IDC MarketScape

IDC MarketScape: Worldwide Enterprise Mobility Management Software 2017 Vendor Assessment

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IN THIS EXCERPT

The content for this excerpt was taken directly from the IDC MarketScape: Worldwide Enterprise Mobility Management Software 2017 Vendor Assessment by Phil Hochmuth (Doc #US42890217). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Buyer Guidance, Vendor Summary Profile, Appendix, Learn More, and Related Research. Also included is the IDC MarketScape Figure (Figure 1).

FIGURE 1

IDC MarketScape Worldwide Enterprise Mobility Management Software Vendor Assessment

IDC MarketScape Enterprise Mobility Management Software 2017
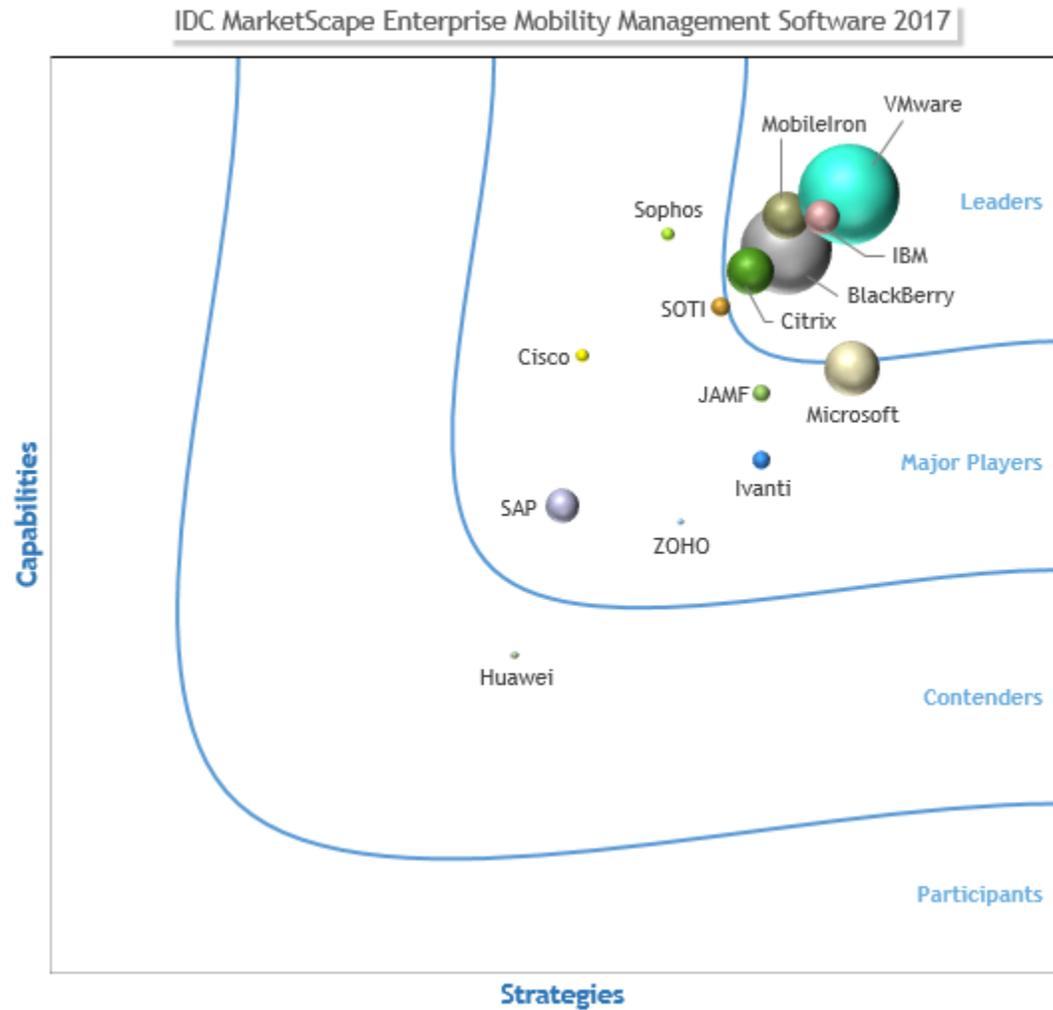
Source: IDC, 2017

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 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 each vendor's strengths and challenges.

BlackBerry

BlackBerry is a Leader in the 2017 EMM IDC MarketScape. BlackBerry's EMM portfolio includes a well-integrated suite of mobile device, application and content management, and enablement capabilities, combined with strong security features and an overall well-integrated solution. BlackBerry's main EMM product, BlackBerry Unified Endpoint Manager (BlackBerry UEM), is an evolution from the company's BlackBerry Enterprise Server and integrates the BlackBerry Dynamics mobile app development platform and BlackBerry Work secure PIM technology from the acquisition of Good Technology. From an MDM perspective, UEM provides strong device management configuration and security capabilities, a long-standing strength of BlackBerry from its days as one of the original enterprise-scale MDM platforms. BlackBerry had strong MAM capabilities prior to its acquisition of Good Technology, but the inclusion of the Good Work Suite, now BlackBerry Work, as well as its strong app-level policy controls and security settings make this one of the stronger MAM solutions on the market. From a mobile content management standpoint, BlackBerry Workspaces (formerly WatchDox) file sync and share technology is a strong cloud-centric content management system, with specific features around security, data confidentiality, and rights management.

Strengths

BlackBerry's strong expertise in security technologies, particularly around certificate management, identity and access management/control, and encryption and device policy enforcement make the company one of the stronger platforms on the market. The NOC is a strong asset that supports UEM customers with seamless connectivity to cloud-based assets, as well as on-premise applications and data resources. Connection to this network, basically a combined cloud-based remote access, threat detection, and connection brokering platform, strengthens the overall EMM offering. BlackBerry's Radar platform, an IoT for management and tracking service, as well as the company's QNX real-time IoT operating system, provide BlackBerry strong technology background and credibility in the emerging IoT space.

Challenges

Questions by the financial/investment community and market watchers around BlackBerry's restructuring as a software company, following the divestiture of its hardware and handset business, has lowered the stature of the company in the consumer mobility market.

While BlackBerry's NOC solution is a strength, the company's overall support for third-party cloud security or identity access management platform providers is being developed and works with SAML-based services.

While it renamed its product BlackBerry UEM, the PC management capabilities in the BlackBerry EMM platform are behind other competitors that have focused on specific Windows 7 to Windows 10 migration scenarios and have stronger technologies and PC life-cycle management. BlackBerry also does not manage native Windows apps (however, its BlackBerry Access secure browser and BlackBerry Work for Windows 10 provide alternative management scenarios).

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.

Strategies and Capabilities Criteria

Tables 1 and 2 provide key capability and strategy measures, respectively, for the success of enterprise mobility management platform vendors.

TABLE 1

Key Capability Measures for Success: Worldwide Enterprise Mobility Management Software

Capabilities Criteria	Definition	Weight
Customer service delivery/offering/satisfaction	The vendor's customer-facing delivery capabilities satisfy market wants and create a strong level of value for its customers	10.0
Functionality or offering	The vendor's capabilities maximize the connection between offerings and customers, such as delivery, partnerships, pricing, distribution, marketing, sales, and service.	44.0
Portfolio benefits	The vendor has a strong portfolio of adjacent and complementary products and services relative to the main product being analyzed in this study.	18.0
Pricing model or structure of product/offering	The vendor is willing to demonstrate value through flexible pricing mechanisms, including profit sharing–based relationships.	10.0
Range of services	Current offerings match directly to current customer needs to deliver maximum customer benefit.	10.0
Cost of ownership	The product provides customers with strong TCO capabilities due to inclusiveness of features and functions, reduction/savings in operational/acquisition costs, and overall value.	8.0
Total		100.0

Source: IDC, 2017

TABLE 2

Key Strategy Measures for Success: Worldwide Enterprise Mobility Management Software

Strategies Criteria	Definition	Weight
Delivery	The delivery model for the product, as well as associated support and maintenance services is well positioned for future customer needs, and it aligns with market trends.	20.0
Financial/funding	The company will generate, attract, and manage capital well over the next three to five years to create market value.	7.0
Functionality or offering strategy	The vendor's current development of offerings will be relevant and attractive to customers over the next three to five years.	28.0
Go-to-market strategy	Over the next three to five years, the vendor's sales/distribution structure will be aligned with the way customers, especially those in high-growth market segments, want to buy.	11.0
Growth	Strategies to grow the business are aligned with market trends and future opportunities over the next three to five years.	30.0
R&D pace/productivity	The pace of continued investment is expanding the company's industry cloud offerings over the next three to five years.	4.0
Total		100.0

Source: IDC, 2017

LEARN MORE

Related Research

- *IDC PeerScape: Practices for Identity and Mobility Management Platform Integration* (IDC #US42775717, June 2017)
- *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)

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