IDC MarketScape

# IDC MarketScape: Worldwide Unified Endpoint Management Software for Small and Midsize Businesses 2022 Vendor Assessment

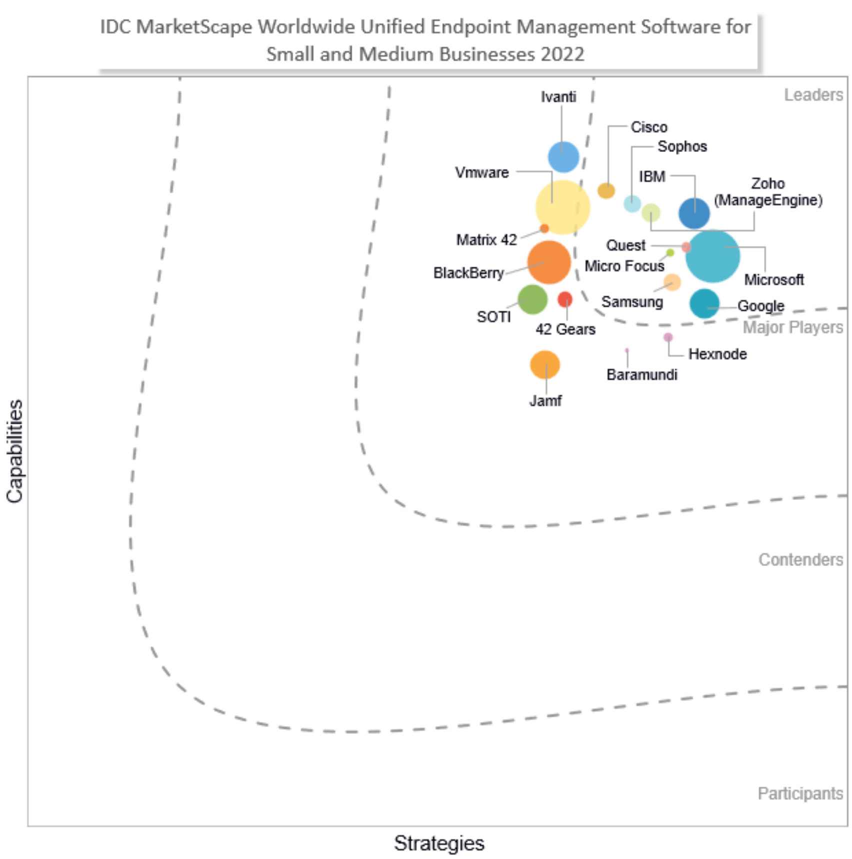
Phil Hochmuth

## THIS IDC MARKETSCAPE EXCERPT FEATURES MICRO FOCUS

## IDC MARKETSCAPE FIGURE

## FIGURE 1

**IDC MarketScape Worldwide Unified Endpoint Management Software for Small and Midsize Businesses Vendor Assessment**




Source: IDC, 2022

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

May 2022, IDC #US48325522e

## IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software for Small and Midsize Businesses 2022 Vendor Assessment (Doc # US48325522). 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

When selecting and deploying unified endpoint management (UEM) software, small and midsize businesses (SMBs) have different requirements, priorities, and trusted supplier sources compared with larger organizations. SMBs typically operate with smaller IT teams, often a few people or a single person responsible for the firm's entire technology estate. This makes the consolidation and integration promise of UEM very appealing — fewer tools for managing, securing, and monitoring more things.

In addition to device endpoint management versatility, SMBs can benefit from bundling UEM tools with adjacent IT products used in the organization's environment — including networking, security, server management, and overall business software platforms. This integration and bundled pricing can sometimes trump the underlying functionality of an UEM product when SMBs are selecting vendors. A best-of-breed UEM may not be the right choice for an organization if it can get an UEM tool, plus a large portion of its overall IT product toolset, from a single vendor.

SMBs also seek technology partners that can integrate with outsourced or managed service providers (SPs), as well as mobile operators/telcos, as these are common channels for SMBs to acquire UEM and mobility technology. Most small businesses tend to source their mobile devices from the mobile carrier they use for service, which makes these carriers important partners for supplying mobility management and, increasingly, UEM tools to SMBs. Similarly, partners can succeed in the UEM market for SMBs if they sell and integrate multiple IT product categories to SMB customers, such as networking, servers, storage, security, and communications platforms. To that end, some key considerations for SMBs looking for UEM partners are:

- Mobile worker front line and remote/hybrid use case requirements for mobility and PC endpoint management
- Support for automation and automated workflows for device deployment, configuration, and provisioning
- The ability to source additional or complementary IT technologies or services from the UEM provider, which are appropriate to the SMB's needs
- Simple workspace IoT rugged device support for SMB-focused use cases — customer kiosks, dedicated/locked-down mobile devices (e.g., apps for delivery staff), and digital signage are some use case examples

## 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 Apple macOS (Mac) PCs and laptops as well as for iOS (iPhone) smartphones and iPadOS (iPad) 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:

- **Enforceable and maintainable device state and functionality.** Transforming a consumer-centric device (e.g., an iPhone or a Google Pixel device) into a locked-down, single-purpose endpoint is relatively simple, but meeting specific industry and use case requirements and security needs is a key consideration for ruggedized and IoT device management platforms.
- **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).
- **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.
- **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.
- **Ability to support both mobile and PC form factors.**

## 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.

### Micro Focus

Micro Focus is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide UEM software for SMBs.

Micro Focus is a United Kingdom–based enterprise IT management and security software vendor with a large enterprise software product portfolio. ZENworks UEM is an evolution of the company's ZENworks product line of PCLM, ITSM, identity, security, and other management software (originally created by Novell, which Micro Focus previously acquired).

ZENworks has a strong analytics story. The company acquired Interset, which made user behavior analytics software. Micro Focus combines this with its device-level logs and data to provide analytics on end-user behavior combined with endpoint device configuration and asset information. ZENworks integrates with Android Enterprise as well as Microsoft Graph API for Office 365 app policy enforcement and integration. It also supports tvOS for Apple TV deployments where the devices are configured and managed centrally for single-use deployments (conference room presentations, interactive/dynamic digital signage, etc.).

ZENworks has a wide range of complementary management and reporting software products, including ZENworks Asset Management (can be tied to contracts, allowing for monitoring of software usage for billing purposes) as well as ZENworks Service Desk, an ITIL-based IT service desk solution that can integrate with ZENworks UEM. ZENworks Endpoint Security Management is another tool in the portfolio relevant to EMM/UEM with adjacent integration capabilities that protect Windows devices, including antimalware/antivirus, low-level firewall capabilities, app blacklisting, and VPN enforcement (i.e., for public WLAN access point connections and fixed and removable drive encryption). Other adjacent software platforms that integrate with ZENworks in the Micro Focus portfolio include NetIQ eDirectory for IAM and ArcSight — the SIEM platform formerly owned by HPE's software division, which spun off and merged with Micro Focus in 2017.

#### *Strengths*

- Micro Focus supports a broad range of Windows policy enforcement capabilities with an on-device agent that can offer deeper levels of control and management as opposed to over-the-air UEM Windows management tools that rely only on the MDM protocol for modern PC management.
- Micro Focus can deploy a sandboxed endpoint environment to managed endpoints in the form of an OS container, which can help prevent against data loss on endpoints, while limiting what types of files and apps can be accessed and executed on the endpoint.
- ZENworks UEM integrates tightly with Micro Focus' other IT products such as data protection, security, and identity platforms, making it a strong tool in a multiproduct Micro Focus environment.

- ZENworks can manage devices efficiently in remote locations by detecting the location of the end user (via the UEM desktop agent) and provision the right set of applications and restrictions, depending on where the worker is (i.e., in the office, at home, or traveling). This can be coupled with remote management capabilities to help troubleshoot devices.

### Challenges

- ZENworks UEM does not support Apple macOS device enrollments with automation provisioning, app distribution, or policy setup, although this is in the vendor's near-term road map over the next 12 months.
- Some Micro Focus customers IDC interviewed for this study said that they found the ZENworks UEM platform somewhat cumbersome to use in terms of setting up reports for device status, inventorying, and monitoring. Data out of the reports was good, once set up, but the templating setup method was difficult, users said.

### Consider Micro Focus When

IT teams operating with small or minimal staff should consider ZENworks UEM. SMBs are also prime candidates to consider the platform, as it can incorporate multiple IT functions into a single product. Larger firms using multiple Micro Focus products (such as identity, data protection, or security products) should also consider ZENworks UEM from a single vendor-management and product integration perspective.

## 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, with a focus on the SMB market. 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.

"SMBs across all industries are adopting sophisticated endpoint device use cases and deployment models, targeting the same level of efficiency and productivity as larger firms," says Phil Hochmuth, program vice president, Endpoint Management and Enterprise Mobility at IDC. "At the same time, SMBs look for greater levels of integration, automation, and product portfolio from the UEM technology suppliers. Vendors targeting this market must take into account these additional needs."

## 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.

## Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

---