Mobile Enterprise Vendor Benchmark
2015
A Comparison of Software Vendors and Service Providers
Germany

Mobile Enterprise Vendor Report
Executive Summary
“Mobile Enterprise Vendor Benchmark 2015” for AirWatch/VMware
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1 Executive Summary

Within the last twelve months, both product and service offerings in the mobile enterprise segment have been improved significantly and are addressing users' actual requirements, while these requirements have increased, due to an increase in the number of users and the higher business value that can be achieved with such solutions.

Still, both products and services differ significantly, and user organizations must be aware of these differences, prior to making any investment decisions.

1.1 Mobile Device Management Software

Mobile device management software is a key technical component for mobile enterprise implementations. Most IT managers and CIOs have realized that some management is required to use mobile devices in professional environments, and so, such solutions are used accordingly.

In the mobile device management software solutions segment for smartphones and tablets, AirWatch/VMware, Cortado, Citrix, Good Technology and IBM as well as Microsoft, MobileIron, SAP, Symantec and Trend Micro were positioned in the leader quadrant. AppTec has been positioned as Rising Star.

In the mobile device management software solutions segment for all kinds of end-user devices, AirWatch/VMware, Matrix42 and Microsoft as well as FrontRange, IBM, LANDesk and Symantec achieved a leadership position. CA has been identified as Rising Star.

1.2 Mobile Application Management

Generally, mobile application management software is an integral part of mobile device management solutions to help vendors differentiate themselves from the competition by enhancing their mobile device management solutions with application management functionality. This additional functionality is quite interesting for many companies and may constitute an important decision-making parameter when selecting a mobile device management solution.

The following companies were positioned in the leader quadrant of this category: AirWatch/VMware, Citrix, Cortado, FrontRange as well as Good Technology, IBM, LANDesk, Microsoft, MobileIron, SAP, Symantec and Trend Micro. CA has been identified as Rising Star.

1.3 Mobile Information Management (Software)

In 2013/2014, the issue of how to secure the transfer to and storage of documents and other information on mobile devices and manage user rights became sort of a
hype topic. Many security officers have prohibited the usage of free, easy-to-use cloud solutions because of respective security concerns, but have failed to approve and allow the usage of alternative solutions, which raised users' annoyance. Meanwhile, there is a variety of solutions based either on a file sharing or the traditional enterprise content management system approach.

In the category of mobile information management software based on file sharing, Acronis, AirWatch/VMware, Alfresco, Box, Citrix, Cortado as well as EMC, Good Technology, HP, IBM, Microsoft, NetApp, Trend Micro and WatchDox were able to reach the leader quadrant.

In the category of mobile information management software based on enterprise content management, Alfresco, EMC, d.velop, HP, Hyland Software as well as IBM, Microsoft, OpenText, Oracle and Perceptive Software were positioned as leaders.

1.4 Enterprise Mobility Management

Basically, enterprise mobility management is a combination of mobile device management, mobile application management and mobile information management functionality, ideally within one product, but at least within an integrated solution. As such, mobile device management vendors with a respective broad portfolio are important players in the market segment.

The following companies were positioned in the leader quadrant of the enterprise mobility management category: AirWatch/VMware, Citrix, Good Technology, IBM as well as Microsoft, MobileIron, SAP and Symantec.
2 Methodology

2.1 Definitions

Mobile enterprise is a term to describe a new work style, optimizing employees' mobile work and manager's mobile management options by leveraging smartphones and tablets that are equipped with respective software and can be operated either internally or as a managed service by respective service providers. Also, there are special devices, for instance, in logistics, to enable mobility in warehouses or similar locations.

Besides selecting the suitable components, business process customization and mobilization is key for success.

All tools, services and solutions have been designed to increase employee efficiency and reduce costs or, in other words, maximize the company's profits.

Source: Experton Group AG

Figure 1: Simplified mobile enterprise illustration
2.1.1 Services – Division by Company Size

In particular in the services category, service offerings and demands differ significantly, depending on the respective user company's size, and a differentiated analysis of service providers by company size was conducted accordingly. Company sizes are defined as follows:

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Midmarket</td>
<td>Companies with about 100 and more employees, with central headquarters in Germany, ideally managed by the owner(s).</td>
</tr>
<tr>
<td>Upper Midmarket</td>
<td>Companies with about 1,000 and more employees, with central headquarters in Germany, ideally managed by the owner(s); international subsidiaries may exist, but usually they have no decision-making powers.</td>
</tr>
<tr>
<td>Large Accounts</td>
<td>Multinational corporations with about 5,000 and more employees, global activities and internationally distributed decision-making structures.</td>
</tr>
</tbody>
</table>

Mobile Device Management Software

Software that enables user organizations to manage their mobile devices. Within this analysis, we differentiate between software offerings for smartphones and tablets and offerings for all end-user devices.

Mobile Information Management Software

Software that allows and manages users' access to and use of documents and files on mobile devices (tablets and smartphones). This category includes vendors from the mobile device management and document management segments.

Mobile Application Management Software

Software that enables user organizations to provision apps to mobile devices (tablets and smartphones) internally. Often, such software is provided by mobile device management providers.

Enterprise Mobility Management Software

Enterprise mobility management comprises mobile device management, mobile information management and mobile application management, and respective vendors from these segments can be found within this category.

Mobile Security Suites

Software that supports mobile devices (tablets and smartphones) through functionality such as anti-virus, anti-malware, a firewall for mobile devices, anti-spam.
Mobile Enterprise Consulting
Consulting around the whole mobile enterprise topic, including processes, management solutions and services, if required.

Mobile Device Management Services
Managed services for mobile device operations and maintenance, including a self-service portal and an adequate help desk.

Workplace Management Managed Service
Managed services covering the complete workplace (operations and maintenance), i.e., thin clients, desktops, notebooks, smartphones, tablets and also fixed-line telephony, mobile telephony and, depending on the vendor, e-mail and collaboration solutions.

Mobile Collaboration
Mobile collaboration software is an extension of social collaboration tools to also enable mobile employees to interact efficiently with colleagues and superiors.

Mobile CRM
Mobile CRM software allows mobile users access to CRM data and enables them to modify these data, if required.

Mobile Analytics
Mobile analytics software allows mobile users to view BI evaluations and enables them to make faster and more informed decisions, if required.

2.2 Methodology and Analysis Design

This "Mobile Enterprise Vendor Benchmark 2015" is based on the “Experton Market Insight” methodology developed by Experton Group. This validated and internationally acknowledged methodology serves as basis for the evaluation and positioning of the individual vendors.

For each vendor, a detailed scoring based on 7 to 10 key and 3 to 5 additional secondary criteria is provided for each product category. These criteria are weighted, based on the respective product category, resulting in an assessment of the individual mobile enterprise offering’s attractiveness (“portfolio attractiveness”) and the strength of the individual vendor (“competitive strength”).

The “Experton Market Insight” Quadrant contains four segments where the vendors are positioned accordingly:

Leaders:
The "leaders" among the vendors have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market.

**Market challengers:**
"Market challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the "leaders".

**Product challengers:**
The "product challengers" offer a product and service portfolio that provides above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories, often due to the vendor's size or the weak footprint in the respective target segment.

**Followers:**
"Followers" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing weaknesses and improvement potentials in their market cultivation efforts.

**Rising Star:**
A company that has not been positioned in the leader quadrant can receive the "Rising Star" award. These are selected companies with significant future potential. For all of them there are indicators of a positive future development, since their solution or portfolio comprises many interesting aspects, while being backed up by a balanced and strategically sound management approach. However, they mostly lack competitive strength and/or the highly attractive portfolio required for a better positioning.
2.3 Selection of Analyzed Vendors

Selection criteria for vendors to be benchmarked included the following:

- Dedicated offering within at least one of the defined categories;
- Availability of the vendor’s offering in the German market;
- Relevant implemented projects, revenues and references in the German market;
- Degree of technological maturity / innovation potential;

Due to the multitude of offerings Experton Group does not guarantee the exhaustiveness of the listed vendors and services. Only services and offerings that were available by December 1, 2014 were analyzed.
2.4 Analysis Design

From November 2014 to February 2015 Experton Group has analyzed the mobile enterprise offerings of relevant providers in Germany and Switzerland, based on a standardized and proven methodology. The analysis was based on a catalog comprising more than 100 criteria and will be conducted by experienced advisors to provide the following:

- Product and segment evaluation in quadrants
- Theme-based scoring / ranking
- Strengths / weaknesses analysis of products / services / technologies

![Figure 3: Research plan](image)

Related decisions were based on product tests, vendor specifications and expert interviews as well as results from Experton Group’s multi-client studies.

The benchmark results were documented within a comprehensive report; an event will be held where leading vendors and service providers will receive an exclusive award. Participation in the benchmark is free of charge. Commercial usage of results (quadrants, analyst quotes) is possible when the evaluation has been completed.

2.5 Project Schedule:

In November 2014, the projects started with the research phase, which continued until December 2014, followed by the analysis, evaluation and report generation phases. Selected results will be presented to the media in March 2015. Interested vendors and service providers will receive the results shortly before CeBIT 2015.
Figure 4: Methodology – from research to benchmark

- November - Project start
- Nov. 3, 2014 - Start of vendor survey
- Dec. 8, 2014 - End of vendor survey (questionnaire)
- Nov. 3, - Dec. 23, 2014 - Analyst interviews/ briefing
- March 2015 - Publication of results
3 Mobile Device Management Software

Managing traditional desktops and notebooks with suitable software has become an established practice. Good device management reduces the total cost of ownership dramatically; in particular, much less administrative staff is required.

For mobile devices such as smartphones and tablets higher security requirements must also be accounted for, in addition to respective cost considerations. State-of-the-art mobile device management software allows users to enforce patches centrally and also to implement security and access rules, provision apps and perform data backups.

For users, there are two key alternative approaches:

- They either decide to use a specific mobile device management solution to be operated together with any existing system management solution for traditional devices.
- Or they select a software solution that can handle both device universes.

As is often the case with new topics, users were focused on the best-of-breed or isolated solution approach three to four years ago, since only few system management vendors had already addressed the mobility issue. Only very few of the large system management vendors concretely do so today. Experton Group does not expect any dramatic change short-term, with point solutions continuing to play an extremely important role. Here, Microsoft is an exception. The vendor seems to enhance his solutions to provide complete support of third-party, non-Microsoft operating systems. CA, too, is an exception and has been included in this benchmark for the first time.

3.1 Evaluation Criteria for Mobile Device Management

Key criteria for selecting a mobile device management solution include concrete features & functions and also viability issues. For user organizations, it is extremely important that their mobile device management can be used within the foreseeable future. It is very inconvenient and also expensive for users if a selected and implemented solution is acquired after few months or support is discontinued due to the vendor's insolvency. For this reason, the focus is not only on functional, but also on business requirements. Many mobile device management vendors are not profitable, and during the last few years several vendors were acquired accordingly; on the other hand, new players are still entering this market. For user organizations, it is extremely important that their mobile device management can be used over the next few years. It is very inconvenient and also expensive for users if a selected and implemented solution is acquired after few months or support is discontinued due to the vendor's insolvency. For this reason, the focus is not only on functional, but also on business requirements.
3.2 Mobile Device Management Software for Smartphones and Tablets

This segment evaluates mobile device management software vendors for smartphones and tablets that are relevant for the German market.

3.2.1 Benchmarked Mobile Device Management Software Vendors for Smartphones and Tablets

The following 21 vendors of mobile device management software for smartphones and tablets were benchmarked:

- Absolut Software
- AirWatch/VMware
- amagu
- AppTec
- Attachmate
- Baramundi
- CA
- Citrix
- Cortado
- Good Technology
- IBM
- McAfee
- Microsoft
- MobileIron
- OpenPeak
- SAP
- Sophos
- SOTI
- Symantec
- Tangoe
- Trend Micro
3.2.2 Benchmark of Mobile Device Management Software Vendors for Smartphones and Tablets

The vendor market for mobile device management software for smartphones and tablets has undergone significant changes since previous year's benchmark, with both customer requirements and vendor offerings having become more professional.

Ten out of the 21 benchmarked vendors were positioned as leaders, which is one company more than in 2014; the newcomer in the leader quadrant is Microsoft. Microsoft has been able to develop a consistent mobile vision and strategy and to also implement it into their solutions accordingly. Microsoft has become a serious mobile device management vendor for smartphones and tablets.

Four new vendors have been included in the analysis: Amagu, AppTec, Baramundi and CA.

Figure 5: Benchmark of mobile device management software vendors for smartphones and tablets
AppTec provides a convincing and very flexible solution portfolio that can be customized to address customers' requirements and also has a transparent strategy; therefore the vendor has been positioned as Rising Star.

Leaders with the best ratings in the segment of mobile device management software for smartphones and tablets are AirWatch/VMware, MobileIron, Citrix and Trend Micro, followed by Good Technology, Microsoft, IBM SAP, Symantec and Cortado, which lag slightly behind.

AirWatch/VMware was able to maintain its top position; in 2014, the vendor has proven that VMware's acquisition of AirWatch had no negative impact on the vendor's product development and strategy implementation. AirWatch/VMware remains the vendor with the most attractive portfolio.

For many years, MobileIron has ranked among the top players in this market and has even strengthened this position, due to the software's technological strength and high degree of performance. Last year's IPO and related reporting obligations had a positive impact on the vendor's product development and customer service.

During the last twelve months, Trend Micro has further improved their position, in particular in the competitive strength category, and has moved closer to AirWatch/VMware and MobileIron. Citrix, too, has improved its position, differentiating itself from its direct competitors.

Compared to last year's benchmark Good Technology improved its portfolio, in particular the usability and its strategy & vision, considerably, which is reflected in a better portfolio attractiveness ranking. The vendor has also slightly improved its competitive strength positioning.

IBM, too, has improved their position considerably. The vendor has further developed its former Fiberlink solution, which has become a useful solution for the whole market.

SAP was able to maintain last year's position. Both the product strategy and the product's integration within SAP's mobile strategy had a clearly positive impact on the development focus and have resulted in minor solution improvements. SAP's results could be further improved by a stronger mobility focus and its respective implementation.

Symantec has become an established mobile device management vendor and was able to improve both its portfolio attractiveness and competitive strength ratings.

Cortado, too, achieved a multitude of minor improvements during the last 12 months and has slightly increased its portfolio attractiveness ratings.

All other benchmarked vendors show certain deficits within several individual categories, in particular, functional weaknesses, a lack of a suitable strategy for the German market and a lack of suitable sales and channel partners.
As expected, specialized and established mobile device management solutions for smartphones and tablets are leading in the strategy & vision category. But AppTec, IBM, Microsoft and Cortado also have a detailed, transparent strategy for this segment. For users, this means that the well positioned companies continue to invest strongly into their software and their ecosystem which makes them suitable partners longer-term. This is especially interesting for the systems management segment, since migration to another system would incur avoidable costs, not only through the actual software, but also through required trainings.

Besides strategy and functionality considerations, the vendor’s momentum is the third aspect that determines the future development and long-term advancement of a solution; a growing partner landscape as well as a growing customer base are of great relevance. AirWatch/VMware and MobileIron have achieved the best ratings, also in this category, since both vendors do not only undertake massive efforts to improve their partner landscape, but also enjoy significant customer growth rates, due to these efforts. Larger companies have to overcome major obstacles, since they mostly have an existing, more or less static partner ecosystem.

In the awareness category, clear differences can be observed between the individual vendors. While MobileIron is one of the smallest vendors in this benchmark, the company offers leading-edge products, based on the high awareness among customers. Microsoft has clearly improved its awareness during the last twelve months, which indicates that the vendor’s mobile strategy is paying off. The following vendors lag relatively far behind, since the analysis does not only account for the vendors’ awareness, but also for the awareness of their products, inclusion in selection procedures and RFPs.

### 3.3 Device Management Software for All Devices

This segment evaluates mobile device management software vendors for all devices that are relevant for the German market.

#### 3.3.1 Benchmarked Mobile Device Management Software Vendors for All Devices

The following 13 vendors of mobile device management software for all devices were benchmarked:

- Absolut Software
- AirWatch/VMware
- Attachmate
- Baramundi
- CA
- Cortado
- Front Range
- IBM
- LANDesk
- About Matrix42
- Microsoft
- Sophos
- Symantec
3.3.2 Benchmark of Mobile Device Management Software Vendors for All Devices

Seven out of the 13 benchmarked vendors were positioned in the leader quadrant.

Compared to the previous year's benchmark, the market for mobile device management software that can be used for all kinds of end-user devices has undergone only slight changes, with both customer requirements and vendors' offerings having become more professional.

Most traditional system management vendors have not recognized the potential of this market yet; only IBM and, since mid-2014, CA have been active in this segment.

CA has entered this market with a good portfolio and a suitable strategy. While the vendor's competitive strength, in particular, its degree of awareness in this market, is still relatively low, Experton Group expects CA to improve its competitive position short-term, based on its visible efforts and success. Therefore, CA has been positioned as the Rising Star in the market for mobile device management software for all devices.
FrontRange, the Rising Star of last year’s benchmark, has made it into the leader quadrant, due to the vendor’s increased degree of awareness in the market and also minor product improvements. While FrontRange still has a key focus on mobility management, this topic has been integrated into the overall concept, which suits the needs of many user organizations.

Matrix42 is clearly ahead of Microsoft and IBM with its convincing and successful integration of its own systems management solutions for standard devices with the AirWatch mobile device management solution. AirWatch, too, was positioned in the leader quadrant within the category of solutions for smartphones and tablets as well as for solutions for all devices.

AirWatch/VMware has been positioned in this particular segment for the first time; the vendor has started not only to address smartphones and tablets, but also laptops and PCs with its MDM solutions. This is a positive enhancement of the vendor’s portfolio.

During the last twelve months, Microsoft was able to make great progress in the MDM market, both on the portfolio side and with regard to the vendor’s market acceptance or competitive strength in this segment.

LANDesk, too, has further enhanced its portfolio and was able to improve its position.

Symantec has also achieved a better positioning, also due to improvements of its MDM functionality for smartphones and tablets.

All other benchmarked vendors show certain deficits within several individual categories, in particular, functional weaknesses, a lack of a suitable strategy for the German market and a lack of suitable sales and channel partners or visibility in the market.

While, as expected, Matrix42, Microsoft and IBM as the three companies with the longest system management experience with clients are the three vendors with the highest strategy & vision ratings, the relative young newcomer CA scores more points than some of the major players.

Based on the analysis of factors such as the growth in the number of license agreements, the growth of the partner network and growth of customers that use the mobile device management solution based on software-as-a-service, all benchmarked vendors were able to further exploit existing potentials. LANDesk was able to develop the highest momentum, followed by Matrix42, which also enjoys a high momentum.
4 Mobile Application Management

Meanwhile, smartphones and tablets have not only been connected to e-mail or PIM systems, but have also been equipped with a multitude of apps.

Users request centralized management features, and therefore, many mobile device management software vendors have integrated respective functionality into their mobile device management solutions to gain a competitive differentiator.

Interesting features in this segment include the following:

- Distribution of internal apps;
- Distribution of apps from volume licenses and their return when an employee does not need the app anymore;
- Distribution of standard apps.

At present, there is no specialized vendor with an exclusive focus on mobile application management, and such specialization would hardly be a conducive approach. Rather, mobile application management is an integral part of mobile device management solutions.

Users for whom device management is of major importance should therefore put more emphasis on the evaluations in chapter 7. Users, for whom application management is also of high relevance, should put a stronger emphasis on the evaluations within this chapter.

4.1 Evaluation Criteria for Mobile Application Management Software

Evaluation criteria for mobile application management software differ only slightly from those for the mobile device management segment (see chapter 3).

Besides mobile device management features, which are also important, the focus is, of course, on application management features. Market consolidation also plays a role and must be taken into consideration during vendor selection; other important criteria include the vendor's strategy & vision as well as his roadmap and growth rates with respect to revenues and partners, in particular implementation partners.

4.2 Benchmarked Mobile Application Management Software Vendors

The following 21 vendors of mobile application management software for smartphones and tablets were benchmarked:

- Absolut Software
- AirWatch/VMware
- amagu
- AppTec
- Baramundi
- CA
- Citrix
- Cortado
4.3 Benchmark of Mobile Application Management Software Vendors

Ten out of the benchmarked vendors in this category were positioned in the leader quadrant.

The results of the benchmark of mobile application management software, compared to mobile device management software, differ only slightly. The four leaders are MobileIron, Trend Micro, AirWatch/VMware and Citrix.
CA received the Rising Star award for this segment, since the solution, although practically new on the market, already provides comprehensive functionality, which will be further enhanced during the next months.

Overall we have observed that mobile application management has become an integral part of mobile device management solutions.

As expected, the established mobile device management providers are the leaders good positioning, due to their distinct and transparent strategy. For users, this means that the well positioned companies continue to invest strongly into their software and their ecosystem.

Besides strategy and functionality considerations, the vendor's momentum is the third aspect that determines the future development and long-term advancement of a solution; a growing partner landscape as well as a growing customer base are of great relevance.

AirWatch/VMware has achieved the best ratings, since the vendor does not only undertake massive efforts to improve its partner landscape, but also enjoys significant customer growth rates, due to these efforts.

In the awareness category, clear differences can be observed between the individual vendors.

While MobileIron is one of the smallest vendors in this benchmark, the company offers leading-edge products, based on the high awareness among customers. The following vendors lag relatively far behind, since the analysis does not only account for the vendors' awareness, but also for the awareness of their products, inclusion in selection procedures and RFPs. Interestingly, SAP, too, is among the well positioned vendors, together with other established mobile device management specialists. This shows that a good product, combined with a clear strategy, also attracts users' awareness.
5 Mobile Information Management (Software)

Still, heated debates are going on in many companies about mobile information management. While they have addressed the necessity of providing reasonable mobile device management (MDM) and mobile security capabilities as well as apps to be able to access back-office systems, there are still uncertainties about how to access documents and other data. One the one hand, free cloud solutions are "prohibited" by many security officers, on the other hand, they do not provide suitable alternatives to ensure safe copies on or synchronization to mobile devices.

We can differentiate between two key solution approaches:

- File sharing: Documents and other files that have been stored within a directory are synchronized to a mobile device and stored safely on this device, if the respective employee wants and is authorized to do so (permission settings and rights management).
- Enterprise content management systems: Mobile access is provided to stored documents, based on access rights, and the documents are synchronized and stored safely.

Within this chapter, the respective vendors within both segments are analyzed and evaluated accordingly.

5.1 Mobile Information Management Software Based on the File Sharing Approach

This segment evaluates mobile information management software, based on the file sharing approach.

5.1.1 Evaluation Criteria for Mobile Information Management Software Based on the File Sharing Approach

From the users' perspective, having the option to use the solution as a cloud-based service and on premise is of key importance. Still, on-premise solutions are widely requested, in particular, within the midmarket segment, and for cloud solutions to be put on the short list, it must at least be ensured that respective data centers are located within the EU or, even better, in Germany.

Another important requirement is apps availability on multiple operating system variants, to allow users to access, store and safely use these documents. Access and usage rights are as important as the offline availability of selected documents.
5.1.2 Benchmarked Mobile Information Management Software Vendors, Based on File Sharing

The following 27 vendors of mobile information management services based on file sharing were benchmarked:

- Accellion
- Acronis
- AirWatch/VMware
- Alfresco
- Apple
- Attachmate
- Box
- CA
- Citrix
- Cortado
- Dropbox
- Egnyte
- EMC
- Good Technology
- Google
- Hightail
- HP
- IBM
- Microsoft
- NetApp
- ownCloud
- Salesforce
- Strato
- Sugar Sync
- TeamDrive
- Trend Micro
- WatchDox

5.1.3 Benchmark of Mobile Information Management Software Vendors Based on File Sharing

Fifteen out of the 27 benchmarked vendors were positioned in the leader quadrant.
The vendor market for mobile information management, based on file sharing, has not changed much during the last twelve months. Both customers' requirements and vendors' capabilities have slightly increased.

IBM and Microsoft are slightly ahead of their competitors. In this segment, IBM scores with social collaboration, but Connections is also used for traditional file sharing purposes.

While Microsoft's OneDrive Pro or SharePoint (Online) is a mature stack, based on many years of content management experience, both in the midmarket and the enterprise segment, these offerings are not available as on-premise solutions.

On the portfolio attractiveness side, AirWatch/VMware is nearly on eye level with IBM; Experton Group expects that AirWatch/VMware plans to enhance its solutions even further. The positions of Citrix, Trend Micro, Acronis and Alfresco hardly differ from each other. Cortado's competitive strength is slightly below the ratings of this...
group of vendors, although there is certainly no reason for such lower ratings for the actual solution.

Box' competitive strength benefits rather strongly from its partnership with Deutsche Telekom.

NetApp and EMC also offer solid solutions for their storage customers.

In the strategy & vision category, we can differentiate between three groups of vendors. IBM and Google have a clear vision and a transparent strategy. The middle group, including Apple, Microsoft, AirWatch/VMware, CA, Cortado, Citrix, Trend Micro, Acronis, Alfresco, Hightail, HP, ownCloud and Box, has an idea about where to go with their offerings in this segment, but pursue a rather one-sided approach. While some of the other vendors have good solutions, they lack a clear long-term strategy.

Trend Micro surprised with its market momentum. The former security vendor has massively expanded its portfolio during the last 18 months and provides high-quality solutions for large parts of the mobility market. The other well-positioned vendors receive good feedback from the market, demonstrated through new customers and partners.

In the awareness category, Microsoft is among the leaders, together with Dropbox, not least due to its free offering for consumers.

The B2B solutions offered by EMC, NetApp, IBM and Good Technology are also known to many user organizations.
6 Enterprise Mobility Management

Enterprise mobility management combines mobile device management, mobile application management and mobile information management, providing a management platform for operating and using smartphones and tablets.

As such, the benchmarked vendors constitute a subset of mobile device management vendors.

Enterprise mobility solutions deliver at least the following functionality:

- Hardware inventory;
- Application inventory;
- Operating systems management;
- Mobile app deployment, updates and deletion;
- Mobile app configuration and policy management;
- Remote control for trouble-shooting purposes;
- Remote access, for instance, for remote wipe;
- Mobile information management.

For user organizations that want to operate their smartphones and tablets in-house, enterprise mobility solutions provide a comprehensive approach that integrates respective solutions to simplify the management, as compared to using various point solutions. Thus, the well-known mobile device management vendors try to differentiate themselves from their competitors by pursuing such suite approach and are increasingly successful, since users recognize a genuine added value to be used in the future.

6.1 Evaluation Criteria for Enterprise Mobility Management Software

In addition to the evaluation criteria applied to mobile device management, mobile application management and mobile information management solutions, another key aspect is the integrative solution approach. Not all vendors have developed all parts of their solution themselves, but rely on partner solutions, which is not necessarily negative, as long as the respective vendor ensures the consistency of the overall solution.
6.2 Benchmarked Vendors of Enterprise Mobility Management Software

The following 14 vendors of enterprise mobility management services were benchmarked:

- Absolut Software
- AirWatch/VMware
- amagu
- CA
- Citrix
- Good Technology
- IBM
- Microsoft
- MobileIron
- SAP
- Sophos
- SOTI
- Symantec
- Tangoe

6.3 Benchmark of Enterprise Mobility Management Software Vendors

Eight vendors achieved the leader quadrant. As expected, vendors from the mobile device management and mobile application management segment achieve an especially strong position.

![Figure 9: Benchmark of enterprise mobility management software vendors](image-url)
In the portfolio attractiveness category, AirWatch/VMware and MobileIron are rather clearly ahead of Citrix and Good Technologies; IBM and Microsoft are also still among the top leaders. At least for SAP customers, SAP remains a good choice, since in the majority of cases, this solution is more than sufficient.

When it comes to the strategy & vision of vendors, MobileIron, Citrix, Good Technologies, AirWatch/VMware and IBM as well as Citrix are clearly ahead of the competition. These vendors have a clear mobility concept and have implemented this understanding into their respective strategies.

On the momentum side, AirWatch/VMware, SOTI and MobileIron are positioned above the competition, which means that these vendors’ solutions gain positive feedback from their partners and customers.

The degree of awareness is an early indicator for a company's future success. MobileIron enjoys a high awareness, which demonstrates that relatively small vendors can compete successfully against the "industry giants" in new markets and with suitable technologies.
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Mr. Schwab mainly advises IT users and IT vendors in the areas of mobility, green IT, efficient IT infrastructures and business value analysis. In addition he advises IT vendors in the areas of marketing and sales strategies and conducts market and competitive analyses.

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After he had completed his studies at the University of Bonn with a degree in physics, Mr. Schonschek started to work at a medium-sized software company in 1997, which was also commissioned by trade companies to process their sensitive data. Often, this raised questions about security and data protection, and so, Mr. Schonschek specialized in related issues.

Since 2006, Mr. Schonschek has published books, articles and analyses on privacy and IT security in renowned publications and publishing companies. At Experton Group, he contributes to analyses and studies on IT security and security- and privacy-related aspects in other areas of IT.
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About Experton Group

Experton Group is a leading IT research, advisory and consulting company. The company has 30 experienced analysts in Europe who support mid-sized and large organizations with their IT strategic planning and implementation. In Germany, Experton Group has offices in Munich and Kassel.

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