IDC MarketScape

IDC MarketScape: Worldwide Unified Endpoint Management Software 2018 Vendor Assessment
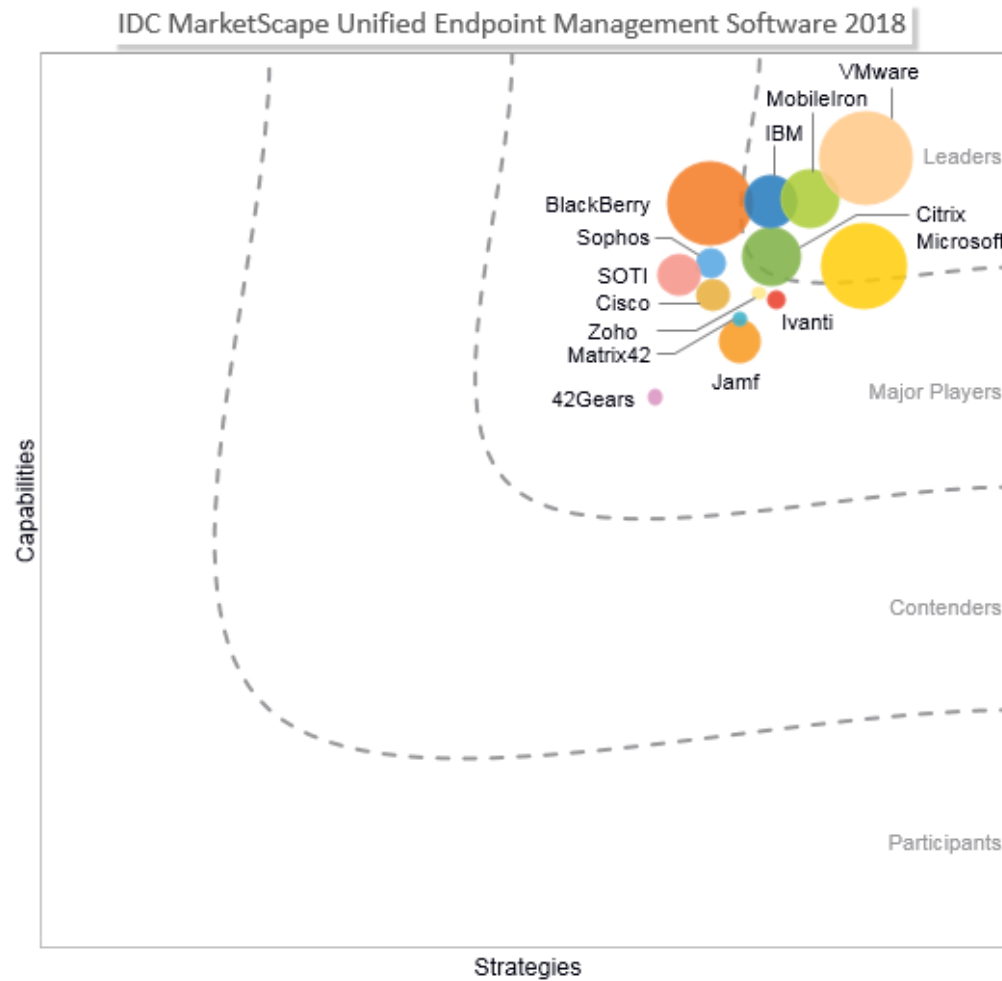
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THIS IDC MARKETSCAPE EXCERPT FEATURES CITRIX

IDC MARKETSCAPE FIGURE

Figure 1

IDC MarketScape Worldwide Unified Endpoint Management Software Vendor Assessment

Source: IDC, 2018

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

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IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software 2018 Vendor Assessment (Doc # US43294318). 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

Unified endpoint management (UEM) is the convergence of multiple facets of device configuration, management, security, and policy enforcement. Generally speaking, UEM involves the convergence of mobile and desktop computing device management, including OS updating and patching, software and application distribution, security and policy management and enforcement, and access control rights configuration. Over the past several years, UEM has evolved from the enterprise mobility management (EMM) market, as EMM software vendors have added the ability to manage PCs to their lineup of mobile device management (MDM) features. This is not to say EMM vendors invented UEM, as several PC-centric UEM providers have provided varying degrees of converged PC/mobile device management for some time. The emerging concept of "modern management" for PCs, where Windows/Mac endpoints are managed more like mobile phones (rolling, over-the-air/internet updates, lightweight or no client-side agents for installing updates or apps, and out-of-box provisioning and setup of devices without requiring hard disk imaging or other LAN/WAN-attached configurations). UEM has appeal to businesses on several fronts. IT teams can consolidate separate groups ("mobile" and "PC" teams) to operate more efficiently. Security policy can more easily be applied across a wider range of device types from a single console, which can also serve as a single view on the health and security state of all end-user endpoints, from smartphones to workstations. According to IDC's 2018 *Enterprise Mobility Software Decision Maker Survey*, more than half of U.S. enterprises are either piloting or actively migrating PC users to UEM platforms. And by 2023, more than three-quarters of enterprises said they expect to have either the majority, or the entirety of their corporate PC deployments managed by UEM platforms.

This is the second IDC MarketScape in a series of three analyzing vendor software offerings around EMM and UEM for IoT use cases. (The next IDC MarketScape will provide specific analysis of EMM/UEM software for IoT/ruggedized device use cases.) Vendors with offerings in the UEM market provide strong baseline support for Windows 10 and Mac OS management capabilities and broadly support mobile OS platforms such as iOS and Android. UEM forerunners also provide capabilities that help customers bridge the gap between traditional PC life-cycle management (PCLM) and UEM platforms, with support for some legacy PC management capabilities and older OS support. Key findings include:

- While EMM vendors that have added UEM capabilities were primarily focused on Windows 10 integration, broader support for Apple Macs, as well as emerging Chromebook devices, is also on the rise among UEM vendors. There is also increasing support for legacy or older operating systems.

- Baseline levels of Apple Mac OS support are prevalent among Leader and Major Player vendors with varying levels of support for specific features and capabilities.

- PCLM solution providers with UEM offerings provide the most legacy OS support and management capabilities, which is attractive to enterprises that are slow in migrating to Windows 10 at scale but still interested in near-term UEM deployment.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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

- A UEM suite offering integrated mobile device and PC management, configuration, and software provisioning
- Product revenue of $10 million or more for calendar year 2017 (Revenue was estimated in April 2018 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, Quest Software, Micro Focus, Snow Software, and Symantec.

ADVICE FOR TECHNOLOGY BUYERS

This study analyzed and rated vendors across a broad range of capability- and strategy-focused criteria. Technology buyers should evaluate UEM platforms giving equal weight to mobile device and PC management. Organizations with installed PCLM platforms with extended enterprise mobility management capabilities must determine if such functionality will meet all future mobility management needs or if new UEM solutions should be considered. Likewise, EMM users considering moving to UEM must evaluate how well a platform's PCLM capabilities will support near- and long-term client computing management requirements. Cross-platform support requirements (Windows, Mac OS and, in the future, Chrome OS) of UEM vendors must be evaluated based on current and anticipated future PC environments.

Key Measures for Success

- **Core support for key PC operating systems.** Beyond EMM capabilities, technology buyers will look to UEM platforms to support all core functionality for PC OS configuration, software updates and patches, policy creation/implementation, device-level security configuration, and controls.
- **Unified console and management interfaces.** The proverbial "single pane of glass" concept has been in IT management forever. UEM platforms that unify and combine policy creation, configuration, and security management for PCs and mobiles will help organizations consolidate endpoint management tasks, reduce redundant activates, and increase overall end-user computing management efficiency.
- **Strong portfolio of adjacent and complementary IT products, services, and solutions.** Solutions such as IT asset management, PCLM, virtual client computing (VCC) and VCC management systems system imaging/management, identity and access management, and PC endpoint security solutions are strong complements to an overall UEM offering.
- **PC/mobile application management functionality.** The industry is in a transition period between traditional and modern endpoint application provisioning and management. The industry is moving toward deployment of modern Windows applications via EMM/MAM-oriented methods (i.e., unified enterprise app stores and over-the-air app download/provisioning). However, even large Windows 10 deployments will still require older app provisioning models such as.EXE,.MSI, or.ZIP application distribution and installation.

- **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 PC and mobile device management capabilities wherever they are. This also untethers PC uses from legacy requirements for endpoint management such Active Directory domain joining or LAN/WAN connectivity. Hybrid is still an important aspect of UEM as many organizations still require some on-premise deployment scenarios, particularly if they are supporting both legacy and newer PC operating systems, which is the case in the vast majority of enterprises.

- **Flexible or user-centric pricing models.** End users access corporate applications and resources from multiple devices, including mobile and PC. Vendors' pricing models around management of these multiple endpoint types should trend toward user-based pricing as opposed to per-device pricing models, which are harder for enterprises to scale form a cost perspective.

- **Deployment/support organizations built for UEM.** Enterprises interested in UEM deployments will require specialists in terms of project scoping and planning, deployment, and ongoing support for PC and mobile devices on a single management platform.

VENDOR SUMMARY PROFILE

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.

Citrix

Citrix is a Leader in the 2018 IDC MarketScape for UEM software. Recently, Citrix rebranded XenMobile to Citrix Endpoint Management and announced the availability of a new Citrix Cloud service offering Citrix Endpoint Management. Citrix Endpoint Management will include Citrix Workspace Environment Management, which provides legacy Windows 7 and Windows 10 user group policy (GPOs) management and resource optimization. Citrix Workspace combines all elements of end-user computing management into a single platform for application and data delivery to any device type. Citrix has a strong affinity toward UEM technologies and end-user computing management in general, as its customer base and history is in end-user computing virtualization, management, and application delivery.

Strengths

Citrix has a solution for GPO management, user profile management, user experience management, and resource optimization for both virtual and physical Windows 7. Customers are can leverage this solution in parallel with Microsoft's SCCM (ConfigMgr) platform to manage Windows 7 devices.

Citrix has several adjacent technologies and products that can help customers move toward UEM and workspace management convergence. Citrix AppDNA helps customers assess Windows 7 to Windows 10 application compatibility and can predict potential issues with Windows 10. It integrates with ConfigMgr. Citrix App Layering can also be used to move individual app layers from one OS platform to another OS platform.

XenMobile supports Chrome OS including supporting the Google's Chrome Enterprise APIs.

Challenges

The Citrix UEM approach is focused on supporting and provisioning Windows 10, and other modern PC OSs, to modern management frameworks. Citrix Workspace Environment Manager (included with Citrix Endpoint Manager) does offer workspace management for virtual and physical Windows 7 and Windows 10 PCs for profile management, resource optimization, and user experience. However, competitors with more capabilities could get ahead of Citrix in customer UEM trials, as many customers will move gradually to UEM, requiring migration support for Windows 7 and other related policy and app delivery frameworks, instead of a fast move to modern management.

Consider Citrix When

Organizations should consider Citrix for UEM/PC management scenarios if the company's strategy is to move aggressively with both non-virtualized and virtualized Windows 10 PC management via modern management (EMM/MDM) controls, while managing legacy PC endpoints (nonnative Windows 10) with virtual app and desktop delivery via Citrix XenDesktop and XenApp solutions.

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

Unified endpoint management software and SaaS solutions provide change, configuration, compliance, asset tracking, and software distribution for client, desktop, mobile devices, and some IoT devices (i.e., devices and systems with which employees, customers, or others interact, input/retrieve information). UEM solutions also manage some peripheral hardware and software assets but not network devices, storage, or server systems. UEM includes technologies and products previously classified as PC life-cycle management, as well as IT asset management relating to end-user computing devices. UEM solutions also include some software distribution functions relating to end-user and endpoint applications – fixed/mobile PC, mobile device (i.e., smartphone/tablet), and some IoT endpoint devices relating to end-user device operating systems and software. Mobile device management and configuration technologies also fall under the UEM umbrella. Extended functions of solutions in enterprise mobility management (EMM, an IDC competitive market) such as network security, security and vulnerability management, mobile content management/security, and remote access are not part of the UEM functional market.

LEARN MORE

Related Research

- *IDC Innovators: Unified Endpoint Management Software, 2018* (IDC #US43983917, June 2018)
- *Worldwide Enterprise Mobility Management Software Market Shares, 2017: Evolving Mobility Use Cases Drive Market Growth* (IDC #US43293918, May 2018)
- *Worldwide Unified Endpoint Management Software Forecast, 2018-2022* (IDC #US43293818, May 2018)

Synopsis

This IDC study represents a vendor assessment of providers offering unified endpoint management 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.

"Enterprises want to converge management platforms and software tools as much as possible, and end-user computing management is a prime target for this effort," says Phil Hochmuth, program director, Enterprise Mobility Research at IDC. "Businesses see UEM as a way to provide stronger, more consistent application of security policies, system configurations, apps, and software distribution to mobile and PC endpoints. "

About IDC

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