

# The Forrester Wave™: Enterprise Mobile Management, Q4 2015

The 11 Providers That Matter Most And How They Stack Up

by Christian Kane

December 4, 2015

## Why Read This Report

In Forrester's 25-criteria evaluation of enterprise mobile management (EMM) vendors, we identified the 11 most significant EMM providers — AirWatch by VMware, BlackBerry, Citrix, Good Technology, IBM, Landesk, Microsoft, MobileIron, SAP, Sophos, and Soti — and analyzed their offerings. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help infrastructure and operations (I&O) professionals select the right partner for their enterprise mobile management.

## Key Takeaways

### **IBM, AirWatch by VMware, MobileIron, Citrix, And BlackBerry Lead The Pack**

Forrester's research uncovered a market in which IBM, AirWatch by VMware, MobileIron, Citrix, and BlackBerry lead the pack. Soti, Good Technology, Microsoft, SAP, and Sophos offer competitive options. Landesk lags behind.

### **I&O Pros Seek Application Management, Security, And Unified Device Management**

The enterprise mobile management market is growing because more infrastructure and operations professionals see mobility as a way to address their top challenges. This market growth is due in large part to the fact that I&O pros increasingly trust EMM providers to act as strategic partners, advising them on top mobile transformation decisions.

### **Data, App, And Unified Device Management Are Key Differentiators**

As mobile device management (MDM) technology becomes outdated and less effective, improved app and data management will dictate which providers lead the pack. Vendors that can provide a combination of data, app, and unified device management position themselves to successfully deliver a productivity and security solution to drive workforce enablement for their customers.

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### Table Of Contents

- 2 EMM Solutions Are Key Components In Mobilizing The Workforce**  
  
EMM Is The Model For Future Unified Application And Device Management
- 3 Enterprise Mobile Management Evaluation Overview**  
  
This Evaluation Highlights Product Capabilities, Vendor Strategy, And Market Reach  
  
This Evaluation Focuses On The Top 11 Enterprise Mobile Management Solutions
- 4 A Tight Race For Leadership And Many Strong Contenders**
- 8 Vendor Profiles**  
  
Leaders  
  
Strong Performers  
  
Contenders
- 11 Supplemental Material**

### Notes & Resources

Forrester conducted product evaluations in October 2015 and interviewed 11 vendor and user companies: AirWatch by VMware, BlackBerry, Citrix, Good Technology, IBM, Landesk, Microsoft, MobileIron, SAP, Sophos, and Soti.

### Related Research Documents

- [Brief: The Future Of Mobile Device Management](#)
- [The Mobile App-ocalypse Is Coming: Are You Ready?](#)
- [Quick Take: BlackBerry Acquires Good Technology, Buying Share In The EMM Market](#)

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

## EMM Solutions Are Key Components In Mobilizing The Workforce

Mobility is front and center for companies as they look to transform the way employees do their jobs by giving them tools that fit the context of the work they do. And mobility is often a catalyst for broader workforce enablement initiatives — with good reason. In the “The Mobile App-ocalypse Is Coming: Are You Ready?” Forrester report, we uncovered the criticality for I&O leaders of facilitating access to mobile tools. Employees who have access to five to 10 mobile apps are at least 20 percentage points more likely to feel that their companies are growing, to advocate for their companies, to be happier, and to feel their customers get better service than those of companies that don’t have that kind of mobile access.<sup>1</sup> EMM solutions are a key component in helping you extend these apps to employees who can capture those benefits.

### EMM Is The Model For Future Unified Application And Device Management

Workforce enablement is not limited to just mobile devices, and the majority of employees are using multiple devices for work. For I&O pros responsible for managing employee devices, having separate management and security tools for different PCs and mobile devices hampers the ability to ensure a consistent experience for employees regardless of the device they’re using. Employees need apps and content across all of their devices, and I&O wants to set one policy across all employee tools. EMM solutions are evolving to streamline management and security for all the tools employees use and bring a consistent experience.<sup>2</sup> This gives I&O pros an approach for unified workforce enablement, which addresses:

- › **Device management.** Fifty-four percent of North American and European information workers now use three or more devices for work.<sup>3</sup> Regardless of the platform or form factor, I&O pros still must ensure any employee device is healthy, compliant, and has the appropriate security policy on it. Employees who use multiple devices during the day need to know that all their devices will be able to help them get their jobs done.
- › **Application and content access.** That kind of device diversity means that workers need access to apps across mobile, PC, web, and virtual channels. They also need the simplicity of a singular app experience without worrying about the device they’re on. Taking a unified approach allows I&O pros to get away from setting individual policies per form factor and entitles workers to an application across all of the devices they use.
- › **Threat management.** When a threat compromises one device or app that an employee uses, there are immediate implications for any other corporate system the device or app is connected to. I&O pros and their security peers need unified threat management — or visibility and control across all of the employee’s workforce tools — providing the ability to take action immediately and reduce the potential threat.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

## Enterprise Mobile Management Evaluation Overview

To assess the state of the EMM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top EMM vendors.

### This Evaluation Highlights Product Capabilities, Vendor Strategy, And Market Reach

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 25 criteria, which we grouped into three high-level buckets:

- › **Current offering.** The criteria in this section are geared toward seeing how offerings help companies manage their mobile transformation alongside a wide range of workforce devices, applications, and services. We evaluated vendors on implementation and operation, PC/Mac management, OS support, mobile device management, network security, reporting and analytics, telecom expense management, containerization, app management, app security, enterprise app store extensibility, enterprise app store experience, data management and security, identity and access control, and secure productivity apps.
- › **Strategy.** To provide insight into a company's trajectory, Forrester evaluated each vendor's strategy on workforce technology vision, road map aggressiveness, partner ecosystem, supporting products and services, user experience, and customer confidence in vision.
- › **Market presence.** We evaluated market presence based on customer count, install base, revenue, and global presence.

### This Evaluation Focuses On The Top 11 Enterprise Mobile Management Solutions

Forrester included 11 vendors in the assessment: AirWatch by VMware, BlackBerry, Citrix, Good Technology, IBM, Landesk, Microsoft, MobileIron, SAP, Sophos, and Soti. Each of these vendors has (see Figure 1):

- › **Components that were available as of September 2, 2015.** Any feature or product releases after September 2, 2015, were not part of the product evaluation, but we considered them in the strategy portion of the evaluation. Additionally, the majority of the products in this evaluation have had updates since we collected data. While Forrester feels this evaluation provides a fair assessment of the market, we encourage customers to ask vendors about their most recent updates.
- › **Evidence of marketplace viability.** The vendor must generate more than \$10 million in annual revenue from the mobile management product and have over 100 customers with more than 3,000 devices under management.
- › **Mindshare among Forrester's enterprise customers.** Forrester client inquiries, shortlists, consulting projects, and case studies frequently mention the vendors we evaluated.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

**FIGURE 1** Evaluated Vendors: Vendor Information And Selection Criteria

Company name	Product name	Product version
AirWatch by VMware	AirWatch Enterprise Mobility Management	8.1
BlackBerry	BES12	12.2
Citrix	XenMobile	10
Good Technology	Good Secure Mobility Solution	N/A
IBM	MobileFirst Protect	10.50, September 2015
Landesk	Landesk Mobility Manager Wavelink Avalanche	9.6 6.1
Microsoft	Enterprise Cloud Suite (includes EMS and Office 365)	N/A
MobileIron	MobileIron	V8
SAP	Mobile Secure Mobile App Protection Mobile Documents	3.2 3.3 1.4
Sophos	Sophos Mobile Control (SMC) Sophos Cloud - Mobile	5.1 v.3
Soti	Soti MobiControl	12.3

**Vendor selection criteria**

**Components that were available as of September 2, 2015.** Any feature or product releases after September 2, 2015, were not part of the product evaluation, but we considered them in the strategy portion of the evaluation. Additionally, the majority of the products in this evaluation have had updates since we collected data. While Forrester feels this evaluation provides a fair assessment of the market, we encourage customers to ask vendors about their most recent updates.

**Evidence of marketplace viability.** The vendor must generate more than \$10 million in annual revenue from the mobile management product and have over 100 customers with 3,000+ devices under management.

**Mindshare among Forrester's enterprise customers.** Forrester client inquiries, shortlists, consulting projects, and case studies frequently mention the vendors we evaluated.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

## A Tight Race For Leadership And Many Strong Contenders

The evaluation uncovered a market in which (see Figure 2):

- › **IBM, AirWatch by VMware, MobileIron, Citrix, and BlackBerry lead the pack.** These vendors demonstrated market-leading strategies and offerings across mobile and PC management, threat management, and workforce productivity. IBM's complete portfolio paired with a strong partner and services organization gives it the breadth to tackle most customer challenges. AirWatch's commitment to simplifying mobility for customers helps them build best practices and develop a clear strategy for transformation. MobileIron's easy integration with best-of-breed solutions in areas like security or analytics means customers don't have to switch their providers to extend that value to mobile management. Citrix's focus on productivity and user experience means strong business apps and business process transformation. BlackBerry's strong network and data security paired with recently acquired Good Technology's containerization for new devices and application services will enhance its offering further and cement its leadership position.
- › **Soti, Good Technology, Microsoft, SAP, and Sophos offer competitive options.** Each of these is a compelling solution with specific strengths that will meet certain customers' needs; however, they lacked some capabilities, which prevented them from demonstrating market leadership. Soti's original equipment manufacturer (OEM) partnerships and security work make it a strong solution for Android and rugged devices. Microsoft's strong identity, data security, and integration into ConfigMgr and Office make it a strong option for any existing customer. SAP's applications, analytics, and app development offering make it a strong solution for customers looking to mobilize business processes within their companies. Sophos' unified threat management gives customers strong visibility and control of the security of all devices their workforce uses.
- › **Landesk rounds out the list as a Contender.** Landesk has strong PC and Mac management capabilities as well as rugged and semi-rugged device support. It has also made several acquisitions across device management, security, and analytics markets. As all of these products come together in its unified vision, Forrester expects Landesk's offerings to continue to improve across many of the dimensions in this evaluation.

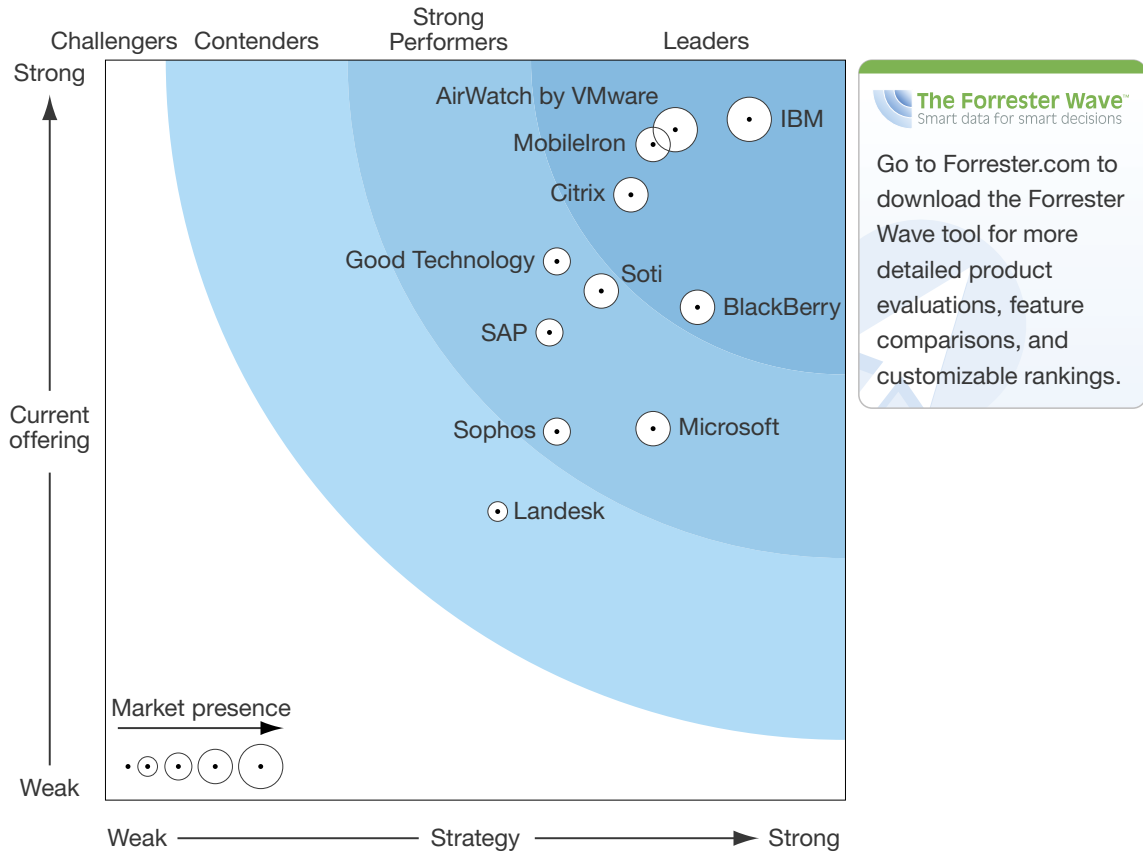
We initially included Globo in this report. Due to recent disclosures connected with reporting revenues and customers, Forrester has elected to remove Globo's solution from this evaluation, as we believe we cannot accurately represent this offering for our clients.

This evaluation of the EMM market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

**FIGURE 2** Forrester Wave™: Enterprise Mobile Management, Q4 '15



**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

**FIGURE 2** Forrester Wave™: Enterprise Mobile Management, Q4 '15 (Cont.)

	Forrester's Weighting	AirWatch by VMware	BlackBerry	Citrix	Good Technology	IBM	Landesk	Microsoft	MobileIron	SAP	Sophos	Soti
<b>CURRENT OFFERING</b>	50%	4.53	3.33	4.09	3.64	4.60	1.95	2.51	4.43	3.16	2.49	3.44
Implementation and operation	7%	3.00	3.00	3.00	3.00	5.00	2.00	1.00	3.00	2.00	3.00	3.00
PC/Mac management	8%	5.00	1.00	3.00	1.00	5.00	5.00	3.00	5.00	3.00	0.00	5.00
OS support	7%	5.00	3.00	4.00	4.00	5.00	3.00	3.00	5.00	3.00	2.00	4.00
Mobile device management (MDM)	5%	5.00	3.00	5.00	3.00	5.00	3.00	3.00	5.00	3.00	3.00	3.00
Network security	7%	4.00	3.00	4.00	4.00	4.00	2.00	0.00	4.00	4.00	3.00	4.00
Reporting and analytics	6%	5.00	4.00	5.00	5.00	5.00	2.00	2.00	5.00	1.00	2.00	5.00
Telecom expense management (TEM)	7%	3.00	5.00	3.00	5.00	5.00	0.00	0.00	5.00	1.00	1.00	1.00
Containerization	6%	5.00	5.00	5.00	3.00	5.00	2.00	2.00	5.00	5.00	1.00	5.00
App management	7%	5.00	4.00	4.00	5.00	4.00	3.00	4.00	5.00	3.00	3.00	3.00
App security	6%	4.00	2.00	3.00	4.00	4.00	2.00	2.00	4.00	2.00	4.00	4.00
Enterprise app store extensibility	8%	5.00	3.00	4.00	2.00	4.00	1.00	4.00	4.00	4.00	3.00	2.00
Enterprise app store experience	6%	5.00	2.00	5.00	5.00	5.00	2.00	2.00	5.00	5.00	2.00	2.00
Data management and security	6%	4.00	4.00	4.00	2.00	4.00	0.00	4.00	4.00	3.00	4.00	4.00
Identity and access control	6%	5.00	3.00	5.00	4.00	4.00	1.00	2.00	5.00	3.00	4.00	4.00
Secure productivity apps	8%	5.00	5.00	5.00	5.00	5.00	1.00	5.00	3.00	5.00	3.00	3.00
<b>STRATEGY</b>	50%	3.85	4.00	3.55	3.05	4.35	2.65	3.70	3.70	3.00	3.05	3.35
Workforce technology vision	20%	4.00	4.00	4.00	4.00	4.00	2.00	4.00	4.00	3.00	3.00	3.00
Road map aggressiveness	15%	4.00	5.00	5.00	4.00	5.00	5.00	5.00	4.00	4.00	3.00	3.00
Partner ecosystem	15%	3.00	4.00	3.00	3.00	3.00	1.00	4.00	5.00	2.00	3.00	3.00
Supporting products and services	15%	3.00	3.00	1.00	1.00	5.00	1.00	1.00	1.00	3.00	1.00	3.00
User experience	20%	4.00	4.00	4.00	3.00	5.00	3.00	4.00	4.00	3.00	4.00	4.00
Customer confidence in vision	15%	5.00	4.00	4.00	3.00	4.00	4.00	4.00	4.00	3.00	4.00	4.00
<b>MARKET PRESENCE</b>	0%	4.25	4.00	3.75	2.75	4.25	1.50	3.50	3.25	2.75	2.50	3.25
Customer count	25%	5.00	3.00	4.00	4.00	5.00	3.00	4.00	4.00	3.00	3.00	5.00
Install base	25%	4.00	5.00	4.00	2.00	5.00	1.00	3.00	3.00	3.00	3.00	4.00
Revenue	25%	3.00	3.00	3.00	3.00	3.00	1.00	3.00	3.00	2.00	1.00	1.00
Global presence	25%	5.00	5.00	4.00	2.00	4.00	1.00	4.00	3.00	3.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).



**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

## Vendor Profiles

### Leaders

- › **IBM.** IBM's MobileFirst Protect (MaaS360) product allows customers to easily add modules with appropriate functionality as they need them. The vendor provides customers with a wide variety of mobility and security tools via integration of the EMM product with other IBM MobileFirst products such as ISAM for identity and access management, the MobileFirst Platform for application development, and QRadar for security intelligence. IBM customers also have access to a rich set of analytics and data with which they can compare their own policies and configurations with those of similar companies using the platform. IBM's large professional services portfolio also helps drive more competitive advantages for IBM moving forward.
- › **AirWatch by VMware.** AirWatch continues to help customers manage a wide variety of apps and devices in its environments with comprehensive platform support that includes both PC and Mac. As part of VMware, AirWatch also leverages Identity Manager and NSX to manage identity and network security across the product portfolio and customer platforms. AirWatch has made a significant commitment to help customers share best practices and bring more consistency to their mobile programs. Its annual user conference features breakout sessions for customers with similar workers or in similar industries to share and collaborate. Additionally, AirWatch's ACE and AppShield programs bring partners together to promote more consistency of management and security in mobile application development.
- › **MobileIron.** MobileIron is focused on neutrality, building the solution with customers' heterogeneous environments in mind, and integration with existing best-of-breed enterprise solutions. MobileIron is one of the few remaining EMM vendors that doesn't have additional products or services in other markets, and therefore the EMM product isn't balanced against or prioritized around a larger portfolio of solutions. As a result, MobileIron has a strong app and data management offering that also leverages its secure network gateway — Sentry. Many of MobileIron's customers boast large mobile application deployments that the solution manages and secures.
- › **Citrix.** Citrix maintains its strong focus on transforming workflows and improving productivity across all devices, including virtual machines. Its EMM solution, which includes MDX Technology, NetScaler, ShareFile, a suite of Worx mobile apps, and XenMobile, provides integrations to help customers create, connect, and secure new applications and workflows. Citrix has strong application and data security capabilities and also addresses network security and load balancing with its NetScaler offering, which works across its entire product portfolio. XenMobile is available standalone as well as part of a broader mobile workspace offering combined with the company's desktop virtualization solution. Citrix's commitment to great user experience is evident across its portfolio of secure productivity apps, which are integrated to help employee workflows that span multiple applications.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

## The 11 Providers That Matter Most And How They Stack Up

- › **BlackBerry.** BlackBerry looks like a very different company today than it did a few years ago — and that's a good thing for customers. BES has become a truly cross-platform solution without leaving behind the commitment to security that entrenched it in the enterprise. The acquisitions of AtHoc, WatchDox, and, most recently, Good Technology show a clear commitment to helping customers with secure collaboration, communication, and application development. BlackBerry's IoT Platform, NOC, and QNX platform also position it well as the enterprise begins to use more connected devices. BlackBerry's announcement of its intent to acquire Good Technology took place after we finalized data collection for this report, and each offering is still available. Forrester expects this acquisition to help BlackBerry in existing areas like application security and emerging areas like the Internet of Things (IoT).<sup>4</sup>

**Strong Performers**

- › **Soti.** Soti has an enterprise mobility management solution differentiated by its strong data security functionality as well as solid OS and network security capabilities. Many customers leverage Soti MobiControl to manage consumer devices used by information workers as well as new and legacy rugged and semi-rugged mobile devices. Soti's Android+ technology provides deep management capabilities and antimalware protection on devices of over 75 Android OEMs. Remote control with remote help desk support is also available and integrated in Soti MobiControl on Android devices, iOS, and Windows. Soti has also made significant investments in R&D with two new offices dedicated to innovation around many areas, including connected devices and predictive and prescriptive analytics.
- › **Good Technology.** Good Technology's strong commitment to security and investment in its containerization and network operations center (NOC) have long made it a popular choice among financial services firms and other customers who value security. However, Good Technology has also done significant work building out secure mobile services for app development. Its Good Dynamics offering allows both ISVs and a company's internal developers to utilize common services like presence in multiple applications — removing the burden of recreating these services in each app. In addition, Good Technology's acquisition of Boxtone has brought service-monitoring capabilities to the solution — something that's increasingly important as customers access more services on mobile devices. BlackBerry's announcement of its intent to acquire Good Technology took place after we finalized data collection for this report, and each offering is still available. Forrester expects this acquisition to help BlackBerry in existing areas like application security and emerging areas like IoT.
- › **Microsoft.** Microsoft made a significant impact on the EMM market in 2015 by connecting many of its management, security, and productivity assets to its EMM solution. Its Enterprise Mobility Suite brings its strength from traditional device management (ConfigMgr), identity (Azure Active Directory Premium), and data protection (Azure Rights Management) together with EMM. The Intune and ConfigMgr combination is particularly compelling because it gives customers the ability to take full advantage of cloud capabilities without requiring them to change their existing on-premises

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

## The 11 Providers That Matter Most And How They Stack Up

infrastructure. In addition, only Intune can fully manage the new Office and Outlook applications without requiring a proxy for network and data security. Although this was not available at our data collection cutoff date, Microsoft has recently released mobile application management (MAM) without device enrollment capabilities for customers who don't want to deploy MDM to workers' devices. This combination of solutions is part of Microsoft's vision to help customers unify its management and security strategy across form factors and platforms.

- › **SAP.** SAP focuses heavily on enabling applications and app developers. To that end, SAP provides an enterprise app store with mobile application management capabilities that help enterprises manage the application life cycle and bridge the gap between the developer, the administrator, and the end user. SAP's EMM offering is differentiated by its integration with the greater SAP application portfolio and by its mobile application development and analytics solution — all of which leverage the SAP Hana Cloud Platform. Although the solution does not support security information and event management (SIEM) integration today, it does offer many reporting and analytics capabilities, like configurable alerts for users and automated workflows to help customers with end-to-end business process mobilization.
- › **Sophos.** Sophos is largely focused on the midmarket and integrates its EMM product with its wide set of security tools, including endpoint, web, and network protection. This is part of a vision of unified threat management with deep integration between products to address all of the devices, apps, and cloud services the workforce uses. Identity plays a big role in this unified threat management vision, and Sophos has built strong identity management capabilities into the product. Sophos has strong containerization capabilities today, including a secure workspace, app container, content container, and support for Android for Work and Samsung Knox. Although it doesn't offer app wrapping without recompiling the app today, it is available with its software development kit (SDK). Sophos' broad security capabilities and data protection make it a strong choice for midmarket customers who prioritize security.

**Contenders**

- › **Landesk.** Landesk's acquisition of LetMobile last year brought the company strong, secure personal information management (PIM), mobile data loss prevention (DLP), and app-wrapping technologies. Landesk has invested heavily in making the app-wrapping process very simple for its customers. The process does not require an SDK, and settings are separate from the wrapper, which allows policy changes without rewrapping. For customers with rugged and semi-rugged deployments, Landesk offers a number of UX improvement and migration tools so companies can retain value from their investments and give users a much better experience when using these devices. Landesk's client and mobile integration strategy is compelling, bringing together client management, EMM, and service management to give tech management administrators a solution to manage all of its users' devices from one console.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

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## Supplemental Material

### Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference survey.** To validate product and vendor qualifications, Forrester also conducted a survey with three of each vendor's current customers.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

## The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

## Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

## Endnotes

- <sup>1</sup> App-enabled employees are 27% more likely to estimate that their company's year-over-year growth is 10% or more. They also are 22% more likely to recommend their company as a good employer and 24% more likely to often recommend their company's products and services to others. The app-enabled employees are also 20% more likely to claim that their company's customers are satisfied with its products and services. See the "[The Mobile App-ocalypse Is Coming: Are You Ready?](#)" Forrester report.
- <sup>2</sup> Mobile device management (MDM) is the common technology used by enterprises to enable their workforce to obtain the right access on their mobile devices. However, early solutions were only able to meet companies' very basic security and management needs for mobility. As business needs mature and employees demand more data access and mobile applications, MDM solutions are expanding their capabilities to meet those needs. See the "[Brief: The Future Of Mobile Device Management](#)" Forrester report.
- <sup>3</sup> Devices used include a combination of three or more of the following: desktop computer, laptop computer, a regular mobile phone, smartphone, a terminal or workstation shared with others, and wearable computers. Source: Forrester's Global Business Technographics® Devices And Security Workforce Survey, 2015.

**The Forrester Wave™: Enterprise Mobile Management, Q4 2015**

The 11 Providers That Matter Most And How They Stack Up

<sup>4</sup> On September 4, 2015, BlackBerry announced a definitive agreement to acquire Good Technology for \$425 million. This acquisition expands BlackBerry's mobile security offerings and eliminates one of its longtime competitors in the enterprise mobile management (EMM) space. See the "[Quick Take: BlackBerry Acquires Good Technology, Buying Share In The EMM Market](#)" Forrester report.

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