

# VENDOR SELECTION MATRIX™ SECURE UNIFIED ENDPOINT MANAGEMENT

**ABRIDGED VERSION  
WITHOUT VENDOR SCORES  
AND SCORECARDS**

## THE TOP VENDORS 2021 IN DACH, BENELUX AND NORDICS

**Research In Action**

**March 2021**

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**RESEARCH IN ACTION**  
independent research & consulting

# FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 62.5% of the evaluation is based on a survey of enterprise IT or business decision makers and 37.5% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report we interviewed 1,000 enterprise IT managers with budget responsibility in DACH\*, Benelux and the Nordics. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Secure Unified Endpoint Management (SUEM) is an approach to securing and controlling all devices and applications regardless of the platform while protecting sensitive data. There are still many vendors in the market who are selling separate tools for Endpoint Security, Client Lifecycle Management (CLM), Mobile Device Management and Enterprise Mobility Management (MDM/EMM). The market has been slow over the last five years. However, the growing complexity, security threats and the Covid-19 Pandemic combine to create the need for immediate action and a huge demand acceleration.

**Bottom Line: The market requires Secure Unified Endpoint Solutions (SUEM) today!**

This report provides you with a useful guide to important SUEM market trends, names the Top 15 vendors as selected by 1,000 users based upon product, company and service quality, and will help you make an informed decision regarding which vendors could best fit your requirements. This information can then be used for a more detailed evaluation.

**To Infinity...and Beyond!**

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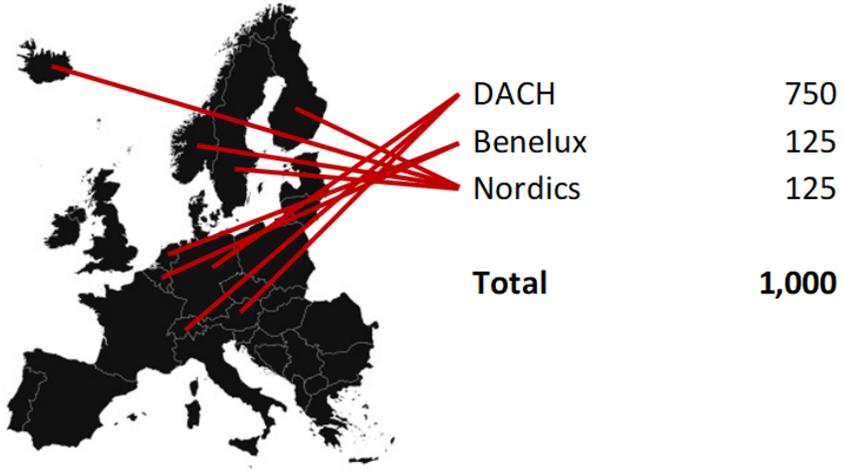


\* DACH: Germany, Austria and the German speaking part of Switzerland, Benelux: Belgium, Netherlands and Luxembourg.



# OUR SURVEY DEMOGRAPHICS: IT AUTOMATION

## COUNTRY BREAKDOWN



## INDUSTRY BREAKDOWN

Energy	62
Financial Services	167
Government & Non Profit	59
Life Sciences	153
Manufacturing	211
Technology, Media & Telecoms	141
Consumer Packaged Goods & Retail	87
Professional Services	48
Travel & Transportation	72
<b>Total</b>	<b>1,000</b>

## COMPANY SIZE BREAKDOWN

### Midsize Companies (Revenue more than € 50 million)



Headcount below 1.000:	94
Headcount 1.000 to 2.500	229
Headcount 2.500 to 5.000:	399
Headcount over 5.000:	278
<b>Total</b>	<b>1,000</b>

## JOB TITLE BREAKDOWN



IT Manager	92
VP IT	89
VP IT Infrastructure	85
VP DevOps	82
Chief Information Officer	79
VP Service Desk	77
VP Application Development	75
Chief Digital Officer	70
Project Management Office	55
VP IT Shared Services	53
IT Operations Manager	49
Chief Technology Officer	47
Business Executive	41
Sourcing and Vendor Management	39
VP Technology	35
VP IT Financial Management	32
<b>Total</b>	<b>1,000</b>

**100,000+**  
Data  
Points

**1,000**  
Enterprise  
Managers

**Leading**  
Vendors

**20+**  
Reports  
In 2021

**37.5 %**  
Analyst's  
Opinion

**62.5 %**  
Survey  
Results



# OUR MARKET IMPACT OVER THE LAST 12 MONTHS

**Customer base:**  
**150,000 IT Automation**  
**100,000 Marketing Automation**



**400 vendors evaluated**  
**20+ research reports**  
**15,000 clicks on average**

**10,000+ enterprise  
survey participants**

**15 press releases**  
**1,200 clicks on average**

**Vendor Selection Matrix™: The right mix makes all the difference**  
**62.5% customer evaluations + 37.5% analyst's judgement = 100% success**

# WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



Decision Makers use a mix of traditional and online tools to create the vendor shortlists

N = 3,750 Enterprise, Marketing and Business Managers with budget responsibilities.

# WHAT IS SECURE UNIFIED ENDPOINT MANAGEMENT?

- **Secure Unified Endpoint Management (SUEM)** is an approach to securing and controlling all devices and applications regardless of the platform (e.g. PCs, laptops, smartphones and tablets) while protecting sensitive data. This should be done in a connected, cohesive manner from a single management console and built-in security.
- **SUEM** therefore combines elements of data and end-user security as well as life cycle management across all client platforms in one single console and (virtual) database, specifically:
  - **Client Lifecycle Management (CLM)**
  - **Mobile Device Management Enterprise Mobility Management (MDM/EMM)**

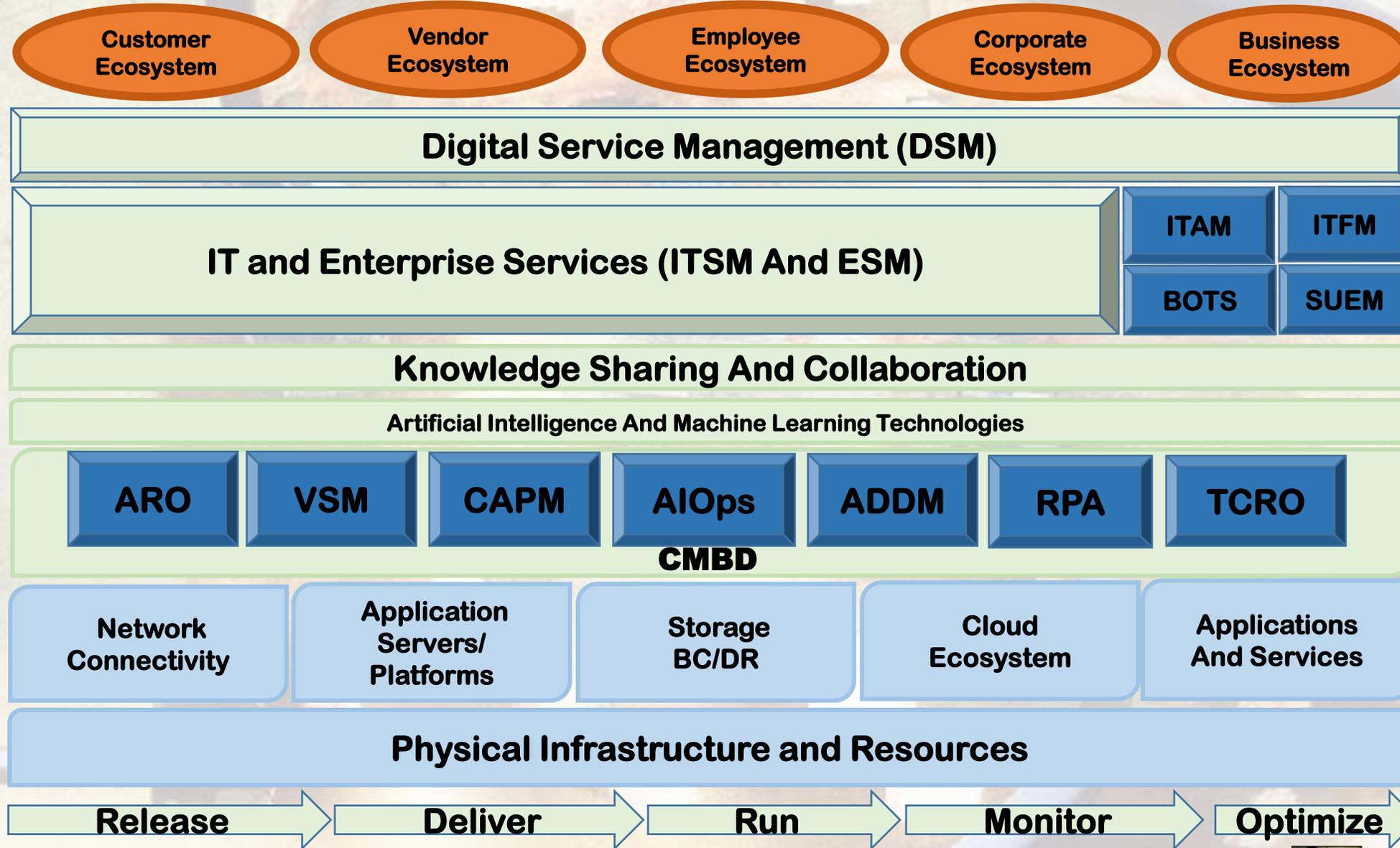


# KEY ELEMENTS OF SECURE UNIFIED ENDPOINT MANAGEMENT?

- Comprehensive single-console endpoint management for all client platforms.
- Desired-state management architecture.
- Multi-vendor, multi-platform and multi-device support.
- Client life cycle management incl. software configuration and patch management.
- One (virtual) database and Configuration Management Database (CMDB) integration.
- IT Asset Management incl. auditing, tracking and reporting.
- Automation of routine endpoint management tasks.
- Bring Your Own Device (BYOD) support.
- Comprehensive security features incl. security threat/Cyber attack monitoring and mitigation.
- Basic analytical capabilities and integration with advanced analytical tools.
- Integration with existing Help Desk and IT Service Management tools.



# THE IT AUTOMATION MARKET TEXTURE



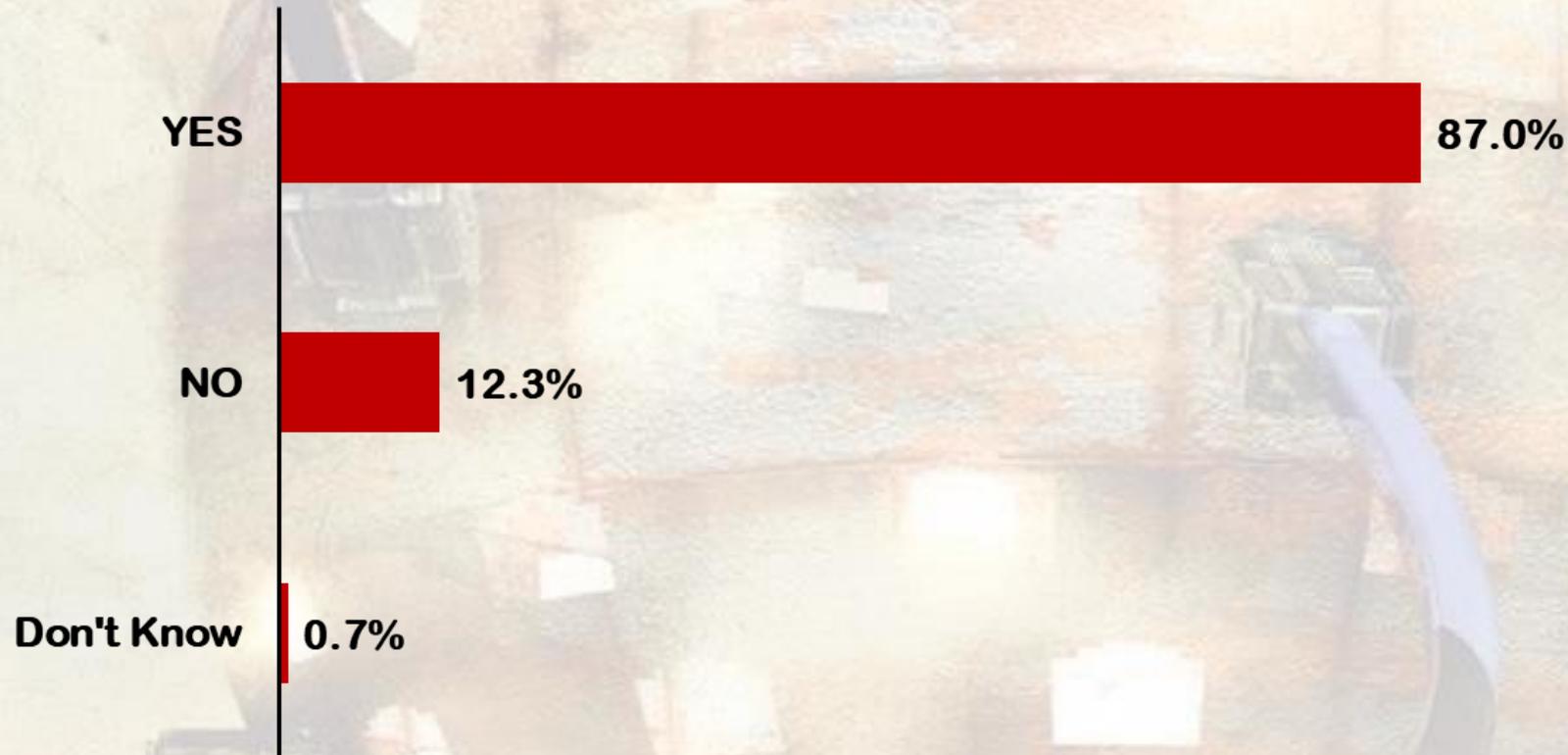
IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduce toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.



# RESEARCH: ARE YOU LOOKING FOR AN INTEGRATED SOLUTION TO COVER ALL YOUR ENDPOINT MANAGEMENT NEEDS?



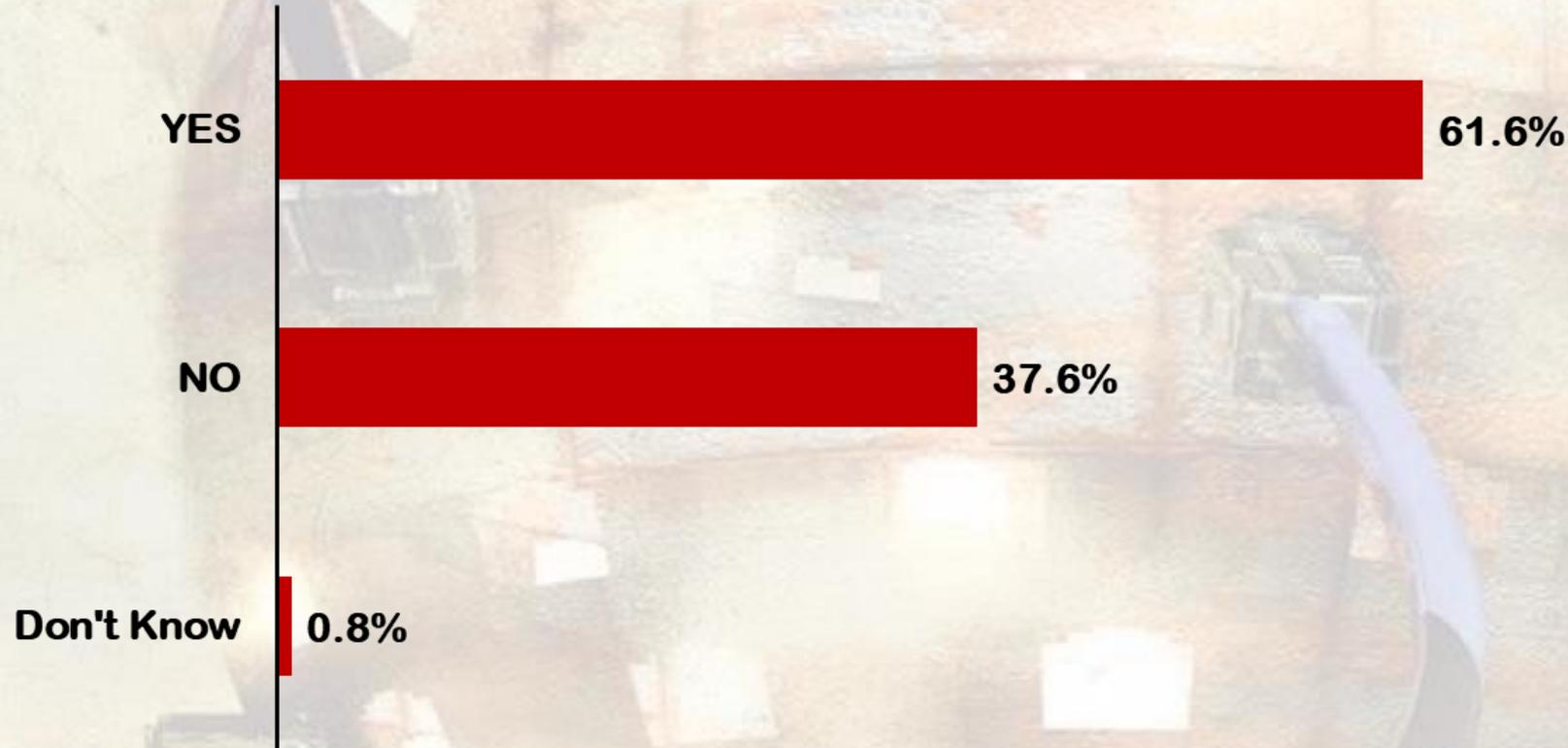
**The market requires Secure Unified Endpoint Solutions (SUEM) today!**

There are still many vendors in the market who are selling separate tools for Endpoint Security, Client Lifecycle Management (CLM), Mobile Device Management and Enterprise Mobility Management (MDM/EMM).

However, the growing complexity, security threats and the Covid-19 Pandemic combine to create the need for immediate action.

N = 1,000 Enterprise IT Managers with budget responsibilities.

# RESEARCH: WOULD YOU LIKE THE MARKET TO PROVIDE A SINGLE SOLUTION FOR ENDPOINT AND IT SERVICE MANAGEMENT BY 2023?



And there is more: The developing Secure Unified Endpoint Management market will also integrate with IT Service Management over the next few years.

This is the logical endgame as the IT Infrastructure Library (ITIL) already foresees in its best practices descriptions. However, this will take a few years to fully come to fruition.

N = 1,000 Enterprise IT Managers with budget responsibilities.



# INSIGHTS: THE SUEM MARKET IN 2021 AND BEYOND

**The growing complexity, security threats and the Covid-19 Pandemic combine to create the need for immediate action and a huge demand acceleration.**

**Here are some key numbers you should be aware of:**

- The number of endpoint devices used by employees continue to double every year.
- More than 40% of corporate data is stored on these endpoints.
- Today, 75% of employees use more than one device to access corporate data.
- By the end of 2021 more than 15 billion machine-to-machine connections will need protection.
- Almost 50% of data loss happens through stolen or misplaced devices.
- More than 25% of corporate data is transferred to USB devices or external Cloud services every year.
- By the end of 2021 there will be one billion different malwares in circulations. Malware comes in many different types (viruses, trojans, worms, adware, ransomware, spyware, bots), about one third stays undetected.
- 99.9% of companies have suffered security attacks.
- All companies have to come up with home office and BYOD support strategies.

**What this means:** The market requires Secure Unified Endpoint Solutions (SUEM) today! .



# VENDOR SELECTION MATRIX™: SECURE UNIFIED ENDPOINT MANAGEMENT VENDORS 2021

VENDOR NAME	PRODUCT(S)
AAGON	ACMP
BARAMUNDI	baramundi Management Suite
BLACKBERRY	UEM
CITRIX	Endpoint Management
DESKCENTER	Deskcenter Management Suite
GOOGLE	Google Endpoint Management, Cloud Identity
IBM	IBM Security MaaS360 with Watson
IVANTI	Unified Endpoint Manager, Patch, Endpoint Security, Avalanche
MANAGEENGINE	Desktop Central, Mobile Device Manager Plus
MATRIX42	Secure Unified Endpoint Management, Enterprise Service Management, Digital Workspace Platform
MICROSOFT	Enterprise Mobility + Security, Intune, Microsoft Endpoint Manager, System Center Configuration Management
QUEST	KACE
SCALEFUSION	Unified Endpoint Management, Mobile Device Management
SOPHOS	Mobile, Central
VMWARE	Workspace ONE

This listing is alphabetical and includes the Top 15 vendors which achieved the best evaluation scores from the buyers, having disregarded those with too few evaluations.

Other Vendors mentioned outside of the Top 15 or with too few evaluations:

- 42GEARS
- BMC
- BROADCOM
- MICRO FOCUS
- OPEN SOURCE
- SNOW
- TANIUM



# VENDOR SELECTION MATRIX™: SECURE UNIFIED ENDPOINT MANAGEMENT VENDOR QUICK FACTS

VENDOR NAME	STAFF	REVENUE	GROWTH	RI*	GOOD TO KNOW
AAGON	> 100	> € 10 M	> 20% p.a.	98%	Very well known for high product quality and excellent service.
BARAMUNDI	> 220	< € 25 M	> 20% p.a.	99%	The 100% made in Germany message resonates very well with customers.
BLACKBERRY	> 3,500	< € 50 M	< 0% p.a.	93%	For some years now on a steady downward trajectory.
CITRIX	> 8.000	> € 150 M	> 10% p.a.	99%	Highly differentiated through integration with Citrix's app virtualization.
DESKCENTER	< 100	< € 10 M	> 10% p.a.	98%	Very strong SUEM offering based on superior IT Asset management.
GOOGLE	> 120,000	> € 100 M	> 25% p.a.	95%	Good fit for small to mid-size Google-centric customers.
IBM	> 350,000	> € 150 M	> 15% p.a.	98%	Strong integration between Maas360 and the broader IBM security story.
IVANTI	> 2.800	> € 200 M	> 10% p.a.	98%	The MobileIron acquisition has catapulted Ivanti into the top league.
MANAGEENGINE	> 10,000	> € 75 M	> 25% p.a.	98%	The operations management system for business tagline works well.
MATRIX42	> 470	> € 50 M	> 25% p.a.	99%	Matrix42 is one of only a few true SUEM vendors, a winning combination.
MICROSOFT	> 115,000	> € 250 M	> 10% p.a.	97%	No coherent SUEM story with a number of non-integrated products.
QUEST	> 3,500	> € 50 M	< 0% p.a.	90%	Quest will struggle to regain a foothold in the Top 10 again.
SCALEFUSION	< 150	< € 15 M	> 75% p.a.	97%	A mid-market solution with the highest growth rates in this space.
SOPHOS	> 3,000	> € 200 M	> 10% p.a.	96%	Very strong endpoint security features.
VMWARE	> 31,000	> € 250 M	> 20% p.a.	97%	Competitive advantage through proliferation of virtualization technology.

\* The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants "Would you recommend this vendor in this market to your peers - Yes or No?".

NOTE: Revenue numbers (and growth) are estimated specifically for this market by Research in Action and do not reflect overall company revenue numbers (and growth). Staff numbers are company totals.



# VENDOR SELECTION MATRIX™: EVALUATION CRITERIA

## STRATEGY

Vision And Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target market and customers?
Innovation And Differentiation	30%	How innovative is the company in this market? Does the solution have a unique selling proposition and clear market differentiators?
Viability And Execution Capabilities	15%	How likely is the long-term survival of the company in this market? Does the company have the necessary resources to execute the strategy?
Recommendation Index	25%	Would customers recommend this vendor in this market to their peers?

## EXECUTION

Breadth And Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by customers?
Market Share And Growth	15%	How big is the company's market share and is it growing above the market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor today?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?

### NOTES:

62.5% of the evaluation is based on the survey results, 37.5% is based on the analysts' assessment.

• 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.

• 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.

• 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants (see page four)

“Would you recommend this vendor in this market to your peers - Yes or No?”.



# VENDOR SELECTION MATRIX™: SECURE UNIFIED ENDPOINT MANAGEMENT



## THE TOP FIVE (Alphabetically)

CITRIX

DESKCENTER

IVANTI

MATRIX42

VMWARE

## THE TOP SIX TO TEN (Alphabetically)

AAGON

BARAMUNDI

IBM

MANAGEENGINE

MICROSOFT

## THE TOP 11 TO 15 (Alphabetisch)

BLACKBERRY

GOOGLE

QUEST

SCALEFUSION

SOPHOS



# THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

## Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

## About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



# APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure, and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g. computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.
- **Continuous Application Performance Management (CAPM)** software solutions continuously identify issues around performance and availability of software applications, IT and enterprise services. The solutions strive to proactively detect and diagnose application performance problems and health and enable a situational awareness of application related issues.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **Digital Service Management (DSM)** solutions enable the management of resources and services which support multiple digital services leveraged by external customers. The purpose is to break down operating silos, ensure compliance and governance while enabling the business to continuously innovate new and existing digital services.
- **End User Experience Management (EUEM)** solutions monitor and manage the impact of application and device performance from the end user's point of view and ensure quality of service as seen and experienced by the end user.



# APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

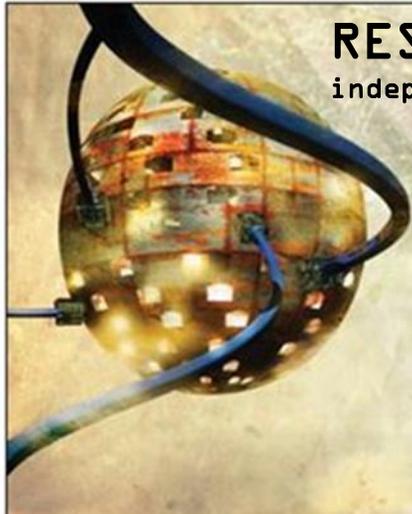
- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **Internet of Things Management (IoT)** solutions vary depending on the use case but typically manage a system of interrelated computing devices, mechanical and digital machines, objects, animals or people that are equipped with unique identifiers which transfer data over a network without requiring human-to-human or human-to-computer interaction.
- **IT Operations Management (ITOM)** solutions monitor and control IT services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Cost and Resource Optimization (TCRO)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.



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