IDC MarketScape: Worldwide Unified Endpoint Management Software for Apple Devices 2021 Vendor Assessment

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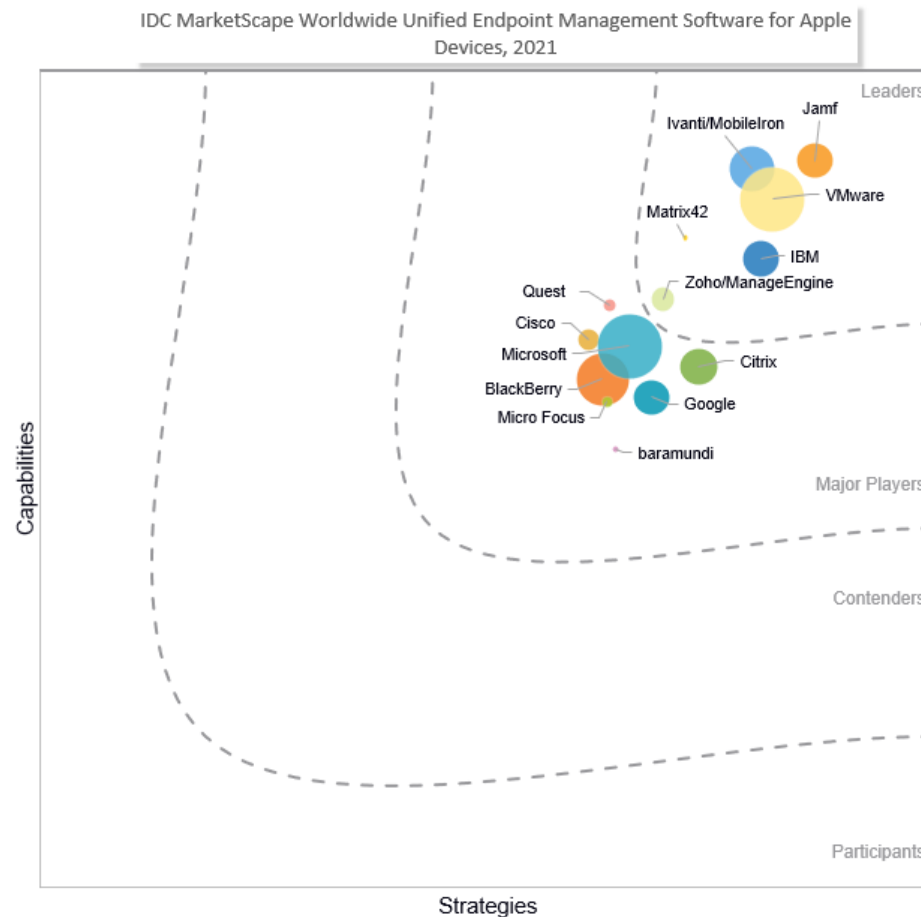
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Unified Endpoint Management Software for Apple Devices Vendor Assessment

IDC MarketScape Worldwide Unified Endpoint Management Software for Apple Devices, 2021

Source: IDC, 2020

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

IDC OPINION

The proliferation of Apple devices – macOS devices, as well as iPhones, iPads, and Apple TV – in business is causing many organizations to rethink their approach to overall endpoint provisioning, management, and security. Windows PCs have long been the dominant computing platform in enterprise and still represent the majority of PCs used for businesses. But trends around end-user choice and a shift to cloud-based – not OS specific or dependent – business software and tools have opened up more opportunity for Apple devices in general.

Adoption of Mac usage in the enterprise (1,000+ employees) is growing by many measures. In the United States, average penetration of macOS devices is around 23%, compared with 17% in 2019, according to IDC's 2020 and 2019 *Enterprise Mobility and Workspace Software Surveys.* Driven partly by the COVID-19 pandemic and the sudden need for devices for home workers, shipments of Mac devices into the enterprise sector (firms with 1,000+ employees) jumped 34% year over year in 2Q20, according to IDC's Worldwide Personal Computing Device Tracker. This wave of new Mac devices suddenly requiring access to business apps and resources is causing some disruption among many enterprise end-user computing support and management teams, which have historically focused more on Windows device management.

Much of the growth story around unified endpoint management (UEM) has been around Windows 10 adoption and the move to "modern management" or cloud based providing/control via the Windows MDM protocol. But shifts in the way Macs are fundamentally managed are also creating opportunity for stronger configuration management and policy enforcement from UEM platforms. Apple's MDM protocol and technology has had the capability to provision and manage macOS devices going back to OS X v10.7. However, similar to Windows management migration to UEM, the traditional, nonmodern Mac management approaches – agent-based management, device imaging, and custom scripting deployment – have a long tail, especially among firms that have used Macs for years.

Macs, of course, are not the entire story around Apple devices in the enterprise. According to IDC's 2020 enterprise survey, iPhones account for 49% of the smartphone installed base among U.S. enterprises, and iPads make up the majority of tablets used in business. Apple facilitates the procurement, provisioning, and integration of all its devices for business use with third-party UEM tools via its Apple Business Manager program (formerly called Device Enrollment Program/Volume Purchasing Program). Many UEM solution providers support this and other aspects of Apple device management. This IDC MarketScape examines the market for UEM deployments with strong emphasis on Mac and other Apple devices. Key findings in this study include:

- Support is strong among UEM vendors for Apple Business Manager device provisioning and mobile device management (MDM)-based Mac and iPhone/iPads support.
- Legacy Mac management requirements, such as agent-based management, are a major requirement especially among businesses with large Mac fleets.
- A number of UEM customers interviewed for this study used separate platforms for Mac device management, in addition to tools for managing Windows, iOS, and Android devices.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC invited vendors to participate based on the following key criteria:

- The vendor has an UEM suite offering device and application management functions for PCs and laptops as well as for mobile devices (smartphones and tablets).
- The vendor has UEM product revenue of $5+ million for calendar year 2019. Revenue was estimated in May 2020 and may differ from forthcoming market share documents.

In addition to the companies profiled in this study, there are also a number of other companies in the UEM market with relative products that did not meet the vendor inclusion criteria for this study. These companies include Addigy, Amtel, HCL Technologies, Hexnode, Kandji, Prey Software, and Verizon.

ADVICE FOR TECHNOLOGY BUYERS

- **Baseline mobile endpoint support.** In addition to PC support, core mobility functionality of UEM platforms is in the areas of 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, IT asset management, network security, and end-user productivity apps are all important for tight integration with UEM platforms, according to users deploying the technology.
- **A broad set of legacy and modern PC management support functions.** The long tail of PCLM and traditional management requirements means solutions that can address both legacy and modern endpoint management scenarios will have the greatest value to deploying enterprises.
- **Workspace intelligence and analytics.** With such a broad view of endpoint and end-user activity, UEM platforms are becoming a central point of data gathering and analytics on enterprise worker behavior, device, app, and data usage patterns, as well as analysis of software performance and availability. UEM vendors with strong analytics and reporting capabilities around these key metrics will have competitive advantages over vendors not focusing on this area.
- **Capabilities for supporting noncorporate devices or BYOD users.** Support for employees' personal mobile device, or BYOD, is critical to expanding seats and overall management scope of an UEM platform. With over 90% of enterprises supporting BYOD, businesses must find tools that can apply to these devices the same levels of granular policy enforcement, security, and control over apps and data accessed by these devices as corporate-owned devices.
- **Conditional access controls and policy enforcement triggers.** This is becoming a critical feature of UEM platforms. Conditional access controls what apps, data, or other resources a user can connect to and consume based on an array of factors, such as location (GPS location and

network connectivity type) as well as the day, the end-user identity and role, and the state of or health of the device being used (from the standpoint of a jailbroken/rooted device or an 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

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.

Jamf

Jamf is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide UEM software for Apple device management. Jamf's Apple Enterprise Management software exclusively supports Apple endpoints – macOS, iOS, iPadOS, tvOS, and watchOS. Jamf Pro is a cloud or on-premises software platform that provides sophisticated and targeted management capabilities for Apple operating systems, with strong focus on macOS. Focusing singularly on Apple has limited Jamf's broader expansion in UEM, but the strategy has largely been validated. Many organizations interviewed for this study said they used Jamf for exclusive Mac management in conjunction with other UEM solutions for Windows and mobile device management. In July 2020, the company went public and saw its valuation grow 20% since then. According to IDC's Worldwide PC Tracker, Mac shipments grew in double digits worldwide as demand for PCs grew with the current pandemic lockdown and work-from-home trend. This, in part, has sparked demand for Mac management for enterprise IT organizations.

The company also has its own identity management platform – Jamf Connect (based on acquired firm NoMAD in 2018), which streamlines Mac integration with cloud identity platforms. The company also offers Jamf Protect, an endpoint security and compliance tool specifically for Mac (based on technology acquired from Digita Security in 2019). Unlike third-party endpoint security tools for Mac, Jamf Protect integrates deeply with the larger Jamf platform and provides antivirus, threat prevention, threat analytics, and automated threat response scenarios tying together UEM and security management for Mac. The company also offers an education-focused software package – Jamf School, formerly ZuluDesk – that integrates Apple device management with other aspects of education IT service management and support.

Strengths

The company's singular focus on Apple products allows the company to release features that support all new Mac, iPhone/iPad, and Apple TV devices on the day they're announced at closely watched Apple launch events. Jamf is able to do this not with specific inside access to Apple technology road maps but by focusing all R&D and engineering resources on rapid macOS/iOS/iPadOS/tvOS feature support.

Jamf supports the broadest set of Mac management features, coupled with Mac-specific identity and security products.

Jamf has strong integrations with industry-specific solutions and software platforms for integrating iPads and iPhones into medical (i.e., EPIC), retail, transportation, government, and education solutions (including Jamf's own offering as well as partners).

For firms that only require basic capabilities, Jamf also offers Jamf Now, a cloud-based MDM solution designed for the MDM needs of small to medium-sized businesses or large environments that have less complex management needs.

Challenges

While the Jamf platform is extensive and powerful, customers IDC interviewed for this study said the environment requires large investments in time and paid ongoing training and support services to get full value out of the platform. In response to this feedback, Jamf recently introduced a free virtual training catalog with hundreds of training modules, included at no additional cost for Jamf customers.

Several firms interviewed for this study said if they only require basic MDM-based Mac management functions, other UEMs would be preferable.

Consider Jamf When

Firms committed to all-Mac environments should look at Jamf first. Also consider Jamf if your enterprise has any sizable Mac installed base (beyond 100 devices). Integrations with other UEM platforms, including Microsoft for device compliance, allow for flexible and productive co-management scenarios for Mac (or all Apple devices) on Jamf and Windows/Android endpoints on other UEM platforms

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Unified endpoint management (UEM) is a technology submarket category of the client endpoint management functional software market. UEM solutions combine into a single software platform the management and provisioning functions for most common end-user computing operating systems (e.g., Windows, macOS, iOS, Android, and Chrome OS) and device types. By definition, UEM products must be able to manage both mobile and PC endpoints; this excludes legacy platforms such as PC life-cycle management (PCLM), PC imaging solutions, and mobile device management (MDM).

LEARN MORE

Related Research

- *Worldwide Unified Endpoint Management Software Forecast, 2020-2024* (IDC #US46460520, September 2020)
- *IDC TechScape: Worldwide Intelligent Digital Workspace, 2020* (IDC #US46763120, August 2020)
- *Worldwide Unified Endpoint Management Software Market Shares, 2019: Endpoint Management Convergence Drives Market Growth* (IDC #US45173520, June 2020)

Synopsis

This IDC study represents a vendor assessment of providers offering unified endpoint management (UEM) software for Apple devices through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for UEM software. The evaluation is based on a comprehensive and rigorous framework that assesses each vendor relative to one another, and the framework highlights the key factors that are expected to be the most significant for achieving success in the UEM market for Apple device management over the short term and the long term.

"Strong support for Apple devices – Macs as well as iPhones, iPads, and Apple TVs – is becoming a must-have function for UEM software providers," says Phil Hochmuth, program vice president, Enterprise Mobility and Client Endpoint Management, IDC. "Growth in Mac usage among business users, especially for employees working remotely and given their choice of PC device, is pushing more businesses to formally adopt management tools and strategies around macOS, along with iOS/iPadOS and tvOS."

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.

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