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Magic Quadrant for Mobile Device Management Software

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As smartphones proliferate in the enterprise, companies are struggling to manage policy, security and support. Enterprise mobile device management software is evolving to offer smartphone (and other device) support across a variety of platforms.

What You Need to Know

This document was revised on 18 April 2011. For more information, see the Corrections page.

Although some of the vendors and products have been around for a long time, mobile device management (MDM) is a nascent market, and the vendors' offerings have little consistency. Many come from mobile messaging and security to support MDM, and, worldwide, there are more than 60 companies in this space. Of these, 42 were deemed potential candidates for this Magic Quadrant (see Figure 1) and were sent questionnaires; 23 met Gartner's inclusion criteria.
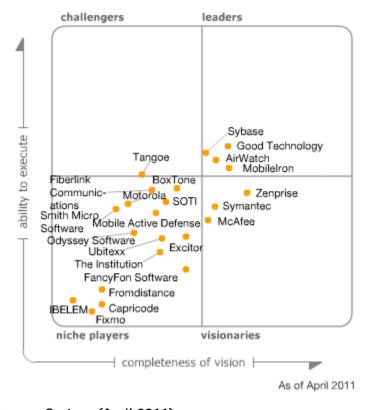
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Magic Quadrant

> **Note 1**
> **The MDM Market**
>
> A number of vendors assessed for this Magic Quadrant were not included, because they did not meet our criteria; however, many of them offer some type of MDM software or services. Examples include:
>
> - Absolute Software
> - AetherPal
> - Avoceen
> - CA Technologies
> - Cloud Systems
> - CommSolv
> - CommonTime
> - HP

Figure 1. Magic Quadrant for Mobile Device Management Software

Source: Gartner (April 2011)

Market Overview

Introduction

As smartphones and other mobile devices grow in popularity in enterprises, management challenges are beginning to arise — from the cost of the services associated with the devices, to the security and policy that mobile devices should follow. Mobile devices such as smartphones and tablets are increasing in power and memory, and, although they are not replacing PCs on a full-time basis, they are often used as primary communication devices. Also, the number of vendors and platforms in the mobile device market continues to increase and add complexity.

By 3Q10, there were more than 30 global smartphone vendors and more than 10 mobile operating-

- IBM
- Innopath
- iPASS
- Jamf
- Juniper
- LANDesk
- LRW
- mFormation
- Mobiquant
- Notify
- Novell
- Perlego
- Proximity
- SynchPoint
- Trellia
- Wavelink
- Zelog

> **Note 2**
> **Supporting Apple iOS Devices**

Questions about support for Apple iOS devices continues to grow. Apple controls much of how applications are developed and supported in the enterprise, with no exceptions. Although Apple has increased its enterprise capability, it still has the strictest requirements for enterprise application support. To use MDM capabilities built into iOS 4, your organization must enroll in the iOS Developer Enterprise Program (iDEP). Once accepted, an organization will receive an Apple Push Notification Service (APNS) certificate, which it can load into an MDM platform. This will allow an organization to create, sign and host its own iOS applications, without having to go through the iTunes store. If you are only implementing Simple Certificate Enrollment Protocol (SCEP), then iDEP is not required. An MDM platform is needed to support applications on an iPhone or iPad. Apple publishes a list of its major partners; however, other vendors may also support iOS devices.

All MDM providers use the same method for managing iOS devices, an XML document called the configuration profile, which Apple defines. Because of this, all MDM providers will provide similar features. There are limits, imposed by

system platforms, although the top four (Apple, Android, RIM and Symbian) control 89% of the total market. Most adopting companies that had previously standardized on a mobile platform (for example, BlackBerry in North America and Symbian in Western Europe) now need to support multiple operating systems, and Apple and Android have become more popular. However, most organizations don't have anyone responsible for managing mobile devices.

Although procurement may be found in finance or IT, there hasn't been any reason to bother with cellular phones after purchase. However, that's changing. Today, the smartphone is likely to be managed by the messaging group, which is responsible for the BlackBerry Exchange Server (BES), rather than by the entity responsible for managing computing hardware. Although many companies may have device management responsibilities, usually for hardware such as PCs or phones, current software doesn't really cover mobile devices, nor is IT staff trained to support handheld devices.

Elements of MDM

Although many companies are trying to solve a similar problem, it takes multiple types of mobile software to address a full solution. A fully managed mobility solution cuts across standard MDM and telecom expense management and includes:

- **Software Distribution** — The ability to manage and support mobile application including deploy, install, update, delete or block.

- **Policy Management** — Development, control and operations of enterprise mobile policy.

- **Inventory Management** — Beyond basic inventory management, this includes provisioning and support.

- **Security Management** — The enforcement of standard device security, authentication and encryption.

- **Service Management** — Rating of telecom services.

Conclusion

The MDM market is quickly evolving. The requirements and definitions are changing rapidly, and vendor offerings will evolve quickly and be even more capable and mature by next year. High demand is creating a frenzy of development, as well as hope. Although many of the successful MDM providers have focused almost exclusively on mobility, during the next few years, those managing PCs will also be investing and looking for opportunities in the MDM space. Most vendors now offer on-premises or software-as-a-service (SaaS)-based tools, and more-mature managed service offerings will emerge during the next three years to drive growth in the industry.

Some key things to keep in mind when assessing an MDM vendor are:

- Some of the device platforms will limit manageability, due to inherent manufacturer design — don't expect MDM solutions to address each platform the same way or support it the same way.

- Android support is still immature — it will be another year before Android is well-supported by most MDM vendors.

Apple, to the configuration profile-based management versus other operating-system platforms, which may include:

- Apple has removed the APIs to detect jailbroken phones.

- The root configuration profile can be removed by the user.

- Applications cannot be pushed or pulled onto the device by IT administrators.

- Device may be erased using iTunes and use iTunes for backup.

- Over-the-air operating-system updates are not supported — these need to be done in iTunes.

▶ Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

▶ Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal

- BlackBerry support is still important — not all MDM vendors support BES integration. It is important that BlackBerry support continues, because, in many regions, it is still the most-supported enterprise device, even as other platforms take away market share. MDM tools won't beat the BES, but should be able to help manage and report on BlackBerry devices.

- Don't underestimate reporting — for some vendors, their reporting and business intelligence (BI) tools are simple if they have them at all.

- Reporting on device status will be a critical component, and vendor capability to offer both text and graphical reports, canned and customized, is critical.

With the advent of new devices, the MDM market is growing quickly. If we assess pure MDM revenue (excluding revenue for messaging, security, etc.) year-end 2010 is estimated at $150 million, increasing at a compound annual growth rate (CAGR) of 15% to 20% during the next three years.

Market Definition/Description

Enterprise MDM products and services help enterprises manage the transition to a more complex, mobile computing and communications environment by supporting security, service, software and inventory management across multiple operating-system platforms, primarily for handheld devices such as smartphones and tablets. To meet Gartner's definition, MDM vendors must address at least three of the four "elements of MDM" set forth in the market overview and support MDM capabilities or features in mobile application platforms, with an emphasis on MDM. Rated vendors are generally expected to be able to respond competitively with respect to the following features and functions.

Inclusion and Exclusion Criteria

Gartner is aware of more than 60 vendors that claim some level of play in MDM on a global basis. In most markets, even growth markets, large numbers of competing vendors with similar products are cause for concern and indicate a need for competitive natural selection and consolidation.

Inclusion Criteria

After due consideration, 23 vendors were selected to be included for ranking in this Magic Quadrant. The following criteria are necessary for inclusion:

- Support for enterprise-class (noncarrier), multiplatform support MDM: software or SaaS, with an emphasis on mobility

- Specific MDM product focus and feature set or a primary focus on MDM in another product set (messaging or security)

- Security management, with at least these features:

    - Enforced password

    - Device wipe

    - Remote lock

management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and

- - Audit trail/logging

  - "Jailbreak" detection

- At least mobile OS 3 platforms supported

- Policy/compliance management

- Software distribution, with at least these capabilities supported:

  - Application downloader

  - Application verification

  - Application update support

  - Application patch support

- Inventory management, with at least these capabilities supported:

  - External memory blocking

  - Configuration change history

- Managing at least 25,000 mobile lines

- Five referenceable accounts

- At least $1 million in MDM-specific revenue

Exclusion Criteria

MDM companies not included in this Magic Quadrant might have been excluded for one or more of these conditions:

- The company did not have a competitive product on the market for a sufficient amount of time during calendar year 2010 and the first quarter of 2011 to establish a visible, competitive position and track record.

- The company had a minimal apparent market share and low market inquiry interest among Gartner clients.

- The company was invited to participate, but did not reply to an annual request for information and did not otherwise meet the inclusion criteria. Alternative means of assessment, particularly client requests and competitive visibility, did not meet the inclusion criteria.

The large number of vendors claiming presence in this market makes it impossible to include every company. Vendors were individually reviewed, discussed and selected by a team of analysts.

Added

communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

This is the first Magic Quadrant published for this market, so all vendors referenced are new to this research.

Dropped

This is the first Magic Quadrant published for this market, so there is no history of vendors dropped.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively affect revenue, retention and reputation (see Table 1). For MDM, this involved providing on-premises-based or SaaS capability with the required number of features to manage the software, security and inventory of a midsize or large (more than 1,000 devices) organization. Although global scaling is important, there should be significant domestic or regional penetration at leading companies.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	standard
Customer Experience	high
Operations	standard

Source: Gartner (April 2011)

Completeness of Vision

Gartner analysts evaluate technology providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs and competitive forces,

as well as how they map to the Gartner position. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunity for the provider. MDM providers should have a significant vision (see Table 2) on the evolving market, including software delivery methods, innovative and differentiated features, geographic expansion, as well as distribution and technology partnerships.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	no rating
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	no rating
Innovation	high
Geographic Strategy	standard

Source: Gartner (April 2011)

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Leaders

Leaders demonstrate balanced progress, effort and clout in all execution and vision categories. If they do not dominate in sales, they are, at a minimum, the most critical competitive threat to their peers in open competition. A leading vendor is not a default choice for all buyers, and clients are warned not to assume that they should buy only from the Leaders quadrant. To stay on the right side of the chart, Leaders (and Visionaries) must offer features that remove significant roadblocks to the complex challenges enterprises face when attempting to treat mobile consumer devices as business tools. One example of a competitively disruptive activity might include delivering a sandbox method to prevent data leakage between personal and business applications.

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Challengers

Challengers have attractive products that address the typical baseline needs for MDM with competitive

visibility that is strong enough to demand attention in RFPs. Challengers may win contracts by competing on a limited selection of functions or a limited selection of prospect buyers by industry, geography or other limiting factors, even if, on spec, their products have broad functions. They may be perceived as a threat by other vendors, but that threat will be primarily focused on a limited class of buyers, rather than the MDM market as a whole. Challengers are efficient and expedient choices for defined access problems.

Visionaries

Visionaries are able to demonstrate long-term strategies for MDM that point to the product and service approaches that will be most competitive in the future. Visionaries might affect the course of MDM, but they lack the execution influence to outmaneuver Challengers and Leaders. Buyers may pick Visionaries for best-of-breed features, and for broader infrastructure investments than Niche Players. Smaller vendors may take risks on potentially disruptive technologies, while larger vendors may be in the process of building out their next-generation portfolios. Buyers of Visionaries' products may base their selections on specific technology features and by participating in the vendor's road map.

Niche Players

Niche Players meet the typical needs of buyers and fare well when given a chance to compete in a product evaluation. Niche Players generally lack the clout to change the course of the market. They may offer an uncommon delivery mechanism for products and services. They may rely on a self-limiting business model, and/or have limited influence outside of a particular industry or geography. Niche Players may target clients that, for various reasons, prefer not to buy from larger network players. In many Gartner market studies, buyers report that Niche Players tend to provide more personal attention to their needs.

Vendor Strengths and Cautions

AirWatch

Founded in 2003 and based in Atlanta, Georgia, AirWatch emerged from the wireless network management services and ruggedized device market, where management SLAs are critical. AirWatch puts emphasis on device status monitoring and help desk controls. AirWatch support is offered for Android, iPhone, iPad, Nokia S60, full Windows (Panasonic Toughbooks), Windows Mobile, Windows 7 and

BlackBerry models.

Strengths

- Options for insourcing and outsourcing of products and services accommodate a wide range of needs, including purchased/insourced systems, SaaS hosted on the user site and SaaS hosted as a cloud service.

- The management console features a strong dashboard and detailed reporting capabilities.

- Multitenant support is designed in for improved scaling, with selective isolation for large installations.

- AirWatch promotes rich policy management in non-Microsoft e-mail server environments, such as any Post Office Protocol (POP)/Internet Message Access Protocol (IMAP)/SMTP mail server, as well as Lotus Domino, Novell GroupWise and Gmail.

- Revenue, while coming from the low end, has been ramping up quickly during the past two years.

Cautions

- Gartner has received feedback from user references regarding poor postsales support.

- The company needs to increase management experience, and is pursuing a plan to hire high-profile managers.

- AirWatch has an international presence, but it still relies on North America for more than 80% of its revenue.

BoxTone

BoxTone, based in Columbia, Maryland, has a large and well-established installed base of BlackBerry devices under management, with a deep understanding of security and enterprise needs and is focused on the mobile market. Although BoxTone continues to strongly support BlackBerry devices, it also supports Android phones, Apple iOS 4 devices and Microsoft smartphone platforms. BoxTone provides deep integration directly with BlackBerry BES, Microsoft Exchange ActiveSync and Good Technologies. It also connects with many popular system management and monitoring platforms (e.g., Microsoft, HP, CA Technologies, IBM and BMC Software). BoxTone provides limited support for HP Palm OS, Nokia S60 and Nokia MeeGo devices. BoxTone mobile service management extends MDM to include service desk

management, incident management, problem management and application performance management.

Strengths

- BoxTone's expertise in BlackBerry installations is a plus for RIM facilities, especially large, business-critical mobile deployments and regulated industries.

- The company has strong real-time mobile analytics and enables comprehensive service quality management and policy compliance enforcement.

- BoxTone has executed well with enterprise-class, reliable mobile software, including noteworthy postsales support, high customer-satisfaction rates and repeat business (add-on revenue).

- Unique automated predictive analytics, proactive alerting, real-time diagnostics and problem resolution with embedded best-practice knowledgebase capabilities speed break/fix to reduce downtime.

- The company emphasizes a comprehensive modular mobility management approach spanning multiple IT roles: user self-service, service desk, IT operations, data center operations, security, compliance, applications, finance and IT management.

- BoxTone has an aggressive and competitive MDM street price.

Cautions

- BoxTone's consolidated dashboard with prepackaged report capabilities provides limited customization or requires additional services.

- BoxTone does not require the use of an on-device agent — using a server-based architecture to manage the device, applications and mobile services remotely via native APIs. Although this approach is simple to deploy, it requires a remote agent to be deployed on certain devices for more-complete functionality, which limits the ability of their MDM solution to provide offline and local policy enforcement.

- The text-based user interface (UI) isn't as visually advanced as those of its competitors.

Capricode

Capricode is based in Oulu, Finland. The company started out in 2002 and has remained focused on MDM

since 2006. Capricode sells mainly through channel partners in the Nordic countries, and is privately held. The SyncShield Advanced Mobile Device Management product is available as on-premises, SaaS and as a hosted solution from service providers.

Strengths

- Capricode's revenue and installed base is growing rapidly, and the product has had some success with mobile operators as a sales channel for enterprises.

- The solution is delivered completely over-the-air, without user intervention, reducing the challenges during the implementation process.

Cautions

- Capricode is a relatively small company, with limited marketing and operations capabilities, focusing on the Nordic countries.

- The MDM features supported on the different operating-system platforms vary significantly, making it difficult for enterprises to implement a consistent cross-platform policy.

- The product lacks support for RIM OS. A command proxy interface to BES, at a minimum, would be a desirable future capability.

Excitor

Excitor is based in Taastrup (Copenhagen area), Denmark. The company started out in 2001 developing vertical mobile applications in areas such as healthcare. Excitor subsequently started to develop MDM capabilities, initially as part of its DME mobile e-mail solution. The MDM functionality has been further enriched and is now available as a stand-alone product, DME Mobile Device Manager. Most of the installed base has historically been in the Nordics, predominantly in the financial services vertical, but in the past year, a significant number of clients have been added in the U.S., the U.K., Germany and the Asia/Pacific (APAC) region, as well as across a variety of industries.

Strengths

- Excitor has a reputation for good customer support and strong references.

- Its licensing is based on perpetual licenses, with an additional maintenance charge and with a cloud-based option with per-user, per-month pricing. Pricing is clear and well-articulated.

- It has a relatively large installed base, including a number of large organizations. Customer feedback is generally good.

- Its revenue and installed base are growing rapidly again, following a slowdown during 2009.

- It has strong security, as well as a container approach to separate personal versus corporate data.

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Cautions

- International expansion to complement the strong local presence in the Nordics is well under way in the U.K., the U.S., Germany and the APAC region, but in early stages.

- No stand-alone service management capability.

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FancyFon Software

FancyFon is based in Cork, Ireland, and also has a presence in Poland. The company was founded in 2006 and is exclusively focused on multiplatform MDM. FancyFon Mobility Center provides a full range of MDM functionality, and is available as an on-premises and a hosted solution. Most of the installed base is in Europe and North America. FancyFon is a privately held company.

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Strengths

- It has strong tool capability and platform support, including Android, BlackBerry, iPhone/iPad, Nokia S60, WebOS, Windows Mobile 6.x and Windows Phone 7.

- Its focus is on small or midsize businesses, with an increasing focus on large enterprises.

- Its revenue and installed base are growing rapidly, and the product has had some success with mobile operators.

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Cautions

- FancyFon has limited vision and expansion capabilities.

- FancyFon is a small company, with limited operations capabilities outside its strong European presence.

- The MDM features supported on the different operating-system platforms vary significantly, with the strongest support for the Symbian platform.

Fiberlink Communications

Founded in 1991, Fiberlink Communications provides SaaS and managed services for enterprise mobility management. Fiberlink started business in remote access service management, offering a connection agent to negotiate worldwide Internet access for traveling users. The Fiberlink MaaS360 support is offered for Android, BlackBerry, iPhone/iPad, Nokia S60, WebOS, Windows Mobile 6.x and Windows Phone 7 models.

Strengths

- Fiberlink has proven long-term viability and global presence, with most revenue originating in North America and Europe.

- The Fiberlink management MaaS360 client agent and user self-service portal are already known and visible in the remote access and virtual private network (VPN) market frames of reference.

- The company is experienced in mobility and telecom services delivered through scalable cloud-based network operations centers (NOCs). Fiberlink offers good mobile analytic tools and device status reporting.

- The customer base is spread across industries that are growth targets for mobile access.

- MaaS360 enables iPhone/iPad users to subscribe to enterprise document and database updates through the Apple enterprise application distribution function.

Cautions

- The company has had a long, but historically weak, competitively recognized role in delivering

SaaS and point services for PCs starting in the early 1990s and for PDAs starting in the late 1990s. The company has not generated broad competitive recognition of MDM capability, despite past attempts to break free of its historical network management service provider roots.

- Fiberlink has low visibility in MDM — it needs increased investment in sales and marketing.

- MDM SaaS is not yet widely popular, although Gartner anticipates rising interest as cloud service adoption increases.

Fixmo

During the preparation of this research, Fixmo, a Toronto, Canada-based company, announced its intent to acquire Conceivium Business Solutions, a vendor that had already qualified for inclusion in this Magic Quadrant. The acquisition was completed before this research was published. The name has been changed in this research to reflect the new owner and brand. Founded in 2004 and based in Virginia, Conceivium began as a value-added management provider for BlackBerry environments and has added support for Apple and Android devices. The business model relies primarily on resellers to implement and maintain the technology. Conceivium MobileAnalyzer/MobileMonitor support is offered for Android, BlackBerry and iPhone/iPad models. Fixmo is also looking to add some capabilities using the Odyssey platform, and it has recently entered into an agreement to incorporate Good Technology.

Strengths

- Conceivium's MobileAnalyzer makes an attractive account-monitoring platform and is used by several large, traditional, managed infrastructure service providers. For example, it can integrate with HP OpenView and IBM Tivoli. There is a logical opportunity to expand into offering telecom expense management services.

- E-mail support includes Microsoft Exchange, Lotus Notes and Novell GroupWise.

- A partnership with Good Technology will help expand support on new phone platforms and provide an opportunity to associate with a better-known brand. However, any connection with so strong a competitor in the same market will cannibalize opportunities.

- Fixmo will bring a larger employee base, more funds and a compatible mobile monitoring business into the picture.

Cautions

- Conceivium historically relied on the BlackBerry market and has limited application and policy management on iPhone/iPad and Android platforms, which will expand when combined with Fixmo Sentinel in the future.

- Prior to the acquisition, Conceivium claimed a relatively large number of managed end points, but not a revenue base to explain it. Small revenue; lack of a presence outside North America; relatively slow, but steady, growth; and a critically small employee base factored strongly in setting Fixmo's execution and vision ratings.

- The Fixmo acquisition resolves the immediate questions of viability, but, otherwise, does not change the ranking decisions afforded to Conceivium in this research. The new company's market performance will be re-evaluated for the 2012 Magic Quadrant.

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Fromdistance

Fromdistance is based in Tallinn, Estonia, and was founded in 2004. The company is private, with venture funding. Most of the client base and distribution partners are located in the Nordic countries. The MDM product is available for RIM OS, Symbian, Apple iOS, Android and Windows 6.x. The product also has capabilities to manage Windows CE/XP/Vista/7 clients.

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Strengths

- Fromdistance revenue and installed base is growing rapidly, and the product has had some success with smartphone distributors, operators and service providers.

- It has versatile server capabilities. One of the few hosted MDM solutions, the product is available as on-premises, SaaS and as a hosted solution from service providers.

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Cautions

- Fromdistance is a small company with limited marketing and operations capabilities, with a strong local, Nordic focus.

- It has little visibility among medium and large companies as an MDM vendor.

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Good Technology

Good Technology, based in Redwood Shores, California, has a long history in the mobile applications space and thousands of clients globally through its e-mail system, which garnered strong sales as a NOC-based architectural alternative to BlackBerry Enterprise Server for non-BlackBerry mobile shops. Lack of hardware hampered its sales, and, during the past two years, new ownership and senior leaders have repositioned it as an MDM platform. Focusing on security, it has seen success with financial services, government, healthcare, legal, professional services and other security-conscious enterprises. Though Good does not have a separate MDM product and supports MDM as a feature of its Good for Enterprise solution for secure messaging and intranet access, it is included in the Magic Quadrant, because it supports the criterion, it is purchased specifically for MDM and it is highly requested as an MDM product through inquiry.

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Strengths

- Has the best name recognition in MDM and appears frequently on shortlists, although the company's primary product is secure e-mail.

- Good's mobile security features, particularly platform-independent FIPS 140-2 encryption in the e-mail system, have helped to catalyze entry for Apple devices into organizations bound to stringent data protection requirements.

- Good can validate and authorize specific applications before allowing them to connect to a corporate network. This feature is available even on platforms that do not support blacklisting and whitelisting, such as iPhone and iPad.

- Good has a track record for supporting and managing both corporate and personal data and applications and is compatible with both Microsoft Exchange and Lotus Notes

- Extensive help desk features are included, as well as a user self-service portal.

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Cautions

- Users must deploy Good for Enterprise Server and transmit end-to-end encrypted data through Good's NOC.

- Strongest security for messaging and Intranet access through the Good client and its FIPS 140-2 certified encryption; otherwise, it uses native encryption or must use third-party applications for non-Good applications.

- Good provides its own UI for corporate e-mail and personal information manager access. In many

cases, this causes complaints from users, who must be convinced of the benefits of the added security in exchange for the UI replacement.

- The cost of the Good solution can be relatively high per user seat, compared with other vendors. Furthermore, the installation and configuration of advanced security features are complex and require a learning curve.

- Good does not offer management or integration for BlackBerry.

IBELEM

IBELEM is based in Nanterre, France, and also have a development team in Nantes, France. IBELEM was founded in 2001 and was initially focused as an SI for mobile applications. Since 2008, IBELEM has developed its own MDM capabilities. The PushManager product is provided as an on-premises or SaaS solution. The installed base is almost exclusively in France. IBELEM is a private company, with venture capital (VC) funding. The MDM product is available for BlackBerry, Symbian, Apple iOS, Android, Windows Phone 7 and Windows 6.x.

Strengths

- Licensing is based on a perpetual license plus maintenance or a per-device fee for SaaS. Pricing is clear, and enables clients to start small and grow over time.

- The installed base consists of a mix of small and relatively large clients.

Cautions

- IBELEM is a small company, with limited operations capabilities and a strong French focus.

- The MDM features supported on the different operating-system platforms vary somewhat, and the on-premises and SaaS solution for the same platform also vary; RIM OS is not supported.

- IBELEM marketing and awareness remains weak outside France.

McAfee

Based in Santa Clara, California, McAfee is a prominent global security player with strong positions in desktop and laptop antivirus, encryption, and comprehensive endpoint management. McAfee entered the MDM realm through the 2010 acquisition of Trust Digital. McAfee EMM support is offered for Android, iPhone/iPad, Nokia S60, WebOS, Windows Mobile 6.x and Windows Phone 7 models. McAfee is not a pure-play MDM, and its focus on broader security solutions, although strategic, does not immediately raise its competitive standing against established MDM players. However, the acquisition posed no product or history conflicts within McAfee product lines, and Trust Digital had already started to develop a reputation for iPhone security at the time of the acquisition. Starting in January 2011, AT&T is reselling EMM as on-premises software.

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Strengths

- McAfee EMM offers MDM managed through its broader ePolicy security suite and is extending interoperability out to their larger product portfolio.

- EMM has a strong dashboard and reporting tools.

- Management is compatible with Exchange, Lotus Notes, Groupwise and Gmail

- McAfee has a track record of selling new incremental management products and features into its large, global ePolicy Orchestrator (EPO) installed base. Success in the adjacent mobile data protection market is a noteworthy case in point.

- Revenue and competitive presence for MDM are 60% in North America, with the balance divided mostly between Europe and the APAC region.

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Cautions

- In the year since the Trust Digital acquisition, integration of EMM into the McAfee framework has been slower than expected, even if allowances are made for its unexpected acquisition by Intel.

- The UI isn't as sleek as some other competitors, and is less easy to use and navigate.

- EMM is not able to automatically whitelist/blacklist and protect the device if it falls out of compliance, although it can be blocked from further contact using McAfee's Network Access Control (NAC) policies.

- External media encryption is offered for iPad, but not for other at-risk platforms, such as Symbian and Android.

- Pricing per seat is comparatively high, sometimes twice that of its competitors, which reflects a PC

valuation mind-set.

Mobile Active Defense

Mobile Application Development Partners, the company behind the service Mobile Active Defense (MAD) is based in Atlanta, Georgia. The company was founded in 2009, and is privately held. Mobile Enterprise Compliance and Security Server is a clientless, zero-footprint MDM product available as an on-premises as well as a hosted solution. Most of the installed base is in North America and dominated by companies and organizations in regulated verticals, such as healthcare or financial services.

Strengths

- MAD employs a novel, strong security approach, using a VPN and a data container. The lightweight design appeals to companies looking for minimal device support burdens.

- The proffered MDM features are uniformly available across the supported platforms.

- The agentless approach supports rapid deployments and may appeal to companies with limited time and/or funds that are in a hurry to implement a basic device-monitoring solution. It has an agent for non-iOS platforms.

Cautions

- Although it has experienced strong initial growth, MAD still has low visibility in the MDM market.

- MAD has not yet developed strong operator or significant channel partner relationships to broaden its growth portfolio, and has seen slower growth than its competitors.

- An agent-based solution provides more control and deeper monitoring of mobile devices. To remain competitive in this market as it matures, MAD should consider a timeline to offer on-device agents.

MobileIron

MobileIron, based in Mountain View, California, launched its product in September of 2009 and has seen

rapid growth in sales, mind share and market share, outselling most MDM platforms during the past year. Built from the ground up, it is solely focused on mobility management. Still a startup, it has practices found at more-mature companies, including strong presales and postsales groups. Although primarily focused on North America, we are seeing expansion into a significant presence in Western Europe as well.

Strengths

- MobileIron has rapidly earned high levels of mind share in the MDM market, and appears frequently on shortlists. With strong marketing capabilities, the company has the ability to convey the business value of MDM.

- Strong presales and postsales support and programs are particularly effective at building client relationships and reinforcing credibility.

- The company emphasizes comprehensive life cycle management, including usage monitoring, cost control, and application deployment and version control. It offers strong support for corporate and personal devices.

- MobileIron has a sleek UI and a full-featured tool.

- The product has great reporting and dashboard capabilities.

Cautions

- Being a small startup company, MobileIron could struggle with scaling, especially globally, as a result of early successful growth. It is a good potential acquisition target for a larger vendor that wants to acquire a superior management interface.

- It does not have its own encryption capabilities, must work with what's on-device or through partners, which could cause higher costs. Buyers need to understand the limits of embedded protections on each platform, because these will be the limits to what MobileIron can manage.

- MobileIron offers a physical or virtual appliance, but is not releasing a SaaS offering until 2Q11.

Motorola

Based out of the newly formed Motorola Solutions in Illinois, the MDM portfolio consists of the Motorola Mobile Services Platform (MSP), originally designed to support its full line of ruggedized Windows-based

mobile devices, including Windows Mobile 6.x. Recently, it has been expanded to support Apple and Android. RIM support is planned for future release this year. Motorola has seen good adoption in the ruggedized world, but is less known and has a smaller market share in non-Motorola and smartphone devices.

Strengths

- It has strong support for Motorola ruggedized devices and peripherals.

- It is available as software for internal operations or as a managed service.

- Motorola offers a vendor-agnostic open system, with integration to corporate management platforms, such as HP OpenView and IBM Tivoli.

- Motorola has proven global scale and support for its MDM offering.

Cautions

- Motorola has emerging horizontal smartphone experience, but has been more focused on ruggedized devices.

- It is little known in the horizontal enterprise market.

- It has limited distribution channels beyond industrial space.

Odyssey Software

Founded in 1996, Odyssey Software, based in West Henrietta, New York, started off by managing ruggedized handheld devices. It is engaged in distribution and license agreements with other companies in the MDM market, including AirWatch, Good Technology, Motorola and Symantec, as well as marketing and developer partnerships with several mobile device platform vendors and mobile operators, including Microsoft, Samsung, LG, Motorola, HTC, RIM, Apple, AT&T and Verizon.

Strengths

- Odyssey's sales are primarily in North America, it has a growing presence in all world markets.

- Long-term MDM experience and execution are assets — seat sales have been growing at a reported rapid rate of 37% CAGR during the past seven years, primarily through licensees.

- Odyssey has full-featured software and inventory functionality across multiple platforms, with support for platform-specific security.

- The company provides unique device support via integration with Microsoft System Center.

Cautions

- Odyssey's practice of increasingly licensing products and technologies to other vendors in the same market reduces direct sales revenue potential and cannibalizes opportunities to compete in RFPs.

- Despite a long time in the MDM market, Odyssey has less visibility in open competition, due to its direct sales focus on Microsoft System Center customers and not being a commonly referenced brand outside that association. This weakness weighed strongly on its ranking.

Smith Micro Software

Smith Micro, based in Aliso Viejo, California, works with many Tier 1 wireless operator selling its connectivity solutions and is engaged with all major wireless OEMs to support new device launches on behalf of those wireless operators. In addition, Smith Micro has a commercial relationship with HTC and supplies its standards-based OMA-DM MDM client for its Android handsets shipping to North America, and Asian markets. Smith Micro sells MDM support for iOS, Symbian and Android to the enterprise market through its direct sales force and is actively recruiting indirect channel partners, including value-added resellers, system integrators (SIs) and service providers.

Strengths

- Smith Micro has a strong and experienced software development group.

- It has good carrier partners and relationships.

- It provides broad mobile operating-system platform support.

Cautions

- Smith Micro has a weak direct enterprise sales and support channel.

- It has no service management capabilities.

SOTI

Based in Mississauga, Ontario, Canada, SOTI has a long and successful background in supporting ruggedized handhelds based on different Microsoft operating systems Recently, support has been added for Apple and Android in its core MDM product MobiControl. SOTI has been successful in vertical industries deploying ruggedized devices, but is less known and has smaller market share in the generic smartphone market.

Strengths

- It has strong support for ruggedized devices and peripherals.

- It is available as software for internal operations or as a managed service.

- SOTI has a global presence through partners and good support capabilities.

- It offers a strong tool capability with a good UI and multiple methods of use.

Cautions

- Generic smartphone support has only recently been launched.

- It is unknown outside industrial uses.

- Good customization on the dashboard and reporting views, but no overall graphics on it.

Sybase

Sybase, an SAP company, is based in Dublin, California. It owns the longest-established MDM platforms, reaching back to PCs in the late 1980s. Afaria was created in 1997 for laptops and subsequently released

in 2000 as the first nonindustrial MDM platform for Palm and Windows devices. Afaria support is offered for Android, BlackBerry, iPhone/iPad, Nokia S60, Windows Mobile 6.x and any phone model that supports Open Mobile Alliance (OMA) Device Management (DM). Afaria also has value-added mobile features for tablets running Windows 7.

Strengths

- Afaria offers broad life cycle management benefits and, when combined with Mobile Office, constitutes a comprehensive wireless e-mail and mobile application integration framework. It constitutes the most mature platform among MDM vendors for managed software distribution.

- Feature sets for help desk support, application and service management, including expense management, are well-represented across the most popular smartphone platforms. Noncompliant devices can be quarantined.

- Sybase is one of a few MDM vendors that offers an embedded VPN in its e-mail client, plus a sandbox facility to isolate and control application access to business data and VPN connections.

- Afaria offers support for an Android application portal for enterprise application management. Afaria Advanced Enterprise Security (AES) for Android, adds more than 80 device management features on Samsung Android devices.

Cautions

- Afaria can be relatively expensive per user seat (twice that of competitors); but this is also true of other vendors with broad functional platforms. To use features such as e-mail encryption, buyers may need to invest in Mobile Office, in addition to Afaria.

- Feedback to Gartner indicates that buyers find the installation of Afaria to be complex. Companies planning a new/first purchase must plan for a learning curve.

- The Afaria UI has been on the market for some time and needs an update.

Symantec

Symantec is a prominent global security player, with strong positions in desktop and laptop antivirus, encryption and comprehensive endpoint management. Symantec has offered MDM support in Altiris since 2004. Symantec SMM support is offered for Android, BlackBerry, iPhone/iPad, Nokia S60, WebOS,

Windows Mobile 6.x and Windows Phone 7. Although Symantec has had MDM for years, Gartner analysts have not seen evidence of competitive public visibility until recently, and cannot verify a significant presence through client references. Symantec has successfully obtained all the pieces for a strong MDM platform; however, its strong focus on security causes a diminution of understanding of the business and operational requirements for mobile device life cycle management. Support for security policy management is strong and complete across the widest range of mobile platforms; however, support for nonsecurity functions is patchy.

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Strengths

- Symantec SMM provides strong security capability with lightweight client options. Integration with other Symantec product frameworks is a strategic advantage for long-term Symantec customers.

- Symantec is emphasizing advanced iOS and Android features, such as elective e-mail data wipes, full e-mail access control, selective wipe on application data, hardware asset tracking, selective whitelist/blacklist and application management, as well as data-roaming policies.

- Symantec has an outstanding track record for overall viability and for competitive sales and support of a wide range of security services. Their global reseller network is strong and well-trained.

- Symantec offers an industry-leading central policy management system for endpoint devices.

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Cautions

- The MDM console isn't as attractive or user-friendly as competitors' and could use updating. Although it provides life cycle management, the console emphasizes a focus on security.

- Buyers who want to build a complete MDM solution may require additional Symantec product lines, especially to complete the security functions.

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Tangoe

Tangoe is a fast-growing TEM company based in Orange, Connecticut, with 2010 estimated sales expected to grow to approximately $85 million. Though the primary revenue source is through TEM, it also has seen the adoption of its MDM platform, acquired from Internoded, also grow in the past 18 months. It has done a good job at integrating TEM and MDM, as well as offering MDM as a service, although full maturity has not yet arrived.

Strengths

- Tangoe is a well-known company in the TEM services market. It can directly leverage its credibility with enterprise IT operations to compete for MDM service fulfillment.

- Tangoe provides consistent life cycle management capabilities across supported platforms.

- It has long-term experience at provisioning and tracking mobile devices on all known platforms.

- When combined with TEM services, Tangoe's MDM pricing is aggressive, inexpensive and highly competitive.

Cautions

- The management and client interfaces are basic design and appearance and need an update.

- The tool offers little beyond the standard reporting functions, and it needs to provide deeper capabilities.

- Although Tangoe has increased its global reach, primarily through its TEM service, its primary focus has been on North America for MDM.

The Institution

The Institution is based in Stockholm, Sweden. The company was founded in 2006, and has exclusively focused on MDM since its inception. The Institution provides the product Revival as an on-premises, hosted or SaaS solution. The installed base is almost exclusively in the Nordic region, and is dominated by channel partner sales. The Institution is privately held.

Strengths

- Licensing is based on a per-month, per-device fee, plus initial install and training fees. Pricing is clear and enables clients to start small and grow over time.

- The installed base and revenue are growing rapidly and consist of a mix of small and relatively large clients.

- Customer feedback is generally good.

Cautions

- The Institution is a small company with limited operations capabilities and a strong Nordic focus.

- The Institution marketing remains weak, and has little mind share beyond the Nordic region.

- The MDM features supported on the different operating-system platforms vary significantly, and the RIM OS isn't supported at all.

Ubitexx

Ubitexx is based in Munich, Germany, and has a development center in Kharkov, Ukraine. The company was founded in 2002, initially as a consulting company assisting clients mobilizing their workforces. In 2005, Ubitexx began to develop its own management and security product, Ubi-Suite, which became the exclusive focus for Ubitexx as of 2008. The Ubi-Suite product is provided as an on-premises, hosted or SaaS solution. The installed base is almost exclusively in the Germany, Austria and Switzerland region. Ubitexx is a private company with VC funding.

Strengths

- Ubitexx has strong local support and presence.

- It offers a full-featured tool that can be customized.

- Its licensing is based on a per-month, per-device fee. Pricing is clear and enables clients to start small and grow over time.

- The installed base is growing rapidly, and consists of a mix of small and relatively large clients.

- Customer feedback is generally good.

Cautions

- It has a weak UI and navigation.

- It offers weak reporting and BI capabilities.

- Ubitexx is a relatively small company, with limited operations capabilities and a strong German focus. Ubitexx marketing and awareness remains weak outside Germany.

- The MDM features supported on the different operating-system platforms vary somewhat, and RIM OS nor Windows Phone 7 are supported.

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Zenprise

Zenprise was founded in 2003 and is based in Fremont, California. It is a small company focused solely on MDM. It recently acquired a small French security and MDM company, Sparus, to better support mobile security and encryption. It is one of the few vendors with support for WebOS and Windows Phone 7, among the other routinely supported platforms. It has a full feature set for life cycle management for corporate and personal devices. Features include capabilities for help desk support, application deployment and versioning, and cost control through usage monitoring. It offers innovation in areas that other vendors haven't provided yet, including content filtering and automated defense capabilities.

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Strengths

- Zenprise has a strong tool UI and functionality.

- It provides end-to-end security via an embedded VPN and sandbox that can control and encrypt application traffic.

- It enables Web content filtering and URL filtering on mobile devices, which differentiates Zenprise from its competitors.

- The product can quarantine noncompliant devices based on policies, devices, operating-system versions, and compliance violations (e.g., user installed blacklisted applications, user "jail broke" the phone, user hasn't upgraded the operating system that addresses security vulnerability).

- Zenprise has a large, installed MDM customer base.

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Cautions

- Fair execution and postsales support were reported in our survey; however, marketing is weak, and competitive visibility reported by Gartner clients is low.

- The tool offers weak dashboard and reporting capabilities for supported devices.

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