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A TECHNOLOGY MARKET RESEARCH FIRM

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Enterprise Mobility Management Market, 2013-2017

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SCOPE

This study provides an analysis of the Enterprise Mobility Management market in 2013, and its potential growth over the next four years. It provides detailed market trends, vendor market share, market size, forecasts, and an analysis of key Enterprise Mobility Management vendors.

This study looks at the Enterprise Mobility Management market as follows:

- **Enterprise Mobility Management** solutions provide businesses with the ability to secure and manage the mobile devices used by their employees. EMM solutions are aimed at smartphone and tablet devices and should support multiple mobile operating systems. The core components of EMM include: Mobile Device Management (MDM), Mobile Application Management (MAM), Mobile Security, and Mobile Content Management. EMM solutions are available as on-premises software, cloud-based services, or hybrid solutions.

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

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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.

METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Enterprise Mobility Management (EMM) solutions combine several core mobile technologies to enable businesses to secure and manage the mobile devices used by their employees. Mobile devices as they pertain to the EMM market include

smartphones and tablets. The core components of an EMM platform include: Mobile Device Management (MDM), Mobile Application Management (MAM), Mobile Security, and Mobile Content Management. These tools and technologies enable businesses to enforce compliance with IT standards, prevent unauthorized access to corporate data networks, and secure mobile devices and their applications.

- The EMM market has only recently evolved as vendors have begun to combine what were once disparate enterprise mobile technologies into singular platforms capable of delivering the full lifecycle of enterprise mobility management. Many of the vendors in the EMM market began offering one or two of these components and have since added additional capabilities through in-house developed solutions or acquisition.
- Today, more EMM vendors are looking to provide comprehensive platforms that are capable of providing business with all the solutions necessary to properly protect their corporate assets while fully empowering their employees with the ability to accomplish more tasks on their mobile devices. EMM vendors are looking to increase the functionality of their solutions through internal development or through acquisitions and/or technology partnerships. Businesses are showing less interest in pure-play vendors that offer point solutions due to their inability to address a sufficiently broad range of enterprise mobility issues.
- Core MDM functionality, such as device wiping, device password enforcement, device password reset, and more, remains a commodity. Vendors offering MDM functionality do not differentiate their solution on a feature-set basis, rather they differentiate their product in areas such as price, management consoles, customer support, and other areas.
- Data security remains a priority for many businesses looking to deploy an EMM solution. Lost and stolen devices pose a serious threat to businesses as any data or information on or accessed by a mobile device can be accessed by unauthorized users. EMM solutions provide protection by providing IT with the tools necessary to lock devices, wipe data, and more.

- Mobile content management continues to gain in popularity as businesses look to secure the processes users utilize while accessing corporate documents on their mobile devices. EMM solutions today provide secure content libraries, support multiple document and file formats, and more.
- Worldwide revenues for the EMM market will total \$838 million by year-end 2013. This figure is expected to grow to over \$3.1 billion by year-end 2017. This represents an average annual growth rate of 39% over the next four years. Figure 1, shows the worldwide revenue for the Enterprise Mobility Management market from 2013 to 2017.

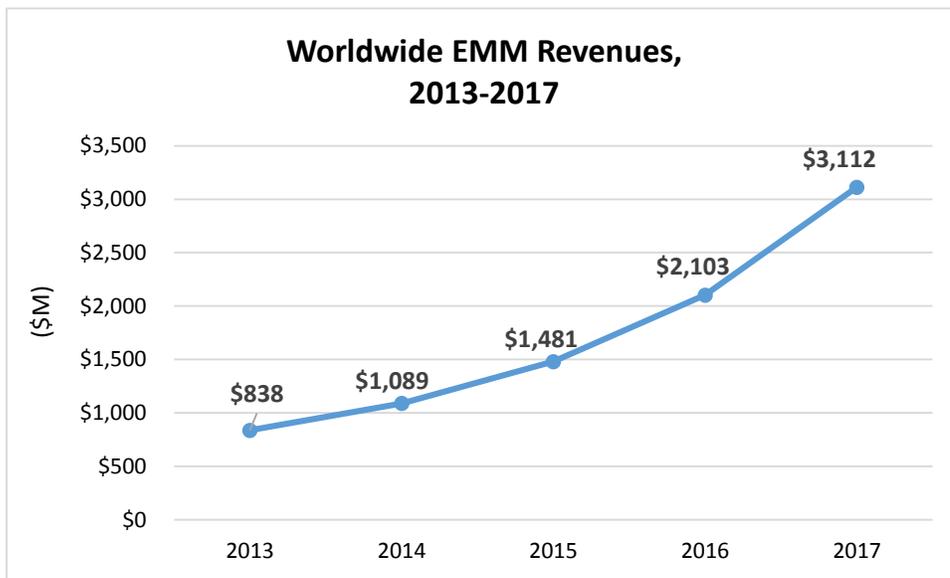


Figure 1: Worldwide Enterprise Mobility Management Revenue, 2013-2017

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