
Summary: The market for enterprise mobile management software has evolved from a primary focus on MDM to a suite that includes MDM, MAM and MCM as the primary capabilities. This Aragon Research Globe™ reviews 18 major technology providers in EMM and their strengths and challenges as this market transforms.

TABLE OF CONTENTS

Enterprise Mobile Management: MDM, MAM and MCM ................................................................. 2
  A Growing Focus on Content ........................................................................................................... 3
  The MDM Market: Commoditized but Growing............................................................................ 3
  Managing the Mobile Enterprise Ecosystem in the Wearable and IOT Era............................... 4
  Enterprise Mobility: The Business Imperative.............................................................................. 4
  Market Coalescence and Consolidation.......................................................................................... 5
Aragon Research Globe Overview .................................................................................................... 6
  Dimensions of Analysis .................................................................................................................... 6
  The Four Corners of the Globe ......................................................................................................... 7
  Inclusion Criteria ............................................................................................................................... 7
  Exclusions .......................................................................................................................................... 8
  Leaders ............................................................................................................................................ 10
  Contenders ..................................................................................................................................... 14
  Innovators ....................................................................................................................................... 16
  Specialists ......................................................................................................................................... 19
Aragon Advisory .................................................................................................................................. 21
Bottom Line ........................................................................................................................................ 21
Enterprise Mobile Management: MDM, MAM and MCM

Managing mobility in the enterprise has shifted from a world that was primarily Blackberry devices and email a few years ago to one in which devices, apps, data and content are exploding and poised to grow even more over the next five years. Enterprise mobile management (EMM) has become the de facto approach that incorporates and transcends mobile device management (MDM), mobile application management (MAM) and mobile content management (MCM). The shift is away from merely managing the assets themselves and toward transforming business through mobilizing the enterprise.

The mobile market has shifted from a device focus a few years ago to focus on a total approach to mobility, which includes application management, content management and data security. While MDM helps address authentication and security, success with mobility also depends on apps that are lightweight, secure and easy to manage, distribute and use. MAM is an inescapable part of the mix.

Enterprises’ mobile management needs are as diverse as the growing universe of vendors and tools. First, they need a strategy to secure and manage the huge number of devices entering the workplace; to distribute, support, monitor and control the use of enterprise applications; and to protect and secure the entire ecosystem, corporate information and intellectual property. Dealing with issues in each of these categories will most often require multiple management tools.

With enterprises still in the throes of shifting to new mobile devices and retiring BlackBerrys, the Internet of Things era is about to kick in and with it new opportunities and new challenges for EMM providers. Aragon feels that IOT will be one of the new frontiers for both EMM and Networking providers. Use cases will be abundant and so will the need to be able to manage these devices.

EMM platforms are rapidly evolving to help manage different aspects of the mobile, bring-your-own device. In fact, security remains at the forefront of needs and vendors have taken different approaches to solving this. We have seen some enterprises limiting BYOD programs due to security issues on some platforms, such as Android.

Enterprises have more choice when it comes to a full EMM platform. They should also evaluate best-of-breed providers that have some but not all EMM capabilities for strengths in their respective areas, such as MAM. Each of them is valuable for certain business needs and circumstances, but the coming consolidation in this market will have important consequences, and should be reflected in relatively short-term planning.

For example, some best-of-breed MAM providers that offer a partial EMM Suite continue to do well. Other MAM providers just focus more on App Stores and app management and offer more functionality than the full EMM suite providers.

At the same time, the demand for mobile application development platforms (MADPs) continues to grow. On top of that, security providers are adding EMM to their endpoint protection suites as a way to extend their overall footprint.
Beyond what can be addressed in the short term, enterprises need to recognize the value of personally owned mobile devices, and to establish an integrated, holistic approach to enterprise mobile management. Aragon recommends these key priorities:

- Authenticate and manage user identity
- Control the devices
- Manage the apps
- Protect enterprise data
- Manage mobile content
- Monitor the network
- Optimize performance of the systems
- Administer inventories and expenses
- Oversee a workplace with users as the perimeter

**Mobile Content Management Is Here**

A growing trend is the shift toward being able to manage mobile content as well as mobile apps. Managing critical content outside of repositories is what MCM is all about. While there are still many standalone MCM providers, increasingly, we see EMM providers beefing up this part of the suite in a big way. Given the huge growth we expect as tablets become more widely used in enterprises, is the need to manage content that is part of a mobile worker’s job.

Mobile security is a top priority in gaining managed control over smartphones and tablets in business, whether the devices are company-owned or BYOD. Content stored on those devices is a critical exposure, and protecting the intellectual property of the business demands a mobile content strategy. Although newer smartphones with modern OSs have device-level encryption to protect content, significantly more is needed to protect sensitive documents and valuable corporate intellectual property.

EMM will require mobile content management tools that can protect data and documents stored on devices and in transit via apps. The ability to easily and securely connect with existing enterprise content, particularly through SharePoint, is a rapidly growing requirement.

**The MDM Market: Commodityized But Growing**

The MDM market is crowded, with many vendors that have varied approaches to largely commoditized functionality. MDM software prices have declined each year, and providers will continue to add services and expand functions to create new revenue streams and grow their businesses. One thing vendors must do is to recognize the expansion into EMM, and shift their focus from MDM price to overall mobile management to align with the requirements on enterprise short lists.

Gaining control of mobile devices is only the beginning of what enterprises will need, and MDM is where most need to start. The explosion of smartphones and tablets, particularly those owned by employees, has forced enterprises to address mobile security and management issues. As more devices come online, such as wearable devices and connected appliances...
and buildings, enterprises will have greater needs for both management of those assets and access via mobile apps. For vendors, the growth of the device market is important, but the explosive growth of Mobile apps means that most enterprises will need to invest considerably to be able to deal with app proliferation.

**Managing the Mobile Enterprise Ecosystem in the Wearable and IOT Era**

The huge influx of smartphones and tablets has pushed enterprises from acceptance and bare connectivity to full integration and business solutions, even more rapidly than occurred with PCs. As we progress later into 2014, enterprises will be hit with the need to manage new classes of devices, which will include growing numbers of wearable devices and other devices that are standalone and networked.

This tablet era is now in a transitional phase. The era of Mobile Devices that have multiple form factors is here. The risk to enterprises that don’t act to manage current mobile devices increases as the volume and types of mobile devices increase.

Business increasingly understands how to leverage and exploit mobility, and tablets are becoming strategic business tools. Wearable devices will have an adoption cycle that hits the consumer segment first, but since many of those devices will enter the workplace, enterprises need to be prepared.

**Enterprise Mobility: The Business Imperative**

For enterprises, the multiple elements of mobile and mobile management are rapidly becoming part of the strategic business foundation. Managing mobile devices and controlling BYOD have been important priorities behind the MDM segment, but increasingly a holistic approach to mobility is required. As enterprises make mobile an integral part of how their systems are designed and how their business runs, mobile management that addresses mobile devices, the mobile app lifecycle, and mobile content in an integrated way becomes a priority.

EMM is an emerging business imperative that requires a broad range of management capabilities. It is driving a coalescence and consolidation in previously fragmented mobile management markets around these business objectives. These expanded business requirements include:

- Managing mobile networks
- Managing and securing users
- Managing and securing devices
- Managing and securing apps and data
- Managing and securing content
- Mobile operations and support
Market Consolidation Will Continue

In 2014, we are in another phase of consolidation that we expect to continue as large tech titans see the value of a complete mobile portfolio. The consolidation round started in late 2012 and continues today. Citrix, Good, IBM, SAP and VMware have been the main acquirers.

As more IOT providers start to offer their ability to manage more legacy devices (see Note), we expect many of those providers to be acquired by the EMM platform providers. This growth of demand, which we expect to be significant, is what will fuel the next round of consolidation in EMM.
Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We use a rigorous analysis of each vendor using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers’ product-oriented capabilities. Positioning in the Aragon Research Globe will reflect how complete a provider’s future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor’s effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness**: Market awareness of the firm and its product.
- **Customer experience**: Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability**: Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging**: Is the offering priced and packaged competitively?
- **Product**: The mix of features tied to the frequency and quality of releases and updates.
- **R&D**: Investment in research and development as evidenced by overall architecture.
Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: national, international or global. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

### The Four Corners of the Globe

The Aragon Research Globe is segmented into four sectors, representing high and low on both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: leaders, contenders, innovators or specialists. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and perform effectively against those strategies.
- **Contenders** have strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives, but have yet to perform effectively across all elements of their strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

### Inclusion Criteria

The inclusion criteria for this Aragon Research Globe are:

- A minimum of $2 million in primary revenue for mobile management software for enterprises, supporting management for mobile apps, mobile devices, mobile content and/or mobile operations and support
- Shipping product: Product must be announced and generally available.
- Customer references: Vendor must provide three customer references in each region where it does business.
Exclusions

The following vendors were excluded from the 2014 Aragon Research Globe for EMM software:

- **Motorola Solutions**: Motorola Solutions offers an expanding MDM product in its Mobility Services Platform. While MSP includes support for iOS, Android and Windows Mobile, the focus and sales effort is aimed at managing Motorola mobile computing in its core business.
- **PartnerPedia**: Bought by BMC Software.
- **Trend Micro**: Shift in focus.
- **App47**: Did not meet minimum participation criteria.
- **BoxTone**: Acquired by Good.
- **Smith Micro**: While Smith Micro has a long history of device management solutions for mobile carriers, it has shifted its enterprise product focus to connectivity, security, and analytics-based mobile solutions.

Figure 1: The Aragon Research Globe™ for Enterprise Mobile Management Software, 2014 (As of 9/16/2014)
AirWatch, which was acquired by VMware in 2014, has not slowed down its push into the enterprise. The company has a large global presence and supports over 17 languages. It continues to drive sales both direct and via partners and continues to innovate its product offering.

AirWatch has seen solid adoption of its Secure Content Locker, which will allow content to be stored in other repositories, such as Microsoft SharePoint. Many large enterprises use AirWatch for MCM in addition to its core MDM and MAM capabilities. AirWatch offers enterprises flexibility of either a cloud or an on-premise deployment. While now part of the VMware family, AirWatch continues to drive innovation out of its Atlanta headquarters.

### Strengths
- Scalability
- Brand awareness
- Strong MCM capabilities through the Secure Content Locker
- App management has solid administration and inventory support

### Challenges
- Expanding its basic app-level management controls and reporting

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Citrix

Since acquiring Zenprise in 2012, Citrix has wasted no time in bolstering its focus on EMM, and in 2013, 85% of sales were based on EMM versus MDM. It has integrated its product families and extended functionality with secure email, as well as integrating with ShareFile, the Citrix MCM offering. XenMobile has become part of the larger, integrated Citrix product family that includes XenDesktop, XenApp, NetScaler ShareFile and GoToMeeting, which can be purchased separately or together.

Citrix has focused on the security of apps, data and content by adding a robust API that serves as a foundation for its overall efforts. It also enhanced its secure collaboration and browsing capabilities via its WorxMail & WorxWeb offerings, enhanced in May of 2014, which provide high levels of data security and better than native app experience for business users. In May it also announced WorxNotes (secure note taking), WorxEdit (mobile editing) and WorxDesktop (secure remote access).

### Strengths
- Full EMM platform
- Suite of Worx mobile productivity apps, including containerized email and secure browsing
- Supports hybrid cloud implementation
- Strong MCM capabilities through ShareFile

### Challenges
Good Technology

Good Technology has been one of the pioneers in providing a secure approach to managing mobile devices and data. Under CEO Christy Wyatt’s leadership, Good has, via acquisition and organic development, transformed itself into a full EMM provider that is also viewed as the de facto leader in mobile security. The FixMo acquisition in June 2014 provides Good with additional mobile data protection and cyber security options.

Good offers very high levels of control and security on personal devices, has introduced a new user experience and business features and eased deployment with new cloud options. Good pioneered a secure way to manage email and share content. With its BoxTone acquisition, Good is now able to manage large fleets of devices in a seamless manner. Using Good Dynamics, developers can easily incorporate Good’s security, high availability and integrate server or client-side services into their mobile apps. While financial services and government have been traditional strongholds, we expect more firms will want to leverage Good’s EMM offering, particularly with their value based subscription offerings.

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<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>• Excellent security for separating corporate data on personal devices</td>
<td>• Viewed as a “heavy” application due to security controls</td>
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<tr>
<td>• Secure email, SharePoint access, instant messaging and browser capabilities</td>
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<tr>
<td>• Secure SDK and app wrapping, secure app-to-app workflows</td>
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<tr>
<td>• Cloud, on-premises and hybrid deployment options</td>
<td></td>
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<tr>
<td>• Large community of Good-secured ISV and custom apps</td>
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IBM

IBM has been building out its EMM assets, including the purchase of Fiberlink’s MaaS360 in December 2013. IBM MaaS360 is a cloud-based or on-premises offering that features fast and easy deployment. MaaS360 includes robust EMM capabilities via a full suite of MDM MAM and MCM. Its platform now extends to application management, document distribution, expense management, and contextual event management for any mobile device.

IBM has placed a significant bet in mobile. With MaaS360, Worklight and its substantial content management capabilities, IBM is one of the major tech titans that has made a demonstrated move in mobile with a very broad EMM offering. It has rich content security capabilities, with a content catalog that allows policies on a per-document basis, and can securely sandbox content within the mobile app. Fiberlink has a strong partner program and we estimate that 40% of its revenue comes from partners.

**Strengths**
- Ease of deployment
- Broad suite of EMM capabilities
- Strong integration with existing enterprise infrastructure, email, LDAP and certificate services
- Document-level security policies

**Challenges**
- Integrating MCM functionality with other IBM ECM products.

MobileIron

MobileIron, the only EMM provider to IPO (June 2014), has broad EMM capabilities focused on the mobile lifecycle. MobileIron has built from an app focus, having offered one of the first enterprise app stores. MobileIron offers a privacy policy to govern access, and includes tools to monitor and manage wireless expenses in real time to control costs and optimize service plans.

MobileIron includes solid monitoring, reporting and dashboards. It offers both on-premises and cloud versions, but most of its users are on-premises to date. While MobileIron began to offer some MCM features in Docs@Work as part of the MobileIron 5.0 release (Sept 2012), we have not seen much demand for it and even with Docs@Work, it mainly partners for MCM. MobileIron has strong partner relationships with mobile carriers, system integrators and VARs that have enabled it to grow in more than 40 countries.

**Strengths**
- Reseller relationships in more than 40 countries
- On-premises and cloud offerings that provide broad device support
- Brand awareness

**Challenges**
- MCM features and awareness
SOTI

Headquartered in Ontario, Canada, SOTI has a large installed base based on MobiControl, its flagship offering. MobiControl has robust MDM functionality and provides MAM, MCM, mobile security features and mobile email management. MobiControl, available both on-premises and cloud-based, has extensive reporting in its management console, and a secure content library that supports a wide range of document formats and can push files to individuals, groups, or all mobile users.

SOTI is a complete EMM provider that also addresses the looming issue of Android security. In fact, to address fragmentation and security issues occurring with Android, SOTI offers its suite to over 50 Android OEM device vendors such as LG, Samsung and ZTE to provide more consistent device management and app control through SOTI MobiControl Android+ functionality framework.

**Strengths**

- Large installed base
- Extensive support for any Android device with the Android+ stack
- Help desk support and remote control features
- Scalability

**Challenges**

- Known for its strong Android capabilities, but also has solid support for iOS and other platforms
Contenders

BlackBerry

Blackberry, formerly Research in Motion, has one of the largest installed bases of MDM servers in the world. That base is quickly eroding, in part because of Blackberry’s issues with its core smartphone business and continual shifts in its management team. Blackberry 10 Enterprise Server supports multiple platforms, but it is a separate offering from Blackberry BES Server. Blackberry BES and the free upgrades that Blackberry is offering to enterprise customers are compelling, but intense competition is causing enterprises to often look elsewhere for EMM products and services.

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<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tr>
<td>• Mobile brand recognition</td>
<td>• Need for two servers to manage legacy RIM installations</td>
</tr>
<tr>
<td>• Able to support iOS and Android devices</td>
<td>• Eroding mobile device market share puts all businesses at risk</td>
</tr>
<tr>
<td>• Large enterprise installed base of BlackBerry and BES users</td>
<td>• Minimal MCM capabilities.</td>
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SAP

SAP has developed a completely new, integrated and cloud-based portfolio that also offers a new internally developed MAM solution for managed and unmanaged devices, mobile app protection/wrapping. SAP Mobile Secure provides a broad suite of EMM tools, including solid MDM, and strong capabilities for content management, software distribution, enforcing policies at the app level. SAP offers both on-premise and cloud options, It also offers mobile app development platform services and partner-developed apps to its installed base.

SAP also offers SAP Mobile Documents for mobile content management, but we have not seen much market demand for that part of its suite. SAP also provides solid analytics capabilities. Client feedback is that SAP prices are much higher than the rest of the market. SAP has responded by making SAP Mobile Secure, its cloud EMM offering, value based.

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<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>• SAP brand recognition and customer base</td>
<td>• Awareness of cloud-based offerings and value-priced offering</td>
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<tr>
<td>• Analytics and reporting integrated throughout the system</td>
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<tr>
<td>• Evolving a broad mobile management strategy including app development, content management and enterprise app integration</td>
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Symantec

Symantec is known for its security products, and has begun to position EMM with a stronger focus. It integrated MDM in 2014, and the previous acquisitions of Odyssey and Nukona have strengthened its device management and App Management capabilities, which it now offers as a SaaS based Cloud Suite.

Symantec has also integrated Norton Mobile Security into the Suite. The app management capability provides app-level security and content management with an app-wrapping technology that does not require source code changes. Finally, its NitroDesk acquisition, which Symantec indicated is already integrated into its EMM platform, will give Symantec an edge when it comes to the area of Android Security.

**Strengths**

- Security brand recognition
- Capabilities across device, app and data management
- Ability to provide security products across mobile and PCs

**Challenges**

- Limited name recognition in enterprise mobile management
- Speed of acquisitions with other products
- Due to the company’s security heritage and large portfolio, Symantec will have to show the market that EMM is a key focus area
Innovators

Absolute Software

Based in Vancouver, British Columbia, Absolute Software focuses on EMM and asset management and has been growing at a solid pace. Absolute Manage MDM for Mobile Devices provides management for iOS, Android and Windows Phone and tablet devices. When deployed as a component of the Absolute Manage product, enterprises can have a single console to control Mac and Windows PCs along with mobile clients.

Absolute has a growing emphasis on BYOD, with automated self-service enrollment and policy driven BYOD-specific capabilities to control access to corporate resources based on configuration compliance. Its MCM features allow for integration with Microsoft SharePoint. Absolute Manage MDM is available as a cloud-based or on-premises solution.

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<th>Strengths</th>
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<tr>
<td>• Integrated management console for Windows, Mac and mobile devices</td>
<td>• Market awareness</td>
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<tr>
<td>• Mobile device and app management capabilities</td>
<td></td>
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<tr>
<td>• MCM support</td>
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Globo

Globo is a global provider of EMM with a history of telecom and WiFi management offerings. It bought Silicon Valley EMM provider Notify in October 2013 and established a presence in Mountain View. Globo has a full EMM suite but focuses on MDM and MAM as its core strengths. It allows policy-based deployment and management and offers strong analytics as well as real-time alerts.

Globo’s MAM offering, Enterprise Reach, allows for white labeling in addition to solid containerization and security capabilities. Go Enterprise supports collaboration and content sharing, although it is relatively new in the market.

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<th>Strengths</th>
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<tr>
<td>• MAM and MDM functionality</td>
<td>• Brand awareness</td>
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<tr>
<td>• Global presence</td>
<td>• MCM functionality</td>
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<td>• WiFi management integration</td>
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Kony

Kony has evolved to become a leader in mobile app development platforms (MADP), and recently announced Kony MobileFabric that blends its MADP capabilities along with its Mobile Back-End as a Service (MBaaS), Platform as a Service (PaaS) and API management capabilities. Kony offers EMM as well and the combination of Mobile App Development and EMM to give enterprises more choice and fewer vendors to have to manage.

Kony is flush with a new investment of $50 Million and also has a new management team, which includes HP and Siebel Veteran Tom Hogan as CEO. Given its strengths in MADP, we expect Kony to acquire additional EMM capabilities through acquisition.

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<th>Strengths</th>
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<tr>
<td>• Leading mobile app development environment</td>
<td>• Awareness outside mobile app development</td>
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<tr>
<td>• MAM and MDM capabilities with unique context-aware API controls</td>
<td>• Focus outside of North America</td>
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<tr>
<td>• Extensive cross-platform development tools can reduce costs by cross-compiling a single code base, combined with EMM for distribution and management of created or acquired apps</td>
<td>• MCM functionality</td>
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<tr>
<td>• Management team</td>
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Pegasystems

Pegasystems acquired Antenna Software in 2013 and has complemented Antenna’s focus on mobile app development and management with a responsive, model-driven Web authoring environment, extensive back-end services, and an extensive portfolio of industry applications. Pega addresses the mobile lifecycle from design to analysis to support the ability to build, run and manage mobile apps and content. In addition to providing MAM and app-store capabilities, Pega enables enterprises to build and distribute apps, and provides tools to integrate them with other business applications.

Pega provides solid security options, including key management, and also supports encryption for communication. Pega has strengths in other enterprise software areas, which should fuel demand for its MAM and MADP capabilities.

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<th>Strengths</th>
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<tr>
<td>• MAM and MDM capabilities</td>
<td>• Awareness outside of IT development</td>
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<tr>
<td>• Strong partner ecosystem includes carriers, device manufacturers and system integrators</td>
<td>• Strong analytics and reporting</td>
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<tr>
<td>• Messaging and encryption of messages</td>
<td>• MCM functionality</td>
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Sophos

Simple to deploy, manage, and use, Sophos encryption, endpoint security, web, email, mobile and network security solutions are backed by SophosLabs, a global network of threat intelligence centers. Perhaps best known for its unified threat management capabilities, Sophos has fully integrated DIALOGS, acquired in April 2012, which strengthened its Sophos Mobile Control (SMC). Sophos released Sophos Mobile Control 4.0 in May 2014. In addition to managing mobile devices, applications and email, it offers file-level encryption, ensuring that each document connected to the server remains secure and that users can collaborate safely.

Sophos Mobile Control also delivers robust, integrated security against malware and malicious web sites. In addition, Sophos offers categorical web filtering so organizations can control network performance and security by managing which websites their users can access. Available on premises or as a service, Sophos Mobile Control provides a simple and differentiated approach for organizations to manage and secure mobile devices, content and applications. Sophos has gone further than others to support MCM, including allowing for federated and encrypted access to documents stored in DropBox or Egnyte.

**Strengths**

- Broad device support, including Android, iOS, BlackBerry, Windows Mobile, Windows 8 and Symbian
- Both on-premises and SaaS implementations
- MCM functionality includes access to encrypted files in cloud services such as DropBox or Egnyte

**Challenges**

- Awareness in EMM

Tangoe

Tangoe offers EMM capabilities via its Tangoe MatrixMobile EMM suite. MatrixMobile is a broad suite for mobile device, app and content policy management. The individual components are not all integrated, but device containerization and TEM integration are differentiators.

Tangoe offers extensive tracking, reporting and controls including GPS location and audit trails, cut-off policies for plan usage and roaming, and the ability to optimize plans with analytical tools. Tangoe has strengthened focus on data management and security with device containerization, with content syncing support for approved users, secure searching and access to corporate file servers and SharePoint servers.

**Strengths**

- Recognition as leading mobile TEM provider
- Real-time app to track usage and costs
- Offers on-premises, private SaaS cloud and global managed service options
- Secure mobile access to SharePoint

**Challenges**

- No multi-tenant cloud offering, although can provide SaaS managed services from Tangoe global datacenters
- Sales strength is in TEM and needs more emphasis on overall EMM message
- Device containerization was recently introduced into the solution in January 2013
Specialists

Apperian

Based in Boston, Apperian was the pioneer of MAM and enterprise app stores, and offers solid capabilities in managing enterprise mobile apps across the full mobile app lifecycle, particularly for iOS and Android. By providing MAM capability for custom, 3rd-party and public apps, Apperian has mobile management for corporate and personal devices without requiring MDM and without requiring the use of an SDK to modify the mobile apps being managed.

Apperian is ideal for enterprises that already have MDM, or do not want to use it, but need to secure and manage their growing mobile app portfolios. Apperian partners for MCM, and while this gives it a bigger suite story, we didn’t see evidence of tight integration.

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<tr>
<td>• MAM features</td>
<td>• Device management capabilities are basic</td>
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<td>• App store offering</td>
<td>• Partners for MCM</td>
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<tr>
<td>• Provides support for mobile users and devices with or without an MDM product installed</td>
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LANDESK

LANDESK is known for its strengths in endpoint protection across both PCs and mobile devices. It is one of the larger vendors providing EMM software. LANDESK’s main markets are system lifecycle and service management software for enterprise servers and PCs. LANDESK Mobility Manager provides the MDM essentials, supporting iOS, Android, BlackBerry and Windows Phone. It also has MAM and MCM capabilities.

When implemented with the LANDESK Management Suite, IT organizations can integrate their mobile device management with the same management system and admin console as servers, desktops and laptops. LANDESK Mobility Manager will be attractive to large companies with strong IT operations management focus with other LANDESK management products. LANDESK also purchased LetMobile earlier this year. LetMobile uses an innovative approach to protect email using a secure gateway.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PC lifecycle management</td>
<td>• Limited recognition in EMM</td>
</tr>
<tr>
<td>• Operations management suite</td>
<td>• Lacks mobile content management</td>
</tr>
<tr>
<td>• Integrated console for servers, PCs and mobile devices</td>
<td></td>
</tr>
</tbody>
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McAfee

While it is know for its endpoint protection, McAfee is not as well known for its EMM capabilities. It offers app distribution, as well as a secure container. McAfee does offer Android, iOS and Windows support and bundles them into its EndPoint Protection Suites. Enterprises concerned about Android security may want to evaluate McAfee, since it could be viewed as an alternative to Samsung Knox without the overhead.

The combination of McAfee’s EMM with its anti-malware and authentication along with integration of other policy and compliance tools should prove to be attractive for IT organizations with existing investments in McAfee security tools or a strong need for compliance management and reporting. While not known for EMM, McAfee’s EMM offering will be attractive to existing McAfee customers.

**Strengths**

- Strong brand recognition
- Uses strong authentication via device certificates for connecting to email
- Integrates with McAfee ePolicy Orchestrator to provide a unified security posture across PCs, mobile devices and networks

**Challenges**

- Awareness of its EMM offerings
- Does not provide device-level encryption, but can block devices lacking the capability
Aragon Advisory

- Carefully evaluate EMM providers both on current capabilities and on product roadmaps, balancing product innovation against time to market of new capabilities.
- EMM suites offer good value but providers with expertise in areas such as MAM and MADP will be in high demand given the growth of mobile apps.
- EMM is still consolidating and expect more providers to be acquired as mobile usage in the enterprise continues to expand.
- Evaluate product roadmaps from providers who are on your short list, evaluating how the providers keep up with OS changes.

Bottom Line

Enterprise mobile management has become a must-have set of capabilities for the enterprise. EMM platforms have evolved to support large numbers of devices and applications. The growth of mobile going forward will force enterprises to leverage multiple approaches since both devices and apps are expected to grow significantly as the wearable and IOT eras arrive at the doorstep of the enterprise.