IDC MarketScape

IDC MarketScape: Worldwide Enterprise Mobility Management Software 2017 Vendor Assessment

Phil Hochmuth

THIS IDC MARKETSCAPE EXCERPT FEATURES VMWARE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Enterprise Mobility Management Software Vendor Assessment

Source: IDC, 2017
Please see the Appendix for detailed methodology, market definition, and scoring criteria.
IDC OPINION

The enterprise mobility management (EMM) market is on the cusp of a major evolution from smartphone/tablet device management to broader PC and IoT device management use cases. Enterprises are increasingly looking to a unified endpoint management (UEM) model, with a single software platform for controlling a wide range of enterprise devices. To that end, EMM software platforms must be evaluated on all relevant capabilities for smartphone/tablet device management, as well as mobile app and content management. However, future-looking enterprises are evaluating how well these platforms manage mobile laptops as well as stationary PCs. Many enterprises also consider EMM a strategic management platform for IoT endpoints and connected internet devices, such as wearables, smart office/conference room equipment, building automation, and other network-connected and employee-interfacing devices and platforms. This IDC MarketScape is the first in three versions analyzing EMM vendor offerings. This first IDC MarketScape considers all major use cases and broad functionality requirements for EMM solution providers in the market, including PC management, or UEM use cases as well as IoT use cases. Subsequent IDC MarketScapes will provide specific analysis of vendors’ EMM software capabilities and strategies with regard to PC and UEM management deployments and IoT/ruggedized device use cases. This EMM market evaluation took into account current capabilities of EMM products relative to mobile and PC devices and a vendor’s strategic plans around future IoT expansion. Vendors with leading offerings in the EMM market provide this breadth of capabilities today with product development road maps that will match future needs. Key findings include:

- EMM vendors generally meet most requirements of today’s enterprise mobile device and application management functions across the most relevant mobile operating systems (Apple iOS and Google Android).
- UEM capabilities in EMM platforms are mainly focused on Windows 10 management, although legacy Windows PC OS support is available by some EMM vendors. Mac OS management is growing, as well as Google’s Chrome OS.
- IT buyers looking at EMM software today are looking closely at solutions with future UEM and IoT capabilities in mind.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Because of the large number of vendors participating in the EMM market, IDC invited vendors to participate based on two key criteria:

- An EMM suite offering mobile device management (MDM), mobile application management (MAM), and mobile content management (MCM) capabilities
▪ EMM product revenue of $15 million or above for calendar year 2016 (Revenue was estimated in April 2017 and may differ from forthcoming vendor share documents.)

In addition to the companies profiled in this study, there are also a number of other companies in the EMM market with relative products that did not meet the vendor inclusion criteria for this study. These include Amtel, Baramundi Software, CA Technologies, Kaspersky Lab, Kony, Matrix42, Prey Software, and Snow Software, among others.

ADVICE FOR TECHNOLOGY BUYERS

This study analyzed and rated vendors across a broad range of capability- and strategy-focused criteria. Technology buyers should evaluate EMM platforms with feet in the present (mobile device/app management and security) and clear eyes on the near future of UEM and enterprise IoT device management requirements. To that end, the criteria and attributes that are key for IT buyers to consider when evaluating EMM platforms are discussed in the section that follows.

Key Measures for Success

▪ **Core functionality of EMM platforms in the areas of MDM, MAM, and MCM.** Core functional components also include secure PIM, DLP and file access controls restrictions, app wrapping, and SDK capabilities. While EMM platforms are evolving to new use cases and management tasks, these core EMM platform capabilities are still a baseline requirement.

▪ **Strong portfolio of adjacent and complementary IT products, services, and solutions.** Solutions such as endpoint security, identity, VPN, network access control (NAC), mobile devices, mobile applications or app development platforms, virtualization, and data/analytics capabilities all have relevant tie-ins with EMM platforms.

▪ **Ability to support a broad range of device operating systems.** iOS and Android are the dominant two mobile operating system (OS) platforms in the world, but others do exist, and new ones are emerging in certain regions and industries. Also the extension of EMM platforms into PC and IoT management scenarios requires support for new types of devices and OS software, from PC operating systems to wearables and other embedded real-time OS technology in IoT endpoints.

▪ **Capabilities for supporting non-corporate devices or BYOD users.** Support for employees personal mobile, or BYOD, is critical to expanding seats and overall management scope of an EMM platform. With over 90% of enterprises supporting BYOD, businesses must find tools that can apply to these devices the same levels of granular policy enforcement, security and control over apps, and data accessed by these devices as corporate-owned device.

▪ **Conditional access controls and policy enforcement triggers.** This is becoming a critical feature of EMM platforms. Conditional access controls what apps, data, or other resources a user can connect to and consume, based on array of factor, such as location – GPS location, network connectivity type – as well as the day, the end-user identity and role, and the state of or health of the device being used (from the standpoint of jailbroken/rooted device, or an OS that is out of date).

▪ **Scalability and cloud-based delivery capabilities.** Cloud is the future of the EMM market as most vendors offer some level of this delivery model. SaaS-based EMM fits with the mobile/cloud synergies of enterprise mobile computing, allowing businesses to flexibly deploy EMM capabilities to mobile devices wherever they are, without having to stand up and maintain on-premise servers and supporting IT resources. Hybrid is still an important aspect of EMM as many organizations still require some on-premise deployment scenarios, particularly
security-sensitive industries such as financial and government, or in deployments in EU countries with more stringent cloud data privacy regulations.

- **Strong UEM capabilities and road map for customer success.** While EMM platforms today mostly manage smartphones and tablets, laptop and PC management (both Windows and Mac) as well as emerging Google Chrome OS devices are increasingly being considered for management with EMM. Unified endpoint management is on the road map for the majority of U.S. enterprises, but this will not be an easy cutover; organizations will need help transitioning from PC-only PCLM platforms to UEM-based solutions. Critical support issues will involve transitioning Win32, PC image management, patching and update packages, and group policy objects to EMM-based modern management.

- **A pragmatic and scenario-driven IoT strategy for EMM.** EMM platforms are not the answer for all IoT scenarios. Businesses will not likely want to manage IoT-connected oil wells, shipping containers, livestock, or other industrial IoT activities with the same platform as mobile phones and laptops. However, it is logical to extend EMM management functionality to enterprise-focused IoT scenarios that integrate connected office technologies (physical access) connected conference rooms, user/asset location tracking, data entry/transactional kiosks, and wearables. Enterprises will look to a UEM platform provider to support these deployments.

## VENDOR SUMMARY PROFILES

This section briefly explains IDC’s key observations resulting in a vendor’s position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of the vendor’s strengths and challenges.

### VMware

VMware is a Leader in the 2017 EMM IDC MarketScape. VMware’s AirWatch product, acquired in 2014, is now tightly integrated into VMware’s End User Computing (EUC) business unit, which includes the company’s virtual client computing and other non-datacenter software products. As an individual product, AirWatch has MDM, MAM, and MCM capabilities and is expanding aggressively into UEM and IoT use cases. AirWatch is also among the leaders in EMM to incorporate reporting data and analytics into its offering, with packages to help businesses better understand how mobile devices, apps, and data are accessed and consumed. VMware also recently acquired mobile app analytics vendor Apteligent to bolster this offering.

The acquisition of EMC (VMware’s majority owner) in 2016 has already resulted in support for management of Dell PC BIOS configuration and security settings, as well as expanding into Dell-branded Chromebook management. On the IoT front, VMware has had some of the most visible customer wins in terms of EMM-led IoT device management, and there is a strong road map around enterprise-focused IoT in terms of connected conference rooms, office building automation, and wearables.

**Strengths**

AirWatch has among the broadest set of features for managing Windows 10, as well as pre-10 Microsoft PC deployments, and Mac and Chromebook. Support for Win32 app distribution, GPO policy enforcement, and other Windows-centric features will help the company gain traction in PCLM migration opportunities among its installed base and beyond.
VMware's Workspace ONE offering, which ties together mobile, traditional, and virtual client computing technologies, is a differentiator in terms of total value and major cross-sell/upsell opportunity for AirWatch among VMware's overall installed base.

VMware’s foray into analytics and IT operations data analysis is a differentiation capability that has the potential to transform EMM from an IT infrastructure platform to a strategic business analysis and optimization tool.

**Challenges**

VMware's IoT go-to-market strategy is split between AirWatch and its separate IoT division, which develops and markets its Pulse IoT Center solution for IoT device management and security. VMware’s approach to IoT is that AirWatch will handle "manned" connected devices — wearables, kiosks, and so forth — while the Pulse solution will address "non-manned" endpoints — meters, telemetry devices, and so forth. However many VMware customers are already deploying AirWatch in both scenarios — industrial and enterprise-focused IoT — as they see mobility and IoT converge. Such enterprises do not want to deploy separate device management solutions for both scenarios.

VMware customers said they had problems with account and technical support since AirWatch was fully integrated into the EUC organization. Longer lead times on responses to technical requests, sales and pricing questions, and other client interactions have frustrated some customers.

**APPENDIX**

**Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

**IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in
an effort to provide an accurate and consistent assessment of each vendor’s characteristics, behavior, and capability.

**Market Definition**

Enterprise mobility management (EMM) is a competitive software market that pulls revenue from various enterprise systems management, security, and content management markets. EMM offerings include capabilities that enable the secure management of devices, applications, and content within a mobile computing context.

A mobile device management (MDM) solution includes many of the standard features included in PC management solutions but also additional functionality that addresses the unique needs of mobile devices such as smartphones and tablets. In its current incarnation, the EMM software market is not meant to capture the entire IoT device management opportunity; however, a portion of the IoT device management market may be included where existing EMM vendors broaden out their platforms to support additional device types. Some of the key features of a mobile device management solution are:

- Device provisioning and management configuration settings
- Inventory/asset management
- Software distribution (applications, OS, and firmware updates)
- Remote wipe/lock and remote control for systems diagnostics
- Policy/compliance management (encryption management, device posture, etc.)
- Authentication and certificate management
- Real-time device monitoring, location information, and GPS tracking
- Reporting and analytics on devices

Mobile application management (MAM) refers to a solution by which specific mobile applications can be managed, secured, and distributed by IT organizations and that typically allows for enhanced policies to be applied to individual applications or a grouping of apps. Mobile application management solutions can either supplement MDM functionality or function as standalone offerings. Common functionalities included within MAM include enterprise app storefronts, containers, and app wrapping.

Mobile content management (MCM) solutions for the enterprise provide IT with a secure way to provide access to files/content/data sitting in various data stores to mobile devices. Such solutions may also provide mechanisms to securely collaborate on this content. These products allow IT to manage who gets access to what information and may tie in with other back-end or mobile-specific policy systems. Preventing data loss is a key goal of these products, and they do so by providing IT with a mechanism to control data flow in and out of the secured app and secure communication between apps. These solutions assist with compliance and governance by offering reporting on user activity with mobile content. Mobile content management solutions may be either cloud based or on-premise based and may also provide access to content that is in the cloud or behind the firewall.
Related Research

- **Five Trends to Watch in Enterprise Mobility Management for 2017** (IDC #US42415517, March 2017)
- **Worldwide Enterprise Mobility Management Software Forecast, 2016-2020** (IDC #US40430216, July 2016)

Synopsis

This IDC study represents a vendor assessment of providers offering enterprise mobile mobility management (EMM) software through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for EMM software. The evaluation is based on a comprehensive and rigorous framework that assesses how each vendor stacks up to its peers, and the framework highlights the key factors that are expected to be the most significant for achieving success in the EMM market over the short term and the long term.

"EMM is evolving beyond its original scope of mobile device, app, and content management," says Phil Hochmuth, program director, Enterprise Mobility Research at IDC. "EMM is extending into unified endpoint management – combining EMM functions with PC and laptop client devices, from both a company-owned device and BYOD perspective. EMM platforms are also extending to non-traditional connected endpoints, such as wearables, digital signage, kiosks, and other IoT-related scenarios such as connected offices and workspace. EMM platforms that will succeed in the short term, and survive long term, must meet all of today's enterprise mobility requirements and be in position for the UEM/IoT future."
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Global Headquarters

5 Speen Street
Framingham, MA 01701
USA
508.872.8200
Twitter: @IDC
idc-community.com
www.idc.com

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