IDC MarketScape

IDC MarketScape: Worldwide Application Streaming and Enterprise Browsers 2025 Vendor Assessment

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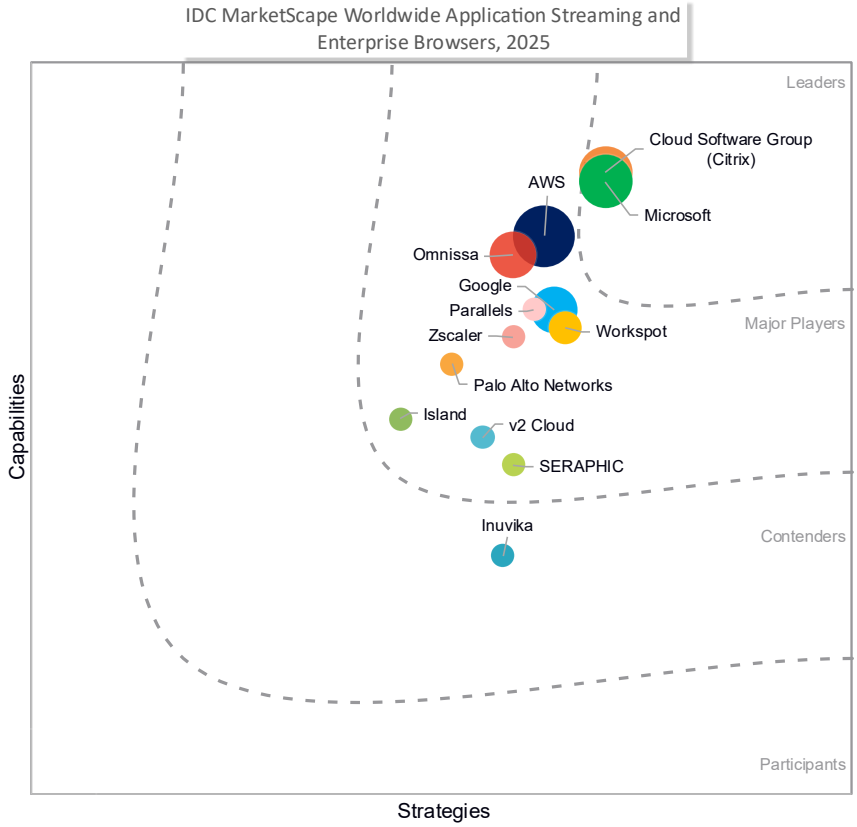
THIS EXCERPT FEATURES MICROSOFT AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Application Streaming and Enterprise Browsers Vendor Assessment



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See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Application Streaming and Enterprise Browsers 2025 Vendor Assessment (Doc # US53004525).

IDC OPINION

Application streaming and enterprise browsers are two related segments of the rapidly evolving enterprise client computing (ECC) ecosystem. This ecosystem, once mostly encapsulated in the virtual client computing (VCC) market, expanded as a result of the emergence of hybrid work. Hybrid work, defined as a combination of asynchronous, aspatial, and automated styles of achieving outcomes, is in turn a response, most obviously, to global events but more inevitably to the exponential rise in complexity related to technology.

That's an analyst's way of saying that the way we work has permanently changed. We no longer need to work together in time or in space to collaborate, and our automation technologies take care of many tasks we did in the past. Meanwhile, data, interconnection between applications, and applications themselves expanded on an exponential curve, outstripping our ability to remember passwords let alone how to do our own jobs.

Vendors in the ECC ecosystem, including those who offer application streaming and enterprise browsers, rose to this emerging challenge. Some created focused, effective solutions, which work best in cooperation with others. Some wove together consolidated platforms, which cover the entire constellation of needed services, with varying degrees of success.

At the same time, the "AI revolution," which had been boiling since 2015, finally erupted into the public consciousness with the release of ChatGTP and other large language models (LLMs) toward the end of 2022. These technologies promise a world in which individuals no longer interact directly with applications or desktops at all, instead asking for the "computer" do everything for them. Hype aside, there is a great deal to unpack in an era where applications, AI models and the packaged parameters to access them (AI apps), and humans interact in a digital workspace.

Application Streaming and the ECC Ecosystem

Application streaming is, itself, a constellation of technologies related to the encapsulation and delivery of an application or a group of applications to a managed or unmanaged device. It uses some form of concentrator or brokering technology to provide the application as a "stream" to the user, rather than installing the application locally. These technologies are distinguished by applying policy at the concentration layer, by requiring applications to pass through that layer, and may have an optimized protocol for delivering the application, which helps smooth out network or other issues.

Application streaming is used in cases including remote application access, application compatibility management, and the presentation of applications requiring historical operating systems to function. They incorporate features like data loss protection, real-time user monitoring, and infrastructure management.

Enterprise Browsers and the ECC Ecosystem

Enterprise browsers are an evolution of secured browser technology, which got its start as early as 1995. They allow for client-side application of security policy, which may be set centrally or aggregated from multiple sources. The vendor either incorporates these capabilities directly into the browser or deploys them as an add-on to the end-user device's existing browser installation.

Enterprise browsers are used in cases where the enterprise primarily or entirely uses web-enabled applications (including SaaS), already has another zero trust solution, or as one part of the ecosystem of security solutions intended to deal with the expanded threat surface associated with hybrid work.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors were selected for this IDC MarketScape based on the following criteria:

- Operate and have clients in more than one geographic market (Americas, EMEA, Asia/Pacific, etc.)
- Provide application and/or enterprise browser support directly to customers
- Provide the ability to interact with hybrid (private and public cloud) architectures
- Have developed an ecosystem of partnerships enhancing operational and endpoint functionality
- Have an extended market presence, sufficient to indicate they can sustain a mission-critical technology system for at least five years

The points provided in the two bullet points at the end of the list are important, particularly for enterprise technology buyers. Application streaming and enterprise

browsers are one part of an ecosystem of technologies used to deliver core business functionality — they must be able to connect the presented application to any peripherals they need and must provide consistent, effective functionality for the duration of the system's deployment. Neither of these is possible when the providing company is financially unstable.

ADVICE FOR TECHNOLOGY BUYERS

Application streaming and enterprise browsers both address the broad functionality of encapsulating, protecting, and projecting applications to end-user devices. They go about this in very different ways, though, with somewhat different resulting functionality. In preparation for using these technologies as part of the enterprise's broader ECC strategy, consider the following:

- **Assess the variance within the user population.** Although it is easy to think that all end users are alike, the acceleration of hybrid work created an ever-increasing variance between end-user needs. Group users not just by job function but by how often they access internally developed and maintained applications, how many software-as-a-service applications they need, and to what extent they interact with a broad array of business-to-business services.
- **Decide whether you need to treat this decision as an "employee as a service" rather than as software**. With software, you intend to devote your own resources, either to administer or to host. With an "employee as a service," you expect to provide an outcome (a digital workspace) with minimal oversight from you or your own resources. This decision needs to cover the entire life cycle of the purchase — it is not enough to have a "lightweight" operating system and "secured"
- **Define what you mean by security, endpoint security, and application security.** The nebulous concepts run rife through the marketing and technical materials presented by vendors — clarity on what you mean will assist you in making reasonable selections among the various offerings
- **Review your existing employees who handle end-user computing and employee experience to determine whether they can be better deployed elsewhere.** For each redeployed resource, assume that their current technical functions will be handled as an "employee as a service"; given the current talent shortage, hiring a lower-cost resource to do the work has a low-probability of success

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Microsoft

Microsoft is positioned in the Leaders category in this 2025 IDC MarketScape for the worldwide application streaming and enterprise browsers vendor assessment.

With a comprehensive portfolio spanning virtualization, browser security, and cloud services, Microsoft delivers application streaming and enterprise browser capabilities through App-V and Edge for Business. The company's integrated approach leverages its extensive Microsoft 365 ecosystem to provide secure and consistent application experiences across diverse devices while maintaining robust security controls through zero trust architecture and conditional access policies that adapt to user context, device health, and risk signals.

Strengths

Microsoft's application streaming and enterprise browser solutions distinguish themselves through several key differentiators that leverage their ecosystem integration and security-first approach, including exceptional integration into their wider ecosystem, a comprehensive zero trust architecture, and some offline capabilities.

Microsoft's solutions provide integration with the broader Microsoft 365 ecosystem, creating a cohesive digital enterprise platform. Edge for Business integrates natively with Microsoft Entra ID for authentication, Purview for data protection, and Endpoint Manager for device management. This integration enables unified policy management across applications, simplified administration through familiar interfaces, and consistent security controls that span the entire digital workspace, significantly reducing management complexity while enhancing security posture.

Microsoft implements a sophisticated zero trust security model that incorporates user identity, device health, location, and risk signals into access decisions. Edge for Business enforces conditional access policies that can require additional verification factors before accessing organizational resources, even on unmanaged devices. The browser creates distinct profiles with visual differentiation between work and personal browsing, preventing cross-contamination by maintaining separate cookies, cache, and browsing data between contexts, effectively balancing security with user experience.

Challenges

Organizations considering Microsoft's solutions should be aware of several challenges that may impact implementation success, including limited analytics extensibility, complex licensing structures, and integration limitations outside of the company's own ecosystem.

Microsoft's analytics capabilities, while functional for basic monitoring, lack the extensibility offered by specialized analytics platforms and the detail provided by specialized providers. App-V provides basic usage reporting through PowerShell commands that display package usage statistics but lack comprehensive visualization tools or customizable dashboards. Edge for Business offers more detailed metrics through Microsoft Endpoint Manager, but the platform's ability to export this data for integration with third-party analytics systems is limited, potentially creating visibility gaps for organizations with complex reporting requirements or existing investments in specialized monitoring tools.

Microsoft's licensing model for application streaming and browser management can be challenging to navigate, particularly for organizations without dedicated Microsoft licensing expertise. The various subscription levels, add-on features, and dependencies on other Microsoft products create complexity in determining the most cost-effective approach. Organizations frequently struggle to align licensing purchases with actual usage patterns, which eventually leads to either over-provisioning or unexpected costs when scaling. This complexity extends to understanding the full economic impact when implementing these solutions alongside existing Microsoft investments.

While Microsoft's solutions excel within its ecosystem, organizations with diverse technology stacks may encounter integration challenges. Edge for Business provides some API access for customers to extract usage data or integrate with non-Microsoft security tools. Organizations heavily invested in alternative identity providers, endpoint management systems, or security platforms may find that Microsoft's solutions require additional configuration or custom development to achieve the same level of integration provided natively within the Microsoft ecosystem, potentially increasing implementation complexity and ongoing management overhead.

Some of these challenges may be addressed as part of Microsoft's recently announced connector program.

Consider Microsoft When

Microsoft is suitable for organizations already invested in the Microsoft 365 ecosystem seeking to extend their security and management capabilities to application delivery. The ideal customer has a mix of modern web applications and legacy Windows

applications requiring consistent security controls across diverse devices and work locations.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The application streaming and enterprise browser market comprises software solutions enabling secure, managed access to web/SaaS applications and legacy

desktop applications across distributed workforces. Unlike consumer-grade browsers, these enterprise-focused platforms integrate directly with identity providers, device management systems, and security infrastructure to deliver contextual access controls.

The application streaming submarket focuses on enabling on-demand access to software via a concentrator or broker, while enterprise browsers provide a policy-enforced environment for web app interactions. Together, these technologies address critical challenges in hybrid workforces, SaaS adoption, and zero trust architecture in a lighter-weight way than either desktop-as-a-service or full VCC stacks.

LEARN MORE

Related Research

- *Worldwide Virtual Client Computing Software Forecast, 2025–2029* (IDC #US52397925, June 2025)
- *Market Analysis Perspective: Asia/Pacific Enterprise Automation, 2025* (IDC #AP52923225, June 2025)
- *Agents as Apps: An Opportunity for Greater Innovation, More Revenue, and Increased Market Share* (IDC #US53385925, May 2025)
- *Enterprise Application Customers: Navigating the Challenges of Tariffs, Regulations, and Costs with AI* (IDC #US53386125, May 2025)

Synopsis

This IDC study evaluates vendors in the application streaming and enterprise browsers submarkets, part of the expanding enterprise client computing ecosystem driven by hybrid work and technological complexity. It highlights the shift in work dynamics, emphasizing asynchronous collaboration and automation. Vendors are assessed based on their ability to provide secure, managed access to applications, integrating with identity providers and security systems. The document also includes vendor profiles, strengths, challenges, and criteria for success in this evolving market.

"In a world where hybrid work reshapes our digital landscape, application streaming and enterprise browsers emerge as pivotal players, redefining how we interact with technology. As AI revolutionizes our workspace, the challenge lies in seamlessly integrating these tools to enhance productivity without compromising security. The future beckons a paradigm shift where applications serve us, not the other way around. Are we ready to embrace this transformation and unlock the full potential of our digital ecosystem? As the very meaning of work changes, how, when, where, and with what we

work will also change," said Shannon Kalvar, research director, Enterprise Client Platforms at IDC. "Application streaming and enterprise browsers are one part of the industry's response to those changes; one which is very much a work in progress."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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