

Magic Quadrant for PC Configuration Life Cycle Management Tools

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The PCCLM market continues to mature; however, most of the vendors decreased in Completeness of Vision, because they are behind the market in meeting several emerging requirements, including non-Windows device management, desktop virtualization management and software as a service.

WHAT YOU NEED TO KNOW

The PC configuration life cycle management (PCCLM) market is mature, and there is not a huge difference in the core functionality of most PCCLM products. Buyers are increasingly driven by factors relating to ease of use and lower total cost of ownership, rather than comprehensive functionality. The vendors in this market are lacking in some key areas, most significantly non-Windows device management, management of desktop virtualization technologies and software-as-a-service (SaaS) delivery models.

Organizations should not merely choose from the vendors in the Leaders quadrant (see Figure 1); they should create a list of criteria that describes the organization's needs and select from vendors that best meet those requirements. Organizations should use a vendor that is focused on this market and can meet the organization's needs for at least the next five years. Organizations should focus on process, training and proper product implementation, because these factors will influence a successful product experience more than the specific capabilities of a particular vendor.

MAGIC QUADRANT

Market Overview

PCCLM is a mature, approximately \$2.2 billion market that continued to see consolidation in 2010. As measured by vendor revenue and client inquiry trends, PCCLM product adoption increased in 2010. This has resulted from increased IT spending and impending Windows 7 migrations. Windows 7 will spur market activity for the next 12 to 24 months.

Windows 7 projects have generated three parallel forces that affect buying behavior for PCCLM tools. First, many organizations are using old versions of their PCCLM products, and must move to newer products to receive Windows 7 support. Second, others are looking for a new product to deploy Windows 7. Third, many organizations are using Windows 7 as an opportunity to improve their client-computing services. This is driving many organizations to switch products to acquire a tool that better meets their needs, and many others are buying products for the first time to improve manageability.

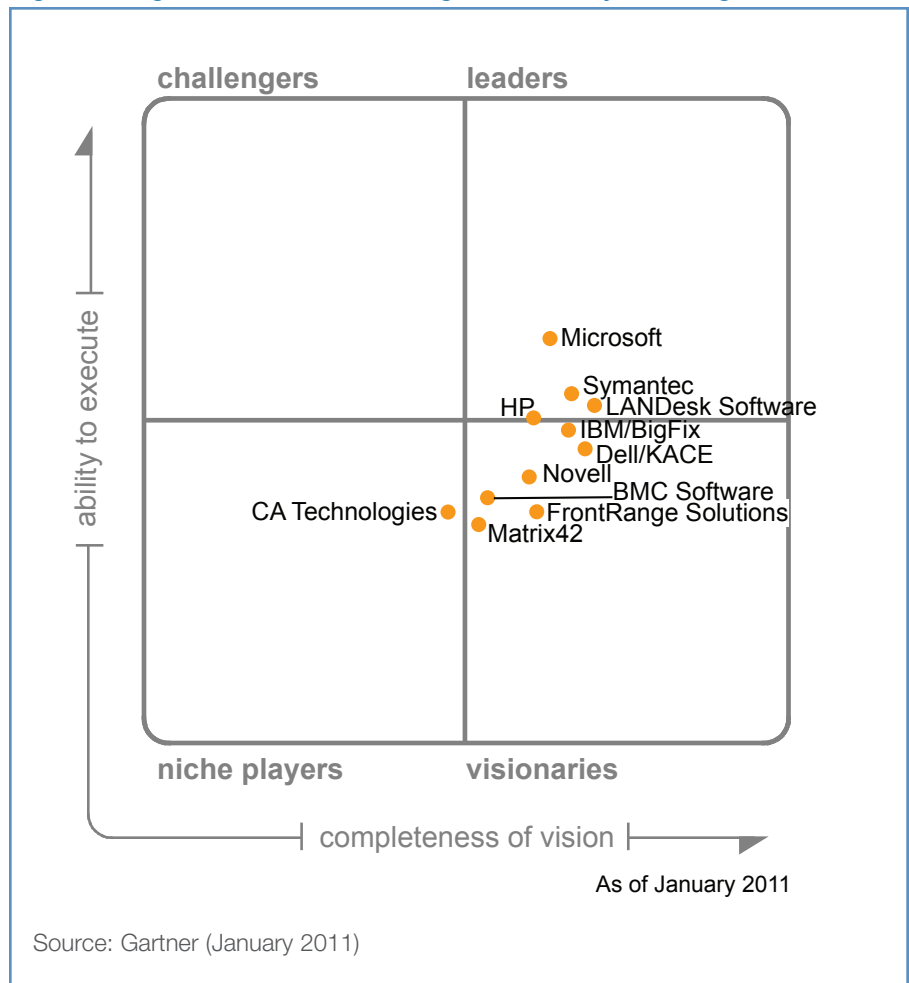
Vendors Have Been Slow to Meet the Market's Emerging Needs

Vendors in this market have mature offerings for managing the core components of PCCLM: operating system deployment, inventory, software distribution, patching and software usage monitoring. This is why they all have similar positions on the Completeness of Vision axis. The market, as a whole, has decreased in Completeness of Vision from past years, because there are five major market requirements that vendors have been slow to address.

1. Alternative Device Management

The most significant development in the last year has been the emergence of consumerization as one of the top client-computing pain points. The consumerization of IT focuses on how enterprises will be affected and can take advantage of new technologies and models that originate and develop in the consumer space, rather than in the enterprise IT sector. Magic Quadrant reference interviews revealed that consumerization is the No. 2 challenge they

Figure 1. Magic Quadrant for PC Configuration Life Cycle Management Tools



faced in 2010. Managing the mobile PC user is the No. 1 pain point (same as last year); consumerization wasn't in the top five last year. The advent of the iPad is the catalyzing factor. Our surveys have shown that somewhere between 50% and 75% of desktop groups have received requests for iPad support.

The iPad in the enterprise phenomenon has also driven users to request support for new handheld devices, such as the iPhone or the Android phone, leading enterprises to support a greater variety of devices. The primary mobile device management (MDM) concern is data protection. IT organizations want to ensure that user data is secure if the device is lost or stolen; however, their

focus on mobile devices is broadening. Organizations are starting to treat smartphones (and now tablets) the same way they treat PCs, which involves providing similar services, such as application delivery, for these devices. An increasing number of organizations are supporting mobile devices with the desktop group; we estimate that between 50% and 60% of organizations support mobile devices in the desktop group, based on surveys and feedback from clients.

These factors have suddenly made MDM space red hot. Organizations, particularly those that manage mobile devices within the desktop group, would prefer to use the same tools across PCs, tablets and smartphones, because it's increasingly the same people who support those device types. No PCCLM vendor has comprehensive capabilities across all major device forms; consequently, many organizations are opting for third-party MDM party tools, because the capabilities of their incumbent PCCLM vendor are too limited. MDM became a major evaluation criterion in 3Q10 for organizations' PCCLM tools, and we saw it heavily influence several buying decisions. This will probably lead to a wave of consolidation in the industry, as PCCLM vendors acquire MDM point solution vendors.

Mac OSX support has also become a major market factor, as Apple Mac adoption continues to grow rapidly. This is evidenced by an increase in client inquiries about Mac management and survey data that we've collected, which shows that approximately 45% to 50% of organizations support Macs. In most cases, users are bringing Macs to work, and IT departments need some basic management and support capabilities for these users. However, we have also spoken to several customers who are in the early stages of providing users with Macs as alternatives to Windows and are developing formal, comprehensive support capabilities.

2. Desktop Virtualization Management

According to the Magic Quadrant references, managing physical and virtual desktop environments is an important emerging requirement of PCCLM tools. Desktop virtualization takes many forms: application virtualization, persistent and nonpersistent hosted virtual desktops (HVDs), work space virtualization and client hypervisors. The logical starting point for PCCLM vendors with desktop virtualization is to support application virtualization products. Application virtualization is just another way of packaging and delivering an application to an endpoint. Application virtualization support in this market is maturing. Some PCCLM vendors support multiple products, while others have tighter partnerships with specific vendors.

PCCLM vendors have also ensured that their agent can run inside of a virtual desktop, because a persistent virtual desktop image is principally no different from a physical desktop, and persistent HVDs also represent most early HVD implementations. The next step is for PCCLM vendors to support dynamically assembled HVDs by patching master images and provisioning dynamic desktops for users. The benefits of this model are reduced storage, improved manageability and better standardization. PCCLM vendors need to be able to provision and manage dynamically assembled HVDs to help organizations maintain consistency across

their physical and virtual estates. A few vendors have shown early capabilities in this area, but most can't support this type of computing environment.

3. Integration With Service Desk and Asset Management

In 2010, for the first time, every vendor in the PCCLM market had a service desk product. BigFix paired up with Tivoli Service Request Manager, although integration has not been developed yet, and Novell now OEMs LiveTime for its service desk product. Although PCCLM and service products are available from the same vendors, and often share the same branding, many vendors struggle to integrate these products. Customers often spend significant amounts of time and money on consultants to develop integration between both products.

The same is true of IT asset management. Most PCCLM vendors have asset management products, but struggle to offer seamless integration between the two products. Still, customers have natural inclination to use integrated PCCLM, service desk and asset management tools, because there are many points of integration among these products. In small organizations, the same people use all three products, so there is a consolidated buyer.

4. Security and Operations Convergence

Gartner has observed the trend of security and operations convergence for several years. The relationship between the two groups involves the security setting policy, and the operations department (e.g., the desktop group) manages the implementation and enforcement of that policy. Patching is the best example of a security process that has moved into the operations realm. The second wave of convergence is security configuration assessment, which involves the ongoing monitoring and enforcement of security configuration standards. Several organizations have moved this responsibility to the desktop group, and a recent survey showed that approximately 25% of desktop organizations own this responsibility.

The security group may do a periodic (e.g., quarterly) scan to assess the security state of the endpoint environment, but an increasing number of desktop organizations perform more-frequent monitoring and reporting, and they have their own tools for this purpose. For this reason, many organizations use their PCCLM tools for security configuration assessment. In general, PCCLM vendors are responding to this trend; however, specific capabilities vary considerably across vendors.

5. Alternative Delivery Models

Alternative delivery models for PCCLM tools (e.g., SaaS and appliances) have existed for several years. The appliance form factor has achieved more success thus far, but we're also starting to see demand for SaaS tools. Demand for such tools has come mostly from small or midsize businesses (SMBs), and has been fueled by broad cloud-computing trends – in particular, by the advent of SaaS service desk tools.

SaaS PCCLM tools have existed for many years, but none saw significant market acceptance. Gartner sees the market moving increasingly to SaaS-based solutions. Approximately 40% of the 2009 Magic Quadrant references stated that they would consider their PCCLM tools in SaaS form, and inbound client inquiry in 2010 is showing a similar inclination from organizations. No SaaS-based PCCLM tools have equivalent capability, in terms of overall functionality, support capability and proof points demonstrated by customer references to the vendors in this Magic Quadrant; however, that will change in 2011.

Market Definition/Description

PCCLM tools manage configurations and support system administration tasks for client devices. They are used by desktop support organizations to automate system administration and support functions that would otherwise be done manually.

Inclusion and Exclusion Criteria

The PCCLM product must include modules for inventory, software distribution, operating system deployment, patch management, remote control and software usage monitoring. Other capabilities we evaluate include application virtualization/streaming, security management, power management, data/settings migration and software packaging with conflict resolution.

The vendor must have at least 10 client references using the PCCLM product. Gartner client inquiry data must confirm that the product is of interest to Gartner clients in enterprise environments by making their product selection shortlists (see Note 1).

Added

No vendors were added in 2010.

Dropped

No vendors were dropped in 2010.

Evaluation Criteria

Ability to Execute

The Ability to Execute axis measures the vendors' ability to meet the current needs of PCCLM buyers, as well as their ability to succeed in this market by gaining market share and achieving revenue growth:

- **Product/Service:** We specifically evaluated software distribution, inventory, operating system deployment, patch management, software usage, remote control, application packaging and power management. We also evaluated scalability and usability, as they relate to its importance in meeting buyers' current needs.
- **Overall Viability:** This criterion evaluates the size of the vendor and its financial performance. We also evaluated the size and growth of the vendor's PCCLM business.
- **Sales Execution/Pricing:** This criterion was most influenced by the frequency of its appearance on buyer shortlists. We also evaluated the degree to which the vendor has a presence in North America, Europe and the Asia/Pacific region (including Japan).
- **Market Responsiveness and Track Record:** We evaluated the execution on delivering products consistently and in a timely fashion, the agility in meeting new market demands, and how well the vendor received customer feedback and quickly built it into the product.
- **Marketing Execution:** This is a measure of brand and mind share through client, reference and channel partner feedback. We evaluated the degree to which customers and partners have positive identification with the PCCLM product, and whether the vendor has credibility in this market. We also used search hits on Gartner.com for the vendor and product as a measure of brand recognition and market awareness.
- **Customer Experience:** We assessed the vendor's reputation in the market, based on customers' feedback regarding their experience in working with the vendor, whether they were glad they chose the vendor's product and whether they planned to continue working with the vendor (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	High
Market Responsiveness and Track Record	High
Marketing Execution	High
Customer Experience	Standard
Operations	No rating
Source: Gartner (January 2011)	

Completeness of Vision

The Completeness of Vision scale provides an aggregate measure of a vendor's likelihood of future success in the PCCLM market. We evaluated vendors' statements about future product direction, the degree to which current capabilities map to future demands and the focus of the vendor on PCCLM requirements.

Market Understanding: This criterion evaluated vendor capabilities against future market requirements. The market requirements map to the market overview discussion above:

- **Alternative Device Management:** Does the vendor have strong capability to manage non-Windows clients, in particular Mac OSX, Apple iOS and Android?
- **Desktop Virtualization Management:** This criterion evaluates the vendor's ability to manage physical and virtual environments. Particularly important capabilities are application virtualization and HVD support.
- **Integration With IT Service Desk and Asset Management:** This evaluates whether a vendor has service desk and asset management products, how relevant those products are in those markets, and how well the PCCLM product integrates with those products.
- **Security and Operations Convergence:** Does the vendor have relevant endpoint security capabilities, and are they integrated with the PCCLM product?
- **Alternative Delivery Models:** Does the vendor have alternative ways of delivering their PCCLM functionality, either in the form of an appliance or SaaS.

Offering (Product) Strategy: We evaluated usability and scalability as they relate to their importance in meeting future buyer needs. We also evaluated the breadth of vendors' PCCLM offerings, as well as the depth of functionality within each module. Usability received the highest weighting, because the market is skewing toward midsize organizations that typically value ease of use over comprehensive functionality and scalability.

Business Model: We considered whether the vendor is funded adequately and staffed to succeed in this market.

Innovation: This category primarily measures the strategic importance of PCCLM to the company or business unit, and whether the vendor has shown a propensity to innovate to establish differentiation (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	No Rating
Innovation	Standard
Geographic Strategy	No Rating

Source: Gartner (January 2011)

Leaders

Positioning in the Leaders quadrant is the result of successful Completeness of Vision and Ability to Execute. These vendors have succeeded in at least some or all the following areas:

- Attention to future client demands in PCCLM (which is discussed in the Completeness of Vision section)
- Consistently positive client feedback concerning the efficacy of their products
- Continued visibility and success in an increasingly crowded and competitive market (Gartner tracks which vendors clients are considering as a measure of visibility)
- Substantial market share
- Superior track records for market responsiveness and customer service

The vendors in the Leaders quadrant have unique characteristics that position them favorably for future market success.

Challengers

Challengers are defined by a keen Ability to Execute; however, when compared with competitors, their products lack complete functionality and have comparatively few features that are viewed as necessary to shape the future of the market. Their Ability to Execute will be proved by their high market share and their appearance on numerous shortlists. These capabilities are bolstered by overall industry-leading fiscal health and broad geographic presence. Basically, Challengers are followers with superior marketing and sales execution. They reach their market positions because they price products aggressively, bundle products with others or, sometimes, give them away.

Visionaries

Visionaries have vision scores that reflect feature-complete products, and they show technology leadership in providing some life cycle management functions that users have begun requesting, or will have an impact during the next year or two (as discussed in the Completeness of Vision section). A Visionary appears on shortlists because it offers a complete solution and a larger story for multiple adjacent management needs (for example, service desk, endpoint security/security configuration management, virtualization, server management or asset management). However, its Ability to Execute is hampered by its size, lack of brand recognition or focus. Its sales force may be smaller than those of other vendors, or it may be large, but focused less on PCCLM.

Niche Players

Niche Players can be good choices. They may have strengths in particular areas, but don't have the focus to invest in all the requirements that we evaluate for Completeness of Vision. Organizations that are looking for products with specific strengths

or that want to consolidate vendors and use multiple products from a single supplier may find that Niche Players' products offer sufficient capability and support.

Vendor Strengths and Cautions

BMC Software

BMC BladeLogic Client Automation, Version 8.1

BMC is one of the few vendors in the PCCLM market that targets the large enterprise (at least 5,000 PCs) as its primary market segment. BMC BladeLogic Client Automation is scalable and strong at supporting mobile users. The product's other main differentiator is its ability to integrate its inventory with BMC's Remedy Service Desk and Atrium CMDB. BMC has been reducing its focus on BladeLogic Client Automation during the past several years. We believe most BladeLogic Client Automation revenue comes from maintenance, and that BMC is pricing it aggressively, pushing down margins.

BMC will continue to invest in BladeLogic Client Automation to keep it current with platform changes (e.g., Windows 7), and the company will invest in it as a discovery source for the Atrium CMDB; however, BMC will increasingly rely on partners to keep up with evolving PCCLM customer requirements. BMC received high scores on Integration with IT Service Management; however, it received low scores on Alternative Device Management and Alternative Delivery Models.

Strengths

- For software distribution, BladeLogic Client Automation uses a policy-based approach to delivering and removing software. It is adept at configuring complex application bundles, and has application repair capabilities to fix failed distributions.
- Version 8 of BladeLogic Client Automation has strong integration with Remedy and Atrium CMDB. BMC added new fields to the inventory module to enable easier integration with Atrium.
- BladeLogic Client Automation is flexible, domain-independent and can work across standard Internet protocols more easily than many competitive products.

Cautions

- Several customers reported challenges in working with BMC's offshore support personnel. Support quality is inconsistent.
- BladeLogic Client Automation is not a full life cycle management product. It lacks operating system deployment, data migration and remote control.
- BladeLogic Client Automation does not have broad platform support. Mac OSX support is weak, and it does not support BlackBerry, iOS4 and Android.

CA Technologies

IT Client Manager (ITCM) r.12.5

ITCM is a full PCCLM product. Its primary differentiation is in the unified architecture it shares with CA IT Asset Manager and Service Desk Manager. Gartner sees ITCM primarily in large CA accounts, where the customer uses a large number of other CA products. ITCM did not get significant traction with Gartner clients in 2010; we only saw ITCM in scenarios where the customer was considering upgrading from an older version, rather than buying ITCM for the first time. ITCM received high scores for virtual desktop management, based on a new capability to deploy applications to dynamically assembled desktops; however, it received medium to low scores on the other visionary criteria.

Strengths

- ITCM is one of the few products in the market that adds value to HVD environments. Specifically, ITCM 12.5 SP1 can maintain application assignments for dynamically assembled desktops for VMware-View-linked clones.
- ITCM has superior PC migration capabilities, which is relevant because of the large numbers of Windows 7 migrations that will take place during the next two years.
- CA has strong service desk and asset management products, with which ITCM is integrated.

Cautions

- Customers report stability and scalability problems with ITCM.
- Product module use is fairly low, particularly patch management.
- ITCM has moderate non-Windows device management capabilities, particularly lacking iOS 4 and Android support.

Dell/KACE

KACE K1000 5.1 and KACE K2000 3.2

KACE was the first vendor in the PCCLM market to have a successful appliance-based product. It is still the only appliance that has seen significant market adoption. Dell acquired KACE in February of 2010, and placed it in its Consumer and Small-Midsize Business Solutions Group. KACE adopted a new licensing practice this year. It sells all the post-deployment functionality (i.e., PCCLM, service desk and application virtualization) KACE functionality under a single stock-keeping unit to simplify the sales process. We typically see Dell/KACE in organizations with about 200 to 5,000 PCs. The KACE appliances have solid functionality that meets the needs of many midsize organizations, and we believe Dell will continue to keep KACE focused on these market segments. KACE is typically not a good fit for organizations that want to manage tens of thousands of clients centrally, because it doesn't scale well to support large environments.

Strengths

- KACE K1000 and K2000 offer strong Mac support. For example, the K2000 does Mac operating system deployment without requiring xServer (which is being discontinued in January 2011), and the K1000 does software metering for Mac OS X applications. Customers using the KACE appliances on Macs generally provide positive feedback.
- The KACE appliances are easy to deploy and maintain, which is one of the major challenges of PCCLM tools in general.
- KACE appliances are consistently priced lower than most competitive products.

Cautions

- Although the K1000 patches non-Microsoft applications and Mac OSX, the functionality is not as reliable as it needs to be.
- Although KACE has some customers with more than 5,000 PCs, the KBOX products are best-suited to midsize organizations (about 200 to 5,000 clients).
- The Virtual Kontainer technology is compelling in concept for encapsulating applications, but we have not seen significant uptake to this point.

FrontRange Solutions

FrontRange Desktop and Server Management (DSM) 6.2 SP2

FrontRange is rebranding its enteo software PCCLM product as FrontRange DSM. DSM is an easy-to-use product, aimed primarily at SMBs. FrontRange is developing an IT service management strategy by selling DSM, License Manager (formerly Centennial) and the FrontRange Service Desk as complementary products. Although there is demand for such combined solutions, FrontRange has not integrated the consoles for these products.

Most of FrontRange's PCCLM revenue once came from Europe; however, this is starting to change. FrontRange's 2009 European revenue dropped, but its U.S.-based revenue increased substantially, now accounting for about 29% of its PCCLM revenue. FrontRange is close to releasing a SaaS platform for DSM, which gave it high marks on the Visionary scale in the Alternative Delivery Model criterion; however, it did not get this credit on the Ability to Execute scale, because the product has not been made generally available at the time of publication.

Strengths

- Package building has long been a differentiator for DSM. Many products require third-party products for advanced application packaging; however, DSM provides a proprietary module to help customers build products.

- FrontRange DSM offers 170 canned scripts, which are particularly useful for organizations that lack technical system administration expertise.
- DSM has unified management for PCs and Citrix environments that maps to organizations' trends involving desktop and server-based computing groups coming together inside IT organizations.

Cautions

- FrontRange DSM has minimal MDM functionality. Organizations that require comprehensive functionality will require a third-party product.
- FrontRange's Mac support is behind the competition, only offering inventory at this time.
- FrontRange lacks significant traction in the PCCLM market; DSM only appeared about 5% of Gartner client shortlists in 2010.

HP

Client Automation Enterprise (CAE) 7.9

HP released CAE 7.9 in June, 2010. HP is focusing on three major trends with CAE: (1) desktop virtualization; (2) security and operations convergence; and (3) the convergence of service desk, PCCLM and asset management. It has made progress in each of these areas, but it still has work to do. HP continues to target CAE to large organizations; it said the average 2010 deal size for CAE was approximately 25,000 PCs. Gartner didn't see HP in many customer deals this year; HP is lacking significant visibility in the PCCLM market, albeit with a strong product for large organizations. HP received strong scores on virtualization management, based on new capabilities to manage dynamically assembled HVDs, as well as unique integration capability with VMware Thinapp, which enables it to scale significantly. CAE received low scores on Alternative Device Management, due to sparse Mac capabilities and a lack of support for mobile devices.

Strengths

- CAE's desired state approach to managing PCs is the product's key differentiator. This approach is useful for organizations that must implement PC changes (e.g., patches) quickly, with high success rates, over tens (or hundreds) of thousands of PCs.
- CAE is one of the few vendors developing management capabilities for non-persistent HVDs.
- CAE is scalable and designed for large organizations, particularly in such areas as HVD management.

Cautions

- CAE has no MDM capability. Customers must use a third-party product.
- Mac management is minimal.
- Comprehensive software usage, software rationalization and compliance reporting require a separate agent (DDMI) and console (HP Asset Manager).

IBM/BigFix

Systems Life Cycle Management Version 8

IBM acquired BigFix in August of 2010 to replace several IBM client management products: Tivoli Provisioning Manager for Software, Tivoli Configuration Manager, Tivoli Point of Sale Manager, Tivoli Configuration Manager for ATM, Tivoli Provisioning Manager Express for Inventory, Tivoli Provisioning Manager Express for Software Distribution, Tivoli Security Compliance Manager and IBM Security Proventia Desktop. BigFix's primary differentiator is that the tool's "intelligence" is on the endpoint, rather than the server. The endpoint can discover a deviation from policy and execute remediation, rather than waiting for an inventory scan and subsequent report on the server side to tell administrators that they need to take an action. This enables organizations to enforce policy more easily than can be done with competitive products.

Although Gartner believes the BigFix acquisition by IBM was a good move, IBM still must execute on the acquisition and allay customer concerns that IBM will alter the BigFix customer experience. IBM will likely keep BigFix focused on large enterprises and meeting the requirements of those organizations, rather than small and midsize customers. BigFix received strong marks on integrated security and configuration management capability, as well as Mac management; however, its lack of MDM and an alternative delivery model strategy held it back.

Strengths

- The BigFix Platform is scalable, enabling organizations to manage large numbers of endpoints (tens/hundreds of thousands) with relatively few servers, compared with competitive products.
- The architecture of the BigFix products (based on the BigFix platform and Fixlet technology) enable organizations to manage the operational and security state of endpoints with the same infrastructure.
- Although not at full feature parity with its Windows functionality, BigFix's Mac management capabilities are strong, compared with other PCCLM products.

Cautions

- Although strong at managing mobile PCs, IBM/BigFix does not have MDM capabilities beyond Windows mobile.
- Although the Fixlet authoring language differentiates BigFix from competitive products, this is a proprietary language/skill with a learning curve before engineers and administrators can use the product.
- IBM has not completed the integration of BigFix with Tivoli Provisioning Manager for OS Deployment and Tivoli Remote Control; therefore, customers have to use a mix separate products for full life cycle management. IBM plans to integrate Tivoli Remote Control during 1Q11.

LANDesk Software

LANDesk Management Suite 9.1 (LDMS)

LANDesk was sold to private equity firm, Thoma Bravo, in September 2010. They are, once again, a stand-alone company. LANDesk has long had a reputation for being responsive to customer demand, a strength that they retained during their tenure with Avocent, and should sustain as a stand-alone company. LANDesk has one of the most complete products in terms of overall functionality, and the code base is solid and stable. LANDesk benefited this year from an increased weight on managing non-Windows clients; however, they were held back, because they lack an appliance or SaaS strategy. LANDesk has a strong OEM partnership with VMware for its Thinapp product. LANDesk has tight integration with a fairly large number of customers using the application virtualization offering.

Strengths

- LDMS has a feature called "targeted multicast, peer download," which enables administrators to distribute applications using a peer-to-peer model at subnets. LANDesk customers have fewer remote package servers than customers using competitive products.
- LANDesk Security Suite and IT Service Management is well integrated with LDMS.
- LDMS supports a wide range of client platforms, including Mac OSX, Windows Mobile, iOS4 and Android (using Exchange Activesync), and BlackBerry (using BlackBerry Enterprise Server).

Cautions

- Operating system deployment has improved with v.9; however, customers often use custom tools to augment its functionality.

- LANDesk was on fewer client shortlists in 2010 due to uncertainty over the future of company. LANDesk has to reinvigorate their brand and channel.
- LDMS street pricing is usually higher than competitive products.

Matrix42

Empirum V12 R2

Matrix42's Empirum is a full life cycle management product, sold mostly to midsize organizations. Most of Matrix42's customers (representing 94% of its business) come from Europe; the rest come from the U.S. (where Matrix42 is focusing on expanding). Empirum is relatively easy to install and use, and has overall solid functionality for operating system deployment and software distribution. Matrix42 has developed management capabilities for Citrix XenDesktop, which ties the various XenDesktop consoles together and enables organizations to manage physical and virtual environments with a single product. It is the only vendor in the PCCLM market with this capability.

Matrix42 has been broadening its capabilities for the past two years, acquiring service desk and asset management products; however, it needs to further integrate Empirum with the service desk and asset management products at a console level and demonstrate market traction beyond its historical stronghold in Central Europe. Matrix42 benefited from our increased weighting on managing physical and virtual environments together; however, this was attenuated somewhat by our increased weighting on MDM and Mac management, where Empirum received low marks.

Strengths

- Empirum's management functionality for Citrix XenDesktop is a visionary capability addressing a major challenge cited by the Magic Quadrant references: managing physical and virtual desktop environments together.
- Empirum's "Rollout Coordination" feature helps administrators monitor software distribution jobs.
- Offers a full life cycle management product, including PC backup and recovery, which many products do not offer.

Cautions

- MDM and Mac support are behind the competition.
- Matrix42 has not received significant traction with Gartner clients making product decisions.
- Matrix42's lack of traction in the U.S. will present challenges for U.S. customers – namely, a lack of English-speaking user communities and challenges finding system administrators with Empirum experience.

Microsoft

Microsoft System Center Configuration Manager R3

Microsoft System Center Configuration Manager 2007 (ConfigMgr) continues to expand its share of the overall PCCLM market. ConfigMgr appeared in Gartner client buying decisions more frequently than any other product in the market in 2010. Gartner generally sees large organizations (i.e., those with more than 5,000 PCs) as Microsoft's most successful ConfigMgr customers. Microsoft released ConfigMgr R3, which was originally planned for 1Q10, in October of 2010. This delay led to some customer dissatisfaction and concern, particularly among those that required power management capabilities.

Microsoft's dominance in the PCCLM market is predicated on a Windows-dominated computing environment. This position of dominance will be threatened during the next five years, as smartphone and tablets, which will be dominated by non-Windows devices, increasingly become targets for management in enterprises. Microsoft benefited this year from increased weighting on virtual desktop management capabilities, particularly with its App-V and (recent) XenApp integration. This was counterbalanced by an increased weighting on non-Windows device management, which Microsoft doesn't offer.

Strengths

- ConfigMgr's integration with App-V is tight, which Microsoft tightened further with the R3 release of ConfigMgr. Prior versions of ConfigMgr lacked on-demand (i.e., user-initiated) App-V application delivery, because all App-V changes were a function of the ConfigMgr agent poll, which takes place on a scheduled basis (often only once a day or even less frequently). Now, the App-V client can pull App-V applications from ConfigMgr distribution points on an on-demand basis.
- Microsoft is developing tight integration with products in important companion areas – for example, System Center Service Manager and Forefront Endpoint Protection.
- ConfigMgr is a stable product. Since its introduction in August 2007, there have been few product bugs.

Cautions

- ConfigMgr can execute scheduled tasks on Windows devices, including the ability to run configuration compliance scans; however, it does not have a policy-based approach to management. This means that PCs generally do not receive system changes as quickly as many other products, and they are more likely to drift from their desired states.
- ConfigMgr does not manage non-Windows operating systems, and does not provide patch content for non-Microsoft applications.
- ConfigMgr is complex; it requires deep expertise to implement and use successfully.

Novell

ZENworks Configuration Management (ZCM) 10.3

ZCM is a full life cycle management product. Its primary differentiator remains its ability to manage configurations based on the user, rather than the machine. In previous years, we only saw clients considering ZENworks in upgrade situations, where they were a longtime Novell customer and were considering upgrading to ZCM. This is still the most common situation; however, a handful of organizations have bought ZENworks for the first time.

Novell recently released ZENworks 11, which brings together ZCM, ZENworks Asset Management, ZENworks Patch Management, ZENworks Linux Management and ZENworks Endpoint Security Management (ZESM) through a common console. However, it was released after the products in this Magic Quadrant were evaluated. ZENworks joins the ranks of a few others in the market that offer such integration between endpoint protection and PCCLM products; however, it must establish ZESM as a competitive product to have a strong security and operations convergence story.

Strengths

- The primary management targets for ZCM are users, not machines. Many competitors are talking about adopting this approach, but Novell is already here. This positions ZENworks well to manage portable user workspaces, rather than strictly user machines.
- Very comprehensive software distribution capabilities, including an integrated application virtualization offering (ZENworks Application Virtualization), which is based on an OEMed product (Spoon).
- ZCM has comprehensive life cycle management functionality based on a single agent.

Cautions

- Novell does not have a strong brand in this market, and we continue to see few organizations considering ZENworks outside of legacy Novell customers considering upgrading from an old version of ZENworks to ZCM.
- Novell's transition into the Attachmate organization should be closely watched in terms of the role ZENworks (and other product lines) plays in the overall Attachmate strategy.
- More than 75% of ZENworks' revenue is from maintenance; less than 25% comes from new licenses.

Symantec

Altiris Client Management Suite (CMS) v.7.0 SP2

CMS is one of the most complete and comprehensive PCCLM products in the market. CMS has deep functionality across most of its features: inventory, software distribution, operating system deployment, software usage and application virtualization. This depth of functionality comes at the cost of complexity, resulting in CMS customers (who get full use of the product) investing heavily in training to become proficient in the product. Organizations that make these investments generally report good results, however. The Altiris brand remains strong and, as in previous years, Symantec remained one of the most frequently considered vendors in 2010. We have seen Symantec pricing CMS aggressively, and often with IT Management Suite, which includes all Altiris functionality (e.g., service desk, asset management and workflow).

Symantec scored fairly well on Alternative Device Management, because it has broad mobile device support and decent Mac management capabilities. Additionally, its proprietary application virtualization solution (called Workspace Virtualization) earned Symantec fairly high scores as well. The area in which Symantec did not score well involved Alternative Delivery Models, where Symantec has no appliance or SaaS offering, other than an appliance provided by a third party.

Strengths

- The software catalog, new to v.7.0, enables organizations to more easily manage rules that apply to software, such as blacklisting, usage monitoring and license management.
- CMS has strong software metering functionality; 75% of Symantec's reference customers use the software metering functionality in CMS, while approximately 50% of the overall Magic Quadrant reference population use software metering.
- Symantec has a large installed base of customers with an active community of user groups and online forums.

Cautions

- CMS has had a number of stability issues with Version 7; the general sentiment from many customers is that they spend too much time working with Symantec support.
- Customers are voicing concerns about Symantec's commitment to the Altiris product, as evidenced by scalability and stability issues.
- CMS has a high server footprint; we do not see Symantec customers using peer-to-peer models for distributing applications packages (as some products provide).



Note 1. Customer References

We verified customer references for the vendors' product versions, as shown above. However, these product versions may not reflect what vendors are shipping. Vendors' product road maps were evaluated within the Completeness of Vision criteria.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.