

EXCERPT

Worldwide Mobile Device Management Enterprise 2007-2011 Forecast and 2006 Vendor Shares - Sybase iAnywhere Profile (Excerpt from #208771)

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IDC OPINION

Worldwide mobile device management (MDM) enterprise license and maintenance revenue reached \$205.7 million in 2006, growing just 7.1% over 2005. A number of factors contributed to the slowdown in growth, including two major acquisitions in the market and lower-than-expected revenue in corresponding markets such as mobile middleware. However, the overall market for enterprise converged mobile devices continues to experience healthy growth and bodes well for the state of the MDM enterprise market over the forecast period. IDC highlights the following:

- ☒ Over 2006 and into 2007, large mobility companies worked on integration of mobile device management with their respective mobile email applications — underlining the importance of mobile device management to mobile application deployments.
- ☒ IDC observed a renewed commitment and focus to mobile device management from many of the large systems management companies. Several vendors in this space are launching new and/or improved MDM offerings, and major acquisitions were made by HP and Symantec.
- ☒ The role of the mobile operator in MDM enterprise is still to be determined. However, IDC believes the most optimal way for mobile operators to participate in this market today is to offer targeted hosted solutions that will mainly appeal to the midmarket.
- ☒ There is a growing convergence between the markets for mobile device management and mobile security. A number of vendors are looking to add more advanced security capabilities such as encryption to the standard device wipe/lock features available in most solutions today.

In This Excerpt

This excerpt is taken from *Worldwide Mobile Device Management Enterprise 2007-2011 Forecast and 2006 Vendor Shares* (IDC #208771, October 2007) and includes an IDC Opinion, Methodology, Market Definition, Situation Overview, Leadership Grid and the Sybase iAnywhere Vendor Profile.

Methodology

Mobile Device Management Enterprise Market Definition

An MDM enterprise solution provides the standard features found in all desktop administration solutions, such as the following:

- ☒ Maintaining PC hardware and software inventories
- ☒ Performing software distribution
- ☒ Managing antivirus scan files
- ☒ Enabling remote control for systems diagnostics

MDM enterprise solutions also include advanced functions that address the unique needs of mobile and wireless users. These solutions include the following:

- ☒ Support for a queued event architecture that manages the exchange of data and executes commands on clients and servers
- ☒ Online optimization through compression and checkpoint restart to better support slow-speed, unreliable WAN links
- ☒ Performance of management functions in the background while the user accesses network-based business applications
- ☒ Automated offline completion of inventory scans, antivirus scans, and software installations that reduce connection times
- ☒ Targeted backups of specific system, application, and data files that enable IS managers to recover or replace lost, damaged, or misconfigured systems
- ☒ Directory services integration providing additional options to network administrators to locate and manage network resources and perform inventory control of mobile devices
- ☒ Mobile security, including authentication and encryption, password protection, and the ability to lock a device and delete a portion or all of the content on the device
- ☒ Support for offline synchronization and over-the-air wireless synchronization and support for a broad range of OSs and connectivity environments

Increasingly, it is becoming a critical requirement for MDM enterprise vendors to provide these solutions in an integrated environment that enables an enterprise to manage and administer its mobile and nonmobile systems in a single view.

SITUATION OVERVIEW

The Mobile Device Management Enterprise Market in 2006

Growth in the mobile device management enterprise market did not reach its full potential over 2006. While a number of the smaller pure-play MDM vendors were able to achieve higher-than-average growth percentages, this was not the case for the majority of vendors. This can be attributed to the following factors:

- ☒ The market for mobile middleware achieved lower-than-predicted growth for 2006, and the fewer enterprise mobility deployments that took place, the less need there is for a corresponding MDM solution.
- ☒ Sybase iAnywhere and Nokia Intellisync were working to integrate their MDM capabilities with their respective mobility suite offerings. In addition, Sybase had a major release of its Afaia product right at the end of 2006.
- ☒ A number of systems management vendors have been in flux with their current offerings; CA has been busy developing a new MDM enterprise offering to better meet the needs of converged mobile devices, and IBM and Novell have been moving their MDM offerings onto new architectures that will allow for increased product innovation.
- ☒ Two major acquisitions were made in the market. HP bought Bitfone, and Symantec bought Altiris. Symantec chose to end of life its current MDM offering, and HP completely revamped the Bitfone product to better meet the needs of the enterprise.

IDC Leadership Grid

The IDC Leadership Grid provides a qualitative comparison of the suppliers within the mobile device management enterprise market. It is a pictorial representation of each vendor's position within the market based on two factors: the supplier's ability to gain share and its alignment with future market opportunities.

The x-axis measures the vendor's opportunity alignment or its ability to leverage essential market trends over the forecast period. The x-axis also considers the vendor's potential for growth and its ability to be a top-tier player in the market. The y-axis represents the vendor's ability to gain share based on such factors as financial strength, channels, customer perception, and partnerships.

To some degree, the IDC Leadership Grid offers a more comprehensive assessment of a company's position in the market than market share alone. The IDC Leadership Grid provides an analysis of multiple factors critical to success (see Figure 1).

FIGURE 1

IDC Leadership Grid: Worldwide Mobile Device Management Enterprise Market



Source: IDC, October 2007

Vendor Profile

Sybase iAnywhere

Toward the end of 2006, Sybase iAnywhere delivered the latest version of its Afaria mobile device management and security products (Afaria 5.5). Also in 2006, Sybase introduced its Information Anywhere suite, which combines application enablement, device management, security, and collaborative capabilities for the mobile enterprise market where Afaria plays a key role in the suite, providing the MDM and security capabilities. In addition, Afaria's individual modules can be bought as standalone products, although Sybase's philosophy is that security is a component of overall device management — and its customer base has confirmed that belief by most often choosing to purchase both.

The latest version of Afaria (5.5) was a major release for Sybase, and it focused its development efforts around three main areas: expanded security capabilities, management functionality updates, and platform enhancements. The first area of improvement was around the Handheld Security Manager and included interoperability with OneBridge (Sybase's mobile email offering), FIPS-certified encryption modules, and a full console integration with Win32 security manager. In terms of management functionality, Afaria 5.5 adds remote control for Windows Mobile devices and an updated patch manager component that supports patches for a larger set of Microsoft products, MBSA 2.0, and provides more reliable patch information. The platform enhancements include the ability to deploy Afaria clients over the air as well as database performance improvements.

Over 2007, Sybase has delivered four feature packs for Afaria. The first two centered on the Handheld Security Manager. The first feature pack allowed for interoperability between Microsoft exchange push email and encryption performance improvements. The second was a Windows Security Manager update. The third was to add Windows Mobile 6.0 support, and the last was one-step client installation and configuration. Sybase also has a number of upcoming feature packs that are now in beta and will be delivered before the next major release, including Symbian 9.0 client support and a new model for high-performance on-demand decryption.

Sybase has one of the most robust mobile device management offerings available in the market today and continues to innovate with a number of enhancements planned for the next major release in 2008. Its tight integration between mobile device management and security will become increasingly important as enterprises look to turn to one vendor for a mobility suite instead of point solutions to address each issue. In addition, Sybase recently announced a partnership with HTC where the two companies will work together to develop optimized device management and security functionality on HTC's Windows Mobile converged devices (see Sybase and HTC Combine Forces for End to End Enterprise Mobility Solution).

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