

## IDC MarketScape

# IDC MarketScape: Worldwide Unified Endpoint Management Software 2021 Vendor Assessment

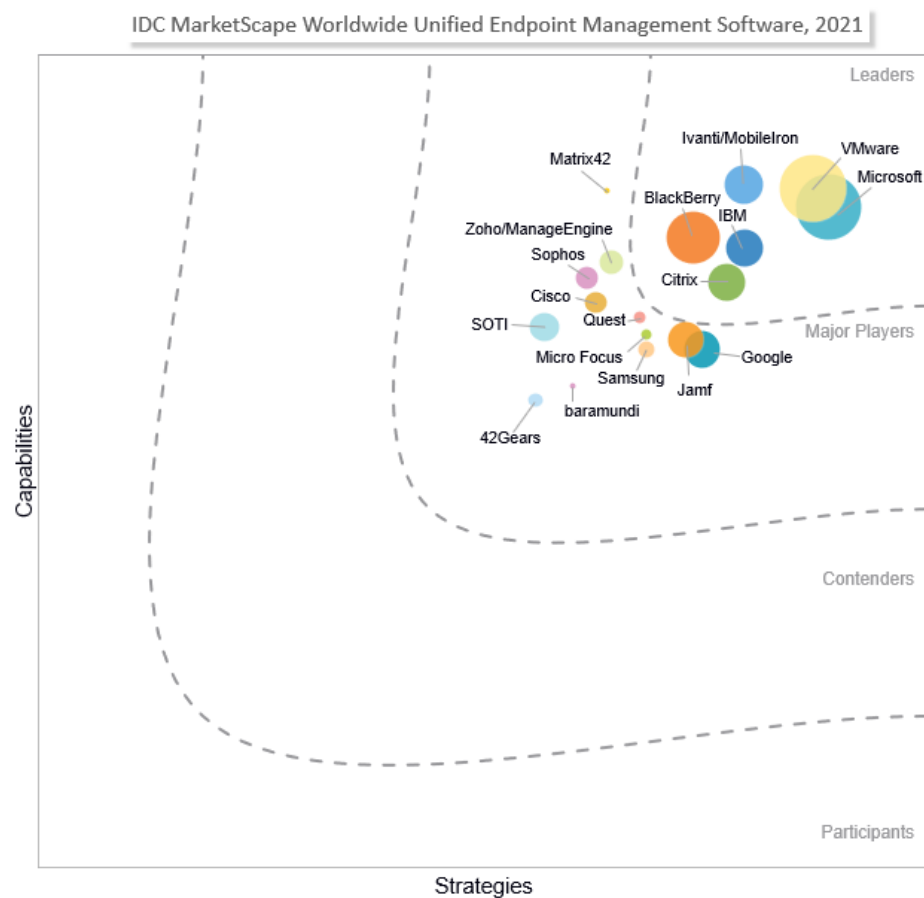
Phil Hochmuth

THIS IDC MARKETSCAPE EXCERPT FEATURES CITRIX

### IDC MARKETSCAPE FIGURE

FIGURE 1

## IDC MarketScape Worldwide Unified Endpoint Management Software Vendor Assessment



Source: IDC, 2020

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software 2021 Vendor Assessment (Doc # US46957820). 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

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- Most enterprises are using multiple UEM solutions for various use cases and/or regional support strategies.
- Convergence of teams comes before the single pane of glass: most end-user organizations.
- Support of five endpoint platforms (Windows, Mac, Apple, Android, and Chrome OS) is common among most vendors in the market.
- Endpoint analytics and advanced telemetry gathering and analysis is a growing offering component among many forward-thinking UEM solutions providers.
- Many vendors are positioning UEM as an infrastructure/security component to a larger "workspace" strategy around how end users work and interact with digital technology.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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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.

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

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- **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.
- **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 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 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 countries with more stringent cloud data privacy regulations.

## VENDOR SUMMARY PROFILES

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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.

### Citrix

Citrix is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide UEM software. Citrix as a cloud software company has focused its range of end user-enabling technologies – virtual client computing, app delivery, device management, and security/access control – around a singular Citrix Workspace product strategy and offering. With an emphasis on whole-workspace management, security, and control, Citrix Endpoint Management (still available as a standalone software offering) focuses on optimizing device provisioning, monitoring, and management functions across five operating systems (Windows, macOS, iOS, Android, and Chrome OS). As part of the larger Workspace offering, Citrix Endpoint Management feeds data from the device level back to the

Workspace analytics platform. The single Citrix Workspace app, which is a digital hub for aggregating all end-user work activity, is integrated into the UEM offering as an application/device provisioning platform and continuous authentication tool.

From a BYOD perspective, Citrix Endpoint Management functions as a component of Citrix Workspace to provide secure access to vital apps, data, and workflows to enable employees to work productively in any environment. Citrix Endpoint Management has strong MAM capabilities with a strong application container technology, MDX, which has over 50 policies it can apply to apps and data usage without requiring MDM enrollment or device-level supervision. Beyond MDX, Citrix also supports containerization/MAM functions in Knox, Apple Business Manager (via User Enrollment functions), and Android Enterprise.

Another strategy of Citrix Workspace beyond its Client Endpoint Management product is integration and interoperability with other competitive UEM and device management products – Microsoft Endpoint Manager, in particular. With support for the Microsoft Graph, Citrix mobile productivity apps can share data and be similarly managed alongside Office 365 apps in a single environment, as well as being deployed to BYOD devices via the Intune MAM container. Conversely, this integration can extend Citrix per-app VPN and single sign-on capabilities.

## **Strengths**

- Citrix Endpoint Management has strong security analytics capabilities as part of the larger Citrix Workspace platform. This allows for the detection of malicious user behavior, such as unusual or unauthorized use or access of cloud systems, anomalies in terms of log-in behavior or location, and other factors that can be detected and analyzed by the Workspace platform.
- The platform has strong blocking-and-tackling features around device management, including blocking or wiping of noncompliant endpoints (both mobile and PC) as well as conditional access support for virtual apps and other cloud/network-based resources controlled by Citrix Workspace. Citrix ADC (NetScaler) is an enduring differentiator and advantage for Citrix Endpoint Management, integrating authentication and application delivery, single sign-on (SSO) to virtual apps, and overall strong access control enforcement with scale that supports hybrid and cloud-centric enterprises.
- While the Citrix Workspace focuses on knowledge worker workspaces, Citrix Endpoint Management supports a range of "workspace IoT," ruggedized and IoT-centric, and frontline worker scenarios, including Citrix Workspace Hub, tvOS, Amazon OS, and Alexa for Business, but also Honeywell, Zebra ruggedized Android devices, Samsung DeX, and Windows IoT Enterprise.

## **Challenges**

- Citrix has a broad set of capabilities to help traditionally managed PC environments (Windows in particular) to migrate to modern management. This includes tools to convert Windows GPOs to modern/UEM-based policies and tools to migrate customer applications from legacy to modern frameworks.
- Citrix has a relatively weak partnership position among mobile operators in the United States and worldwide. While carriers are becoming less of a main channel for mobile device procurement and deployment as businesses move to UEM, missing this channel component potentially keeps Citrix Endpoint Management out of more enterprise mobility deals, especially among SMB and midmarket firms.

## Consider Citrix When

Organizations should consider the Citrix UEM platform if they are moving toward a larger intelligent digital workspace model for end-user computing management (including apps, devices, data, and infrastructure software).

## APPENDIX

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### 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

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### 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 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 moving away from specialization of endpoint device management – from a separate tools and IT personnel perspective – when it comes to general end-user computing use cases and workloads," says Phil Hochmuth, program vice president, IDC's Enterprise Mobility and Client Endpoint Management. "Many organizations see UEM as part of a larger strategy to streamline end-user experiences with technology across various device form factors and use cases."

## 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

5 Speen Street  
Framingham, MA 01701  
USA  
508.872.8200  
Twitter: @IDC  
idc-community.com  
www.idc.com

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