IDC MarketScape

IDC MarketScape: Worldwide Unified Endpoint Management Software for Small and Medium-Sized Businesses 2021 Vendor Assessment

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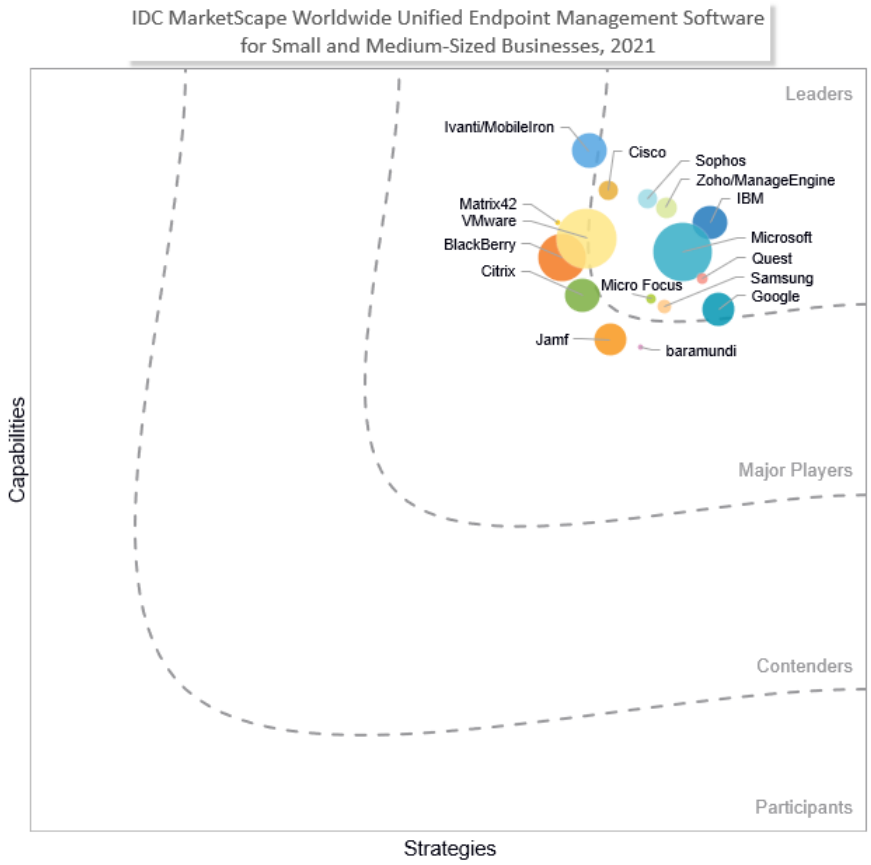
THIS IDC MARKETSCAPE EXCERPT FEATURES MICRO FOCUS

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Unified Endpoint Management Software for Small and Medium-Sized Businesses Vendor Assessment



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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 for Small and Medium-Sized Businesses 2021 Vendor Assessment (Doc # US46965720e). 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

Small and medium-sized businesses (SMBs; firms with under 1,000 employees) have many of the same challenges and requirements around end-user computing (EUC) technology deployment and management as enterprise-scale organizations. Security, manageability, and endpoint management functions that span mobiles and PCs are critical to SMBs. Among SMBs worldwide, 43% said they planned to increase spending on unified endpoint management (UEM) tools in 2021, according to IDC's October 2020 *COVID-19 Impact on IT Spending Survey*. This is being driven by the increased need for small and midsize firms to deploy devices and apps to an increasingly mobile and remote workforce while lowering administrative burdens and IT overhead.

UEM platform and vendor requirements for SMBs differ from those for larger firms in that smaller organizations typically require UEM to be a more tightly integrated tool into other IT management and security platforms they are using. An UEM tool integrated with, or offered along with, a broader security infrastructure, business applications, network management, or cloud and productivity services portfolio appeals to firms with small or single-person IT staff. This can help SMBs deploy effective PC/mobile device management and provisioning in context with all the other IT management, orchestration, and administration requirements. Some key findings regarding SMBs and UEM tools are:

- Carriers and mobile operators still play a large role in the decision making and deployment of UEM solutions, especially around mobile device deployment, as smaller companies rely on carriers for devices and services.
- UEM providers with broader IT and security portfolios are making tighter integrations between platforms such as service desks, IT asset management, endpoint and network security, and business and productivity apps targeting SMBs.
- Vendors with strong managed service provider partnerships are among the favored UEM solutions deployed across the majority of SMBs IDC interviewed for this study.

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.

- The vendor has UEM product specifically targeted or overall positioned for small and midsize customers (under 1,000 employees).

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.
- **A 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 such 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 operating system [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 (EU) 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.

Micro Focus

Micro Focus is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide UEM software for SMBs. Micro Focus is a United Kingdom-based enterprise IT management and security software vendor with a broad portfolio of IT software products. The company's ZENworks UEM software stems from the Novell ZENworks product line, a well-established brand in the industry for PCLM, ITSM, identity, security, and other management software.

The ZENworks UEM suite delivers device life-cycle management, including software configuration, packaging, and deployment, as well as mobile device software provisioning (via Volume Purchase Program for Apple app license management, as well as managed Google Play for Android app management). The platform can manage Windows 7/10 PCs, iOS, and Android devices. It also supports the Microsoft Graph API for Office 365 policy enforcement (which requires Intune license for the endpoint).

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, a full ITIL-based IT service desk solution that can integrate with ZENworks UEM. ZENworks Endpoint Security Management is another tool in the portfolio relevant to UEM with adjacent integration capabilities such as Windows lockdown and low-level firewall capabilities, app blacklisting, and VPN enforcement (i.e., for public WLAN access point connections). 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 Hewlett Packard Enterprise, which was divested to Micro Focus in 2017.

Strengths

The suite-based approach and multifunction capabilities of ZENworks allow small IT teams to manage large numbers of endpoint devices across a diverse set of OS types. The company had customer references of three- and four-person IT teams managing hundreds of thousands of devices on the integrated management suite.

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.

Micro Focus has a deep portfolio and is able to provide solutions that span across more than just the UEM domain. For large customers, this is a value as they may already have a large investment in

solutions such as identity and access, datacenter security, archiving, backup, content management, AI, insight engines, and file and print.

ZENworks integrates with Android Enterprise and Microsoft Graph API for Office 365 app policy enforcement and integration. It also supports tvOS for Apple TV devices, which can be configured and managed centrally for single-use deployments (conference room presentations, interactive/dynamic digital signage, etc.).

Challenges

PC management on ZENworks is still primarily a legacy-based management framework using Microsoft Deployment Toolkit (MDT) and PCLM-based application delivery/packaging systems.

ZENworks is an on-premises offering that may not be a good fit for firms looking for SaaS-based UEM offerings. Adding a cloud-based delivery option for ZENworks UEM in 2021 is on the company's road map.

Micro Focus has not leveraged its larger customer and installed base of software products to grow its UEM product. Part of the challenge involves the market segment ZENworks addresses (SMB and midsize) versus the large enterprise customers using the vendor's identity, security, and app development products. However, this is a priority for the company in 2021, as the company plans to introduce an integration road map for UEM across the Micro Focus portfolio.

Consider Micro Focus When

Small businesses or organizations with lean IT staff should look at ZENworks UEM, especially if the integration of multiple same-vendor IT products is a priority. Large enterprises with Micro Focus software infrastructure should also look at the UEM platform if interested in integrating endpoint management into other system infrastructure software platforms while streamlining vendor management.

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 (e.g., 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 for small and midsize businesses (SMBs) 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 for SMBs over the short term and the long term.

"Firms with under 1,000 employees are seeing the value around unified endpoint management as a way to consolidate tools and more tightly integrate device management and application provisioning with broader IT platforms and tools they use," says Phil Hochmuth, program vice president, Enterprise Mobility and Client Endpoint Management at IDC. "SMBs will look to partner with UEM providers that can meet them where they are in terms of carrier channels, technology partners, and managed service providers."

About IDC

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