

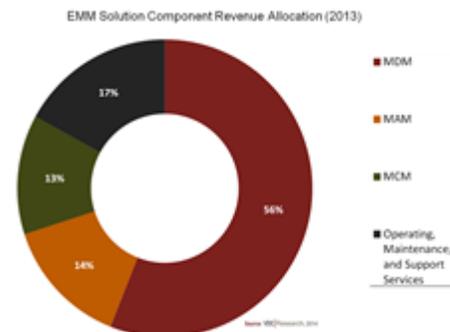
Mobile-First Enterprise Mobility Management (EMM) Vendors are a Significant Force in the Mobile Software Market, According to VDC Research

However, these vendors are at a pivot point as competitive pressures make shortening innovation cycles and getting products to market more quickly crucial for maintaining momentum.

“Mobile-first EMM vendors such as Good Technology, MobileIron and SOTI are experiencing strong growth, as the number of devices being managed by their software continues to climb rapidly.”

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Of the enterprise mobility software segments, EMM is one of the most visible and competitive in the mobile ecosystem according to VDC Research. In just the past six months, the firm notes that recent acquisitions – IBM’s acquisition of Fiberlink (11/13), VMware’s acquisition of AirWatch (1/14), and Good Technology’s acquisition of BoxTone (2/14) – have changed the markets’ dynamics. The impact of this consolidation will ultimately cause mobile-first EMM vendors to pivot and adjust their strategies. While mobile device management (MDM) is increasingly commoditized, VDC’s research showed that this solution component still accounted for 56% of EMM vendor revenues in 2013. Moving forward, VDC projects that MDM revenues will continue to grow, but vendors can expect to see stronger growth for other higher-value mobility components for managing content and applications. Mobile-first EMM vendors have expanded their solution range and demonstrated they can grow their roster of large customers; however, they will be challenged to keep pace with the changing requirements in larger deployment environments as mobility becomes strategic to the business. Vendors such as Good Technology, MobileIron and SOTI are experiencing strong growth as the number of devices being managed by their software continues to climb rapidly; however, competitive pressures make getting products to market more quickly and shortening innovation cycles crucial for maintaining momentum in the market.



As businesses implement best practices for mobile architecture, user experience, security policies, and standards, they will quickly discover that this will require more advanced solutions from their technology partners. VDC sees this trend as having a potential detrimental impact on mobile-first EMM vendors, and one that will put pressure on these vendors to differentiate in areas such as delivering a superior customer experience, providing enhanced data security, and keeping costs low while accelerating their pace of innovation.

VDC forecasts that the global market for EMM solutions will see a healthy compound annual growth rate (CAGR) of 21.2% from 2013 to 2018. A new report from VDC details revenues, regional breakouts, vertical markets, and leading vendor share for this rapidly evolving market.

As mobility becomes more engrained into business operations, the opportunity for major technology vendors (e.g., Citrix, Dell, HP, IBM, Microsoft, and VMware) to offer mobile solution bundles that can seamlessly integrate with their existing infrastructure elements will become more pronounced. These vendors will find themselves well positioned to offer their customer a la carte mobile solutions components and will also be able to be aggressive with their pricing.

“Today’s IT organizations are challenged to provide end-to-end mobile support from software distribution and patching to asset management and incident support for a wide variety of mobile platforms,” said Eric Klein, Senior Analyst for Enterprise Mobility at VDC Research. “Vendors have ridden the BYOD-influenced MDM investment wave. However, to remain viable, successful EMM vendors will need to leverage this growing installed base to pivot and expand their

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solution range developing differentiated tools and services that are less device-centric and focus more on applications and content.”

VDC's Enterprise Mobility Solutions Research Program - [Learn About the Research Program](#).

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