



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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Enterprise Mobility Management Market, 2015-2019

SCOPE

This study provides an analysis of the Enterprise Mobility Management market in 2015, 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.

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. 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.

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METHODOLOGY

The information and analysis in this report is 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

- Growing business mobile adoption continues to fuel concerns over security, privacy and data integrity. The Bring Your Own Device (BYOD) trend compounds these concerns as many organizations must deal with a multitude of different mobile devices and mobile operating systems deployed for both business and personal use.
- The need for Enterprise Mobility Management (EMM) solutions has increased rapidly over the past year, as organizations seek solutions that can manage all aspects of mobile security ranging from the device, to software, to data and applications.

- Enterprise Mobility Management (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. As the popularity of cloud-based solutions grows, vendors that started out offering on-premises EMM solutions have had to add cloud-based offerings. Conversely, vendors that started out offering cloud-based solutions are adding on-premises solutions to cater to customers that are still not comfortable with cloud-based solutions.
- Worldwide revenues for the EMM market will total \$1,495 million by year-end 2015. This figure is expected to grow to over \$4.4 billion by year-end 2019. This represents an average annual growth rate of over 30% in the next four years. Figure 1, shows the worldwide revenue for the Enterprise Mobility Management market from 2015 to 2019.

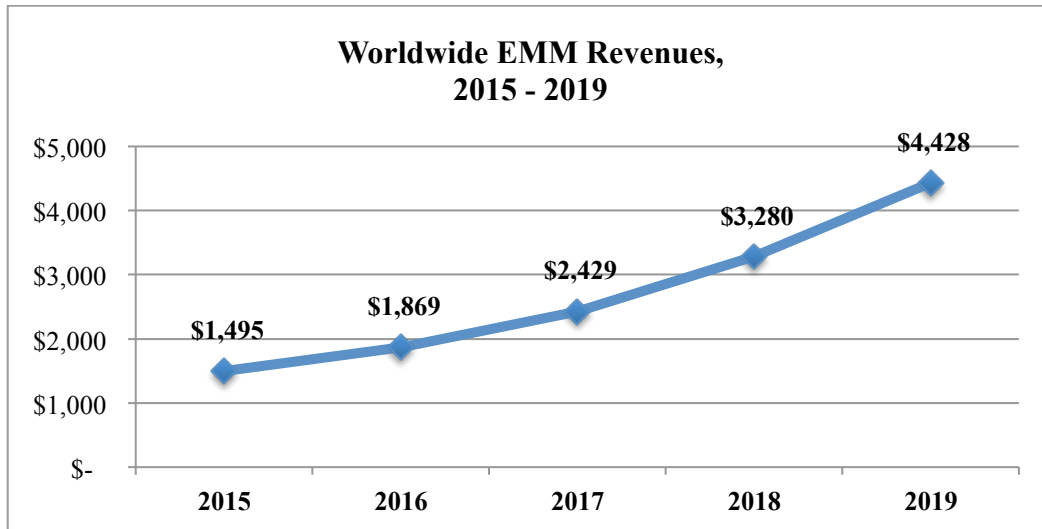


Figure 1: Worldwide EMM Revenue, 2015-2019

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