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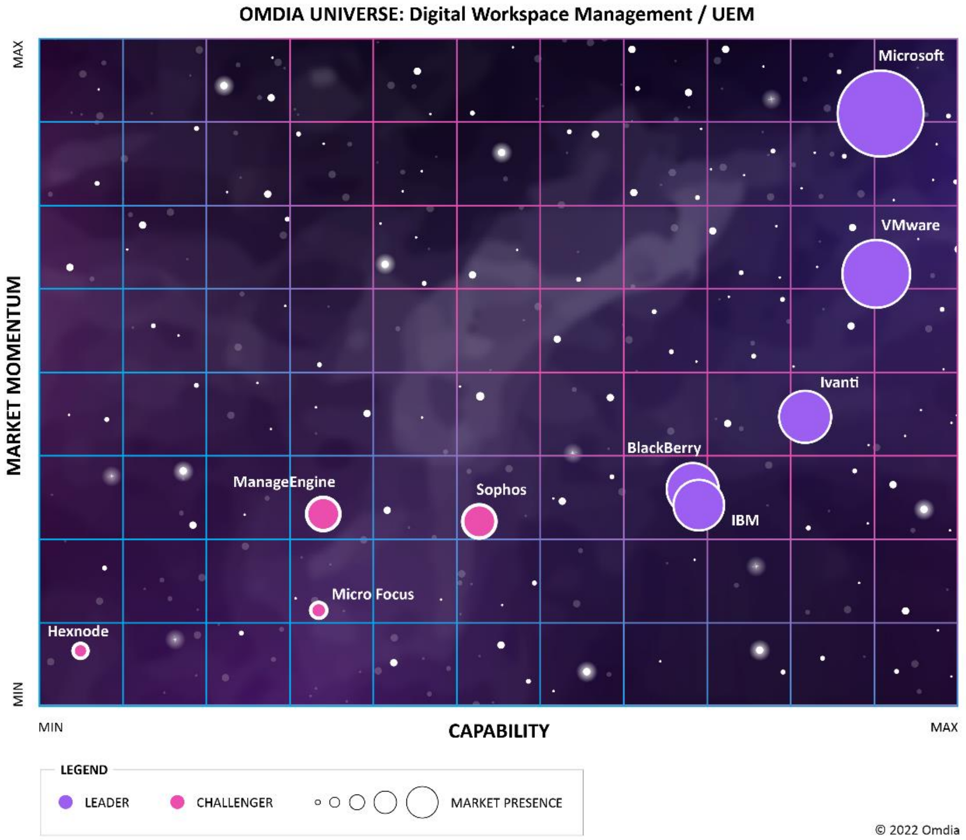
Summary

Catalyst

The ways that employees work continue to undergo significant change, influenced by new technologies and demand to embrace more hybrid working practices. Businesses face challenges in enabling this modern and mobile workforce, including those associated with improving visibility, management, and security over devices and applications that employees use to work productively. The modern workspace and employee experiences are digital-first, and organizations must embrace new ways and technologies to manage it.

Figure 1: The Omdia Universe for digital workspace management / unified endpoint management platforms



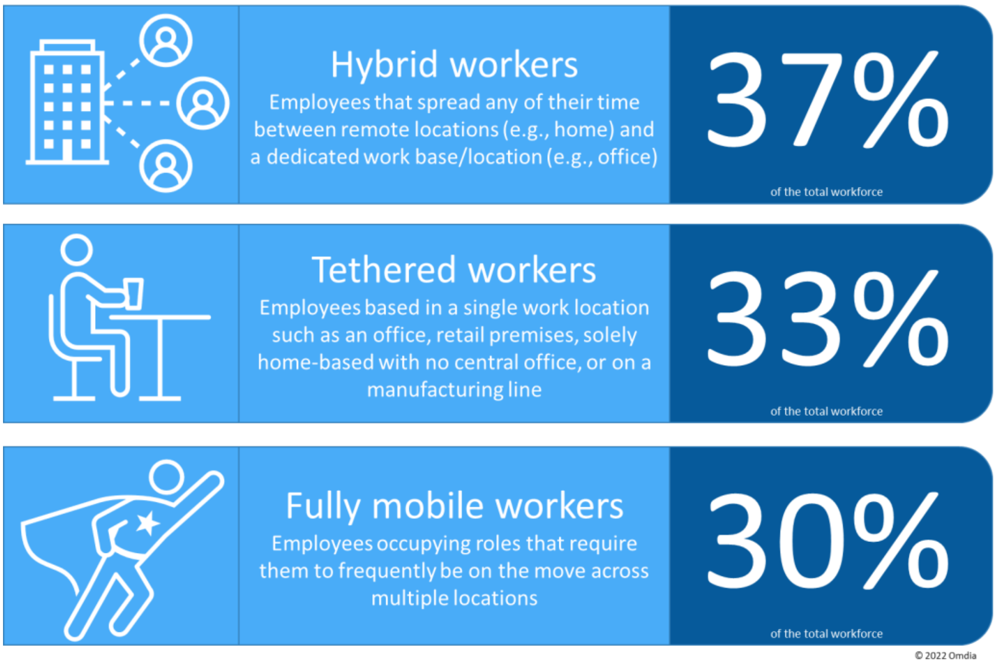
Source: Omdia

In this Universe report, Omdia explores how the digital workspace management (DWM)/unified endpoint management (UEM) market is evolving into one focused on much more than just endpoint management and security. The report compares different solutions in this category and discusses the important position these solutions have in the broader enterprise IT infrastructure puzzle.

Omdia view

As work becomes more mobile, the infrastructure investments that businesses are prioritizing to support new work styles are also changing. According to Omdia's Future of Work 2022 Survey, key business and IT decision makers are placing greater priority on investing in technologies that can help secure and manage work across different locations and devices. These technologies ensure that employees can work productively and collaboratively from anywhere—and across any endpoint. Tools that strengthen employee experience and productivity by delivering seamless and secure access to devices, data, applications, and collaborative channels have become valuable business assets. For many employees, the corporate headquarters is now hybrid and no longer best represented as a brick-and-mortar office, as shown in **Figure 2**.

Figure 2: The workforce has become more mobile



Source: Omdia, *IT Enterprise Insights: IoT, Cloud, AI, & 5G*, n=4,769

As work moves away from just the traditional office perimeter, businesses must invest in more mobile-centric technology infrastructures and working practices to deliver employee experiences that yield optimum productivity. This trend and others are driving interest in solutions, such as UEM/DWM platforms, that help secure and empower employees across a diverse range of roles with capabilities that help them work productively, regardless of their physical work location.

Key messages

- With around half the total workforce set to work in a mobile or hybrid fashion going forward over the long term, C-level IT and business executives will need to embrace new technology, processes, and people practices to appropriately support and secure new work styles.
- DWM platforms help businesses better manage, secure, and enable employees across any location, any device, and any application.
- UEM solutions now deliver so much more than just endpoint management, so it is important that technology leaders better understand this evolved value proposition.
- In delivering advanced mobile security, self-remediation, employee experience, and autonomous capabilities, UEM solutions have evolved into more comprehensive DWM platforms that support broader business use cases.
- These platforms are becoming a vital technology infrastructure component as businesses look to better support a more hybrid and mobile-first workforce.
- 73% of businesses are reconsidering the existing partnerships they have in place with their digital suppliers, so it is vital that vendors deliver not only great technical capabilities, but also services that help strengthen adoption and the long-term value delivered by any solution.
- The bring-your-own (BYO) trend is back, but in addition to just their personal devices, people are also bringing their own network connectivity, apps, and behaviors. Businesses need help in supporting and securing this activity—help that DWM platforms provide.
- The DWM market traditionally consists of vendors that are in the process of evolving their traditional UEM products into more comprehensive DWM platforms. This evolution can deliver benefits not only around enterprise security and productivity, but also around the environmental and sustainability aspects that are becoming an important business focus.

Analyzing the DWM/UEM platforms universe

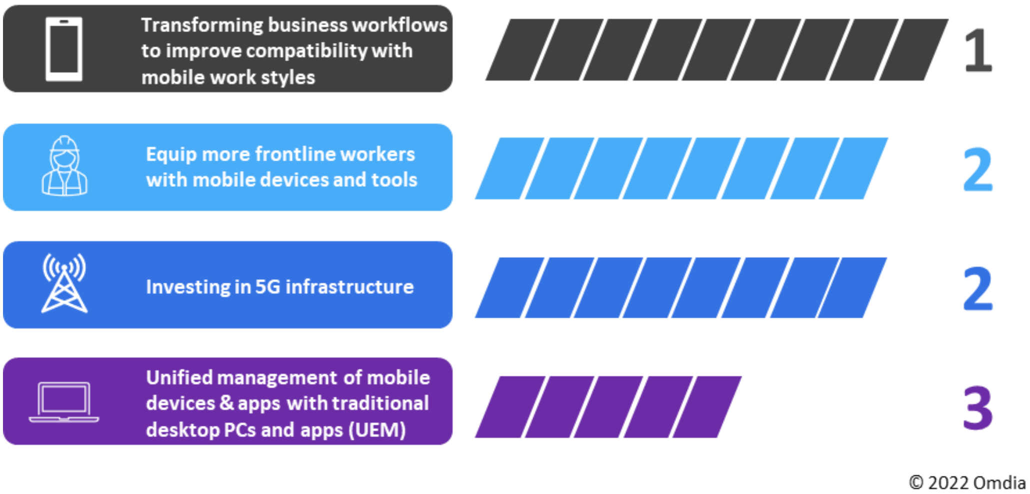
How to use this report

The Omdia Universe report is not intended to advocate an individual vendor, but rather, to guide and inform the selection process to ensure all relevant options are considered and evaluated in an efficient manner. The report findings gravitate toward the customer's perspective and likely requirements, characteristically those of a medium-large multinational enterprise (5,000+ employees).

DWM market definition

UEM is the traditional and widely recognized terminology associated with the DWM product category. However, the reality is that these solutions now offer so much more than just endpoint management capabilities. UEM solutions have undergone an interesting evolution, especially since 2020. Vendors in this category continue to expand their solutions in delivering capabilities that move well beyond just the endpoint management foundation. This is in line with changing business priorities around enterprise mobility. Businesses are looking at enterprise mobility in a more strategic and broader sense. In addition to unifying how the mobile app and device ecosystems are managed and secured, businesses are increasingly focusing on new areas. These include enabling the transformation to mobile work styles, investing in new 5G connectivity capabilities, and supporting more employees with mobile services.

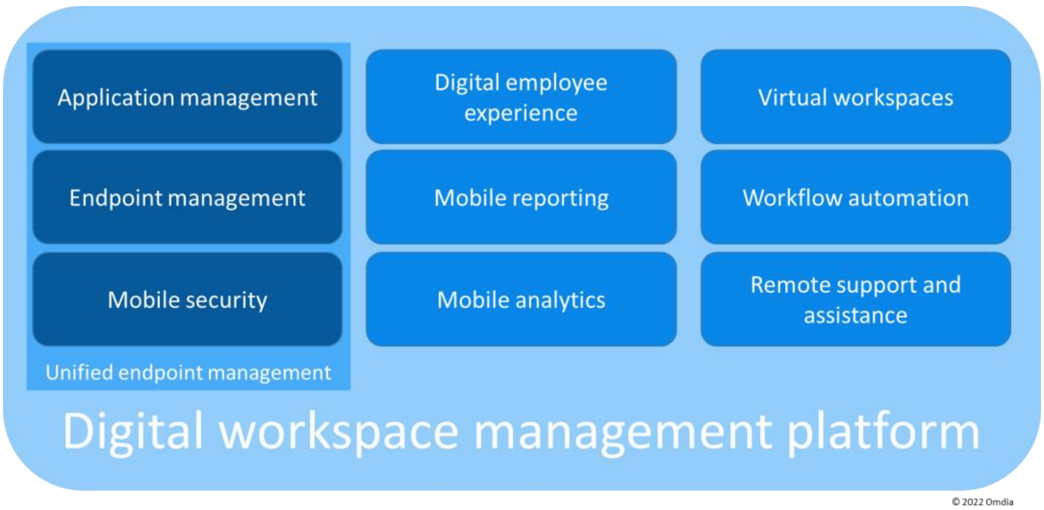
Figure 3: Business mobility priorities



Source: Omdia, *Future of Work 2022 Survey*, n=441

Mobility and digital workplace capabilities have become business critical and an important foundation of the broader digital infrastructures that organizations are building to optimally support a more mobile and hybrid workforce. Increasingly, the core mobile endpoint management capabilities that vendors in the product category deliver are being developed further to offer a range of new capabilities, including advanced mobile security, self-remediation, employee experience, and autonomous capabilities, as shown in **Figure 4**.

Figure 4: DWM platforms



Source: Omdia

This enhanced set of capabilities is enabling UEM solutions to evolve into more comprehensive DWM platforms that support broader end-user compute, digital experience, security, and mobile workforce management use cases. DWM platforms are built on top of a strong UEM foundation; however, they extend on these core capabilities with additional productivity, app, and endpoint management features that help businesses better empower and secure a more mobile-first workforce. The features and capabilities examined and compared in this report include the following:

- **Endpoint and application management:** This criterion examines the capabilities solutions offer that enable businesses to manage, configure, and monitor a broad variety of endpoints, operating systems, and mobile applications. These are commonly the foundational capabilities delivered by DWM platforms. Additionally, this category explores the strength of productivity apps and desktop as a service/ virtual desktop infrastructure (VDI) capabilities offered, in addition to any configuration and device and app discoverability functionality. This was the feature set most heavily weighted in developing the competitive analysis for this report.

- **Mobile worker security:** This category explores the baseline and advanced security capabilities delivered. Security and privacy policy management, support for zero-trust approaches, risk analytics and security scoring, and threat intelligence capabilities are among those explored within this category. In developing the competitive analysis for this report, Omdia assigned this feature set the second-highest weighted score.

- **Mobile reporting and analytics:** In this category, Omdia explores capabilities that support businesses in gathering, contextualizing, and delivering data and insights across the entire mobile and digital workspace ecosystem. Features explored here include those that provide insights into endpoints, applications, and employee behaviors. In developing the competitive analysis for this report, Omdia assigned this feature set the third highest weighted score.

- **Digital experience:** Businesses are increasingly looking for new ways to better understand, measure, and improve employee experiences. This category explores capabilities that are helping businesses improve employee experiences, including digital employee experience (DEX), self-service, workflow automation, and virtual assistant functionality.

- **Partner and integration ecosystem:** This criterion explores features that enable businesses to extend the use of DWM platforms through integrations, especially those with third-party digital providers. Additionally, this category explores the strength and breadth of partnerships in place to support the adoption and utilization of the solution.

- **Deployment:** This category explores a solution’s different deployment options, in addition to whether solutions developed around the needs of specific industries are offered. Language support, ongoing support, and professional services capabilities are also explored as part of this category.

- **Market momentum:** Omdia analyzes market momentum through analysis of factors, including a vendor's licensing and revenue growth, innovation, its presence and adoption across different geographies, and its overall go-to-market approach and future strategy.

- **Market presence:** Market presence is analyzed based on a vendor's overall revenue, in addition to its relevance and current adoption among enterprises.

Market leaders

This category represents what Omdia believes to be the leading market solutions that provide advanced capabilities across all areas explored within this research. Additionally, market leaders also have strong market momentum and a significant market presence, especially among enterprises. Omdia believes that vendors in this category are worthy of a place on most technology selection shortlists.

Microsoft assumes the strongest leadership position in this year's report due to its very strong market momentum and impact, in addition to its feature-rich capability set. The company's attractive licensing model, broad solutions portfolio, and continued investment in endpoint management and security have disrupted the UEM market and made it more important than ever for other vendors to expand on their core UEM capabilities with additional value-add solutions and adjacent capabilities.

VMware is also well-represented in the leadership category. The vendor is building on its strong endpoint management capabilities by investing heavily not only in advanced mobile security and analytics capabilities, but also in the introduction of DEX management capabilities.

Ivanti brings to market a diverse and integrated platform that delivers mobility management, security, and service management capabilities. The vendor has made great progress over the past 18 months in further developing market awareness and adoption of its solution. Its continued investment and commitment to its integrated product set and strategy will be important in further strengthening its appeal, especially among more enterprises.

IBM and BlackBerry complete the leadership bracket. IBM has a strong focus on security with its MaaS360 offering. This is also a solution, along with Microsoft Intune and VMware Workspace ONE, that many telcos leverage in developing their digital workplace and managed mobility services. Its focus on security means IBM lacks some of the digital experience capabilities offered by some of its peers. BlackBerry also has a strong focus on strengthening device and network security with its solution. Additionally, BlackBerry offers a very secure set of native mobile productivity apps (emails and beyond) that have good adoption among businesses in highly regulated industries.

Market challengers

Solutions in this category offer a good and broad set of capabilities, in addition to a reputable market presence and market momentum. Although this category of solutions does not commonly offer the more advanced set of capabilities or have the same market presence among enterprises as those in the leader category, Omdia recommends they should still be considered as part of the technology selection process, especially by mid-sized organizations.

Sophos offers a good set of mobile endpoint management features. The vendor has a strong focus on security, particularly on how its mobile security capabilities richly integrate with the broader set of enterprise security solutions it offers.

ManageEngine, another challenger, offers a broad set of native IT management and productivity solutions that complements its UEM offering. Micro Focus—a vendor that continues to invest in growing its feature set and market presence. Considering the competitive nature of this market, it will be important for all market challengers to invest in new capabilities and go-to-market approaches that will help them differentiate in a compelling way. Hexnode offers a good set of core endpoint management capabilities but lacks the advanced features offered by other solutions in the market. Its solution should still be explored by small to midsize organizations that are looking for competitively priced core mobility management capabilities.

Market dynamics and outlook

There are multiple trends and dynamics driving growth and interest in the DWM market:

- **DWM platforms are a remote work foundation.** As work styles become more remote and mobile-centric, DWM platforms will be a foundational management and security capability upon which modern technology infrastructures will be built. No longer will these tools be a nice-to-have or a convenient complement to other infrastructure solutions; instead, they will become a vital piece of the enterprise architecture.

- **DWM platforms will be an important enabler of zero-trust security approaches.** It will be no single tool or practice that will enable businesses to be successful in embracing zero-trust security approaches, but more a combination of different and well-integrated capabilities. The device, application, and user insights delivered by DWM platforms will make them an important enabler of zero-trust for businesses of all sizes.

- **DWM is a core component of a more converged approach to business mobility.** Omdia's Mobile Convergence Model details how important it is for businesses to adopt a more integrated approach to the provision and ongoing management of mobile connectivity, mobility management, and mobile productivity capabilities. Collectively, these capabilities will be important in meeting the demands of the modern worker, but they often exist in and are managed by different teams and in a siloed fashion. As businesses move toward a more converged business mobility approach, the broader business value of DWM solutions, especially around the critical role they play in improving the employee experience, will become better understood and help drive improved adoption.

- **The frontline workforce is mobilizing.** Frontline workers are those employees that work away from centralized business functions and are often closest to the customers consuming the products and services that organizations deliver. Frontline worker roles include retail store workers, frontline health workers, customer-facing field service personnel, teachers, and emergency services personnel. Omdia estimates that frontline workers account for between 65% and 70% of the total workforce, and these workers are increasingly becoming enabled with new digital hardware and software. Mobility will be a characteristic central to this frontline worker digitalization, and DWM platforms will be an important element in securing and enabling this effort.

- **There is a greater focus on cost and tool consolidation due to the economic downturn.** Recent Omdia research showed how two-thirds of businesses are reconsidering the partnerships they currently have in place with technology vendors, with financial elements and a lack of contractual flexibility being key drivers in this decision for many. The financial challenges many businesses are facing, and will continue to face, will see more organizations look for ways in which they can consolidate enterprise technology investments to reduce costs. The value of DWM solutions in enabling more modern workstyles, coupled with the fact these platforms deliver a range of compelling capabilities that have previously been delivered by different toolsets, makes them an attractive investment for businesses looking to realize new cost efficiencies.

- **Businesses can receive help in delivering against their broader environmental, social, and governance (ESG) objectives.** The unified and granular view across all endpoints offered by DWM platforms provides businesses with better insights into the health of the device estate. These insights then enable them to make better decisions around when new hardware may be required and gain visibility into old hardware that may need to be recycled/retired. The advanced capabilities these solutions offer also deliver safer bring-your-own-device (BYOD) enablement. This could improve employee experiences (since the computing hardware may be more aligned with their personal preferences) while also further helping businesses reduce costs associated with new hardware provisions.

Vendor analysis

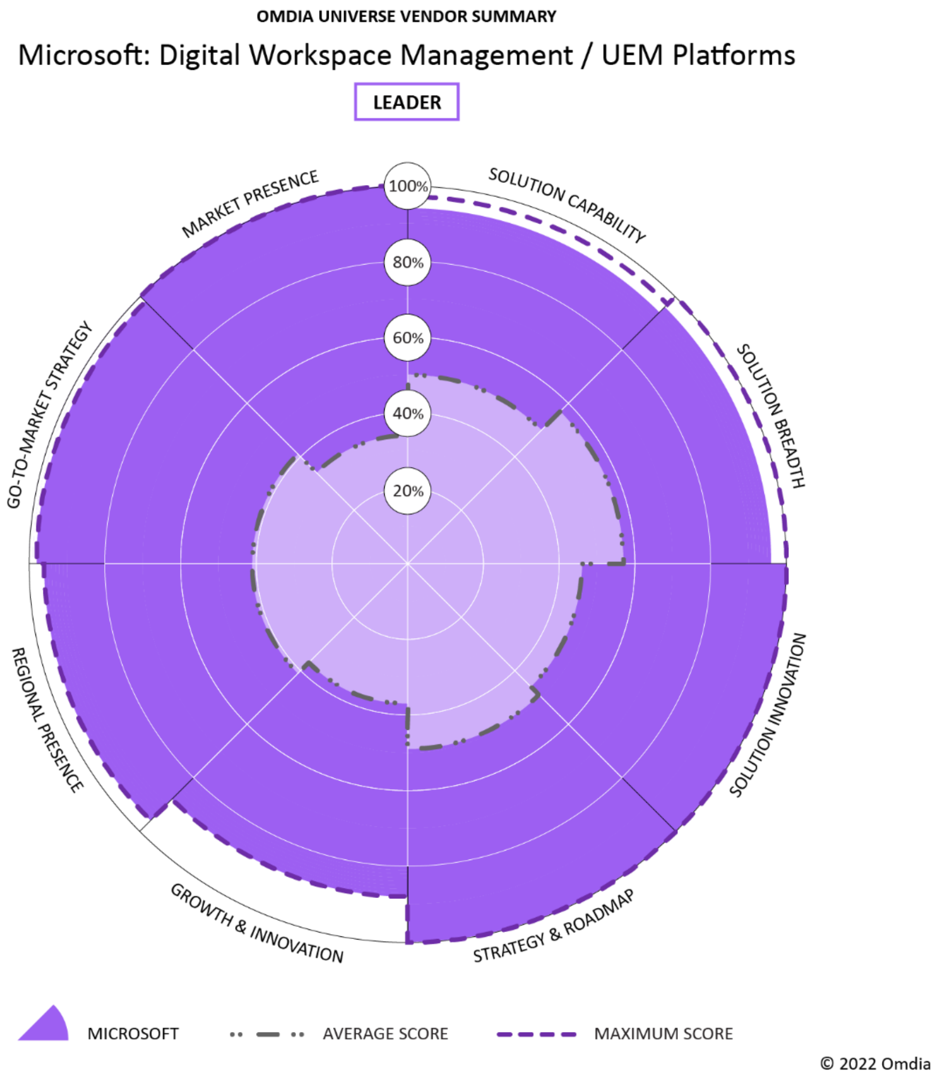
Microsoft (Omdia recommendation: Leader)

Background and Omdia view

Changing employee work styles, specifically the move to mobile working at scale, are presenting businesses with a diverse set of new security challenges and endpoint risks. UEM solutions have become an important foundation to help businesses overcome these challenges and securely enable more mobile work styles. With Intune, Microsoft offers one of the most well-established and widely adopted UEM solutions on the market. Management via the cloud is central to Microsoft's proposition with Intune, and the vendor has established a very dominant position in the UEM market due to the strong capabilities it offers, in addition to its attractive licensing model via the Microsoft Enterprise Mobility and Security offering. Due to the increase in mobile working and the business need to better secure and enable it, Microsoft's UEM solution has become a core part of its security and modern work sales and go-to-market efforts. The vendor targets all verticals with Intune, and the solution has strong adoption among businesses across all geographies.

Over the past five years, Microsoft has experienced strong momentum with Intune, with the number of users and devices across Android, Windows, and iOS under management via the solution increasing year-over-year. In managing and securing modern work styles, businesses are increasingly relying on a complex mix of different tools, including endpoint management, VPNs, remote assistance, app packaging and patching, and endpoint analytics capabilities. Microsoft's focus is on bringing together this range of mission-critical endpoint and application management and security tools into a single cloud solution. In delivering this integrated set of capabilities, the vendor will help customers simplify how endpoints are managed, strengthen security postures, potentially reduce total cost of ownership, and improve employee experiences.

Figure 11: Omdia Universe ratings – Microsoft



Source: Omdia

Strengths

- **Co-management approach that extends across cloud and on-premises.** Microsoft supports a co-management approach between Intune and Microsoft Configuration Manager (ConfigMgr) that supports businesses in moving to cloud-based device and app management. The co-management approach enables customers to move specific workloads from ConfigMgr to Intune at a pace that is comfortable for them. This modern management approach has proved very successful for Microsoft, not only because of the huge number of PCs the vendor has under management with ConfigMgr, but also because it provides customers with more flexibility in how devices and the policies that govern how they are used can be managed. Co-management also extends into application management, as Microsoft supports Windows apps via both ConfigMgr and Intune. Thus, businesses can keep legacy app deployment and patching policies and workflows created using ConfigMgr while moving other app policy and compliance workloads to Intune.

- **App protection policies.** To help improve and secure employee productivity, Intune app protection policies (APPs) can be integrated directly into Microsoft 365 apps to make them securely accessible via any corporate or personally owned device. Microsoft also makes its APP solution available via a software development kit (SDK) to be used in other line-of-business applications. It is also on Microsoft's immediate roadmap to add an in-app VPN to its APP solution so that employees can get access to a broader range of apps from a mobile device without the need for that device to be formally enrolled. The conditional access feature with APP also prevents the launching of apps across non-compliant devices.

- **Strong analytical capabilities and insights.** Microsoft has millions of devices under management across both Intune and ConfigMgr, which provides a massive amount of telemetry data. The sheer scale of signals Microsoft has visibility of enables more analytics, automation opportunities, and insights across the endpoint estate than any other UEM vendor. This large data pool can also be leveraged by IT pros to develop an understanding of which endpoints may be negatively affecting employee experience, in addition to seeing how endpoint experience and posture (boot times, app reliability, etc.) compare across different organizations.

Considerations

- **Businesses are becoming increasingly open to exploring end-user compute and productivity capabilities beyond just the Microsoft ecosystem.** Omdia continues to observe an increased interest from organizations to invest in an end-user computing and productivity ecosystem with Google. The combination of hardware and software capabilities offered by Google is proving to be appealing to organizations looking to equip the frontline with new digital capabilities, particularly in the healthcare industry. Although Google does not offer UEM capabilities comparable to those delivered by Microsoft, Omdia anticipates this will be an area it will invest in further going forward.

- **Refine and better integrate DEX capabilities and approach.** Microsoft is quite unique in that it has a wealth of endpoint and application telemetry data that can be used to help businesses improve the experience employees have with technologies. Additionally, its Microsoft Viva solution provides useful insights into employee well-being, teamwork habits, and organizational trends, while its Microsoft Adoption Score app analytics deliver compelling insights into productivity for IT admins. These capabilities are all quite disparate in how they are delivered and offered to the market. Better integrating and packaging them has the potential to help Microsoft become an important support point for businesses looking to better understand and be able to positively influence employee sentiment and the technology experience.

- **Reporting and dashboarding capabilities.** Intune's out-of-the-box reporting and dashboarding capabilities are not as advanced as some other solutions on the market. Although Intune does make its data available to admins so that they can create custom reports using tools such as Power BI, Microsoft Sentinel, or their own tools, more advanced dashboarding and reporting capabilities are something customers would value, especially when offered out-of-the-box.

Methodology

Omdia Universe

Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's ICT Enterprise Insights survey data, in addition to any other in-house studies and surveys that may be relevant. Omdia then creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market. Vendors are invited to submit a written and documented response indicating how their current solutions align with the features and capabilities Omdia defined. Analysts supplement the information they gather first-hand from vendors with other information obtained in the public domain and from industry events, vendor briefings, and user conferences. Customer insights used in the analysis are derived from a bespoke survey Omdia develops at the onset of the project, in addition to reviews and ratings on TrustRadius. The Universe is peer-reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

The scoring for the Universe is performed against the matrix capability set and model. The overall position is based on the weighted average score, where each subcategory in a dimension is allocated a significance weighting based on the analyst's assessment of its relative significance in the selection criteria.

Omdia ratings

The scoring for the Universe is performed by independent analysts against a common evaluation model, and the average score for each subcategory and dimension is calculated. The overall position is based on the weighted average score, where each subcategory in a dimension is allocated a significance weighting based on the analyst's assessment of its relative significance in the selection criteria:

- **Market leader:** This category represents the leading solutions that Omdia believes are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best of breed.

- **Market challenger:** The vendors in this category have a good market positioning and are selling and marketing the product well. The products offer competitive functionality and a good price-performance proposition and should be considered as part of the technology selection.

- **Market prospect:** The solutions in this category provide the core functionality needed but not necessarily with the breadth and depth of leading global players. A niche or relatively new vendor with select innovative products and strategies may fall into this category and should be explored as part of the technology selection for many use cases. Note that none of the vendors in this Universe are considered prospects.

Inclusion criteria

The DWM/UEM market consists of many vendors that deliver solutions tailored to customers of all sizes. However, inclusion in this Universe is based on a vendor's ability to offer solutions that go above and beyond core endpoint and application management capabilities. All the vendors have a presence with midsize and large enterprise organizations (5,000 employees and above), and their solution has a global reach and presence with customers in at least three regions: Asia & Oceania; Europe, the Middle East, and Africa (EMEA); and North America. Vendors must also offer capabilities across all the areas explored by Omdia in this report. Each vendor must have at least 250 customers, and Omdia client inquiries have expressed demand for information on its product(s).

Appendix

Further reading

Omdia Market Landscape 2022: Managed Mobility Services (November 2022)

Market Landscape: Digital Workplace Services 2022 (October 2022)

Digital Partner Opportunities: Ten insights and recommendations from Omdia's 2022 future of work survey (July 2022)

Future of Work 2022: Hybrid Work Insights (July 2022)

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Omdia consulting

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