

Company Impact

November 2013

AnyPresence Set To Increase Footprint in a Crowded Space With Meta-Platform

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The Bottom Line

AnyPresence has developed a platform to support deployment of enterprise mobility with a strong focus on reducing development time and cost, and has gained expertise in deploying mobility projects with health care providers, finance institutions and utilities. We evaluate whether the company's technology and know-how will serve as differentiators and help the company face the increasing commoditization in the industry.

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AnyPresence at a Glance

AnyPresence provides a backend-as-a-service (BaaS) platform for mobile-enabling enterprise business processes, products and services. The company was founded in 2010 by former SAP, Oracle and Siebel Systems executives, is based in Reston, Va., and currently has 30 employees. AnyPresence is privately held and has raised U.S.\$7.5 million, backed by Grotech Ventures and Kinetic Ventures. The company focuses exclusively on the enterprise market.

Product

The AnyPresence platform offers enterprise mobility features for business process applications, with capabilities for user roles and authentication, cloud data management and integration into source systems. The platform allows businesses to deploy HTML5 apps to a scalable cloud infrastructure, as well as compile native iOS and Android apps in the cloud, while making them available for local testing, over-the-air distribution or submission to app stores.

The company has made two important product announcements in 2013. In June, it launched the AnyPresence Meta-Platform, which allows companies to white-label the AnyPresence platform and enable their own developer ecosystem to build apps that connect with their products or services. In September, AnyPresence announced general availability of its fifth-generation release, with new features that focus on reducing the time and cost for application development. This includes the InstantStarter wizard and In-Browser Native App Previews; both features allow developers to quickly create a working prototype and preview it without leaving the browser environment.

Go to Market

Business Model

There are different approaches to BaaS pricing: Most vendors favor a usage model based on API calls, data storage or number of users, or a combination of the three. Others favor charging a flat fee per app; AnyPresence falls in this category. The company believes usage for enterprise customers is difficult to estimate, and instead charges an annual flat fee per app. This includes backend and user interface across any number of users for HTML5, iOS and Android platforms. Pricing starts in the low five figures per cross-platform app, with annual subscriptions and discounts for multiple apps and multi-year contracts. Customers can start with a two-week trial; after that, they can get regular access for as low as \$20,000 per year, depending on how many apps they are building and where the app servers are hosted. The company also generates revenue from professional services including training, app building and platform Extensions. Companies typically purchase a bundle of three to four apps for a low-six-figure annual contract, which includes cloud-based hosting, unlimited developers and multiple app environments.

Partners

AnyPresence has strategic technology partners that support key stages in the development life cycle. This element helps reduce time and cost required for deployment of enterprise mobility projects. AnyPresence has partnership agreements with companies including:

- **Acentia:** AnyPresence and Acentia have partnered to provide enterprise mobility solutions to the public sector.
- **Apperian:** Integration with mobile application management (MAM) pioneer Apperian allows for one-click enterprise mobile app deployments through an app publishing API program.
- **Citrix:** AnyPresence is part of Citrix's Ready Worx Verified partner program and is featured in the Citrix Worx App Gallery. The Ready Worx program is powered by the Citrix Worx App SDK, which ensures that verified apps contain a high level of built-in security and allows for easy verification of AnyPresence apps with Citrix XenMobile and Citrix MDX app container technology.
- **FireHost and Online Tech:** For customers with additional security and data privacy needs, AnyPresence leverages partnerships with both FireHost and Online Tech; these partnerships allow AnyPresence to offer HIPAA compliant mobile apps with a signed business associates agreement (BAA), an important differentiator for clients in the health care space.

Sales

The company has not disclosed specific information on sales revenues but has confirmed it has paying customers. We estimate that its sales for 2013 will be less than U.S.\$5 million. The company's client base is concentrated in North America and has started to expand internationally, with clients in Europe and Asia-Pacific. Some AnyPresence customers, such as Schneider Electric and MasterCard, are global. Currently, most of its deals are direct sales; the company is in the process of developing a channel partner network.

Customers

AnyPresence has built a customer base in key verticals including health care, finance and utilities. Using the AnyPresence platform, companies in these sectors have developed business-to-consumer (B2C) and business-to-employee (B2E) mobile applications for different use cases. In the health care sector, AnyPresence has worked with providers to build and deploy mobile apps for patient and physician engagement. In other sectors such as utilities, the company has supported the development of mobile applications for common self-service functions such as account management, usage analysis and outage reporting. AnyPresence lists Gannett, Miami Children's Hospital, PawsPlus, Leon Medical Centers and Schneider Electric as some of its customers; MasterCard is one of the company's customers for the Meta-Platform.

Competition

The enterprise mobility market is evolving with a number of different players, including mobile enterprise application platform (MEAP) vendors, BaaS vendors and mobile cloud application platforms. AnyPresence considers its main competition for enterprise mobility deals to be custom-built (i.e., non-platform) development of enterprise mobile applications; the company also sees limited competition from vendors including Appcelerator and FeedHenry.

The company claims its platform can make development of enterprise mobile applications up to five times faster when compared to MEAP vendors and custom-built applications. AnyPresence believes it has four key differentiators:

- The capability to quickly mobile-enable legacy enterprise applications
- The flexibility to deploy in the cloud, on-premises or in secure data centers
- No platform lock-in, with full source code access across the entire stack

- A design-time API layer that enables it to serve as an OEM platform for enabling developer ecosystems (Meta-Platform offering)

Other potential competitors of AnyPresence include Antenna, Verivo and StackMob, all of which have mobile development platform offerings that help companies with front-end or backend development.

Market Trajectory

After the launch of its first-generation platform in 2011, AnyPresence gained experience in health care with its first customers. The company has since expanded its reach to include other sectors such as retail, media, manufacturing and finance. AnyPresence claims it has kept consecutive growth since 2012, with greater than 100 percent quarter-to-quarter growth in 2013. It projects it will grow from 30 to 40 employees by the end of 2013 and will double this number by year-end 2014.

SWOT Analysis

AnyPresence

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Company leadership made up of industry veterans with solid knowledge of enterprise business applications • Platform architecture allows cloud-based or on-premise deployment with secure integration • Meta-Platform allows customers to build their own developer ecosystem for B2C apps • The company has developed expertise in B2B and B2E mobile applications 	<ul style="list-style-type: none"> • Company needs to build and expand its channel partner network to support target growth goals • Limited presence in international markets
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Partnership with system integrators with expertise in specific verticals such as finance and health care • Strict regulation in industries such as health care and finance favors vendors with on-premise deployment 	<ul style="list-style-type: none"> • Industry giants such as Amazon, Salesforce and Rackspace are moving into the BaaS space • Increased competition is leading to commoditization of BaaS solutions

YG Take

Yankee Group believes that AnyPresence has attained a technological advantage thanks to its system architecture and expertise in deploying mobility projects with health care providers, finance institutions and utilities. The company has developed a platform that complies with the requirements of different decision-makers and influencers: a short development cycle, cloud-based and on-premise options, and secure and compliant access to data. The platform supports complex use case scenarios; this gives the company a competitive advantage in industries with strict regulation such as finance and health care. The company's Meta-Platform is a key asset because it enables AnyPresence to deploy its solution on a white-label basis, which multiplies the results of each deal by increasing the number of apps—and potentially the number of users—that impact their bottom line.

As the BaaS segment continues to evolve in the next 24 months, increased competition will drive commoditization and differentiation will become critical. Yankee Group believes that AnyPresence is well positioned to survive and thrive as a key industry player, but the company needs to outline how it will support its target growth goals and expansion in international markets. Moving forward, the company should continue its investments in R&D to maintain its technological leadership and focus on developing a partner network with sales and technical expertise in key verticals.

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