Vendor Landscape: Mobile Device Management Suites

Device management is only the tip of the iceberg. Go deeper to find the right MDM vendor for you.
Introduction

Select a mobile device management (MDM) vendor that simplifies your mobilized enterprise, regardless of which devices are used and who owns them.

This Research Is Designed For:

✓ Enterprises seeking to select an MDM solution.

✓ Their MDM use case may include:

  • **Implementing a bring-your-own-device (BYOD) program** while maintaining visibility and control over devices.
  
  • **Enhancing security and manageability** on company-owned devices, apps, and content.
  
  • **Dealing with consumerization** by managing and supporting an increasing variety of consumer devices and apps that are invading the enterprise.

This Research Will Help You:

✓ Understand what’s new in the MDM market.

✓ Evaluate MDM vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios.
Executive Summary

Info-Tech evaluated 12 competitors in the MDM market, including the following notable performers:

Champions:

- **AirWatch** is growing quickly based on the strength of its MDM and strong market share.
- **MobileIron** was an early leader among MDM vendors, and continues to maintain its lead by constantly innovating.
- **Citrix** acquired Zenprise’s champion-level MDM and has improved and integrated it with its own mobility products.
- **Fiberlink** stands out with cloud-only MDM, but does not sacrifice any functionality by betting on SaaS.
- **SOTI** is not as well known as other vendors, but provides full-featured MDM and unique Android and help desk capabilities.

Value Award:

- **SAP** may not be a company known for MDM, but Afaria remains a full-featured MDM suite, and the recent introduction of rock-bottom cloud pricing means SAP gives you the best bang for your buck.

Trend Setter Award:

- **MobileIron** was the first to introduce many features that are now standard among MDM suites, and continues to innovate. Its current and upcoming innovations continue to push the boundaries of what is possible with MDM.

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**Info-Tech Insight**

1. **Pure-play vendors still stand out, but consolidation is coming:**
   
   Vendors that focus exclusively on MDM are generally the strongest, but larger tech companies realize that mobile is here to stay. Some pure-plays will resist being gobbled up, but the acquisition of Zenprise by Citrix is an indication of things to come for smaller MDM vendors.

2. **MDM is more important than ever:**
   
   The idea of a post-PC world is quickly becoming reality. MDM is becoming necessary for any organization managing more than a handful of mobile devices.

3. **Innovation continues while prices drop:**
   
   Core MDM prices have dropped in the past year, but vendors are in an arms race to add unique functionality, often in the form of add-ons that come at additional cost.
Market Overview

**How it got here**

- BlackBerry (formerly RIM) made mobile devices viable business tools, and provided the management tools to properly secure control and manage company-owned smartphones through their BlackBerry Enterprise Server (BES).

- When the iPhone 3G exploded in popularity, it became common for employees to bring their own smartphones to work. As smartphones became ubiquitous, the BYOD trend meant that organizations were dealing with a variety of device types and mobile platforms, without effective tools to secure, control, and manage them.

- Early MDM acted as a central hub to keep track of devices and apply simple policies. However, businesses and vendors soon realized that BYOD provided its own set of challenges, such as separating work data from personal data, and opportunities, such as accessing apps and documents from any device at any time.

**Where it’s going**

- Today, MDM is not only for device management; mobile application management, mobile content management, and identity management are all part of MDM. Enterprise mobility management (EMM) has been proposed as a more accurate term to describe it, but MDM has stuck around as the searchable term for a central mobility management hub.

- MDM vendors have matured and begun to consolidate. Expect more consolidation in the next year as MDM vendors merge or are acquired by the bigger enterprise tech players that still don’t have a viable MDM product.

- As MDM does more, there will be fewer all-in-one solutions. Prepare to shop for a set of products that integrate with core MDM rather than a single solution.

- Mobile devices themselves are becoming more business-friendly. For example, iOS7 has introduced some features that overlap with current MDM. MDM vendors will need to continue to innovate to provide value over and above what comes standard and free on maturing mobile platforms.

Mobile technology is changing quickly. Smartphones are ubiquitous, tablets are replacing PCs as primary computers, and new form factors like wearable tech are around the corner. Choose a vendor that meets today’s needs while continuing to innovate in order to prepare for the future.
MDM vendor selection / knock-out criteria: market share, mind share, and platform coverage

- Basic device management is no longer enough. Even app management and basic security no longer differentiate top vendors, and were required for inclusion in the MDM Vendor Landscape.
- For this Vendor Landscape, Info-Tech focused on those vendors that offer broad capabilities across multiple platforms and that have a strong market presence and/or reputational presence among mid sized enterprises.

**Included in this Vendor Landscape:**

- **AirWatch.** Now a mature MDM vendor, AirWatch continues to grow and innovate.
- **BlackBerry.** Incorporating iOS and Android management into BES qualified BlackBerry for inclusion in the landscape.
- **BoxTone.** A pure-play vendor that has been making some strategic partnerships.
- **Citrix.** Acquiring Zenprise in 2012 has further strengthened Citrix’s mobile portfolio.
- **Fiberlink.** With powerful cloud-based MDM, Fiberlink has quickly become a top contender.
- **Good.** Known for email containers and top-notch security, Good also offers more traditional MDM.
- **Microsoft.** New to the vendor landscape, Microsoft now has a set of products for managing mobile devices.
- **MobileIron.** One of the most recognizable MDM vendors, MobileIron is an MDM trend setter.
- **SAP.** Afaria was an early contender in the MDM space, and continues to perform in its new home at SAP.
- **Sophos.** New to MDM, Sophos already does all the basics and becomes more advanced with each release.
- **SOTI.** Leveraging a history in industry-specific management, SOTI has powerful MDM.
- **Symantec.** An established security vendor with a full MDM product as well.
## MDM criteria and weighting factors

### Product Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
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<tbody>
<tr>
<td>Features</td>
<td>The solution provides basic and advanced feature/functionality.</td>
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<tr>
<td>Usability</td>
<td>The end-user and administrative interfaces are intuitive and offer streamlined workflow.</td>
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<tr>
<td>Affordability</td>
<td>The three-year TCO of this solution is economical. Affordability is scored for our Value Index but is does not contribute to a vendor’s overall score for the Vendor Landscape.</td>
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<tr>
<td>Architecture</td>
<td>Multiple deployment options and extensive integration capabilities are available.</td>
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### Vendor Evaluation Criteria

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<tr>
<td>Viability</td>
<td>Vendor is profitable, knowledgeable, and will be around for the long term.</td>
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<tr>
<td>Strategy</td>
<td>Vendor is committed to the space and has a future product and portfolio roadmap.</td>
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<tr>
<td>Reach</td>
<td>Vendor offers global coverage and is able to sell and provide post-sales support.</td>
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<tr>
<td>Channel</td>
<td>Vendor channel strategy is appropriate and the channels themselves are strong.</td>
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</tbody>
</table>

### Criteria Weighting:

- **Features**: 50%
- **Usability**: 25%
- **Architecture**: 25%
- **Product**: 60%
- **Vendor**: 40%
- **Strategy**: 40%
- **Channel**: 10%
- **Reach**: 10%
The Zones of the Landscape

**Champions** receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

**Market Pillars** are established players with very strong vendor credentials, but with more average product scores.

**Innovators** have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

**Emerging Players** are comparatively newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

For an explanation of how the Info-Tech Vendor Landscape is created, see [Information Presentation – Vendor Landscape](#) in the Appendix.
Balance individual strengths to find the best fit for your enterprise (slide 1 of 2)

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For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.
Balance individual strengths to find the best fit for your enterprise (slide 2 of 2)

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For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.
What is a Value Score?

The Value Score indexes each vendor’s product offering and business strength relative to their price point. It does not indicate vendor ranking.

Vendors that score high offer more bang-for-the-buck (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, SAP maintained the highest Info-Tech Value Score of the vendor group. Vendors were indexed against SAP’s performance to provide a complete, relative view of their product offerings.

Average Score: 70

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For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.
Table stakes represent the minimum standard; without these, a product doesn’t even get reviewed.

The Table Stakes

<table>
<thead>
<tr>
<th>Feature</th>
<th>What it is:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Mgmt</td>
<td>App portal, visibility into installed apps, pushing apps, volume purchasing.</td>
</tr>
<tr>
<td>Group &amp; Policy Mgmt</td>
<td>Create groups and administer policies, configuration mgmt., integration with directories.</td>
</tr>
<tr>
<td>Hardware &amp; Browser Mgmt</td>
<td>Disable device hardware features, and exert control over browser.</td>
</tr>
<tr>
<td>Inventory Mgmt</td>
<td>Track hardware and offer basic summaries or dashboards with device information.</td>
</tr>
<tr>
<td>Location Services</td>
<td>Locate managed devices and display them on a map.</td>
</tr>
<tr>
<td>Security</td>
<td>Apply and enforce security policies, remote wipe, jailbreak detection, encryption.</td>
</tr>
</tbody>
</table>

What Does This Mean?

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as table stakes.

Many of the vendors go above and beyond the outlined table stakes, some even do so in multiple categories. This section aims to highlight the products’ capabilities in excess of the criteria listed here.

Info-Tech Insight

If table stakes are all you need from your MDM solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.
**Scoring Methodology**

Info-Tech scored each vendor’s features offering as a summation of their individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale with vendors receiving half points.

**Advanced Features**

<table>
<thead>
<tr>
<th>Feature</th>
<th>What we looked for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>App Development</td>
<td>SDK or app wrapping, secure tunneling/VPN, partnerships w/popular third-party app vendors.</td>
</tr>
<tr>
<td>Email Mgmt (Advanced)</td>
<td>Reverse proxy to restrict email features and/or attachments, integrated with policy compliance.</td>
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<tr>
<td>Expense Mgmt</td>
<td>Proactively identify anomalous usage. Detect or restrict roaming, in-app purchases &amp; data usage.</td>
</tr>
<tr>
<td>Persona Separation</td>
<td>Selective wipe, encryption, integrate with device-specific separation, secure container/profile.</td>
</tr>
<tr>
<td>Platforms (Advanced)</td>
<td>Support for mobile platforms other than iOS and Android, PC mgmt, rapid support for updates.</td>
</tr>
<tr>
<td>Reporting and Analytics</td>
<td>BI-level reporting, logs and audit trails, data export and integration with BI platforms.</td>
</tr>
</tbody>
</table>

For an explanation of how Advanced Features are determined, see [Information Presentation – Feature Ranks (Stop Lights)](#) in the Appendix.
Each vendor offers a different feature set; concentrate on what your organization needs (slide 1 of 2)

<table>
<thead>
<tr>
<th>Vendor</th>
<th>App Dev</th>
<th>Doc Mgmt</th>
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<td>AirWatch</td>
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Legend:  
- =Feature fully present  
- =Feature partially present/pending  
- =Feature Absent

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Cloud or on-premise? Choose a vendor suited to your deployment method

If you want to deploy MDM in the cloud, go with a vendor that builds and markets MDM as a service.

**1 Deployment Method**

**Best suited for cloud deployment**

- airwatch
- CITRIX
- Maas360

**Best suited for on-premise deployment**

- MobileIron
- SAP
- SOTI

**Why Scenarios?**

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.
When separating work data from personal data, choose a vendor that approaches it in a way that fits your needs.

There are different approaches to managing multiple personas.

**Exemplary Performers**

- **Good**
  
  A secure container is a simple way of separating work data from personal data. Good is known for its corporate container that locks down any data within it. It is not always ideal for end users, but for security-conscious organizations it can be necessary.

- **MobileIron**
  
  MobileIron’s main persona separation approach is to support an ecosystem of native and managed apps that can share data with each other. The result is an extra layer of security without necessarily requiring users to change their behavior.

- **Citrix**
  
  Even before entering the MDM market, Citrix addressed persona separation through virtualization. By integrating with its other products and incorporating MDM security acquired through Zenprise, Citrix offers several options for separation.

---

For an explanation of how Scenarios are determined, see [Information Presentation – Scenarios](#) in the Appendix.
Do you deploy your own applications? Choose a vendor that can automatically add security and management capabilities.

App wrapping is ideal for organizations developing their own apps to be managed through MDM.

**Why Scenarios?**

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

For an explanation of how Scenarios are determined, see *Information Presentation – Scenarios* in the Appendix.
AirWatch’s MDM is best in class

**Champion**

- **Product:** AirWatch
- **Employees:** 1,400
- **Headquarters:** Atlanta, GA
- **Website:** [air-watch.com](http://air-watch.com)
- **Founded:** 2003
- **Presence:** Private

---

**Overview**

- AirWatch has quickly become a dominant force in the MDM market. With consistent growth and an exclusive focus on enterprise mobility, it is likely to remain a top player.

**Strengths**

- App wrapping and a software development kit (SDK) allow for advanced app development and integration with other enterprise solutions.
- AirWatch has advanced reporting and analytics, including expense management features and BI-like capabilities.
- AirWatch has been quick to integrate with Samsung KNOX for separating personas on some popular Android devices.
- Deployment options are plentiful. The core MDM can function in the cloud or on-premise, as can enterprise apps and docs.

**Challenges**

- AirWatch recently added document editing and annotation features, but no MDM vendor’s document management can fully match the features of unmanaged consumer productivity solutions.
- With $225 million in recent funding, AirWatch is growing quickly and is positioned to be a long-term leader in the MDM market. However, the company is still relatively new and it remains to be seen if its growth can be sustained.
AirWatch is a strong vendor and offers a full set of advanced MDM features.

Info-Tech Recommends:

AirWatch should be on nearly every MDM shortlist. It has a full set of features and is set to continue to grow and innovate.
MobileIron is one of the top MDM solutions available and continues to innovate

**Champion**

- **Product:** MobileIron
- **Employees:** 500
- **Headquarters:** Mountain View, CA
- **Website:** mobileiron.com
- **Founded:** 2007
- **Presence:** Private

**Overview**

- MobileIron is one of the best-known MDM vendors, for good reason. Their razor focus on MDM has led to continued innovation in a quickly moving market.

**Strengths**

- A complete and comprehensive solution, offering a full set of advanced features such as app wrapping, document management, email management, reporting/analytical capabilities, and advanced security.
- MobileIron’s deployment options are plentiful, with MDM software, custom apps, and documents able to be hosted either on-premise or in the cloud.

**Challenges**

- While other vendors have rapidly lowered prices in the past year, MobileIron has stuck to their guns, and is now the most expensive solution among the vendors in this landscape.
- Despite MobileIron’s substantial growth, it must continue to be innovative to sustain its champion position in the MDM market.

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

Pricing provided by vendor
MobileIron’s MDM is suitable for almost any organization that can afford it

Value Index

13
8th out of 12

Add-Ons and Deployment Options

The MobileIron Premium bundle includes core MDM plus:

- AppConnect
- Docs@Work
- Web@Work

MobileIron bundles their key products, but they are also available separately. All are available on-premise or in the cloud.

Info-Tech Recommends:

Every organization should consider MobileIron’s full-featured MDM. List price is substantially higher than other options, but seek out discounts to narrow the gap.
Citrix purchased a strong MDM suite and has made it stronger

**Champion**

- **Product:** Citrix XenMobile
- **Employees:** ~ 8,200
- **Headquarters:** Ft. Lauderdale, FL
- **Website:** [citrix.com](http://citrix.com)
- **Founded:** 1989
- **Presence:** NASDAQ: CTXS

**Overview**

- Citrix purchased pure-play MDM vendor Zenprise in late 2012, adding to its already strong lineup of mobile-centric products. The transition has gone smoothly, with Citrix being quick to integrate XenMobile with the rest of its business.

**Strengths**

- Zenprise was a champion-level MDM product, and most of its advanced functionality has been kept intact and up to date through the transition to Citrix.
- The management interface for XenMobile is modern in appearance and easy to use.
- XenMobile bundles and integrates tightly with several other Citrix products, and will continue to add more integration. Many organizations already use Citrix products, and can add XenMobile to fulfill advanced mobility requirements.

**Challenges**

- Some businesses will hesitate to purchase a solution that is still making the transition to a new company.
- Other Citrix products are required for some advanced functionality. While core MDM is reasonably priced, adding more features can multiply the cost several times.

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

Pricing provided by vendor
Citrix has powerful MDM, especially for Citrix shops

Add-Ons and Deployment Options

Add-Ons:
- App wrapping and SDK
- Enterprise data security and content collaboration
- Secure sandboxed email client
- Unified app store
- ShareFile (bundled with XenMobile)

Citrix’s MDM has integration with their other mobile products, allowing for a rich set of complementary products in Citrix shops. Both cloud and on-premise are available.

Features

<table>
<thead>
<tr>
<th>App Dev</th>
<th>Doc Mgmt</th>
<th>Email Mgmt</th>
<th>Expense Mgmt</th>
<th>Help Desk</th>
<th>Personas</th>
<th>Platforms</th>
<th>Reporting</th>
</tr>
</thead>
</table>

Info-Tech Recommends:

Citrix should be a consideration for most organizations, but especially those already using other Citrix products that could integrate with MDM for a full mobility solution from one vendor.
Fiberlink’s MDM may be cloud-based, but it is certainly not fluffy

**Overview**
- Fiberlink’s MaaS360 has quickly become one of the most well-known and most powerful MDM products on the market. The company stands out with its forward-looking dedication to cloud deployments.

**Strengths**
- Standing out as the only purely SaaS MDM suite, MaaS360 does not lose any functionality by living in the cloud. It offers a full set of advanced features. With a free trial and minimal time needed to set it up, there is little reason not to try MaaS360 when searching for an MDM solution.
- Fiberlink’s prices for core MDM have come down in the past year.
- Fiberlink is the first vendor to develop an administrator interface for Google Glass.

**Challenges**
- The lack of an on-premise deployment option may be a deal breaker for many organizations that cannot trust their information with a third party.
- While core MDM prices are down, Fiberlink, like many vendors, charges for add-ons that, while flexible, can drive prices up when advanced functionality is needed.

**Champion**
- **Product:** MaaS360
- **Employees:** 450
- **Headquarters:** Blue Bell, PA
- **Website:** maas360.com
- **Founded:** 1991
- **Presence:** Private

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

Pricing provided by vendor
Fiberlink can provide a full set of advanced features, if you don’t mind the cloud.

**Vendor Landscape:**

- **Value Index:** 96 (2nd out of 12)

**Product:**

- Overall: ★
- Features: ★
- Usability: ★
- Afford.: ★★
- Arch.: ★★

**Vendor:**

- Overall: ★
- Viability: ★
- Strategy: ★
- Reach: ★★
- Channel: ★★

**Add-Ons and Deployment Options:**

**Add-Ons:**

- App security
- Secure doc sharing
- Secure mail
- Secure browser
- Content cloud
- Expense management
- Laptop management

Fiberlink has a rich set of add-ons available beyond core MDM. It is the only vendor to function exclusively in the cloud, with no on-premise option.

**Features:**

- App Dev: ★
- Doc Mgmt: ★
- Email Mgmt: ★
- Expense Mgmt: ★
- Help Desk: ★
- Personas: ★
- Platforms: ★
- Reporting: ★

**Info-Tech Recommends:**

Unless SaaS deployment is out of the question, consider Fiberlink’s MaaS360 for full-featured MDM. Core MDM is solid, and additional features can be added as needed.
SOTI has some unique support capabilities and deep Android management

### Champion

<table>
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<tr>
<th>Product</th>
<th>SOTI MobiControl</th>
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<tr>
<td>Employees</td>
<td>250+</td>
</tr>
<tr>
<td>Headquarters</td>
<td>Mississauga, ON</td>
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<tr>
<td>Website</td>
<td>soti.net</td>
</tr>
<tr>
<td>Founded</td>
<td>1995</td>
</tr>
<tr>
<td>Presence</td>
<td>Private</td>
</tr>
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</table>

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

### Overview

- SOTI is an experienced player in the MDM space, but its name does not often come up when discussing MDM. Their device management and support functionality is very strong.

### Strengths

- SOTI has consistently proven that their help desk and support features are first class. Their remote control features on both Android and iOS are unique among MDM vendors.
- Android management is a particular focus of SOTI's, which has strong partnerships with most Android device manufacturers to enhance functionality at a deep level and reduce fragmentation issues.

### Challenges

- SOTI has a powerful SDK for custom app development, but does not have automatic app wrapping.
- SOTI has a long history in the device management business and a large customer base as a result, but struggles to gain mind share with businesses seeking an MDM solution for non-rugged devices.

Pricing provided by vendor
SOTI offers champion-level MDM at a reasonable price

SOTI has full support for both cloud and on-premise setups.

Add-Ons and Deployment Options

Add-Ons:
- User and administrator training courses
- Boot camp on-site seminars

Info-Tech Recommends:

SOTI's name may not come up as often as other champion-level MDM vendors, but it should be considered alongside them. Especially in Android-heavy organizations with heavy help desk loads, SOTI can be a powerful solution at a reasonable price.
Good Technology is known for its strong security features

**Market Pillar**

- **Product:** Good for Enterprise and Good Dynamics
- **Employees:** 700
- **Headquarters:** Sunnyvale, CA
- **Website:** good.com
- **Founded:** 1996
- **Presence:** Private

---

**Overview**

- One of the most well-established MDM vendors, Good Technology is known for a highly secure solution that keeps corporate data safe.

**Strengths**

- Security has remained Good’s main strength, with a corporate container that locks down enterprise data and apps. It is perhaps the simplest approach to separating personal from corporate data, which many organizations struggle with.
- Good now also offers core MDM without containerization for a price as low or lower than other vendors.

3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000

**Challenges**

- Good is not known for core MDM. Organizations tend to go with Good for its security features, which require the considerably more expensive Good for Enterprise container.
- The container approach can be a hassle for users, especially when the container replaces native device capabilities that users are accustomed to. While this increases cross-platform security, the approach can eliminate some of the advantages of employees using their own preferred devices.

Pricing provided by vendor

---
Consider Good when security is paramount, but do not ignore its core MDM

Add-Ons and Deployment Options

Add-Ons:
- Good for Enterprise (GFE)
- AppCentral mobile application management
- Cloud/SaaS management capabilities
- BoxTone for Good MDM
- Technical and maintenance support

Good is best known for its Good For Enterprise secure container. GFE is bundled with core MDM, but core MDM can also be purchased separately if desired.

Info-Tech Recommends:

While the company is not known for it, Good offers core MDM at a reasonable price. However, Good’s main draw is its pricier high-security products. Highly regulated or security-conscious industries should consider Good.
SAP has decent MDM with one key innovation: a rock-bottom price

**Innovator**

- **Product:** SAP Afaria
- **Employees:** 64,600
- **Headquarters:** Walldorf, Germany
- **Website:** sap.com
- **Founded:** 1972
- **Presence:** NYSE: SAP

**Overview**

- SAP’s MDM has had a long and winding road, with Afaria being acquired by Sybase (via XcelleNet), which was itself acquired by SAP. Afaria has had time to settle in to its new home, and continues to be an innovative MDM product.

**Strengths**

- SAP is introducing extremely aggressive pricing for their basic cloud MDM, coming in at less than half the price of any other vendor in this landscape.
- SAP has strong mobile document management features.
- Afaria’s enterprise app store is feature-rich, and SAP offers app wrapping through a partnership with Mocana.
- Comprehensive APIs allow for integration with other enterprise systems.

**Challenges**

- Afaria is only one of over 1,500 SAP software products, and although Afaria had strong name recognition in the early days of MDM, the product has struggled to gain visibility in the past year.

**3 year TCO for this solution falls into pricing tier 6, between $50,000 and $100,000**

Pricing provided by vendor
SAP gives you the best value for your money

Add-Ons and Deployment Options

Add-Ons:
- SAP Mobile Documents
- Mocana app wrapping (partnership)
- Managed mobility services

SAP offers several add-ons through other SAP products and partnerships with third parties. Their MDM is available on-premise or via an inexpensive cloud option.

Features

Info-Tech Recommends:

SAP’s price can’t be beat, and its MDM is adequate for most needs. It should be considered by cost-conscious organizations that don’t need some of the advanced features done better by other vendors.
BoxTone relies on some strategic partnerships

**Emerging Player**

- **Product:** BoxTone Enterprise Mobility Management
- **Employees:** 150
- **Headquarters:** Columbia, MD
- **Website:** boxtone.com
- **Founded:** 2006
- **Presence:** Private

**Overview**

- BoxTone comes from a history of augmenting BlackBerry management, but now offers full cross-platform MDM with strong application management.

**Strengths**

- BoxTone’s telecom expense management features are advanced for an MDM suite, with deep usage statistics from within managed applications.
- Proactive diagnostic and alerting features, as well as integration with third-party help desk tools, can automate management and ease help desk loads.
- A partnership with Good Technology allows the two solutions to complement each other.

**Challenges**

- Cloud deployment options exist, but are mainly offered through partners, with BoxTone emphasizing on-premise deployments.
- BoxTone has a document container, but file synchronization and sharing features rely on partners rather than being native to BoxTone.
- Organizations using both BoxTone and Good Technology will have to make choices about which features to adopt from which solution.

The vendor declined to provide pricing, and publicly available pricing could not be found.

Vendor Landscape: Mobile Device Management Suites
BoxTone has solid MDM and application management

BoxTone does basic MDM very well, especially when it comes to service management and help desk features. For other advanced features, it works better as an add-on to a container solution, like Good Technology's, rather than trying to perform every function itself.
Symantec offers capable MDM that integrates with its security products

**Emerging Player**

- **Product:** Symantec Mobile Management
- **Employees:** 21,500
- **Headquarters:** Mountain View, CA
- **Website:** symantec.com
- **Founded:** 1982
- **Presence:** NASDAQ: SYMC

The vendor declined to provide pricing, and publicly available pricing could not be found.

**Overview**

- Symantec’s main focus is security, but the company has been taking MDM seriously for several years. The acquisition of Nukona in 2012 beefed up Symantec’s mobile application wrapping and management capabilities.

**Strengths**

- Symantec provides advanced email management features as well as integration with third-party email apps to enforce access control policies.
- Symantec has made improvements to its reporting and analytical capabilities.
- Mobile Management integrates with other Symantec products and security solutions, making it a consideration for current Symantec users.

**Challenges**

- Symantec is not as fast to incorporate new mobile platforms as other vendors; for example, support for Windows Phone 8 and Windows RT are still in the works.
Symantec’s MDM does not stand out, but may be adequate for some security-focused organizations.

**Value Index**

N/A

The vendor declined to provide pricing, and publicly available pricing could not be found.

**Add-Ons and Deployment Options**

**Add-ons:**
- Symantec App Center
- Symantec Mobile Security

Symantec’s Mobile Management Suite contains both add-ons in addition to Symantec Mobile Management.

Symantec’s core MDM is only available for on-premise deployments, but App Center is available in the cloud.

**Features**

- App Dev
- Doc Mgmt
- Email Mgmt
- Expense Mgmt
- Help Desk
- Personas
- Platforms
- Reporting

- - - - - - - -

**Info-Tech Recommends:**

Symantec does not stand out in comparison with other vendors in this landscape, but organizations already using Symantec security products may find value in their integration with MDM.
Sophos Mobile Control has matured quickly

**Emerging Player**

- **Product:** Sophos Mobile Control
- **Employees:** 1,700
- **Headquarters:** Abington, UK & Burlington, MA
- **Website:** sophos.com
- **Founded:** 1985
- **Presence:** Private

**Overview**

- Sophos worked with Dialogs for several years before acquiring it, but was a late official entrant to the MDM market when it introduced Mobile Control in 2011. The product has improved quickly in the past year.

**Strengths**

- Sophos has demonstrated strong security features in its other products, and that focus remains in their mobile management offering.
- Mobile Control’s admin interface is attractive and generally easy to use.
- Sophos’s pricing is competitive, especially with per-user licensing, multi-year agreements, and volume discounts.

**Challenges**

- Sophos still struggles to catch up to more mature and focused MDM vendors. It lacks some advanced features such as app development and advanced reporting.
- Separating corporate data from personal data is not an emphasis in Sophos’s solution, with only basic containers that don’t fully integrate with Mobile Control.

**3 year TCO for this solution falls into pricing tier 7, between $100,000 and $250,000**

Pricing provided by vendor
Sophos has MDM that is basic but functional

**Vendor Landscape**

**Product**

<table>
<thead>
<tr>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
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**Vendor**

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<th>Reach</th>
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**Add-Ons and Deployment Options**

**Included in core MDM:**

- Mobile app management and collaboration
- Mobile email management features
- Security and technical support
- Managed anti-virus platforms

While other vendors have moved away from all-in-one MDM, Sophos’s core mobile management includes most features. It has cloud support, but it limits some features.

**Value Index**

50  
7th out of 12

**Info-Tech Recommends:**

The advanced functionality in Sophos Mobile Control is limited, but since the advanced features it does have are bundled with core MDM, the total cost for Sophos may be lower for organizations that need those features. Sophos is improving quickly and worth a look.
Microsoft’s MDM products are limited in comparison with other vendors’

<table>
<thead>
<tr>
<th><strong>Emerging Player</strong></th>
<th><strong>Overview</strong></th>
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<tbody>
<tr>
<td><strong>Product:</strong> Windows Intune &amp; System Center Configuration Manager</td>
<td>• Microsoft’s ActiveSync technology is at the core of policy administration in almost every other MDM vendor, but it has only recently offered its own full set of MDM solutions.</td>
</tr>
<tr>
<td><strong>Employees:</strong> 97,000</td>
<td></td>
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<tr>
<td><strong>Headquarters:</strong> Redmond, WA</td>
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<tr>
<td><strong>Website:</strong> microsoft.com</td>
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<tr>
<td><strong>Founded:</strong> 1975</td>
<td></td>
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<tr>
<td><strong>Presence:</strong> NASDAQ: MSFT</td>
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Microsoft's MDM products are limited in comparison with other vendors’

- Intune and SCCM lack almost all of the advanced features that have come to be expected from MDM vendors. Microsoft’s solutions are good for core MDM only.
- Android management is extremely limited.
- Microsoft’s MDM is wrapped up in two different products and alongside non-MDM functionality, rather than as one mobility management product.

The vendor declined to provide pricing, and publicly available pricing could not be found

<table>
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<th>$1</th>
<th>$1M+</th>
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</table>
Microsoft’s MDM is only for die-hard Microsoft fans

Microsoft’s MDM solution is spread across two products. SCCM is on-premise only; Intune is cloud-based but can integrate with SCCM.

Microsoft is late to the game in fully supporting mobile management, and there is little reason to consider its MDM products when more mature and functional products are available.
BlackBerry has finally responded to competitors by offering cross-platform MDM within BES

<table>
<thead>
<tr>
<th>Emerging Player</th>
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<tbody>
<tr>
<td><strong>Product:</strong> BlackBerry Enterprise Service 10 (BES 10)</td>
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<tr>
<td><strong>Employees:</strong> 12,700</td>
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<tr>
<td><strong>Headquarters:</strong> Waterloo, ON</td>
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<tr>
<td><strong>Website:</strong> blackberry.com</td>
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<tr>
<td><strong>Founded:</strong> 1984</td>
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<tr>
<td><strong>Presence:</strong> NASDAQ: BBRY</td>
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### Overview

- The company formerly known as RIM has incorporated management of Android and iOS devices – formerly available separately as BlackBerry Mobile Fusion – into its BlackBerry Enterprise Service (BES).

### Strengths

- BlackBerry Balance is perhaps the best example of separating corporate data from personal data on BlackBerry devices in a way that negotiates the tricky line between security and end-user ease of use. Secure Work Space brings some of that functionality to Android and iOS.
- BlackBerry’s products are still perceived as enterprise-focused and security-focused.

### Challenges

- BES 10 is essentially a new management tool rather than an upgrade for existing BES deployments. BlackBerry 10 devices require BES 10 for full functionality and are essentially a new platform to support. Both BES 10 and new BlackBerry devices will be a tough sell for many organizations that have moved on to other platforms or BYOD models.
- BlackBerry lacks many advanced cross-platform features and deployment options that pure-play MDM vendors excel in.

---

The vendor declined to provide pricing, and publicly available pricing could not be found.
BlackBerry’s BES 10 is best suited for managing BlackBerry’s own devices

**Vendor Landscape**

**Product**

<table>
<thead>
<tr>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
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<th>Arch.</th>
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</table>

**Add-Ons and Deployment Options**

**Components:**

- BES 10 for management of BB10, iOS, Android, and older BlackBerrys (via BES 5)
- BlackBerry Balance containerization for BB10
- Secure Work Container for iOS and Android

BES 10 still requires older BES servers for legacy BlackBerry management, but has cross-platform management of iOS and Android. It is only available on-premise.

**Features**

<table>
<thead>
<tr>
<th>App Dev</th>
<th>Doc Mgmt</th>
<th>Email Mgmt</th>
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</table>

**Value Index**

N/A

The vendor declined to provide pricing, and publicly available pricing could not be found

**Info-Tech Recommends:**

For organizations upgrading to new BlackBerry 10 devices, BES 10 is the only way to provide full management capabilities. However, as a cross-platform MDM solution, it pales in comparison with competitors.
Identify leading candidates with the *Mobile Device Management Vendor Shortlist Tool*

The Info-Tech *Mobile Device Management Vendor Shortlist Tool* is designed to generate a customized shortlist of vendors based on your key priorities.

This tool offers the ability to modify:

- Overall Vendor vs. Product Weightings
- Individual product criteria weightings:
  - Features
  - Usability
  - Affordability
  - Architecture
- Individual vendor criteria weightings:
  - Viability
  - Strategy
  - Reach
  - Channel
Appendix

1. Vendor Landscape Methodology: Overview
2. Vendor Landscape Methodology: Product Selection & Information Gathering
3. Vendor Landscape Methodology: Scoring
4. Vendor Landscape Methodology: Information Presentation
5. Vendor Landscape Methodology: Fact Check & Publication
6. Product Pricing Scenario
Info-Tech’s Vendor Landscapes are research materials that review a particular IT market space, evaluating the strengths and abilities of both the products available in that space, as well as the vendors of those products. These materials are created by a team of dedicated analysts operating under the direction of a senior subject matter expert over a period of six weeks.

Evaluations weigh selected vendors and their products (collectively “solutions”) on the following eight criteria to determine overall standing:

- **Features**: The presence of advanced and market-differentiating capabilities.
- **Usability**: The intuitiveness, power, and integrated nature of administrative consoles and client software components.
- **Affordability**: The three-year total cost of ownership of the solution.
- **Architecture**: The degree of integration with the vendor’s other tools, flexibility of deployment, and breadth of platform applicability.
- **Viability**: The stability of the company as measured by its history in the market, the size of its client base, and its financial performance.
- **Strategy**: The commitment to both the market-space, as well as to the various sized clients (small, mid-sized, and enterprise clients).
- **Reach**: The ability of the vendor to support its products on a global scale.
- **Channel**: The measure of the size of the vendor’s channel partner program, as well as any channel strengthening strategies.

Evaluated solutions are plotted on a standard two by two matrix:

- **Champions**: Both the product and the vendor receive scores that are above the average score for the evaluated group.
- **Innovators**: The product receives a score that is above the average score for the evaluated group, but the vendor receives a score that is below the average score for the evaluated group.
- **Market Pillars**: The product receives a score that is below the average score for the evaluated group, but the vendor receives a score that is above the average score for the evaluated group.
- **Emerging Players**: Both the product and the vendor receive scores that are below the average score for the evaluated group.

Info-Tech’s Vendor Landscapes are researched and produced according to a strictly adhered to process that includes the following steps:

- Vendor/product selection
- Information gathering
- Vendor/product scoring
- Information presentation
- Fact checking
- Publication

This document outlines how each of these steps is conducted.
Vendor Landscape Methodology: Vendor/Product Selection & Information Gathering

Info-Tech works closely with its client base to solicit guidance in terms of understanding the vendors with whom clients wish to work and the products that they wish evaluated; this demand pool forms the basis of the vendor selection process for Vendor Landscapes. Balancing this demand, Info-Tech also relies upon the deep subject matter expertise and market awareness of its Senior, Lead, and Principle Research Analysts to ensure that appropriate solutions are included in the evaluation. As an aspect of that expertise and awareness, Info-Tech’s analysts may, at their discretion, determine the specific capabilities that are required of the products under evaluation, and include in the Vendor Landscape only those solutions that meet all specified requirements.

Information on vendors and products is gathered in a number of ways via a number of channels. Initially, a request package is submitted to vendors to solicit information on a broad range of topics. The request package includes:

- A detailed survey.
- A pricing scenario (see Vendor Landscape Methodology: Price Evaluation and Pricing Scenario, below).
- A request for reference clients.
- A request for a briefing and, where applicable, guided product demonstration.

These request packages are distributed approximately twelve weeks prior to the initiation of the actual research project to allow vendors ample time to consolidate the required information and schedule appropriate resources.

During the course of the research project, briefings and demonstrations are scheduled (generally for one hour each session, though more time is scheduled as required) to allow the analyst team to discuss the information provided in the survey, validate vendor claims, and gain direct exposure to the evaluated products. Additionally, an end-user survey is circulated to Info-Tech’s client base and vendor-supplied reference accounts are interviewed to solicit their feedback on their experiences with the evaluated solutions and with the vendors of those solutions.

These materials are supplemented by a thorough review of all product briefs, technical manuals, and publicly available marketing materials about the product, as well as about the vendor itself.

Refusal by a vendor to supply completed surveys or submit to participation in briefings and demonstrations does not eliminate a vendor from inclusion in the evaluation. Where analyst and client input has determined that a vendor belongs in a particular evaluation, it will be evaluated as best as possible based on publicly available materials only. As these materials are not as comprehensive as a survey, briefing, and demonstration, the possibility exists that the evaluation may not be as thorough or accurate. Since Info-Tech includes vendors regardless of vendor participation, it is always in the vendor’s best interest to participate fully.

All information is recorded and catalogued, as required, to facilitate scoring and for future reference.
Vendor Landscape Methodology: Scoring

Once all information has been gathered and evaluated for all vendors and products, the analyst team moves to scoring. All scoring is performed at the same time so as to ensure as much consistency as possible. Each criterion is scored on a ten point scale, though the manner of scoring for criteria differs slightly:

• Features is scored via Cumulative Scoring
• Affordability is scored via Scalar Scoring
• All other criteria are scored via Base5 Scoring

In Cumulative Scoring, a single point is assigned to each evaluated feature that is regarded as being fully present, partial points to each feature that is partially present, and zero points to features that are deemed to be absent or unsatisfactory. The assigned points are summed and normalized to a value out of ten. For example, if a particular Vendor Landscape evaluates eight specific features in the Feature Criteria, the summed score out of eight for each evaluated product would be multiplied by 1.25 to yield a value out of ten.

In Scalar Scoring, a score of ten is assigned to the lowest cost solution, and a score of one is assigned to the highest cost solution. All other solutions are assigned a mathematically determined score based on their proximity to / distance from these two endpoints. For example, in an evaluation of three solutions, where the middle cost solution is closer to the low end of the pricing scale it will receive a higher score, and where it is closer to the high end of the pricing scale it will receive a lower score; depending on proximity to the high or low price it is entirely possible that it could receive either ten points (if it is very close to the lowest price) or one point (if it is very close to the highest price). Where pricing cannot be determined (vendor does not supply price and public sources do not exist), a score of 0 is automatically assigned.

In Base5 scoring a number of sub-criteria are specified for each criterion (for example, Longevity, Market Presence, and Financials are sub-criteria of the Viability criterion), and each one is scored on the following scale:

5 - The product/vendor is exemplary in this area (nothing could be done to improve the status).
4 - The product/vendor is good in this area (small changes could be made that would move things to the next level).
3 - The product/vendor is adequate in this area (small changes would make it good, more significant changes required to be exemplary).
2 - The product/vendor is poor in this area (this is a notable weakness and significant work is required).
1 - The product/vendor is terrible/fails in this area (this is a glaring oversight and a serious impediment to adoption).

The assigned points are summed and normalized to a value out of ten as explained in Cumulative Scoring above.

Scores out of ten, known as Raw scores, are transposed as-is into Info-Tech’s Vendor Landscape Shortlist Tool, which automatically determines Vendor Landscape positioning (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, below), Criteria Score (see Vendor Landscape Methodology: Information Presentation - Criteria Score, below), and Value Index (see Vendor Landscape Methodology: Information Presentation - Value Index, below).
Vendor Landscape Methodology: Information Presentation – Vendor Landscape

Info-Tech’s Vendor Landscape is a two-by-two matrix that plots solutions based on the combination of Product score and Vendor score. Placement is not determined by absolute score, but instead by relative score. Relative scores are used to ensure a consistent view of information and to minimize dispersion in nascent markets, while enhancing dispersion in commodity markets to allow for quick visual analysis by clients.

Relative scores are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion Raw score is multiplied by the pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process to eliminate any possibility of bias. Weighting factors are expressed as a percentage such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100% and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.
4. Overall Vendor scores are then normalized to a 20 point scale by calculating the arithmetic mean and standard deviation of the pool of Vendor scores. Vendors for whom their overall Vendor score is higher than the arithmetic mean will receive a normalized Vendor score of 11-20 (exact value determined by how much higher than the arithmetic mean their overall Vendor score is), while vendors for whom their overall Vendor score is lower than the arithmetic mean will receive a normalized Vendor score of between one and ten (exact value determined by how much lower than the arithmetic mean their overall Vendor score is).
5. Overall Product score is normalized to a 20 point scale according to the same process.
6. Normalized scores are plotted on the matrix, with Vendor score being used as the x-axis, and Product score being used as the y-axis.

Vendor Landscape

- **Champions**: solutions with above average Vendor scores and above average Product scores.
- **Innovators**: solutions with below average Vendor scores and above average Product scores.
- **Emerging Players**: solutions with below average Vendor scores and below average Product scores.
- **Market Pillars**: solutions with above average Vendor scores and below average Product scores.
Vendor Landscape Methodology: Information Presentation – Criteria Scores (Harvey Balls)

Info-Tech’s Criteria Scores are visual representations of the absolute score assigned to each individual criterion, as well as of the calculated overall Vendor and Product scores. The visual representation used is Harvey Balls.

Harvey Balls are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

2. Each individual criterion Raw score is multiplied by a pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process, based on the expertise of the Senior or Lead Research Analyst, to eliminate any possibility of bias. Weighting factors are expressed as a percentage, such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100%, and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.

3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.

4. Both overall Vendor score / overall Product score, as well as individual criterion Raw scores are converted from a scale of one to ten to Harvey Ball scores on a scale of zero to four, where exceptional performance results in a score of four and poor performance results in a score of zero.

5. Harvey Ball scores are converted to Harvey Balls as follows:
   - A score of four becomes a full Harvey Ball.
   - A score of three becomes a three-quarter full Harvey Ball.
   - A score of two becomes a half full Harvey Ball.
   - A score of one becomes a one-quarter full Harvey Ball.
   - A score of zero becomes an empty Harvey Ball.

6. Harvey Balls are plotted by solution in a chart where rows represent individual solutions and columns represent overall Vendor / overall Product, as well as individual criteria. Solutions are ordered in the chart alphabetically by vendor name.
Vendor Landscape Methodology: Information Presentation – Feature Ranks (Stop Lights)

Info-Tech’s Feature Ranks are visual representations of the presence/availability of individual features that collectively comprise the Features’ criterion. The visual representation used is Stop Lights.

Stop Lights are determined as follows:

1. A single point is assigned to each evaluated feature that is regarded as being fully present, partial points to each feature that is partially present, and zero points to features that are deemed to be fully absent or unsatisfactory.
   - Fully present means all aspects and capabilities of the feature as described are in evidence.
   - Fully absent means all aspects and capabilities of the feature as described are missing or lacking.
   - Partially present means some, but not all, aspects and capabilities of the feature as described are in evidence, OR all aspects and capabilities of the feature as described are in evidence, but only for some models in a line.

2. Feature scores are converted to Stop Lights as follows:
   - Full points become a Green light.
   - Partial points become a Yellow light.
   - Zero points become a Red light.

3. Stop Lights are plotted by solution in a chart where rows represent individual solutions and columns represent individual features. Solutions are ordered in the chart alphabetically by vendor name.

For example, a set of applications is being reviewed and a feature of “Integration with Mobile Devices” that is defined as “availability of dedicated mobile device applications for iOS, Android, and BlackBerry devices” is specified. Solution A provides such apps for all listed platforms and scores “Green,” solution B provides apps for iOS and Android only and scores “Yellow,” while solution C provides mobile device functionality through browser extensions, has no dedicated apps, and so scores “Red.”

<table>
<thead>
<tr>
<th>Stop Lights</th>
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<tr>
<td>Green means a feature is fully present; Red, fully absent.</td>
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<table>
<thead>
<tr>
<th>Features</th>
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<tbody>
<tr>
<td>Feature 1</td>
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<tr>
<td>Green</td>
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Yellow shows partial availability (such as in some models in a line).
Vendor Landscape Methodology: Information Presentation – Value Index

Info-Tech’s Value Index is an indexed ranking of solution value per dollar as determined by the Raw scores assigned to each criteria (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

Value scores are calculated as follows:

1. The Affordability criterion is removed from the overall Product score and the remaining Product score criteria (Features, Usability, Architecture) are reweighted so as to retain the same weightings relative to one another, while still summing to 100%. For example, if all four Product criteria were assigned base weightings of 25%, for the determination of the Value score, Features, Usability, and Architecture would be reweighted to 33.3% each to retain the same relative weightings while still summing to 100%.

2. A sum-product of the weighted Vendor criteria scores and of the reweighted Product criteria scores is calculated to yield an overall Vendor score and a reweighted overall Product score.

3. The overall Vendor score and the reweighted overall Product score are then summed, and this sum is multiplied by the Affordability Raw score to yield an interim Value score for each solution.

4. All interim Value scores are then indexed to the highest performing solution by dividing each interim Value score by the highest interim Value score. This results in a Value score of 100 for the top solution and an indexed Value score relative to the 100 for each alternate solution.

5. Solutions are plotted according to Value score, with the highest score plotted first, and all remaining scores plotted in descending numerical order.

Where pricing is not provided by the vendor and public sources of information cannot be found, an Affordability Raw score of zero is assigned. Since multiplication by zero results in a product of zero, those solutions for which pricing cannot be determined receive a Value score of zero. Since Info-Tech assigns a score of zero where pricing is not available, it is always in the vendor’s best interest to provide accurate and up-to-date pricing. In the event that insufficient pricing is available to accurately calculate a Value Index Info-Tech will omit it from the Vendor Landscape.
Vendor Landscape Methodology: Information Presentation – Price Evaluation

Info-Tech’s Price Evaluation is a tiered representation of the three year Total Cost of Ownership (TCO) of a proposed solution. Info-Tech uses this method of communicating pricing information to provide high-level budgetary guidance to its end-user clients while respecting the privacy of the vendors with whom it works. The solution TCO is calculated and then represented as belonging to one of ten pricing tiers.

Pricing tiers are as follows:
1. Between $1 and $2,500
2. Between $2,500 and $5,000
3. Between $5,000 and $10,000
4. Between $10,000 and $25,000
5. Between $25,000 and $50,000
6. Between $50,000 and $100,000
7. Between $100,000 and $250,000
8. Between $250,000 and $500,000
9. Between $500,000 and $1,000,000
10. Greater than $1,000,000

Where pricing is not provided, Info-Tech makes use of publicly available sources of information to determine a price. As these sources are not official price lists, the possibility exists that they may be inaccurate or outdated, and so the source of the pricing information is provided. Since Info-Tech publishes pricing information regardless of vendor participation, it is always in the vendor’s best interest to supply accurate and up to date information.

Info-Tech’s Price Evaluations are based on pre-defined pricing scenarios (see Product Pricing Scenario, below) to ensure a comparison that is as close as possible between evaluated solutions. Pricing scenarios describe a sample business and solicit guidance as to the appropriate product/service mix required to deliver the specified functionality, the list price for those tools/services, as well as three full years of maintenance and support.
Vendor Landscape Methodology:
Information Presentation – Scenarios

Info-Tech’s Scenarios highlight specific use cases for the evaluated solution to provide as complete (when taken in conjunction with the individual written review, Vendor Landscape, Criteria Scores, Feature Ranks, and Value Index) a basis for comparison by end-user clients as possible.

Scenarios are designed to reflect tiered capability in a particular set of circumstances. Determination of the Scenarios in question is at the discretion of the analyst team assigned to the research project. Where possible, Scenarios are designed to be mutually exclusive and collectively exhaustive, or at the very least, hierarchical such that the tiers within the Scenario represent a progressively greater or broader capability.

Scenario ranking is determined as follows:

1. The analyst team determines an appropriate use case.
   *For example:*
   - Clients that have multinational presence and require vendors to provide four-hour onsite support.

2. The analyst team establishes the various tiers of capability.
   *For example:*
   - Presence in Americas
   - Presence in EMEA
   - Presence in APAC

3. The analyst team reviews all evaluated solutions and determines which ones meet which tiers of capability.
   *For example:*
   - Presence in Americas – Vendor A, Vendor C, Vendor E
   - Presence in EMEA – Vendor A, Vendor B, Vendor C
   - Presence in APAC – Vendor B, Vendor D, Vendor E

4. Solutions are plotted on a grid alphabetically by vendor by tier. Where one vendor is deemed to be stronger in a tier than other vendors in the same tier, they may be plotted non-alphabetically.
   *For example:*
   - Vendor C is able to provide four hour onsite support to 12 countries in EMEA while Vendors A and B are only able to provide four-hour onsite support to eight countries in EMEA; Vendor C would be plotted first, followed by Vendor A, then Vendor B.

Analysts may also elect to list only the most Exemplary Performers for a given use-case. One to three vendors will appear for each of these purchasing scenarios with a brief explanation as to why we selected them as top-of-class.
Vendor Landscape Methodology: Information Presentation – Vendor Awards

At the conclusion of all analyses, Info-Tech presents awards to exceptional solutions in three distinct categories. Award presentation is discretionary; not all awards are extended subsequent to each Vendor landscape and it is entirely possible, though unlikely, that no awards may be presented.

Awards categories are as follows:

- **Champion Awards** are presented to those solutions, and only those solutions, that land in the Champion zone of the Info-Tech Vendor Landscape (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, above). If no solutions land in the Champion zone, no Champion Awards are presented. Similarly, if multiple solutions land in the Champion zone, multiple Champion Awards are presented.

- **Trend Setter Awards** are presented to those solutions, and only those solutions, that are deemed to include the most original/inventive product/service, or the most original/inventive feature/capability of a product/service. If no solution is deemed to be markedly or sufficiently original/inventive, either as a product/service on the whole or by feature/capability specifically, no Trend Setter Award is presented. Only one Trend Setter Award is available for each Vendor Landscape.

- **Best Overall Value Awards** are presented to those solutions, and only those solutions, that are ranked highest on the Info-Tech Value Index (see Vendor Landscape Methodology: Information Presentation – Value Index, above). If insufficient pricing information is made available for the evaluated solutions, such that a Value Index cannot be calculated, no Best Overall Value Award will be presented. Only one Best Overall Value Award is available for each Vendor Landscape.

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<tr>
<th>Vendor Awards</th>
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<tbody>
<tr>
<td>Info-Tech’s <strong>Champion Award</strong> is presented to solutions in the Champion zone of the Vendor Landscape.</td>
</tr>
<tr>
<td>Info-Tech’s <strong>Trend Setter Award</strong> is presented to the most original/inventive solution evaluated.</td>
</tr>
<tr>
<td>Info-Tech’s <strong>Best Overall Value Award</strong> is presented to the solution with the highest Value Index score.</td>
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Vendor Landscape Methodology: Fact Check & Publication

Info-Tech takes the factual accuracy of its Vendor Landscapes, and indeed of all of its published content, very seriously. To ensure the utmost accuracy in its Vendor Landscapes, we invite all vendors of evaluated solutions (whether the vendor elected to provide a survey and/or participate in a briefing or not) to participate in a process of Fact Check.

Once the research project is complete and the materials are deemed to be in a publication ready state, excerpts of the material specific to each vendor’s solution are provided to the vendor. Info-Tech only provides material specific to the individual vendor’s solution for review encompassing the following:

- All written review materials of the vendor and the vendor’s product that comprise the evaluated solution.
- Info-Tech’s Criteria Scores / Harvey Balls detailing the individual and overall Vendor / Product scores assigned.
- Info-Tech’s Feature Rank / Stop Lights detailing the individual feature scores of the evaluated product.
- Info-Tech’s Raw Pricing for the vendor either as received from the vendor or as collected from publicly available sources.
- Info-Tech’s Scenario ranking for all considered scenarios for the evaluated solution.

Info-Tech does not provide the following:

- Info-Tech’s Vendor Landscape placement of the evaluated solution.
- Info-Tech’s Value Score for the evaluated solution.
- End-user feedback gathered during the research project.
- Info-Tech’s overall recommendation in regard to the evaluated solution.

Info-Tech provides a one-week window for each vendor to provide written feedback. Feedback must be corroborated (be provided with supporting evidence), and where it does, feedback that addresses factual errors or omissions is adopted fully, while feedback that addresses opinions is taken under consideration. The assigned analyst team makes all appropriate edits and supplies an edited copy of the materials to the vendor within one week for final review.

Should a vendor still have concerns or objections at that time, they are invited to a conversation, initially via email, but as required and deemed appropriate by Info-Tech, subsequently via telephone, to ensure common understanding of the concerns. Where concerns relate to ongoing factual errors or omissions they are corrected under the supervision of Info-Tech’s Vendor Relations personnel. Where concerns relate to ongoing differences of opinion they are again taken under consideration with neither explicit nor implicit indication of adoption.

Publication of materials is scheduled to occur within the six weeks immediately following the completion of the research project, but does not occur until the Fact Check process has come to conclusion, and under no circumstances are “pre-publication” copies of any materials made available to any client.
Product Pricing Scenario

A mid-level clothing manufacturer/retailer with two US offices and 1,500 total employees is looking to implement a centrally managed mobile device management solution. The firm is primarily interested in providing basic management and support for a variety of iOS and Android smartphones and tablets.

The corporate office breakdown is as follows:

- 1,500 users with mobile devices. All users have smartphones, but many also have a tablet.
- 2,200 devices require management and visibility.

US West Coast (Head Office)
Employing 1,600 people (70% of total staff), the west coast office holds Sales, Finance, Strategy, Marketing, Buyers, and the majority of IT. The IT staff here consists of 45 employees, three of which are dedicated security professionals consisting of one security manager and two security analysts.

US East Coast (Satellite)
Employing 200 people (10% of total staff), the east coast office holds solely a Marketing department.

The expected solution capabilities are as follows:

- Core mobile device management with the following capabilities:
  - Keep track of hardware and summarize information about managed devices.
  - Apply basic ActiveSync policies.
  - Additional basic security, such as jailbreak detection and remote wipe capabilities.
  - Apply and enforce policies based on device type, platform, ActiveDirectory group, etc.
- Advanced features such as application management/development and document management are not included in this pricing scenario.