industries that have a desire to develop and deliver mobile applications to deal with patient self-reporting, patient engagement, clinical research and medication adherence should investigate CloudMine. This is especially true if their needs include creating mobile and Web applications that integrate with EHR provider systems, and complying with regulatory requirements associated with sensitive information.

mParticle

New York, New York State, U.S. (www.mparticle.com)

Analysis by Jason Wong

Founded in 2013, mParticle unifies the collection and integration of mobile data into leading analytics, marketing and data warehouse platforms. The mParticle platform supports in-app data collection via its open-source native iOS and Android SDKs. It has also launched support for Apple TV with its tvOS SDK, and supports Web data collection via its JavaScript SDK. The platform also offers APIs that allow it to be integrated with marketing and analytics platforms. SDKs can be a headache to manage and test; on average, an app will have three to six SDKs, but some may have more than 10. This can have a significantly negative impact on the performance of the mobile app itself. mParticle aims to eliminate this problem with mobile SDK proliferation by consolidating and

streamlining the data collection process, and then connecting that customer data to many services via server-to-server APIs.

Why Cool: By using mParticle, developers can reduce the amount of time spent on integrating, maintaining and testing mobile SDK code, while increasing the speed at which marketing and analytics teams can connect their data to new services and add or change services without adversely affecting app development. This means that development teams can mitigate the risk and complexity associated with integrating, supporting, and replacing multiple mobile SDKs and back-end services. mParticle also makes it easier to get data out of one system and into another, making it simpler to answer complex questions compared to analyzing data in silos. Major brands, such as Airbnb, Spotify, Staples, Starwood, SoulCycle and iHeartRadio, are using mParticle to address their mobile marketing and analytics needs. Each month, mParticle has more than 750 million active mobile users on its platform, captures more than \$2 billion in e-commerce transactions, and processes more than 65 billion API calls. mParticle has grown its integration portfolio with popular enterprise marketing and analytics platforms and now has more than 85 integrations with services such as Amazon Redshift, Amplitude, Appboy, Kahuna, Kochava, Facebook, and Oracle Responsys.

Challenges: mParticle is a new and small vendor that intersects two volatile mobile areas: mobile analytics and back-end services. While it has built up a broad portfolio of integrations with partner services, mParticle is also, to some degree, competing with those partners that don't want to lose mind share and value. As a result, mParticle will need to move beyond just aggregation. Indeed, it is already offering data mapping, transformation and management of third-party integrations capabilities on its platform. Additionally, this type of service offering naturally sits with larger platform as a service (PaaS) and MBaaS capabilities; although they are yet to deliver similar functionality, mParticle will have to compete with these large, established vendors the moment they do.

Who Should Care: Mobile product owners and app development leaders should evaluate mParticle in terms of how it can help streamline mobile data and analytics integrations, particularly for B2C-facing apps. mParticle has seen the most traction with businesses in the retail, travel and hospitality, and media industries. Its platform can help create a unified mobile data collection and management strategy, making it easier for marketing and development teams to more effectively boost app usage, lower app maintenance costs, and alleviate SDK fatigue.

eeGeo

Dundee, U.K. (www.eegeo.com)

Analysis by Richard Marshall

eeGeo provides an attractive, game-grade visualization approach for geolocated data at an unusually low cost. Building such systems normally requires significant visual modelling, but eeGeo automates this step by combining information from multiple sources to ensure a realistic 3D model. This process ensures that models are automatically updated without the need for the manual updates that are usually required when using other systems, thus reducing costs. The maps can

include animations, such as moving vehicles, and include dynamic weather display to improve realism and provide additional elements for marketing. As a component for existing apps, this provides both realistic navigation, especially within buildings, and a vehicle for rapid assimilation of all kinds of information at building, street and city levels.

Why Cool: Conventional modelling is prohibitively expensive to build and maintain, meaning that only a few organizations can afford to use such approaches. eeGeo's automatic ingestion of map and building information and dynamic scene rendering dramatically reduces costs, therefore enabling much broader adoption. This comes at exactly the right time: Geolocated information is becoming more widely available, but many people are struggling to relate to geolocated information when it is presented in the form of conventional maps, floorplans and charts. Using familiar, 3D visualizations of cities and building interiors helps users relate to information that would be otherwise difficult to assimilate. The eeGeo SDK is available as a cross-platform library, meaning that you only have to write the code that uses its APIs once. The library has been successfully deployed on multiple platforms, including iOS, Android, and OSX, while the company's product roadmap states plans to provide support for WebGL and to accommodate the emerging virtual reality market, including support for Google Cardboard and Oculus Rift.

Challenges: This is a new style of visualization and so will be unfamiliar to both designers and users. Some enterprise users may find that the design style is too different from existing norms and, in such instances, will refrain from deploying eeGeo's services for anything other than site and building maps.

Who Should Care: Enterprises that use geolocated data should consider this visualization approach, allowing their data values to be layered on realistic models of their locations. Presenting information to people who may be unskilled in map reading will also be much easier, as landmarks help users find visual anchors. Enterprises offering site maps, for example, of shopping malls, entertainment venues and large office complexes, should consider this approach as a means of presenting easy-to-follow directions that are supported by visual verifications within the map.

Where Are They Now?

Movilizer

Mannheim, Germany (www.movilizer.com)

Analysis by Adrian Leow and Richard Marshall

Profiled in "Cool Vendors in Mobile App Development, 2015"

Why Cool Then: ERP apps are some of the most common use cases for mobile, and yet, all too often, the deep customization of the back end entails full custom development of the supporting mobile app, requiring development skills that are in short supply. Similarly, ERP apps often work best when pulling information from multiple back ends, which also requires custom development to blend and present the information correctly, thus creating dependencies and custom integration layers. Movilizer made this process simple and efficient, enabling those familiar with ERP systems and processes, especially SAP, to rapidly create mobile apps with deep integration to back-end

systems and device capabilities. No programming was required to add features such as camera, location, bar code scanning and signature capture, which were then pushed out to staff based on their role. Movilizer provided rapid, pragmatic mobilization of essential business processes, which could then be scaled to huge volumes due to elastic cloud support.

Where They Are Now: On 1 March 2016, Honeywell, a provider of custom-engineered sensors, switches and controls, and productivity solutions, completed its acquisition of privately held Movilizer, which created one of the world's first cloud platforms for field service applications. According to Honeywell, acquiring Movilizer's cloud software platform advances its vision of the connected worker. It also supports Honeywell's vision of driving growth and value through data, and creating new business models for its customers. Movilizer's offering complements Honeywell's workflow solutions portfolio of mobile productivity technology, including data collection, voice solutions, rugged mobile computers, bar code scanners and workflow printing solutions.

Who Should Care: Honeywell's acquisition of Movilizer is relevant for organizations looking to deploy large-scale mobile versions of critical business processes, as Movilizer's original offering is an interesting alternative to off-the-shelf apps or full custom coding. Those looking to build portfolios of task-specific apps based on SAP will also find the tool particularly useful. Existing Honeywell customers who are looking into innovation opportunities with industrial IoT, and who also wish to drive greater productivity and flexibility in their mobile initiatives, will benefit from access to Movilizer's tools. Any organization that operates with a distributed workforce will need mobile solutions that can be rapidly developed, are massively scalable and connect its mobile teams more closely to the enterprise, and therefore should also consider Movilizer's offering as part of Honeywell.

KidoZen

Miami, Florida, U.S. (www.kidozen.com)

Analysis by Adrian Leow and Richard Marshall

Profiled in "Cool Vendors in Mobile App Development, 2015"

Why Cool Then: Mobile apps that draw information from enterprise back-end systems and deliver it in a mobile-optimized process, provide significantly better value than siloed apps that connect to only one data source. KidoZen recognized this and consequently prioritized data access that was managed and secured in its MBaaS offering. As a result, KidoZen's platform was ideal for supporting bimodal approaches and providing a solid, yet adaptable, mobile app integration platform on which mobile apps could be rapidly constructed without compromising data governance. The data management rules were embedded in the MBaaS layer, avoiding the need to replicate them in the app code itself. The platform supported the automatic generation of basic apps from available APIs to kick-start projects, as well as typical MBaaS features, including offline synchronization, analytics, identity management and location.

Where They Are Now: On 23 November 2015, the remaining assets of KidoZen were acquired by Mad Mobile, a startup developing a cloud-based platform that enables companies to transform and

map their current APIs or Web properties to enterprise-class mobile apps. Mad Mobile builds complex, transactional mobile apps for enterprises. The KidoZen platform enhances Mad Mobile's ability to offer enterprise customers a choice of delivery models: full-service, self-service, hybrid, cloud or on-premises. The KidoZen team, including a development group located in Buenos Aires, Argentina, were transitioned to Mad Mobile without causing any service disruptions for KidoZen customers.

Who Should Care: Mad Mobile's acquisition of KidoZen is relevant for organizations looking to create a mobile app integration platform on which it can deliver mobile apps quickly and securely. This is an important requirement for digital business agility. The platform is suited for midsize-to-large organizations with strong data management and governance requirements.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Wearables: New Interactions and New Opportunities"

"Toolkit: Mobile App Development RFP Template"

"Market Guide for Rapid Mobile App Development Tools"

"Market Guide for Cloud Mobile Back-End Services"

"Market Guide for Mobile App Analytics"

"The Enterprise App Explosion: Scaling One to 100 Mobile Apps"

"How to Address the Complexities of the Mobile AD Technologies Vendor Landscape"

More on This Topic

This is part of an in-depth collection of research. See the collection:

- Cool Vendors 2016: Features, Fads and Disruptions Will Define the Digital Landscape

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