IDC MarketScape

IDC MarketScape: Worldwide Unified Endpoint Management Software 2022 Vendor Assessment

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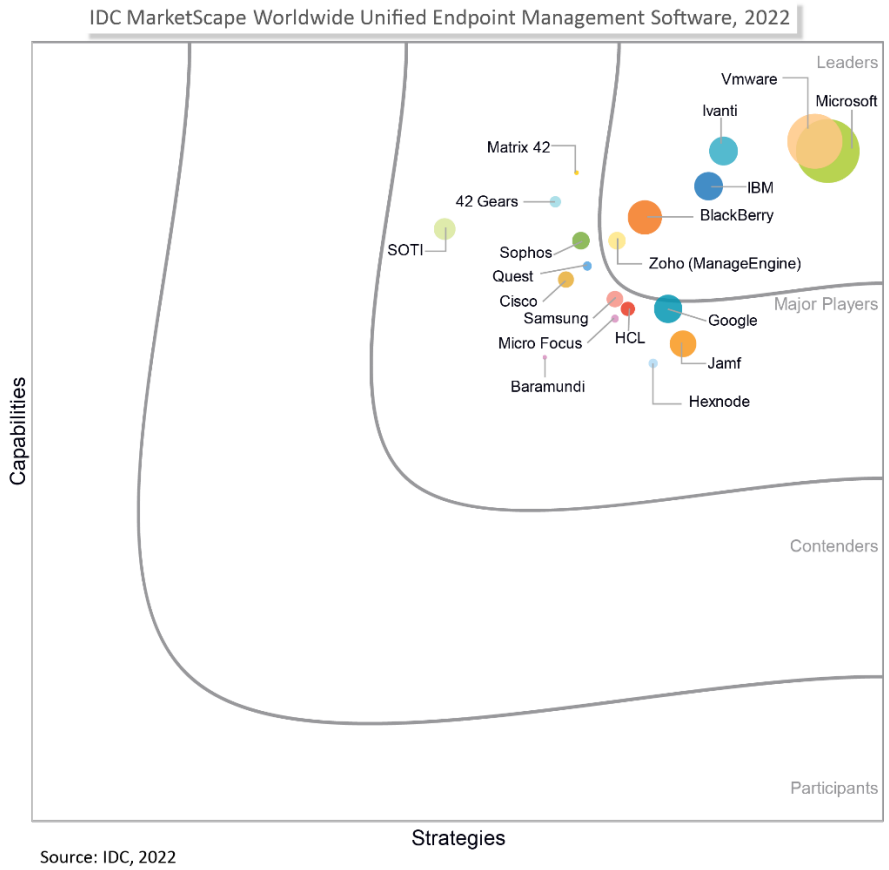
THIS IDC MARKETSCAPE EXCERPT FEATURES MICROSOFT

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Unified Endpoint Management Software Vendor Assessment



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

May 2022, IDC #US48325122e

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software 2022 Vendor Assessment (Doc # US48325122). 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

As enterprise IT operations start returning to some form or pre-COVID-19 pandemic version of "normal," organizations are discovering new use cases and requirements for their endpoint device management platforms. It is now critical for unified endpoint management (UEM) technology to be able to support multiple device types accessing corporate data, apps, and IT resources both on network (attached to a corporate LAN, an extended WAN, or via a VPN connection) and off network (connected to the public internet via wired/wireless broadband, but not attached to private business networks).

In addition, it is important for UEM platforms to address specific business use cases and tactical workflows and operations. Mobile devices, tablets, and laptops are now used broadly in task-specific scenarios (e.g., retail, optical data input/capture, logistics record keeping, public safety communications) that may require different features and capabilities from a device management perspective compared with standard end-user computing requirements for mobiles or PCs. In some instances, enterprises may choose multiple UEM platforms, deploying technologies in best-of-breed scenarios to handle various use cases across the organization.

Customer UEM and device management requirements will also vary widely based on organizational details (enterprises versus SMBs, vertical market or region, etc.). Also, decisions on device-type standardization (e.g., Mac-only or Windows-only shops, Android-centric firms, or iOS-only deployments) will also largely dictate the type of UEM technology adopted.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC invited vendors to participate in this assessment 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 2021. Revenue was estimated in May 2022 and may differ from forthcoming market share documents.

In addition to the companies profiled in this study, there are a number of other companies in the UEM market. These include Apple, Addigy, Amtel, Citrix, HMD, Kandji, Prey Software, SimpleMDM, Tanium, and Verizon.

ADVICE FOR TECHNOLOGY BUYERS

Buyers of UEM software should look for the following attributes, capabilities, and relevant use case scenario support from vendors under consideration:

- **Hybrid worker device support scenarios key.** The UEM platform should be able to support endpoint device management from both an on-premises/in-office perspective and a remote or work-from-home scenario, with full support functionality across both scenarios.
- **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.
- **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.
- **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 operating system [OS] that is out of date).
- **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 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.
- **Capabilities for supporting noncorporate devices or bring-your-own-device (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.
- **Ability to address three to four major endpoint device operating systems.** To be a viable UEM platform, an offering should support at least three of the four major operating systems for an enterprise endpoint device (Windows, macOS, iOS, and Android) and be able to support both mobile and PC form factors across these OSs.

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.

Microsoft

Microsoft is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide UEM software.

Based in Redmond, Washington, Microsoft is among the world's largest software vendors and technology companies with a vast product portfolio spanning enterprise, consumer, and vertical markets. In the UEM market, Microsoft Endpoint Manager is the main product offering. The umbrella product brand encompasses the vendor's on-premises System Center Configuration Manager (SCCM, or ConfigMgr), as well as the Microsoft Intune cloud-based PCs (Windows and Mac devices) and mobile device management platform. With these two components, Microsoft offers a broad set of UEM use cases and scenarios for managing PCs and mobile devices. This could include managing a fleet of Windows PCs completely on premises, with Active Directory domain-joined functionality, as well as managing cloud-based PCs, and deploying software to endpoints via modern management (MDM) protocols and services.

Microsoft Endpoint Manager can also address hybrid or migrating use cases where customers are moving from on premises to modern management but require tools to address devices in both environments. For example, MEM "tenant attach" capability allows on-premises PCs to be managed with a cloud-based console and to be viewed in a single portal or as mobile devices and cloud-managed endpoints. Integration is a key aspect of the Microsoft Endpoint Manager offering, and the product ties into a wide range of other tools from the vendor, including Office 365 apps, Teams, and OneDrive as well as Microsoft security products including Microsoft Defender for Endpoint (endpoint security) and Microsoft Sentinel (security information and event management).

Analytics and end-user experience are major focus areas of Microsoft Endpoint Manager. Endpoint Analytics is a built-in capability of Endpoint Manager, allowing IT admins to view detailed data and analytics on how end users are interacting and experiencing overall endpoint device and app usage. This could include viewing, and remediating, devices with slow boot-up times, flagging apps that frequently crash or take too long to launch, or diagnosing network or remote access capabilities.

From a licensing and cost perspective, Microsoft Intune license for Endpoint Manager is bundled into several widely used enterprise licensing programs that Microsoft offers around the Microsoft 365 product line and licensing scheme. Customers with E3 and E5 Microsoft 365 licenses can activate modern management of endpoint devices within their existing licensing scheme at no additional cost. This is a compelling consideration for many large enterprises that are already licensing Microsoft technology at a large scale.

Strengths

- Microsoft has added a range of updates and improvements in its Mac device management functionality for macOS endpoints managed by MEM. This includes the ability to apply granular policies to Mac software distribution and deployments, broader support for macOS device configuration profiles, and user-based policy enforcement customization.

- MEM is strong on frontline/rugged device management, which includes devices running Windows IoT and Microsoft's HoloLens AR hardware, as well as vertically focused endpoints such as Zebra.
- The Microsoft 365 product bundling is compelling for small and midsize businesses, by combining PC OS, productivity/collaboration, and management software in a single offering. For midsize firms, or businesses with lean/limited IT staff and resources, comanagement with ConfigMgr can converge Microsoft Windows 10 and Windows Server management into a single console and management environment.
- Microsoft 365 Lighthouse, an administrative portal the company has developed for supporting managed service providers, allows SMBs to adopt MEM and other Microsoft 365 tools without integration or deployment complexities that can challenge smaller firms.

Challenges

- Some customers IDC spoke with said that Endpoint Manager capabilities for managing non-Google Android devices (e.g., devices running the Android Open Source Project version of the OS) are not as strong as some competitive products. Microsoft says it is planning to release enhanced support for AOSP endpoints, such as Meta's Oculus VR headsets, in 2022.
- While Microsoft's frontline/ruggedized device management approach is broad, it does not support some popular and widely used endpoint IoT operating systems and device types, such as Apple TVs, some wearables, Raspberry Pi, Samsung Tizen devices, and Linux. (Linux is on Microsoft's near-term support road map for 2022.)
- While the market for UEM technology has evolved and shifted from mobile-centric partners (carriers such as AT&T and Verizon) to enterprise software vendors and resellers, there is still a segment of the market that looks to carriers as a primary partner for deploying device management (mobile in particular). On this front, Microsoft has fewer relationships and partnerships in the wireless carrier space compared with other competitors.
- MEM supports most core macOS management scenarios natively in the product, with support for macOS MDM protocol configurations. Microsoft has also partnered with Apple management specialist Jamf to enhance Apple device management with MEM (particularly around macOS management). On its own, Endpoint Manager has fewer native, deeper-level macOS support features and functions compared with other UEM solutions offering standalone macOS management features.

Consider Microsoft When

Consider Microsoft's Endpoint Manager offering for most UEM deployment scenarios, ranging from general PC and mobile device management and configuration to specialized use cases (e.g., ruggedized/frontline worker devices, workspace IoT, and temporary/seasonal contractor support).

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

- *IDC Market Glance: Client Endpoint Management, 1Q22* (IDC #US48969122, March 2022)
- *Top 5 Trends in Unified Endpoint Management to Watch in 2022* (IDC #US48779022, February 2022)
- *Top Technology Integration Opportunities for Unified Endpoint Management* (IDC #US48266821, September 2021)

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 emerging from the pandemic with new requirements around how endpoint devices are used, deployed, managed, and secured," says Phil Hochmuth, program VP, Endpoint Management and Enterprise Mobility at IDC. "Unified endpoint management adoption was strong through the pandemic, but what has emerged is a market where multiple platforms may now exist in an organization that focuses on unifying endpoint management for specific use cases. Deploying one UEM tool to 'rule them all' is becoming a rarer thing in most deployments."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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