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## ***Mobile Device Management Market, 2012-2016***

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### **SCOPE**

This study provides an analysis of the Mobile Device Management market in 2012, and its potential growth over the next four years. It provides detailed market trends, market share, market size, forecasts, and an analysis of key Mobile Device Management vendors.

This study segments the Mobile Device Management market as follows:

- **Mobile Device Management** solutions protect and secure mobile devices, specifically smartphones and tablets, in the enterprise.

Revenues, pricing, and all currency figures presented in this study are expressed in \$USD, unless otherwise indicated.

All market numbers represent worldwide figures, unless otherwise indicated.

Installed base figures represent *active* devices under protection that have been used at least once in the last three months.

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## METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from Mobile Device Management vendors and users within global corporations via interviews and surveys.

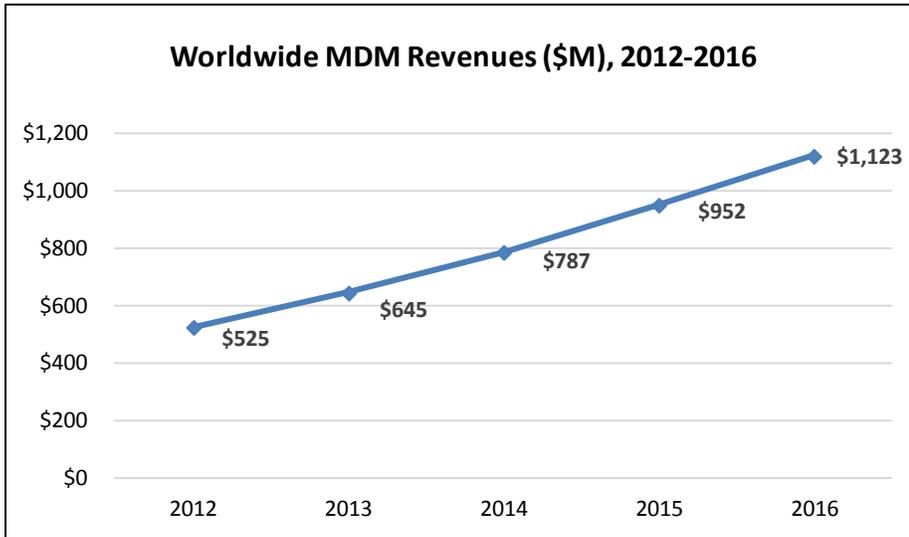
Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

## EXECUTIVE SUMMARY

- Mobile devices have become very prevalent in the enterprise and allow employees to be more productive. The nature of mobile devices, however, makes them prone to loss or theft since they are frequently used outside an office setting. As a result, the protection of these devices is paramount since they often have the same access to corporate data that on-premises workstations have.
- The BYOD trend lets employees choose their preferred mobile device based on personal preference instead of selecting a device that is easiest to manage for a given enterprise, which makes securing mobile devices in the enterprise tough. Accordingly, enterprises must be able to control multiple mobile operating systems on their network since business users will never consistently adopt one platform. Further adding to the confusion, mobile devices are also constantly being replaced by employees as they upgrade to newer devices, lose their devices, or other reasons.
- Mobile Device Management (MDM) solutions manage device capabilities, data security, network connectivity, and other various aspects of mobile devices. The capabilities of MDM solutions are evolving very quickly as hardware and software for these devices are updated on a much more frequent basis than their users' workstation counterpart. While the core MDM functionality used to be about simple device management features, such as password enforcement, functionality has expanded to protect nearly every aspect of hardware and

software on a mobile device, such as access to device features (e.g cameras), email account setup, and app data security.

- The core MDM functionality, such as device wiping, device password enforcement, device password reset, and more, has been commoditized. There is little differentiation in this feature-set across MDM solutions. Differentiation arises in management interface, price, customer support, and other areas. Most MDM solutions, however, have also added a data or app security aspect that can also easily differentiate one MDM vendor from another.
- Most MDM solutions were originally designed to manage and protect smartphones, but they now have naturally evolved to embrace the management of tablets that often run the same or similar operating systems found on smartphones. Providing support for the latest mobile device is often a tall order since so many mobile devices in the enterprise are BYOD devices. Organizations are bound to have early adopters of a device that is not yet supported by the business' MDM solution. This rapidly changing environment of mobile devices, known as consumerization, has made their management much more difficult. As a result, many enterprises still dictate rules for bringing devices onto a network, either by device manufacturer or operating system.
- Large IT security vendors have slowly been introducing MDM capabilities into their offerings, but the majority of MDM solutions in the market are offered by pure-play vendors. Likewise, these pure-play MDM vendors have slowly been introducing new security features that extend functionality to the more traditional, stationary endpoints in the enterprise, such as laptops and desktops.
- Worldwide revenues for the MDM market will total \$525 million by year-end 2012. This figure is expected to grow to over \$1.1 billion by year-end 2016. This represents an average annual growth rate of about 21% over the next four years. Figure 1, shows the worldwide revenue for the Mobile Device Management market from 2012 to 2016.



**Figure 1: Worldwide Mobile Device Management Revenue, 2012-2016**

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