IDC MarketScape: Worldwide Unified Endpoint Management Software 2021 Vendor Assessment
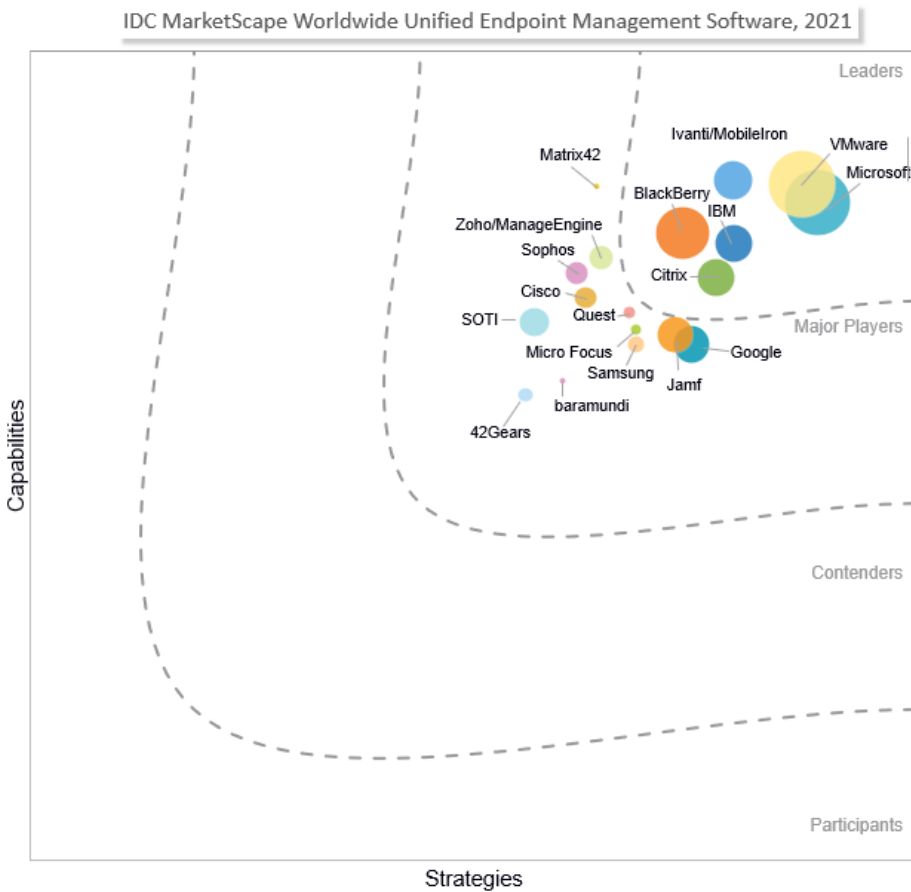
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THIS IDC MARKETSCAPE EXCERPT FEATURES IVANTI/MOBILEIRON

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Unified Endpoint Management Software Vendor Assessment

Source: IDC, 2020

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software 2021 Vendor Assessment (Doc # US46957820e). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Among enterprises, the management of endpoint computing devices – PCs, laptops, smartphones, tablets, and so forth – is rapidly converging around the concept of unified management. This is the provisioning, configuration, management, monitoring, and maintenance of up to five different operating systems (OSs) (Windows 10, macOS, iOS, Android, and Chrome OS) via a single console or software tool. Nearly three-quarters (72%) of U.S. enterprises are piloting or fully deploying UEM solutions currently, with 45% of firms beyond the pilot stage, according to IDC's 2020 *Enterprise Mobility Decision Maker Survey.* But any technology convergence or transformation effort has a long tail of partial integration and various states of hybrid management (think of the TDM/VoIP convergence of the early 2000s or cloud migration in the 2010s). Endpoint management convergence will be similar; in five years, fewer than half of enterprise IT leaders expect to be managing all endpoints solely with UEM technology.

The long tail of hybrid/legacy device management means co-management – applying policies to devices via a modern UEM and legacy PC life-cycle management (PCLM) tools – will be the norm in many firms. Some endpoint management leaders won't rewrite or throw out years of finely honed scrips and custom configuration options not supported (or easily replicated) in modern UEM software. However, some firms starting IT operations from scratch will adopt UEM out of the gate, choosing modern/cloud-managed and provisioning endpoint approaches. Owing to the COVID-19 pandemic, and expanded remote/work-from-home workforces, many firms are quickening their UEM migrations and modern endpoint provisioning and management. (Most UEM and modern management solutions can affect via the internet/public cloud, without requiring or taxing enterprise VPN and network resources.) To that end, spending on UEM solutions will be a priority among firms in the United States and worldwide going into the new year, as more than one-third of firms say they plan to increase spending on this technology in 2021 (source: IDC's *COVID-19 Impact on IT Spending Survey,* conducted during the October 15–30, 2020, period).

This study is the first in a series of IDC MarketScape documents evaluating product offerings from over 18 vendors worldwide. This study focuses on UEM solutions holistically, with considerations for the broadest set of deployment scenarios and requirements. But not one UEM solution fits all use cases. Subsequent documents will look at specific requirements and evaluation products based on criteria focused on the following areas: UEM solutions for small and midsize businesses, UEM for ruggedized device and IoT deployments, and UEM solutions for Apple device management.

For this study, IDC analyzed offerings from 18 different vendors and interviewed over 30 customers using UEM products. Key findings for this study include:

- Most enterprises are using multiple UEM solutions for various use cases and/or regional support strategies.
- Convergence of teams comes before the single pane of glass: most end-user organizations.
- Support of five endpoint platforms (Windows, Mac, Apple, Android, and Chrome OS) is common among most vendors in the market.
- Endpoint analytics and advanced telemetry gathering and analysis is a growing offering component among many forward-thinking UEM solutions providers.
- Many vendors are positioning UEM as an infrastructure/security component to a larger "workspace" strategy around how end users work and interact with digital technology.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC invited vendors to participate based on the following key criteria:

- The vendor has an UEM suite offering device and application management functions for PCs and laptops as well as for mobile devices (smartphones and tablets).
- The vendor has UEM product revenue of $5+ million for calendar year 2019. Revenue was estimated in May 2020 and may differ from forthcoming market share documents.

In addition to the companies profiled in this study, there are also a number of other companies in the UEM market with relative products that did not meet the vendor inclusion criteria for this study. These companies include Addigy, Amtel, HCL Technologies, Hexnode, Kandji, Prey Software, and Verizon.

ADVICE FOR TECHNOLOGY BUYERS

- **Baseline mobile endpoint support.** In addition to PC support, core mobility functionality of UEM platforms is in the areas of mobile device management (MDM), MAM, and MCM. Core functional components also include secure PIM, DLP and file access controls restrictions, app wrapping, and SDK capabilities. While UEM platforms are evolving to new use cases and management tasks, these core UEM platform capabilities are still a baseline requirement.
- **Strong UEM capabilities and road map for customer success.** While UEM platforms today mostly manage smartphones and tablets, laptops and PCs (both Windows and Mac) as well as emerging Google Chrome OS devices are increasingly critical for management with UEM. Critical support issues will involve transitioning Group Policy Object (GPO) and PC image management frameworks and modernizing patching and software distribution to UEM-based modern management.
- **Strong portfolio of adjacent and complementary IT products, services, and solutions.** Solutions such as identity, cloud access security brokers (CASBs), IT service management (ITSM), IT asset management, network security, and end-user productivity apps are all important for tight integration with UEM platforms, according to users deploying the technology.
- **A broad set of legacy and modern PC management support functions.** The long tail of PCLM and traditional management requirements means solutions that can address both legacy and modern endpoint management scenarios will have the greatest value to deploying enterprises.
- **Workspace intelligence and analytics.** With a broad view of endpoint and end-user activity, UEM platforms are becoming a central point of data gathering and analytics on enterprise worker behavior, device, app, and data usage patterns, as well as analysis of software performance and availability. UEM vendors with strong analytics and reporting capabilities

around these key metrics will have competitive advantages over vendors not focusing on this area.

- **Capabilities for supporting noncorporate devices or BYOD users.** Support for employees' personal mobile device, or BYOD, is critical to expanding seats and overall management scope of an UEM 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 devices.

- **Conditional access controls and policy enforcement triggers.** This is becoming a critical feature of UEM platforms. Conditional access controls what apps, data, or other resources a user can connect to and consume based on an array of factors, such as location (GPS location and 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 a jailbroken/rooted device or an OS that is out of date).

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

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.

Ivanti/MobileIron

Ivanti/MobileIron is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide UEM software. With Ivanti's acquisition of MobileIron (which became official in December 2020, along with the acquisition of Pulse Secure), the company now has an extremely broad portfolio of device management offerings, security capabilities, and UEM-focused technologies. In acquiring MobileIron, Ivanti bolstered its capabilities around modern mobile and PC management and increased its capabilities around secure device provisioning, management, and monitoring.

Ivanti/MobileIron's combined UEM offerings cover a broad range of management scenarios across mobile/PC management software platform, including PC patch management, and identity tools that integrate with the company's UEM technology. Ivanti/MobileIron also has a large installed base of legacy mobile devices and PCs managed on its platforms. The company's solutions provide co-management approaches via modern management and full agent-based management. As a combined entity, Ivanti/MobileIron plans to offer customers choice and a gradual migration path in terms of Windows and Mac life-cycle management – full-on, cloud-centric modern management of endpoints (via the previous MobileIron platform) and traditional tools for on-premises and domain-attached environments (via the previous standalone Ivanti UEM offerings). A co-management offering, where both methods can be deployed and managed in sync, is in the near-term road map.

Ivanti/MobileIron's Neurons Platform is a technology initiative inclusive of its UEM solution and brings management and automation across a broad range of device OS types – Windows, Mac, Chrome OS, Linux, Unix, iOS, and Android – IoT devices. The Neurons approach allows for configurable and flexible automation scenarios for device provisioning, monitoring, and life-cycle management across a range of form factors.

Strengths

Ivanti/MobileIron supports and rounds out its core UEM offering with a mobile threat management product (Ivanti/MobileIron Threat Defense) and an identity and access management platform (Ivanti/MobileIron Zero Sign-On) that includes a multifactor authentication and certificate management solution – allowing enterprise employees to use their mobile device in place of passwords for access to corporate resources and devices. Ivanti/MobileIron calls this combined offering its Zero Trust Security platform.

With its strong focus on security, Ivanti/MobileIron supports a broad set of governmental, industry, and other compliance standards and certifications, including FedRAMP, FIPS 140-2, SOC2, and NIAP Common Criteria. This allows the company to sell into environments with some of the highest security requirements and use cases.

Ivanti/MobileIron has strong support for both Windows and macOS endpoints – at a very detailed level, including OS and third-party patch updating, hardware/software inventorying, remote control, and application delivery and provisioning – and support for legacy management functions and features, such as device imaging both Windows and Mac), GPO management support (Windows), printer management and setup (Windows/macOS), and modern and legacy app distribution for Macs (DMG file distribution and managed Mac App Store support).

As a combined company, Ivanti/MobileIron has extensive channel reach. It has deep partnerships with a broad range of mobile operators and all the major operators in North America, EMEA, and APAC. The company also has a broad network of resellers and partners in enterprise systems infrastructure software.

With its Neurons approach to UEM, Ivanti/MobileIron can manage and configure a wide range of end-user computing and IoT endpoints. On the IoT and "workspace IoT front," Linux, Raspberry Pi, tvOS, and Zebra devices are supported, as well as modern and legacy Windows rugged endpoint OSs such as Windows IoT and Windows CE.

Remote control is another function of Ivanti/MobileIron's UEM solution, and remote control for Windows and Macs is included in the baseline UEM offering. For upgrading, Ivanti/MobileIron uses a peer-to-peer, multicast patch and software updating technology, which can help enterprises avoid bandwidth congestion or over-the-air download issues that many enterprises face with large OS and software upgrades – which can be in the multigigabyte range.

Challenges

While Ivanti/MobileIron has compelling product capabilities and strategies in the UEM market, the merger is still very nascent, and many of these integrations are still evolving.

Ivanti/MobileIron is still figuring out its strategy for product branding and go to market relative to the sperate Ivanti and MobileIron channels and partnerships. This could confuse some customers of its current products or potential new prospects.

Ivanti/MobileIron offers a strong portfolio of security-focused UEM solutions across its Zero Trust portfolio. However, relative to several of its top competitors, it does not integrate or partner with as many third-party SIEM, ITSM, or CASB products – platforms that many customers interviewed for this study identified as critical for UEM integration.

Consider Ivanti/MobileIron When

Enterprises and SMBs that are converging separate mobility management functions and tools into a centralized PC/IT-centric management framework should consider Ivanti/MobileIron for an overall UEM solution for mobile/PC endpoint management. Customers looking for either a cloud-centric solution, on-premises solution, or a hybrid scenario should consider Ivanti/MobileIron on a short list of UEM vendors.

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 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

Unified endpoint management (UEM) is a technology submarket category of the client endpoint management functional software market. UEM solutions combine into a single software platform the management and provisioning functions for most common end-user computing operating systems (i.e., Windows, macOS, iOS, Android, and Chrome OS) and device types. By definition, UEM products must

be able to manage both mobile and PC endpoints; this excludes legacy platforms such as PC life-cycle management (PCLM), PC imaging solutions, and mobile device management (MDM).

LEARN MORE

Related Research

- *Worldwide Unified Endpoint Management Software Forecast, 2020-2024* (IDC #US46460520, September 2020)
- *IDC TechScape: Worldwide Intelligent Digital Workspace, 2020* (IDC #US46763120, August 2020)
- *Worldwide Unified Endpoint Management Software Market Shares, 2019: Endpoint Management Convergence Drives Market Growth* (IDC #US45173520, June 2020)

Synopsis

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

"Enterprises are moving away from specialization of endpoint device management – from a separate tools and IT personnel perspective – when it comes to general end-user computing use cases and workloads," says Phil Hochmuth, program vice president, IDC's Enterprise Mobility and Client Endpoint Management. "Many organizations see UEM as part of a larger strategy to streamline end-user experiences with technology across various device form factors and use cases."

About IDC

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