

IDC MarketScape: Worldwide Unified Endpoint Management Software for Apple Devices 2024 Vendor Assessment

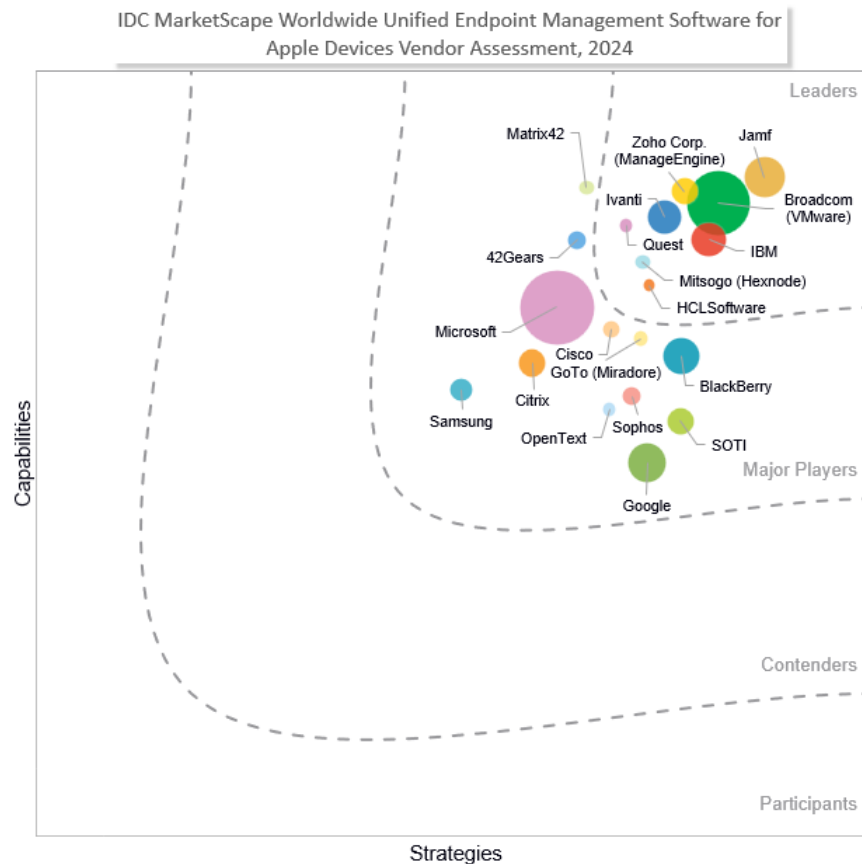
Phil Hochmuth

THIS IDC MARKETSCAPE EXCERPT FEATURES JAMF

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Unified Endpoint Management Software for Apple Devices Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Unified Endpoint Management Software for Apple Devices 2024 Vendor Assessment (Doc # US51779224). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The presence of Apple Mac laptops and desktops is growing among enterprises by multiple measures. More than 45% of enterprises are now having some presence of macOS in their environment (source: IDC's *Enterprise Device Management Survey, 2023*). Among large enterprises, Macs now make up around 15% of all PC endpoints, according to the survey. And more such devices are likely on their way in work environments, as IDC forecasts shipments of MacBooks to grow 15% among businesses over the next two years (source: IDC's PC Tracker, 4Q23).

At the same time, many enterprises struggle to bring Macs into the fold in terms of device management and IT infrastructure integration. Among U.S. enterprises, fewer than 50% of Macs in business deployments are enrolled in any device management software (per IDC's endpoint survey). The specificities of Unix-based macOS, with its unique configuration, security, and scripting language, have led to the creation of dedicated subgroups in some IT organizations for Apple device management. While unified endpoint management (UEM) tools are designed to converge multiple OSs into a single management platform, many organizations look to specific tools for managing Macs, as well as iPhones and iPads. To that end, many organizations have created Mac management centers of excellence. The concept of UEM still comes to play here, as Apple devices across various form factors – Mac laptops/PCs, iPhones/iPads, Apple TVs, Apple Watches – can be unified under a single Apple UEM platform. This falls in line with the overall ecosystem play of Apple and can provide a better user experience (UX) in scenarios where workers have exclusively Apple endpoints.

Among all firms adopting UEM, 70% have more than one product in their environment – often for specific use cases, such as Apple device management. Many firms also roll Apple device management into larger, multi-OS/OEM endpoint management approach with a single UEM product. However, UEM tools targeted at managing Apple devices (whether exclusively or as part of a more comprehensive UEM strategy) should include the following functions and product strategies:

- **Strong support and adherence to Apple device management architectures:** Apple annually updates the industry on new features and capabilities for Apple device management at its spring Worldwide Developer's Conference (albeit to less fanfare than new operating system (OS), software, and device announcements). Supporting these new features – such as declarative management, device attestation – is key for Apple-focused UEM vendors.
- **Integration with key enterprise identity, security, and systems infrastructure software platforms:** Cloud-based identity tools, EDR/XDR, zero trust, and IT service management (ITSM) are among the languages Apple-centric UEM tools must have fluency in to be successful.
- **Analytics, telemetry, and endpoint data analysis:** Apple-centric UEMs must be able to gather key data from a fleet of managed Macs and mobile endpoints, including security and device state, as well as insights into end-user usage patterns, areas of frustration/challenges, and overall user sentiment.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC invited vendors to participate in this assessment based on the following key criteria:

- The vendor has a unified endpoint management software product capable of managing Apple's Mac devices (macOS), iPhones (iOS), and iPads (iPadOS).
- The vendor has an estimated UEM product revenue of \$5+ million for calendar year 2023. Revenue was estimated in February 2024 and may differ from forthcoming market share documents.

ADVICE FOR TECHNOLOGY BUYERS

Buyers of UEM software should look for the following attributes, capabilities, and relevant use case scenario support from vendors under consideration:

- **Multidevice, work-from-anywhere users are now the norm.** Enterprise Mac users likely have an iPhone, iPad, and Apple Watch in their immediate workspace. Apple-focused UEM tools must support multiple devices attached to a single user in a coordinated and well-orchestrated manner, allowing for more seamless productivity, proactive help desk support, granular device telemetry and analytics, and advanced security scenarios such as conditional access. Awareness of the users and the context of their work is key in this context.
- **Modern management is the future of device management.** Apple is helping drive the concept of modern endpoint management with the evolution of its MDM protocol and the development of Declarative Device Management (a more efficient means for endpoints to communicate device state to back-end UEM servers). Location-agnostic, agentless, provisioning, configuration, and life-cycle management over Apple endpoints should be the goal for most enterprises. While agent-based device management is still necessary in many scenarios, UEM buyers should look to vendors that adhere to the principles of MDM protocol support.
- **UEM integration is key:** Many enterprises plan to enroll all Mac in their environment into a single UEM tool (alongside devices running Windows, Android, etc.). Some companies are Apple/Mac-only from a device choice perspective. Organizations with a heterogeneous endpoint environment that are deploying an Apple-focused UEM platform must ensure the platform integrates and complements other device management tools in use. Reporting, analytics, and fleet visibility are baseline requirements. More advanced scenarios could include identity-based, multi-OS device provisioning for users with multiple device types.
- **End-user analytics and digital employee experience (DEX) are the future of UEM platforms.** With a comprehensive view of a worker's devices, UEM platforms are positioned to collect, analyze, and take action on volumes of available data on the state of an end user's digital experience. Employee behavior, device and application health, usage patterns based on location, time of day, network type, and so forth are all critical in better understanding how employees work with the devices and apps they are given to do work. UEM tools are at the vanguard of providing capabilities around data collection, analytics, and reporting to be part of a larger DEX initiative, spearheaded by UEM technology.
- **Conditional access controls and policy enforcement are table stakes.** This is becoming a critical feature of UEM platforms. Conditional access controls what apps, data, or other

resources a user can connect to and consume based on an array of factors, such as location (GPS location and network connectivity type) as well as the day, the end-user identity and role, and the state of or health of the device being used (from the standpoint of a jailbroken/rooted device or an OS that is out of date).

- **Specialty-use device scenarios – frontline worker, multiuser endpoints, field workers, and deskless workers – should be considered.** UEM tools must be able to support management of devices across nontraditional use cases (e.g., beyond basic mobile computing: voice/video calls/meetings, email, calendar, messaging, and productivity tools). Device support for frontline workers, users or ruggedized endpoints, and field workers should be as extensible as standard UEM device support, including remote management (e.g., screenshare/assist), and the collection of analytics and data from frontline endpoints. This is often where UEM vendor choice leads to a multi-vendor/product strategy, if certain specialty device management use cases are required, with vastly different needs for "regular" employee device management functionality.
- **Adjacencies and tie-ins to a strong portfolio of complementary IT/system infrastructure software products should be sought.** Solutions such as identity, cloud access security brokers (CASBs), ITSM, security information and event management (SIEM), network security, and line-of-business/vertical-specific application platforms are all important for UEM vendor consideration. Since UEM software does not operate in a vacuum, it is critical that vendors go to market either with complementary IT software product portfolios or strong integrations and partnerships with key industry players.
- **The aim should be to manage the unmanaged.** Look for Apple UEMs with capabilities for managing endpoint apps, access control, and security/compliance posture without full enrollment of the Mac, iPhone, or iPad. Known as "MAM-only" features, it is more critical than ever for UEMs to be able to manage and secure personal BYO devices across all form factors – PCs/laptops, phones, tablets, wearables, and IoT devices. IT teams must deploy UEM tools that can address granular policy enforcement, security, and control over apps and data accessed by these devices as corporate-owned devices.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Jamf

Jamf is positioned in the Leaders category in this 2024 IDC MarketScape for worldwide UEM software for Apple devices.

Jamf is a device management vendor focused almost exclusively on the Apple ecosystem, providing management and security solutions for Apple devices within corporate, educational, healthcare, and other sectors that have large Mac and mobile estates. Jamf managed macOS PCs (all form factors) as well as iPhones (iOS), iPads (iPadOS), Apple TVs (tvOS), and Apple Watch (watchOS). The vendor has seen strong growth as its expansion has followed the growth of Macs in enterprise environments. (Apple grew 35% in terms of PC shipments in 2022-2023, according to IDC's Worldwide PC Tracker.) Jamf's is fast to integration and quick to support new features and capabilities introduced by new iterations of Apple's flagship operating systems. This focus has allowed Jamf to capitalize on the trend of organizations adopting Mac choice programs, transitioning from pilot phases to broader,

companywide initiatives. Jamf also integrates with a broad set of enterprise-IT systems infrastructure software platforms, such as ServiceNow (ITSM), Okta, and Microsoft Entra (identity) as well as Microsoft Sentinel (SIEM). The product has extensive third-party integrations with specific software platforms for electronic health records, school/education classroom management software, and retail POS systems.

From a mobile device perspective, Jamf manages iPads and iPhones with a full UEM feature set and support for capabilities such as user-based administration, multiuser support for iOS/iPadOS devices, and other functions that help support frontline device use cases, such as in hospitals or retail stores. The ability to manage tvOS devices allows Jamf to expand to some IoT use cases, such as managing digital signage and conference room sharing and content management. Jamf also closely followed Apple's recent release of expanded Watch management functionality, allowing the UEM tightly control settings and features on corporate-owned/managed Apple Watches. From its 2022 acquisition of mobile threat management vendor Wandera, Jamf also has an extensive endpoint security and zero trust network access offering, which integrates tightly to Jamf's UEM offering but also supports Windows and Android endpoints.

Strengths

Jamf's deep expertise in managing Apple devices allows for granular control of Macs in enterprise deployments, as well as iPhone and iPad management.

Jamf's strong focus on security, including advanced threat protection and compliance management, aligns with the increasing cybersecurity demands of enterprises.

Jamf targeted solutions for sectors like healthcare and education allow the company to address use cases tied closely to Apple devices.

Challenges

Jamf excels in Apple device management, and while it has broadened its security capabilities to Windows and Android devices, the Apple-exclusive focus limits the vendor's reach and capabilities in terms of managing broader, multi-OS device fleets.

Specific verticals where Jamf has seen success in terms of Mac and Apple device management – such as education – are increasingly adopting non-Apple products, such as Chromebooks in schools, which could limit Jamf's addressable market.

Cost and complexity can be a hinderance to adoption of Jamf for some enterprise organizations, and among SMBs looking for simple Mac/iPhone management for the cloud. For smaller firms, Jamf has more market-focused offerings, including Jamf Now, and Jamf Business Plan, which bundles multiple products.

Consider Jamf When

Jamf's focused strategy on Apple device management, coupled with its extended security and zero trust functionality for other platforms, makes it a strong choice for enterprises and SMBs looking for granular and comprehensive Mac and Apple mobile device management.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Unified endpoint management (UEM) is a technology submarket category of the client endpoint management functional market. Software products in this submarket combine, into a single software platform, the management and provisioning functions for most common end-user computing operating systems and device types (i.e., Windows, macOS, iOS, Android, and ChromeOS). By definition, UEM products must be able to manage both mobile (smartphone/tablet) and PC (desktop/laptop) endpoint device form factors (although support for multiple OSs in each device category is not a requirement). This excludes legacy platforms such as PC life-cycle management (PCLM), PC imaging solutions, mobile-only MDM platforms, and industrial IoT endpoint management platforms.

LEARN MORE

Related Research

- *Five Trends to Watch in Endpoint Device Management in 2024* (IDC #US51763224, January 2024)
- *The Role of Client Endpoint Management Tools in Digital Employee Experience Monitoring* (IDC #US46460821, December 2023)
- *Worldwide Unified Endpoint Management Software Forecast, 2023-2027* (IDC #US47945922, July 2023)
- *IDC MaturityScape: Apple Device Management in the Enterprise 1.0* (IDC #US50671623, May 2023)
- *What's Behind the Windows/Mac Device Management Gap in the Enterprise?* (IDC #US50688223, May 2023)

Synopsis

This IDC study represents a vendor assessment of the unified endpoint management software market, with a focus on Apple endpoint device management, through the IDC MarketScape model.

"Apple Macs, iPhones, and iPads are now commonly used as productive business tools in enterprises across many industries," says Phil Hochmuth, research VP for Endpoint Management and Enterprise Mobility, IDC. "IT organizations are increasingly required to deliver a cohesive Apple experience to end users, across multipole device types, while providing deep integration to enterprise applications and IT infrastructure platforms. Apple-focused UEM and device management tools can help organizations keep these devices managed and secure."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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