OMDIA UNIVERSE

Publication date:
14 Dec 2023

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Omdia Universe: Digital Workspace Management / Unified Endpoint Management Platforms, 2024

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Summary

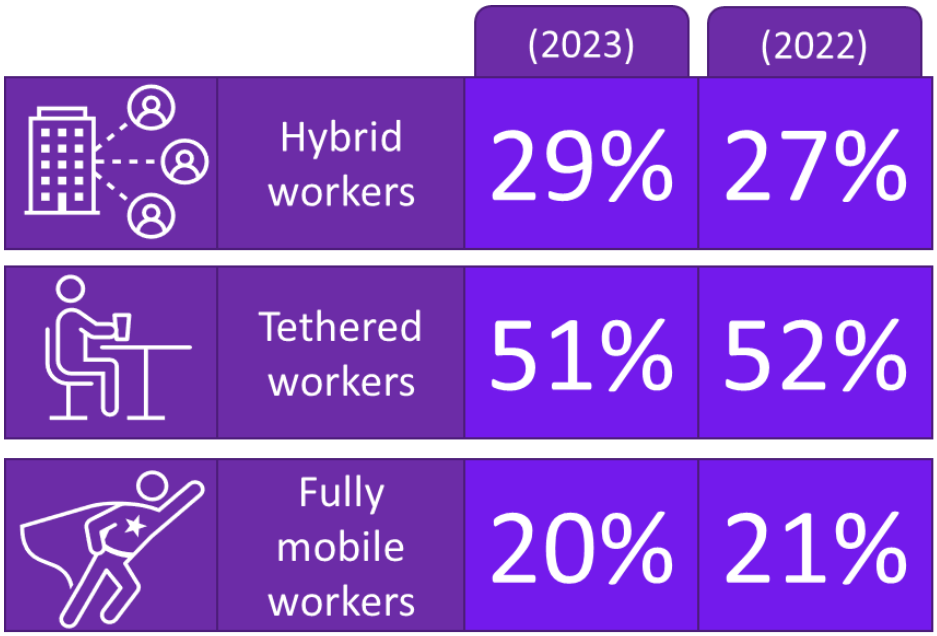
Catalyst

Digital workspace management (DWM) platforms are important tools that support businesses in securing and empowering a more hybrid and flexible workforce. Over recent years, the way employees work has undergone significant change, influenced by the adoption of new mobile technologies and the increase of hybrid working practices. Consequently, businesses face challenges in enabling and securing this modern, mobile-centric workforce. The modern workspace and employee experiences are digital-first, and organizations must embrace new ways and technologies to manage them. By utilizing digital workspace management platforms, businesses can effectively address these challenges and support their employees in this new era of work.

Omdia view

Results from the Omdia 2023 Future of Work survey paint a clear picture of how changing employee demands, economic pressures, a diverse threat and security landscape, and continued technological disruption continue to bring about business change. Evolving end-user computing, enhancing employee productivity and experiences, facilitating better communication and collaboration, and supporting more mobile-centric work styles and approaches have all jumped to the top of the digital transformation priority list, and businesses need the support of experienced partners and capable technologies in overcoming challenges. As **Figure 2** shows, work has become increasingly mobile over recent years:

Figure 2: Percentage of employees aligned with different work styles



Source: Omdia

Omdia recommends that organizations not fall into the trap of overly focusing on work locations. Instead, a focus on developing resilient and digitally enabled organizations is key. Independent of the work location associated with a role, the challenge here for organizations is twofold:

- Invest in a secure and enabling digital infrastructure that supports all employees in doing their best work, independent of their physical location.
- Forge a culture that is inclusive of all employees. There should be no location-based compromises regarding people's practices and culture. Recognize the traits and values associated with different hybrid, fully remote, and in-office work styles and support all experiences.

Businesses are prioritizing digital infrastructure investments that help them better support and secure more diverse work styles. Digital workspace management solutions are an essential part of this modern digital infrastructure. These technologies help ensure that employees can work productively and collaboratively from any location and across any endpoint. They are tools that help bolster employee experience and productivity by providing seamless and secure access to the devices, data, applications, and collaborative channels that have emerged as invaluable business assets. In this era of hybrid work, where the corporate headquarters is no longer exclusively represented as a brick-and-mortar office, digital workspace management solutions have become crucial for businesses to manage their workforce effectively.

Analyzing the digital workspace management universe

How to use this report

The Omdia Universe report is not intended to advocate an individual vendor but rather to guide and inform the selection process to ensure all relevant options are considered and evaluated efficiently. The report findings gravitate toward the customer's perspective and likely requirements, characteristically those of a medium-to-large multinational enterprise (more than 5,000 employees).

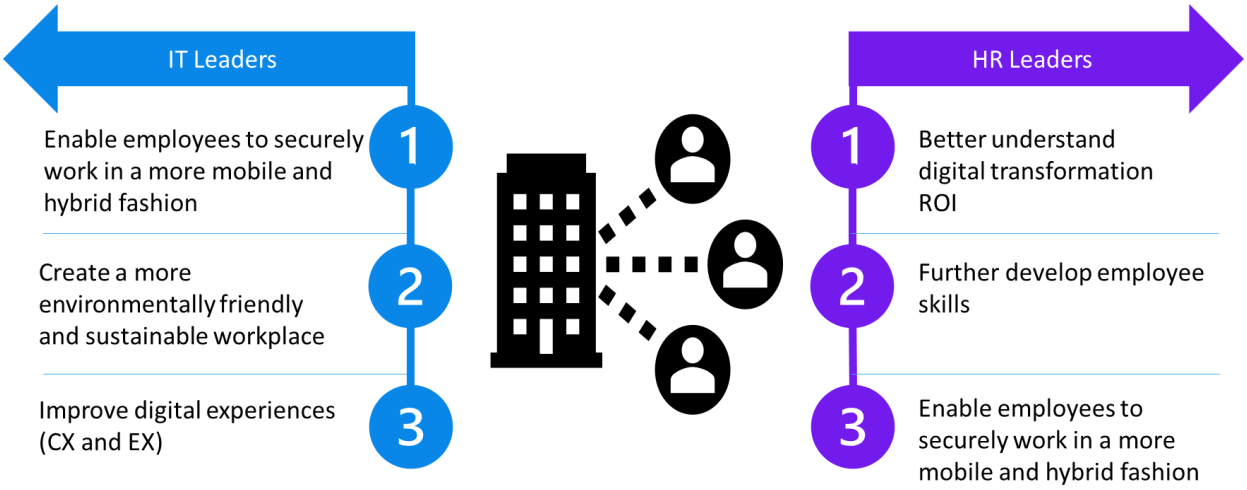
Market definition

Unified endpoint management (UEM) is the traditional and widely recognized terminology associated with the DWM product category. However, the reality is that these solutions now offer so much more than endpoint management capabilities. UEM solutions have undergone an interesting evolution, especially since 2020. Vendors in this category continue to expand their solutions to deliver capabilities that move well beyond the endpoint management foundation. This is in line with changing business priorities around enterprise mobility. Businesses are looking at enterprise mobility in a more strategic and broader sense. In addition to unifying how the mobile app and device ecosystems are managed and secured, businesses are increasingly focusing on new areas. These include enabling the transformation to mobile work styles, investing in new 5G connectivity capabilities, and supporting more employees with mobile services.

As employees and their work move away from the office's four walls, businesses must invest in new tools and services that help enable and secure a more diverse, mobile-centric set of work styles. Businesses must

have a technology and support infrastructure that enables every worker across any location. Mobile has become an important and overarching theme central to how work is changing for many. There is evidence of this when we explore the strategic future of work goals that businesses prioritize. Here, the main future of work priority for digital leaders across IT is to enable employees to work in a more mobile and hybrid fashion securely.

Figure 3: Strategic Future of Work priorities



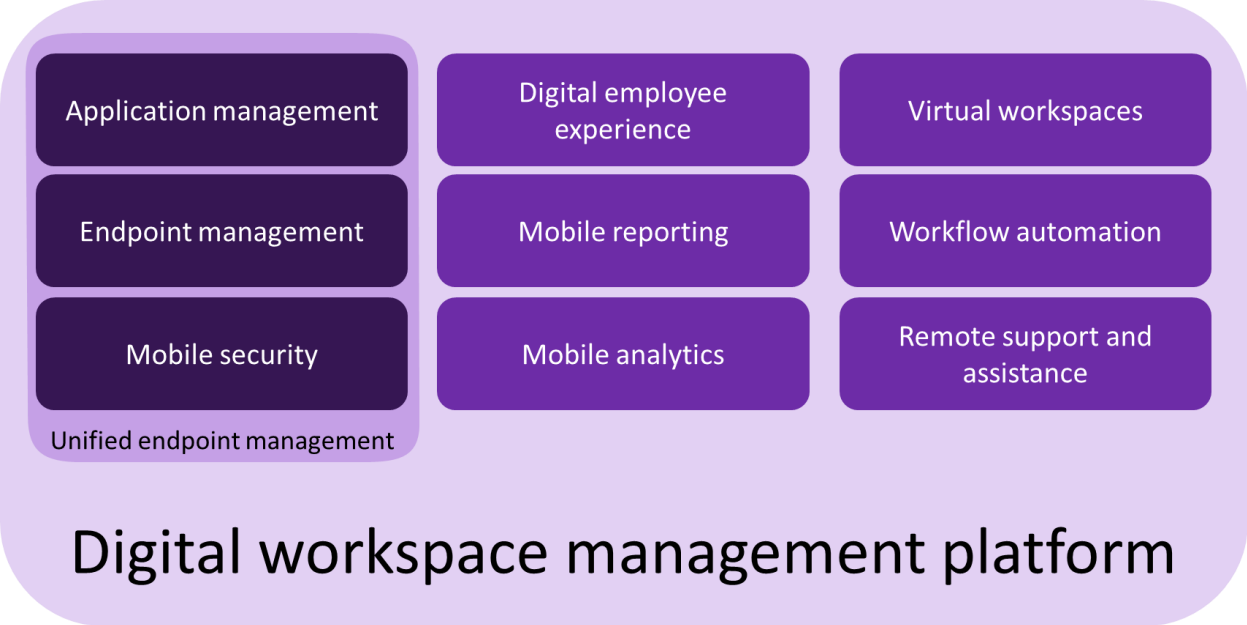
Notes: Future of Work Survey 2023, n=1,075

Source: Omdia

Becoming a more mobile-centric organization involves mobile becoming more richly and natively embedded in the collaboration, productivity, and security activities that help steer how people work. Mobile is becoming a more important communication and collaboration modality, and introducing solutions such as Microsoft Teams Phone Mobile and Cisco Webex Go will further accelerate this trend. Mobile also influences productivity, notably in how mobile apps help improve people's interactions with business systems and workflows. Generative artificial intelligence (AI) across mobile devices will also enable employees to interact with business apps and data seamlessly.

Mobility and digital workplace capabilities have become business-critical and an important foundation of the broader digital infrastructures organizations are building to optimally support a more mobile and hybrid workforce. Increasingly, the core mobile endpoint management features that vendors in this category deliver are developing further in offering a range of new capabilities, including advanced mobile security, self-remediation, employee experience, and autonomous capabilities, as shown in **Figure 4**.

Figure 4: Digital workspace management platforms



Source: Omdia

These enhanced capabilities are evolving UEM solutions into more comprehensive digital workspace management platforms that support broader end-user compute, digital experience, security, and mobile workforce management use cases. DWM Platforms are built on top of a strong unified endpoint management foundation; however, they extend on these core capabilities with additional productivity, app, and endpoint management features that help businesses better empower and secure a more mobile-first workforce. The features and capabilities examined and compared in this report include:

- **Endpoint and application management:** This criterion examines the capabilities solutions offer that enable businesses to manage, configure, and monitor various endpoints, operating systems, and mobile applications. These are commonly the foundational capabilities delivered by DWM platforms. Additionally, this category explores the strength of productivity apps and desktop as service/VDI capabilities offered, in addition to any configuration and device and app discoverability functionality. Omdia weighted this feature set most heavily in developing the competitive analysis for this report.
- **Mobile worker security:** This category examines the baseline and advanced security capabilities delivered. Security and privacy policy management, support for zero-trust approaches, risk analytics and security scoring, and threat intelligence capabilities are among those explored within this category. In developing the competitive analysis for this report, Omdia assigned this feature set the second-highest weighted score.
- **Mobile reporting and analytics:** In this category, Omdia explores capabilities that support businesses in gathering, contextualizing, and delivering data and insights across the entire mobile and digital workspace ecosystem. Features studied here include those providing insights into endpoints, applications, and employee behaviors. In developing the competitive analysis for this report, Omdia assigned this feature set the third-highest weighted score.
- **Digital experience:** Businesses are increasingly looking for new ways to better understand, measure, and improve employee experiences. This section explores capabilities that help

businesses improve employee experiences, including digital employee experience (DEX), self-service, workflow automation, and virtual assistant functionality.

- **Partner and integration ecosystem:** This criterion explores features that enable businesses to extend the use of DWM platforms through integrations, especially those with third-party digital providers. Additionally, this section examines the strength and breadth of partnerships in place to support the adoption and utilization of the solution.
- **Deployment:** This category explores a solution's deployment options and whether solutions developed around the needs of specific industries are offered. Language support, ongoing support, and professional services capabilities are also explored as part of this category.

Market dynamics

Multiple trends and dynamics drive growth and interest in the DWM market.

Coexisting with Microsoft has become important for most UEM vendors. Microsoft's adoption growth over recent years has disrupted the UEM market in such a way that most vendors must now tell a compelling Intune integration story.

Apple management is emerging as an important competitive battleground. Over recent years, Apple has demonstrated a greater commitment to the enterprise. Features such as Declarative Device Management (DDM) are a good example of the new investment Apple is making, and established UEM vendors are keen to expand support for iOS and macOS ecosystems that have long been the focus for dedicated solutions from the likes of Jamf. Expect leaders in this space to invest further and develop management and security features for the Apple ecosystem.

Generative AI (GenAI) will have a significant impact on mobility management. The plan for how GenAI will specifically impact the UEM solution landscape is still unclear, with most vendors advising that they are still in the investigative stage of developing these capabilities. However, the value to mobile reporting, self-service and support, endpoint and application policy management, and creating a better understanding of what the digital experience looks like for employees is evident. Omdia anticipates these use cases will be the focus for UEM vendors into 2024 and beyond.

Digital workspace management platforms are a hybrid work foundation. As work styles become more remote and mobile-centric, DWM platforms will be a foundational management and security capability upon which modern technology infrastructures will be built. No longer will these tools be a nice-to-have or a convenient complement to other infrastructure solutions—they will become a vital piece of the enterprise architecture.

DWM platforms will be an important enabler of zero-trust security approaches. No single tool or practice will enable businesses to successfully embrace zero-trust security approaches—rather, it will be a combination of different and well-integrated capabilities. The device, application, and user insights DWM platforms deliver will make them an important enabler of zero trust for businesses of all sizes.

DWM is a core component of a more converged approach to business mobility. Omdia's mobile convergence model details the importance of businesses adopting a more integrated approach to the provision and ongoing management of mobile connectivity, mobility management, and mobile productivity capabilities. Collectively, these capabilities will be important in meeting the demands of the modern worker, but they often exist and are managed by different teams and in a siloed fashion within most organizations. As businesses move toward a more converged business mobility approach, the broader business value of

DWM solutions—especially around their important role in improving the employee experience—and managing policies associated with cellular provisioning (eSIMs) will become better understood and help drive improved adoption.

DWMs can enable the mobilization of the frontline workforce. Frontline workers are those employees who work away from centralized business functions and are often closest to the customers consuming the products and services that organizations deliver. Frontline worker roles include store retail workers, frontline health workers, customer-facing field service personnel, teachers, and emergency services personnel. Omdia estimates that frontline workers account for 65–70% of the total workforce, and these workers are increasingly becoming more enabled with new digital hardware and software. Mobility will be a characteristic central to this frontline worker digitization, and DWM platforms will be an important element in securing and enabling this effort.

A greater focus on cost and tool consolidation is necessary due to the economic downturn. Recent Omdia research showed how 75% of businesses are reconsidering the partnerships they currently have in place with technology vendors. The financial challenges many businesses will continue to face over the next few years will result in more organizations looking for ways to consolidate enterprise technology investments to reduce costs. The value of DWM solutions in enabling more modern workstyles, coupled with the fact these platforms deliver a range of compelling capabilities that have previously been delivered by different toolsets, makes them an attractive investment for businesses looking to realize new cost efficiencies.

DWMs can help the business deliver against its broader environmental, social, and governance (ESG) objectives. DWM platforms deliver a unified and granular view across all endpoints, providing businesses with better insights into the health of the device estate. This allows them to make better decisions around when new hardware may be required, with visibility into old hardware that may need to be recycled/retired. The advanced capabilities these solutions offer also deliver safer BYOD enablement, which could benefit employee experiences as computing hardware is more aligned to their personal preferences while helping businesses reduce costs associated with new hardware provisions.

Market leaders

This category represents what Omdia believes to be the leading market solutions that provide advanced capabilities across all areas explored within this research. Market leaders also have strong market momentum and a significant market presence, especially among enterprises. Omdia believes that vendors in this category are worthy of a place on most technology selection shortlists.

For the second year running, Microsoft assumes the strongest leadership position due to its very strong market momentum and impact and its feature-rich capability set. Microsoft offers a very attractive licensing model, especially for businesses that already have a Microsoft Enterprise License agreement. Additionally, the vendor delivers a feature-rich DWM solution and a portfolio of employee experiences and mobile security solutions. Microsoft has disrupted the UEM market in a big way, so much so that other vendors in the market must increasingly tell a compelling story about how their respective solutions complement and build on the capabilities Microsoft offers. VMware, as with last year's report, is also well represented in the leadership category. VMware offers a strong set of core endpoint and application management capabilities complemented by mobile threat defense and digital employee experience capabilities. Ivanti offers a diverse and integrated platform extending across mobility management, security, digital experience, and service management/workflow automation capabilities. In Omdia's experience, Ivanti is increasingly appearing on the shortlists of enterprises exploring investment in UEM capabilities, which is a testament to its continued efforts to raise its solution's market profile. IBM and BlackBerry are also leaders in the market,

with IBM having a strong focus on security with its MaaS360 offering and BlackBerry focusing on device and network security, as well as offering a secure set of native mobile productivity apps.

Market challengers

Solutions in this category offer a good, broad set of capabilities in addition to a respectable market presence and market momentum. Although this category of solutions does not commonly offer the more advanced capability set or have the same market presence among enterprises as those in the leader category, Omdia recommends they should still be considered as part of the technology selection process, especially by mid-sized organizations.

ManageEngine offers a very broad set of native IT management and productivity solutions that complement its UEM offering. ManageEngine's vision is for its UEM solution to serve as a bridge between ITOps and SecOps teams, enabling them to perform all endpoint-related activities from a single console, using a single agent and a single workflow. The other challenger in this year's report is OpenText—a vendor that continues to invest in growing its feature set and market presence. Considering the competitive nature of this market, it will be important for all market challengers to invest in new capabilities and go-to-market approaches that will help them compellingly differentiate themselves.

Market prospect

Hexnode offers a good set of core endpoint management capabilities but lacks the advanced features offered by other solutions in the market. Its product provides features developed to help businesses automate device management and improve the security posture, which will remain an area of investment. Smaller organizations looking for competitively priced core mobility management capabilities should explore this solution.

Market outlook

Digital infrastructure enhancements, enterprise collaboration, security, and employee productivity are converging around mobile. Business mobility—the ability to be a productive employee regardless of location—is a complex digital competency that enterprises need to get right in order to cater to more mobile-centric work styles. Connectivity, management, security, and productivity are all critical mobile competencies that businesses should consider in developing an infrastructure that optimally enables a more flexible and mobile workforce.

A key organizational challenge is managing this disparate infrastructure, as it typically consists of multiple points of management and administration. Furthermore, any associated data is often stored in silos, making it difficult to obtain meaningful usage and adoption metrics to guide future strategy. There is a lack of convergence between the tools and infrastructure supporting workplace mobility and the different people and teams who play important roles in the overall ecosystem.

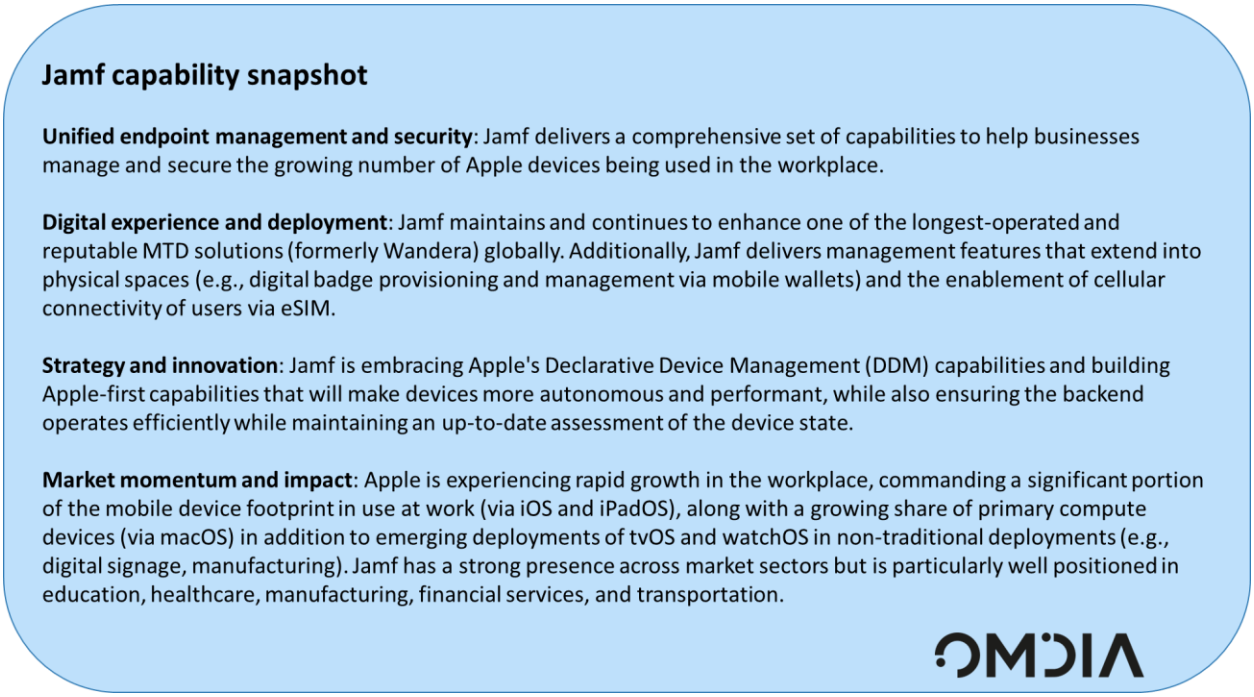
Business mobile convergence (BMC) is a concept that advocates for greater synergy between those responsible for enabling and managing workplace mobility (people) and for richer integration between mobile infrastructure and digital capabilities (technology). This strategic, unified approach is essential, given the need to support a more mobile workforce and ensure business continuity within modern business operations.

Vendor analysis

Jamf (vendor profile)

Note: By design, Jamf delivers a solution focused on Apple ecosystem support, with advanced support of Android and Windows devices undertaken via integrations with other UEM solutions. For this reason, Omdia has profiled the vendor rather than quantitatively assessing and comparing them against other vendors in this report.

Figure 5: Jamf



Source: Omdia

Overview

Apple devices have become a staple of the business end-user compute experience, and Omdia anticipates this trend will accelerate further due to Apple's increased focus on and investment in business use cases over recent years. Jamf is a vendor that simplifies work by supporting organizations in managing and securing an ecosystem of Apple devices and applications. With over 74,400 customers, including 22 of the top 25 most valuable brands, and 31.8 million devices running Jamf, the vendor has an established product portfolio, and Omdia regards it as a leader in Apple ecosystem management. This includes market-leading Apple device management, app lifecycle management, and endpoint security for Mac and mobile platforms, in addition to remote access solutions.

Jamf focuses on delivering a comprehensive set of capabilities to manage and secure the entire Apple experience at work, including device form factors and operating systems across the iOS mobile, macOS desktop, IoT, wearable, and virtual reality/augmented reality (VR/AR) categories. While best known for its

market-leading Apple ecosystem support, Jamf also supports a broad set of centralized management and security controls built specifically for Android devices. These capabilities can be deployed to personally owned devices, those running Android Enterprise, and those enhanced by additional layers of OEM protections, such as Samsung Knox. Jamf can deliver this functionality through standalone app-based deployments or integrations with other popular device management solutions.

Jamf also offers a full set of capabilities that enable Apple TV to be managed effectively at scale, with many of its customers using this platform to support a variety of work use cases, such as digital signage and kiosks in environments ranging from healthcare to manufacturing. In 2023, Apple extended MDM and remote access support to tvOS and watchOS, which Jamf has also embraced. And although Vision Pro does not formally support management yet, Jamf anticipates that similar frameworks to enable management and security will be extended to Apple's AR/VR solutions in the future.

Strengths

Market-leading Apple device management and security: Jamf is a market leader in Apple device management, with a business proposition and solution built around helping businesses secure and manage the increasingly diverse Apple device and application ecosystem. Omdia has seen Jamf become the primary UEM solution adopted by businesses well invested in the Apple ecosystem. Jamf supports zero-touch deployments of company-owned devices and user-driven device enrollments through modern approaches, including account-driven user enrollment for BYOD and company devices. Jamf was also early to market with capabilities to manage shared iOS devices securely. Its management capabilities for iOS and iPadOS extend beyond basic device management and include the ability to provision connectivity through eSIM and physical access tokens through keycards stored in digital wallets. This makes Jamf a strong choice for businesses looking to effectively manage their Apple devices. One of the more notable differentiators of Jamf's solution is an "agent" that can be deployed alongside MDM. Installation of this on-device agent enables Jamf to carry out advanced capabilities not supported by native MDM commands or not currently addressed by Apple.

Encouraging the use of GenAI to improve security and endpoint management: Jamf is advanced in its application of GenAI for tech support and endpoint management. Its virtual support assistant tailors responses by referencing the vendor's extensive documentation and real-world institutional knowledge found in the Jamf Nation forums. Security alerts can be enriched with additional telemetry data, including actions taken immediately before and after an alert. Jamf's large language model (LLM) references this data, along with threat research and insights, to deliver a detailed hypothetical root cause analysis and insights on what may have triggered the alert and why. This provides support analysts with a roadmap for potential actions and a basis for triggering automated workflows.

Development of industry-specific solutions: Jamf offers a diverse range of solutions that are productized and tailored to the needs of businesses in different industries. The vendor has developed a wide variety of industry-specific solutions, both within its native platform and through third-party integrations released via the Jamf Marketplace. Some examples include Jamf's support for shared iOS and iPadOS devices in healthcare with unique integrations supporting electronic medical record solutions and PII protection at the patient bedside. Another interesting frontline use case is tablet solutions in commercial aircraft cockpits that ensure the device is configured to meet regulatory requirements only when a pilot is operating the aircraft and not while flying as a passenger.

Considerations

Other UEM vendors are becoming more focused on the Apple ecosystem: Jamf has been the go-to vendor for dedicated Apple device management for some time. It is a large and developing market, with Jamf

measuring the TAM opportunity at over $35 billion today in potential annual subscriptions for the solutions it sells globally. This opportunity is not lost on other vendors in the UEM space that are beginning to invest significantly in broadening their support of Apple ecosystems. Although Omdia believes Jamf will still offer the most feature-rich solution for some time, greater parity between UEM solutions with Apple support is inevitable.

Further strengthening telco partnerships would help elevate Jamf's appeal: Recent Omdia research shows that businesses view telcos as a very important workplace mobility partner. This is largely because businesses are keen to adopt a converged set of mobility services and solutions that comprise connectivity, devices, management, and security—all of which telcos can deliver. Jamf has strong partnerships and relationships with telcos, which means there is an opportunity to drive an even greater share of its business via these partners as they invest further in managed mobility services, including device as a service offerings.

Federal Information Processing Standard (FIPS) 140-2 accreditation: An improvement opportunity for Jamf is to achieve FIPS 140-2 accreditation. Currently, its remote access solution is built on the Wireguard cryptography protocol, which provides benefits for mobile and hybrid workers, including fast VPN connection speeds and seamless reconnection even when roaming across networks. However, this protocol is not FIPS compliant. Jamf notes that it is working with Apple's newly released Network Relay protocol, which offers many similar core capabilities and would include FIPS accreditation. Jamf is ISO 27001 certified and has SOC 2 accreditation. Additionally, it has StateRAMP Ready status, in addition to others, as per its Trust Center.

Appendix

Methodology

Omdia Universe

Omdia's rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

The DWM/UEM market consists of many vendors that deliver solutions tailored to customers of all sizes. However, inclusion in this Universe is based on a vendor's ability to offer solutions that go above and beyond core endpoint and application management capabilities. All the vendors have a presence with midsize and large enterprise organizations (5,000 employees and above), and their solution has a global reach and presence with customers in at least three regions: Asia & Oceania; Europe, the Middle East, & Africa (EMEA); and North America. Vendors must also offer capabilities across all the areas explored by Omdia in this report. Each vendor must have at least 250 customers, and Omdia client inquiries have expressed demand for information on its product(s).

Further reading

2023 Future of Work survey (September 2023)

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