



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

PALO ALTO, CA, USA

TEL. 650 322-8059 • FAX 650 322-8061

Enterprise Mobility Management Market, 2014-2018

Editor: Sara Radicati, PhD

SCOPE

This study provides an analysis of the Enterprise Mobility Management market in 2014, 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. The revenue projections in the following sections do not include revenues from systems integration or professional services.

All market numbers represent worldwide figures, unless otherwise indicated. Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World.

EUROPE: LONDON, UK • TEL. +44 (0)20 7794 4298 • FAX. +44 (0)20 7431 9375

e-mail: admin@radicati.com

<http://www.radicati.com>

This report does not contain country breakouts but these may be obtained from The Radicati Group at an extra charge.

Installed base figures represent *active* devices under management 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

- The proliferation of mobile device adoption in the enterprise, both phone and tablets, continues to fuel concerns over security, privacy and data integrity. The Bring Your Own Device (BYOD) trend has compounded these concerns as many enterprises must now deal with a multitude of different devices deployed for both business and

personal use.

- The Enterprise Mobility Management (EMM) market has emerged in recent years as enterprises are seeking solutions that can manage all aspects of mobile security ranging from device, to software, to data protection. EMM comprises four main areas of functionality, as follows:
 - *Mobile Device Management (MDM) Features* – which include device level management features and device level analytics.
 - *Mobile Security Features* – such as encryption, authentication, single sign-on, data loss prevention, and more.
 - *Mobile Application Management (MAM) Features* – such as containerization, app wrapping, and app usage analytics.
 - *Mobile Content Management Features* – such as secure email, calendar, document management software integration, and more.
- EMM solutions are available in a variety of form factors including on-premises, cloud-based and hybrid. EMM tends to be inherently a cloud-based technology due to the need to manage mobile devices on the go. However, due to the distrust many larger enterprises still have for cloud-based solutions, many vendors that started out with purely cloud-based solutions have had to augment their portfolio with on-premises solutions. Conversely, vendors that started out as on-premises based have had to add cloud-based solutions due to the growing demand for cloud solutions particularly at the low and mid-market range.
- Adoption of Enterprise Mobility Management solutions continues to see strong growth, driven by the convergence of a number of different trends including: the growing Bring Your Own Device (BYOD) trend, the growth of mobile workforces, the proliferation of mobile apps, increased security threats, and the need to adhere to strict regulatory and compliance requirements.
- Worldwide revenues for the EMM market will total \$1,366 million by year-end 2014. This figure is expected to grow to over \$5.7 billion by year-end 2018. This represents

an average annual growth rate of 43% over the next four years. Figure 1, shows the worldwide revenue for the Enterprise Mobility Management market from 2014 to 2018.

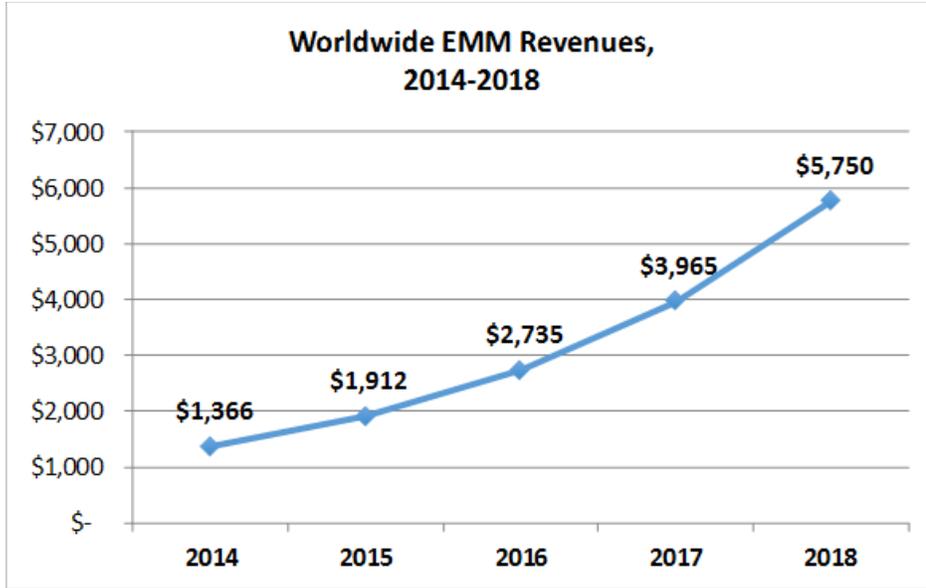


Figure 1: Worldwide EMM Revenue, 2014-2018

To view the complete Table of Contents for this report, visit our website at www.radicati.com.