April 20, 2005

The Forrester Wave™: Client Systems Management Tools, Q2 2005

by David Friedlander

TECH CHOICES

April 20, 2005

The Forrester Wave™: Client Systems Management Tools, Q2 2005

Lab-Based Evaluation Of Client Systems Management Tools Across More Than 180 Criteria

by David Friedlander

with Simon Yates, Laura Koetzle, and Stephan Wenninger

EXECUTIVE SUMMARY

Rising operational costs in the distributed enterprise are a critical issue and the ongoing management and maintenance of client systems is a major cost contributor. Managing desktop deployments, securing proliferating mobile devices, supporting remote workers, and enforcing security requirements are all putting pressure on operational costs. Client systems management tools are designed to help end user organizations reduce desktop and mobile support costs while increasing end user service levels and improving productivity. However, too few organizations use client management tools, and vendor offerings vary depending on their historical product focus. Some vendors are more focused on security management, while others are working on improved change and configuration management or IT life cycle management. But end user demand for integrated management tools is driving market consolidation and forcing once disparate management point solutions into more comprehensive management suites. Today, no single vendor provides the perfect solution for every customer. An enterprise should chose a vendor based on its specific requirements and should account for any existing tools or relationships with vendors.

TABLE OF CONTENTS

NOTES & RESOURCES

This Forrester Wave is based on interviews and lab evaluations conducted in September 2004. We interviewed seven vendor companies, including: Altiris, BMC Software, Computer Associates, LANDesk Software, Microsoft, Novell, and Symantec.

Related Research Documents

"Why Client Management Will Break In Five Years"
December 27, 2004, Trends

"Change And Configuration Management"
November 8, 2004, Market Overview

"How To Evaluate Client Systems Management Tools"
September 24, 2004, Tech Choices

AUTOMATED CSM IS A CRITICAL REQUIREMENT FOR THE DISTRIBUTED FIRM

Today, client management is focused primarily on provisioning and managing devices. Although machines can be configured based on a user's role, client management remains device-focused. A desktop or laptop is typically assigned to a single user or to shift workers with identical job roles and loaded with the standard operating system image and application portfolio.

Once deployed, however, client devices must be constantly updated with new versions of applications or configured to meet evolving IT policy requirements. Automating common tasks across client systems is possible to a certain extent, but today's tools often fall short. Enterprises need a comprehensive view of all client assets and user policies to properly automate client systems management (CSM). A wide range of CSM functions must be integrated, such as patch management, software deployment, security configuration management, disk imaging, data recovery, application packaging, and user migration.

Nonetheless, all of these tasks require ongoing support overhead to assess, validate, pilot, and implement. Increasingly heterogeneous client environments and policy-based management requirements will cause existing client management tools and processes to break down. Firms will need to rethink how they manage client devices and revamp tools.

Microsoft Has Established A Clear Lead In The CSM Market

Microsoft leads the client management market and will continue to do so as firms become increasingly tied to the Microsoft platform. A 2004 Forrester survey found that Microsoft Systems Management Server (SMS) had a 37% share of the desktop management market.[1] While Microsoft has opened up the SMS and Windows interfaces, the fact that it owns the desktop platform gives it an unparalleled advantage. Recent improvements to its systems management tools will further solidify Microsoft's presence in the CSM market through tight integration with the Windows OS and improvements to the inherent manageability of the platform.

However, other vendors continue to thrive in this market. LANDesk in particular has established thought leadership with its recent addition of strong security management capability to its product portfolio. Altiris' partnership with Dell and Hewlett-Packard also gives the vendor access to the majority of the corporate PC market.

CLIENT SYSTEMS MANAGEMENT EVALUATION OVERVIEW

To assess the state of the CSM market and see how the vendors stack up against each other, we evaluated the strengths and weaknesses of leading CSM vendors using the Forrester Wave methodology.

Evaluation Criteria

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Hands-on lab evaluation.** Vendors spent one day with a team of analysts who performed hands-on evaluation of the product using a scenario-based testing methodology. Each product was evaluated using the same scenarios, creating a level playing field by evaluating every product on the same criteria.

- **Vendor survey.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

Vendors were evaluated against approximately 184 criteria that can be grouped into three logical categories: the current product offering, vendor strategy, and market presence. Forrester evaluated each vendor's product in the lab and examined the products' features, functionality, and ease-of-use. We also evaluated each vendor's strategy based on discussions with executives and product managers. Finally, we evaluated each vendor's market presence based on a number of categories, ranging from revenue to support capability.

Many Features Contribute To Each Vendor's Current Product Offering

The following key criteria were used to assess the current product offerings (see Figure 1 and see Figure 2):

- **Architecture.** As many vendors are piecing together different components like patch management, license management, and software distribution, they provide various levels of architectural cohesion. A more unified architecture will streamline management processes, enable a higher degree of automation, and free systems administrators from the headache of managing multiple components.

- **Software and operating systems management.** The vendors offer different levels of application packaging and deployment tools. Firms must evaluate the type of applications they will be deploying and what operating systems they will be deploying to — for example, if support for mobile devices is needed — and match these requirements with the appropriate tool.

- **Patch management.** Vendors apply a range of methods for gathering patches and related information. Some vendors provide additional testing and vulnerability assessment features, while others pull in basic patch information from vendor Web sites.

Figure 1 Evaluation Criteria

CURRENT OFFERING	
Architecture	How well is the product built for delivering stability, performance, and scalability?
Software/OS management	What overall capability does the product have for software and OS management?
Patch management	How strong is the patch management function? Is functionality licensed and integrated from a leading patch management vendor?
Asset discovery	How strong is the asset discovery function?
Administration and management	How robust are the administration and management capabilities?
Standards and interoperability	What vendor-neutral standards does the product support? What major third-party products does the product interoperate with?
STRATEGY	
Focus	What percentage of revenues does the vendor derive from the systems management market? Is it focused on the client management market? How critical is CSM to the vendor's overall business?
Product vision and direction	What is the vendor's product direction and strategy for the next 12 to 18 months? Is it likely to execute against its vision successfully?
Unified architecture	What steps is the vendor taking to further integrate its product architecture? Is it improving integration between its management agents and the OS platforms?
Configuration management	Is the vendor adding change and configuration management to its product road map? Does its overall systems management strategy tie in to centralized management and organic IT?
Security management	Is the vendor adding security configuration management functionality to its product?
Cost	How much does the product cost?

Source: Forrester Research, Inc.

Figure 2 Evaluation Criteria (Cont.)

MARKET PRESENCE

Installed base	How large is the vendor's installed base of customers for this product and for all products?
Systems integrators	How strongly do systems integrator partners support this product?
Contact center	How strong is the vendor's customer service contact center?
Services	How strong are the vendor's implementation and training services?
Employees	How many engineers does the vendor have dedicated to this product? How big is the vendor's sales presence?
Technology partners	How strongly do technology partners support this product?
Sales model	What is the vendor's sales model? Is it direct or primarily through the channel?
Revenue	How strong is the vendor's financial position?
Revenue growth	What is the vendor's year-over-year quarterly revenue growth?
Revenue breakdown	What is the vendor's revenue generated from licenses, maintenance, and services in the past year?
Cash	What is the vendor's cash position?

Source: Forrester Research, Inc.

- **Asset discovery.** The information that CSM tools capture through discovery determines the level of control and awareness that firms can have over their client devices. This capability also allows the client system to alert IT when a critical patch or required software update is missing.

- **Administration and management.** Granular reporting is a critical component of CSM. The product should have a single console for managing software deployment, patch management, and discovery. We evaluate the level of analysis provided by the product and whether multiple reporting consoles will deliver the depth they need.

- **Standards and interoperability.** Additional value can be gained by integrating client systems management tools with help desk, financial, or management tools. We evaluated the overall level of integration with existing products, as well as support for standards like SNMP, WMI, and LDAP.

Vendor Strategy

Our evaluation of each vendor's strategy is based on the product vision, road map, and how closely those plans align with emerging end user requirements. In particular, we looked at:

- **Focus.** We evaluated the vendor's overall focus on CSM and the approximate percentage of revenues it derives from the market. Large vendors like BMC or Microsoft with a broad product portfolio received a lower ranking for focus, as they necessarily have invested in at least several distinct markets. While smaller specialized vendors will score higher on focus, end user firms should determine whether they prefer to work with a large systems management provider or a smaller specialist vendor.

- **Product vision and direction.** We evaluated the vendor's product direction and its ability to execute on its road map.

- **Unified architecture.** Although unified architecture is already a criterion for the current offering, we evaluated each vendor's road map for enhancements. Vendors that lack a unified architecture, such as CA and Symantec, were ranked on their plans to introduce one. Vendors with an existing unified architecture were evaluated on their road map for general improvements to the product architecture.

- **Configuration management.** Based on the emerging requirement for Organic IT, we evaluated each vendor's road map specific to change and configuration management (CCM).[2] The implementation of a configuration management database (CMDB) is at the core of configuration management.[3] We evaluated each vendor's overall road map for systems management, and its overall focus on dynamic systems provisioning and CCM. We focused specifically on the vendor's ability to apply this to CSM.

- **Security management.** Managing endpoint security settings is quickly becoming a critical requirement for firms. Everything from browser configuration to firewall and network access policies must be managed. Although security management is in large part a subset of configuration management, it has additional specific requirements for vulnerability assessment, compliance reporting, and remediation. Vendors did not need to offer client security tools like antivirus, antispyware, or desktop firewalls to score well, but they needed to at minimum include client security reporting and configuration control capability in their road map.

- **Cost.** Software licensing and maintenance costs for the product are evaluated as part of the vendor's strategy.

ALL THE VENDORS ARE SOLID, BUT SOME STAND OUT

Forrester included seven vendors in the assessment: Altiris, BMC Software, Computer Associates, LANDesk Software, Microsoft, Novell, and Symantec. Each of these vendors has, at minimum, a broad set of tools for client management tasks like software deployment, asset discovery, and patch management functionality for Windows desktops and laptops and at least $50 million in revenues attributable to the CSM market.

The evaluation uncovered a market where all of the vendors had strong product offerings and promising strategies. However, certain vendors were able to differentiate by technical innovation in their product offerings and clear attention to emerging customer requirements in their road maps. Our evaluation showed that:

- **Altiris, BMC, and LANDesk lead the pack.** Although Microsoft dominates the market in terms of total market share, Altiris, BMC, and LANDesk have the strongest product offerings and overall road maps. All three offer broad platform support, a unified architecture, and a wide range of CSM functionality. BMC has differentiated itself by focusing on CCM, while LANDesk has introduced a security management suite. Altiris offers the broadest set of CSM functionality, and recently announced plans to acquire Pedestal Software, which will add security management to its portfolio.

- **CA and Microsoft offer competitive options.** Each vendor has a solid product offering and a clear strategy for improving their products. Microsoft in particular has invested heavily in its systems management strategy recently, and while it only supports the Windows platform, it has continued to add features like OS deployment and mobile device support to SMS. Although CA's architecture is fragmented, it is moving quickly to provide a common architecture across its entire product line.

- **Novell and Symantec are rising to the challenge but have work to do.** Novell recently announced plans to acquire Tally Systems, which will enhance ZENwork's reporting and discovery capability, but it must still enhance its road map to address both security and configuration management. Although Novell has an established presence in the security market, it needs to clarify its client security strategy and tie it in to CSM.

  Symantec is moving quickly to integrate its CSM products and establish a credible presence in the client security management space. Symantec recently launched the new LiveState platform — a unified architecture and database based on the former iCommand offering — that will include patch management, software delivery, and system recovery by May 2005. It also includes security configuration library templates that administrators can use to control security settings on the desktop. Symantec currently offers asset discovery as a separate module but will include it in a future update to the LiveState platform.

Although certain vendors clearly stand out, no one product meets every customer's requirements. To address this, we developed a Forrester Wave for each of the three most important criteria today — unified product architecture, security management, and configuration management.

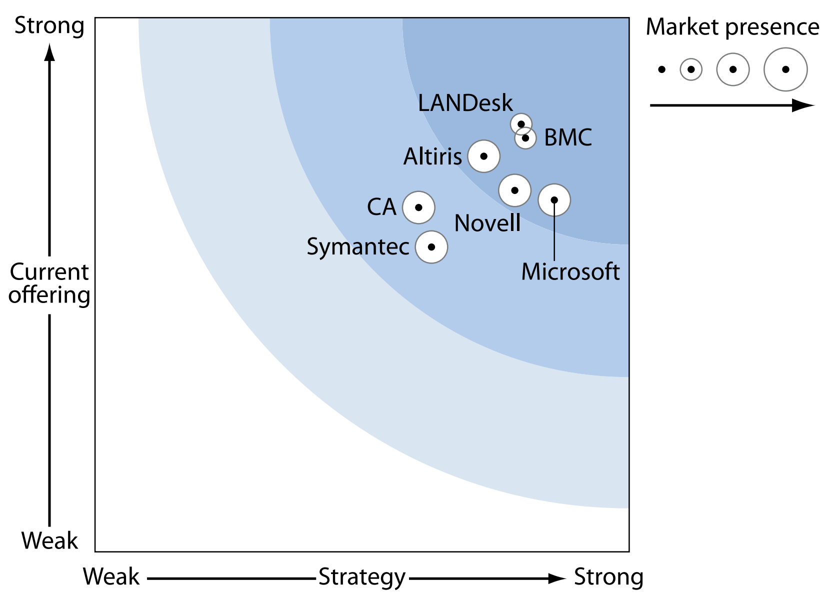
Unified Architecture Streamlines IT Processes

Midsize firms with limited IT staff resources or firms with homogenous computing environments will benefit the most from CSM product suites with a unified architecture. At the same time, however, larger and more heterogeneous environments can benefit from a unified architecture that allows them to add new functionality as needed as long as it is an architectural fit within the existing CSM implementation. LANDesk and BMC clearly stand out in this category. LANDesk has built all of its product components on a single platform, and no longer licenses components from other vendors. BMC's Marimba product has a Java Class at the core of its architecture that gives it flexibility that other vendors lack.

Microsoft also has a particular advantage in this area, although SMS only supports the Windows platform, which is in part reflected in its lower score for the current product offering. SMS has a unified architecture that Microsoft can leverage both to let partners tie in to SMS and to connect with other Microsoft platforms, such has Active Directory. The SMS architecture is readily extensible, and a number of third-party vendors have taken advantage of this to extend SMS functionality to non-Windows platforms. Microsoft has a key advantage in the CSM market since it can bring manageability improvements directly to the desktop platform and tie them in to its systems management strategy.

Altiris also has a unified architecture, but it lacked other key architecture features, such as support for failover. The other vendors have road maps that call for a unified architecture by the end of 2006, but the current product offerings remain somewhat fragmented (see Figure 3).

Figure 3 Forrester Wave™: CSM Unified Architecture, Q2 '05



The Forrester Wave™
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: CSM Unified Architecture, Q2 '05 (Cont.)

	Forrester's Weighting	Altiris	BMC	CA	LANDesk	Microsoft	Novell	Symantec
CURRENT OFFERING	50%	3.68	3.85	3.20	3.98	3.27	3.36	2.83
Architecture	36%	4.21	4.67	2.40	4.43	4.04	3.62	2.45
Software/OS management	12%	4.26	3.34	3.53	3.95	2.81	3.86	4.32
Patch management	12%	3.10	3.50	4.70	4.40	2.60	4.50	3.70
Asset discovery	10%	4.00	3.48	4.18	3.60	2.36	3.06	2.53
Administration and management	15%	3.66	3.11	3.64	3.92	3.32	3.06	2.88
Standards and interoperability	15%	2.22	3.57	2.53	2.92	2.86	1.94	2.05
STRATEGY	50%	3.64	4.03	3.03	3.99	4.30	3.93	3.15
Focus	8%	4.00	2.00	3.00	5.00	3.00	3.00	3.00
Product vision and direction	15%	4.00	4.00	3.00	4.00	5.00	4.00	4.00
Unified architecture	50%	4.00	5.00	3.00	4.00	5.00	5.00	3.00
Configuration management	9%	3.00	5.00	4.00	3.00	3.00	2.00	3.00
Security management	9%	3.00	1.00	4.00	5.00	1.00	2.00	4.00
Cost	9%	1.95	2.60	1.35	3.00	5.00	2.60	2.00
MARKET PRESENCE	0%	3.02	2.57	3.65	2.57	3.74	3.14	3.01
Installed base	15%	3.05	2.10	4.28	2.70	3.65	3.65	2.95
Systems integrators	5%	2.00	0.40	1.90	4.20	1.50	5.00	0.00
Contact center	15%	4.34	4.70	5.00	2.50	4.40	4.88	2.78
Services	10%	3.80	3.20	4.70	3.05	4.70	5.00	3.50
Employees	10%	2.30	3.10	4.40	1.75	3.50	2.20	3.10
Technology partners	5%	1.00	2.00	3.00	3.00	3.75	3.75	1.75
Sales model	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue	20%	1.00	3.00	4.00	0.00	4.75	3.00	3.50
Revenue growth	20%	4.75	1.00	1.50	4.75	2.50	0.50	3.50
Revenue breakdown	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cash	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00

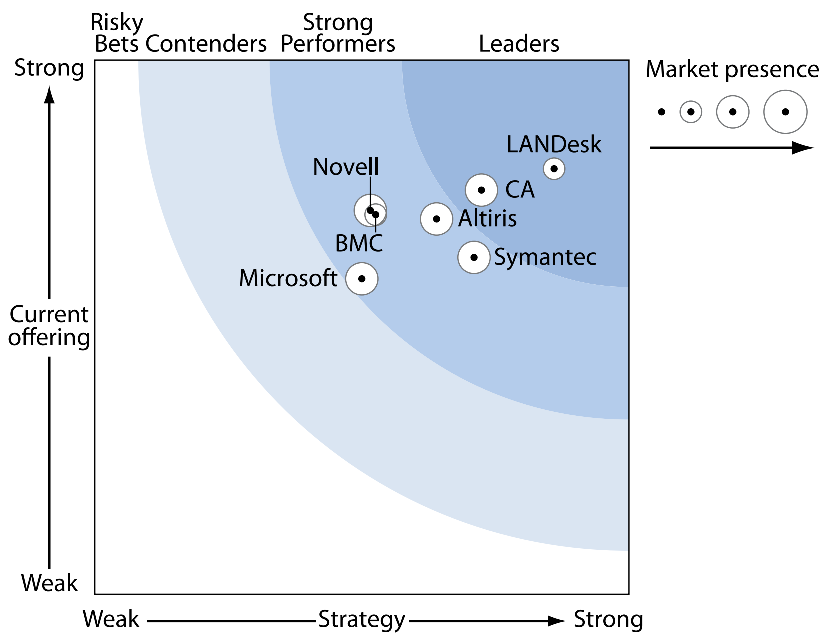
All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

LANDesk has established an early lead in the security management market segment. It is the only CSM vendor that has introduced integrated security management capability. It offers audit and compliance, application monitoring and blocking, network connection control, and antispyware capability. It also includes patch management and discovery with both its management and security offerings. Although LANDesk only recently entered the security market, it has taken an innovative approach to security management by tying it closely to existing systems management tools.[4]

However, other vendors are likely to follow quickly with client security management tools. Symantec and CA, both of which have a strong presence in the security market, are in the best position to introduce client security management products. Symantec is offering security configuration templates with its LiveState product. It could also leverage its acquisition of Platform Logic and bring its server security management technology to the desktop. Altiris is acquiring Pedestal Software and will bring its security management product to market under the Altiris brand in mid-2005 (see Figure 4).

Figure 4 Forrester Wave™: CSM Security Management, Q2 '05



The Forrester Wave™
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: CSM Security Management, Q2 '05 (Cont.)

	Forrester's Weighting	Altiris	BMC	CA	LANDesk	Microsoft	Novell	Symantec
CURRENT OFFERING	50%	3.49	3.53	3.76	3.96	2.93	3.57	3.13
Architecture	10%	4.08	4.63	2.45	4.35	4.08	3.71	2.55
Software/OS management	15%	4.26	3.34	3.53	3.95	2.81	3.86	4.32
Patch management	30%	3.10	3.50	4.70	4.40	2.60	4.50	3.70
Asset discovery	15%	4.00	3.48	4.18	3.60	2.36	3.06	2.53
Administration and management	18%	3.61	3.14	3.61	3.99	3.47	3.21	2.74
Standards and interoperability	12%	2.22	3.57	2.53	2.92	2.86	1.94	2.05
STRATEGY	50%	3.20	2.63	3.62	4.30	2.50	2.58	3.55
Focus	5%	4.00	2.00	3.00	5.00	3.00	3.00	3.00
Product vision and direction	10%	4.00	4.00	3.00	4.00	5.00	4.00	4.00
Unified architecture	10%	4.00	5.00	3.00	4.00	5.00	5.00	3.00
Configuration management	20%	3.00	5.00	4.00	3.00	3.00	2.00	3.00
Security management	50%	3.00	1.00	4.00	5.00	1.00	2.00	4.00
Cost	5%	1.95	2.60	1.35	3.00	5.00	2.60	2.00
MARKET PRESENCE	0%	3.02	2.57	3.65	2.57	3.74	3.14	3.01
Installed base	15%	3.05	2.10	4.28	2.70	3.65	3.65	2.95
Systems integrators	5%	2.00	0.40	1.90	4.20	1.50	5.00	0.00
Contact center	15%	4.34	4.70	5.00	2.50	4.40	4.88	2.78
Services	10%	3.80	3.20	4.70	3.05	4.70	5.00	3.50
Employees	10%	2.30	3.10	4.40	1.75	3.50	2.20	3.10
Technology partners	5%	1.00	2.00	3.00	3.00	3.75	3.75	1.75
Sales model	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue	20%	1.00	3.00	4.00	0.00	4.75	3.00	3.50
Revenue growth	20%	4.75	1.00	1.50	4.75	2.50	0.50	3.50
Revenue breakdown	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cash	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

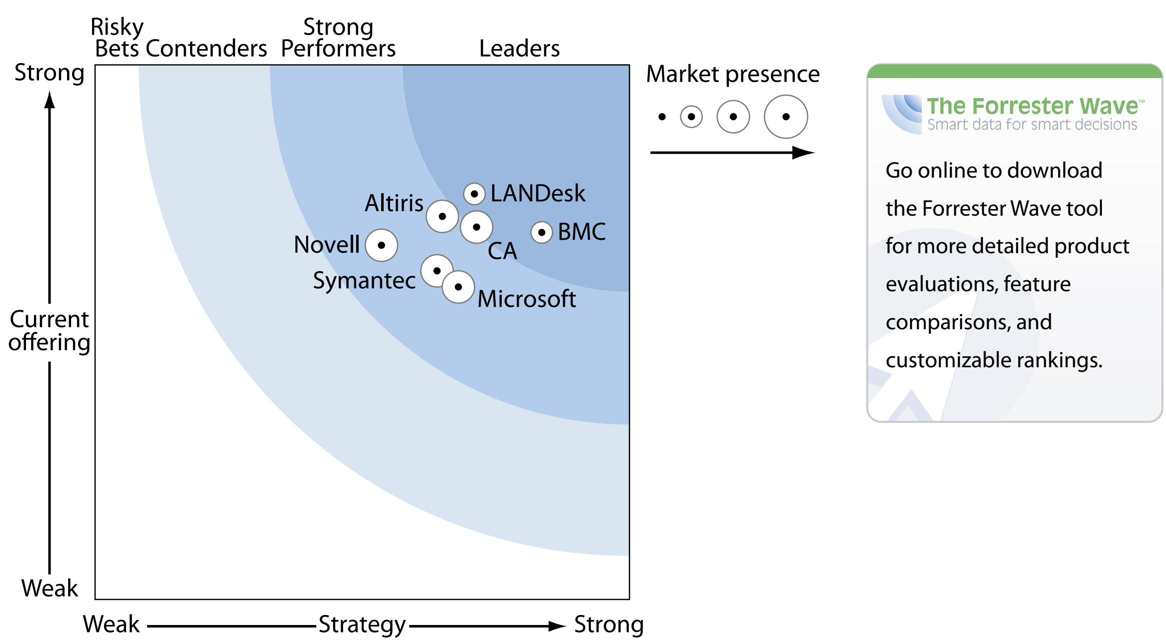
Source: Forrester Research, Inc.

Configuration Management Is At The Core Of Automated Systems Management

BMC has established market leadership in configuration management with its business service management (BSM) offerings. Like other major systems management vendors, it still needs to fill out its capability in this space. However, BMC has clearly articulated a road map for making the Marimba product a core part of this strategy. The Marimba product group reports in to the service management business unit. Because BMC has a solid presence in systems management and offers help desk and asset management products, it is in the best position to fulfill customer requirements for integrated configuration management going forward.

CA and Microsoft have both established similar road maps for configuration management, aligned with the overall industry trend toward Organic IT. However, CA faces a number of challenges as it works to integrate its product architecture, and Microsoft's Dynamic Systems Initiative is only in its early stages.[5] Symantec could also emerge as a significant player if it can leverage its acquisition of Veritas in this market. The other vendors have not clearly established road maps (see Figure 5).

Figure 5 Forrester Wave™: CSM Configuration Management, Q2 '05



Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: CSM Configuration Management (Cont.)

	Forrester's Weighting	Altiris	BMC	CA	LANDesk	Microsoft	Novell	Symantec
CURRENT OFFERING	50%	3.56	3.41	3.46	3.77	2.90	3.29	3.05
Architecture	14%	3.99	4.62	2.72	4.31	4.00	3.82	2.59
Software/OS management	20%	3.94	3.08	3.26	3.93	2.64	3.65	4.18
Patch management	12%	3.10	3.50	4.70	4.40	2.60	4.50	3.70
Asset discovery	20%	4.00	3.48	4.18	3.60	2.36	3.06	2.53
Administration and management	20%	3.68	3.08	3.54	3.72	3.12	2.87	2.92
Standards and interoperability	14%	2.19	3.00	2.27	2.80	2.85	2.15	2.30
STRATEGY	50%	3.25	4.18	3.57	3.55	3.40	2.68	3.20
Focus	5%	4.00	2.00	3.00	5.00	3.00	3.00	3.00
Product vision and direction	15%	4.00	4.00	3.00	4.00	5.00	4.00	4.00
Unified architecture	10%	4.00	5.00	3.00	4.00	5.00	5.00	3.00
Configuration management	55%	3.00	5.00	4.00	3.00	3.00	2.00	3.00
Security management	10%	3.00	1.00	4.00	5.00	1.00	2.00	4.00
Cost	5%	1.95	2.60	1.35	3.00	5.00	2.60	2.00
MARKET PRESENCE	0%	3.02	2.57	3.65	2.57	3.74	3.14	3.01
Installed base	15%	3.05	2.10	4.28	2.70	3.65	3.65	2.95
Systems integrators	5%	2.00	0.40	1.90	4.20	1.50	5.00	0.00
Contact center	15%	4.34	4.70	5.00	2.50	4.40	4.88	2.78
Services	10%	3.80	3.20	4.70	3.05	4.70	5.00	3.50
Employees	10%	2.30	3.10	4.40	1.75	3.50	2.20	3.10
Technology partners	5%	1.00	2.00	3.00	3.00	3.75	3.75	1.75
Sales model	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue	20%	1.00	3.00	4.00	0.00	4.75	3.00	3.50
Revenue growth	20%	4.75	1.00	1.50	4.75	2.50	0.50	3.50
Revenue breakdown	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cash	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Although any of these vendors' products provide robust CSM functionality, companies need to closely examine their own needs to get the best vendor match. Companies should adjust the Forrester Wave spreadsheet weightings to reflect their own priorities, using the vendor profiles as general guidance.

- **Altiris.** The Altiris Client Management Suite is an integrated solution that provides solid functionality in all three categories. It also includes tools for disk imaging and recovery, desktop migration, and a solid application packaging function. Most vendors offer at least some of these additional functions, but they license them from another vendor. Altiris has developed functionality or has acquired products to support a number of additional functions. The product supports a wide range of operating systems, including Windows and several major Unix and Linux platforms. Altiris also recently launched a handheld management suite that extends its capability in this area to fully support Pocket PC and Palm devices.

  Altiris is one of the leading CSM vendors, with nearly 700 employees and expected annual revenues of approximately $160 million in 2004. It has more than 8,500 customers using its Client Management Suite.

- **BMC.** The Marimba Client Management suite provides strong integrated functionality in all three categories. Its unique product architecture gives it tremendous flexibility and allows administrators to manage almost any operating system with a common agent. The product's support for remote systems using native HTTPS also stands out.

  Prior to the acquisition by BMC (completed in July 2004), Marimba had a relatively limited market presence, with a small reseller channel and a few hundred customers. The vendor now has access to many more resellers, support staff, partners, and engineers, giving it a much more significant market presence.

- **Computer Associates.** The CA Desktop Management Solution offers solid asset discovery and software deployment capability. Although it leverages two distinct Unicenter products — Asset Management and Software Delivery — its console integration reduces some of the post-deployment complexity. The solution also includes Desktop DNA, a robust client migration tool. However, CA only provides patch management through eTrust Vulnerability Manager (eVM), a security appliance. In 2005, CA plans to offer an integrated management suite that includes patch management capability.

  CA remains one of the four largest players in the systems management market, with more than 6,500 customers and many partners in the CSM market. It offers a broad range of security and systems management tools, including antivirus, identity management, and IT asset management.

- **LANDesk.** The LANDesk Management Suite is the only CSM product we evaluated that offers fully integrated patch management functionality. LANDesk's competitors either license some patch management components or offer a separate patch management product. Additionally, LANDesk announced recently that it will launch a security management product in December based on the same architecture as the LANDesk Management Suite. To date, LANDesk is the only vendor that plans to provide integrated security and configuration management capability.

  LANDesk Software, which was spun off from Intel in 2002, has grown rapidly in the CSM market. In LANDesk's 12 years as a CSM vendor, it has built a solid base of customers and channel partners. LANDesk's size limits its ability to provide direct customer support — thus, the vendor relies heavily on its channel partners. The vendor has about 10,000 customers and an estimated $70 million in annual revenues.

- **Microsoft.** To allow customers to draw apples-to-apples comparisons, we evaluated SMS as a standalone product in the CSM TechRankings™. This put SMS at a disadvantage because it is enhanced significantly by both other Microsoft products and third-party tools for important functionality. For example, customers often deploy Microsoft Operations Manager (MOM) alongside SMS to get alerting, monitoring, and more robust reporting capabilities. SMS also provides stronger functionality for relatively new Windows platforms than it does for older Windows platforms. Nonetheless, the product competes well in its core market: Windows-centric environments.

  Microsoft leads the CSM market with approximately 45,000 customers and has unparalleled support capability through its own regional offices and large partner network.

- **Novell.** ZENworks shines in its directory integration and its sophisticated client-side policy capability. The product interoperates well with Windows environments and also offers strong heterogeneous platform support. Although the Linux management tool is currently a separate product, Novell plans to integrate it with the ZENworks architecture in 2005. Novell licenses its patch management functions from a third party but offers patch management as part of the ZENworks suite.

  Novell has a solid CSM customer base and will record an estimated $130 million in 2004 revenues attributable to ZENworks.

- **Symantec.** The Symantec iCommand suite has particularly strong software deployment, OS, and image management capability. It also offers a good enterprise administration and reporting console as an add-on that can leverage information from all of the CSM components. It allows administrators to use discovery and directory information for targeting and other management tasks. Symantec recently announced its LiveState platform, which provides the basis for a unified architecture. Initially, it includes patch management, software deployment, and system recovery. Asset discovery (licensed from Centennial Software) currently uses separate architectures and databases. Although a Web console provides a single interface, the components are not tightly integrated.

Symantec has announced a unified architecture for CSM and is planning to ship several products based on this platform in May 2005, as noted above. The LiveState platform will provide a common database and agent/server architecture (based on extensions to the current iCommand architecture) and a new common console interface. Asset discovery information will be directly accessible from the software/OS management and patch management modules (for targeting purposes, for example), and standalone asset discovery will remain available as an add-on.

Symantec acquired ON Technology in late 2003, giving it immediate access to the CSM market. The licensing deals for patch management and asset discovery are also a legacy of the acquisition. The iCommand product, along with the Ghost and PowerQuest product lines, give Symantec a strong presence in the market.

ENDNOTES

[1] Forrester surveyed 110 IT managers responsible for enterprise PC procurement, management, and support to learn about the primary vendor they use for client systems management. The survey revealed a crowded market with one definitive leader: Microsoft. A slew of vendors fight over the rest of the market with no other clear leaders, but there remains room for overall market growth. See the December 31, 2004, Trends "The CSM Vendor Landscape."

[2] Today's management software isn't ready for Organic IT — it can't deal with virtualized resources, rapid resource allocation, or coordination of resources across an entire app. IT is stuck managing manually and reacting to events, rather than preventing them. See the May 18, 2004, Trends "Organic IT 2004: Cut IT Costs, Speed Up Business."

[3] A CMDB stores details of the elements that an organization uses to provide and manage its IT services. Configuration management is responsible for identifying, recording, tracking, and reporting key IT components or assets — these assets are called configuration items (CIs). Change management is the practice of ensuring that all changes to CIs are carried out in a planned and authorized manner. This includes: ensuring that there is a business reason behind each change; identifying the specific CIs and IT services affected by the change; planning the change; testing the change; and having a rollback plan should the change result in an unexpected state of the CI. See the November 8, 2004, Market Overview "Change And Configuration Management."

[4] A 2004 Forrester survey of more than 1,300 North American and European technology decision-makers revealed that 53% of security technology buyers will also buy systems management technologies. See the August 23, 2004, Trends "Systems Management Vendors Should Pursue Security Buyers."

[5] Microsoft will need more in its management software than today's software deployment and monitoring features for both the server and client. It will need to add desired configuration management, including detecting and correcting configuration drift. See the September 15, 2004, Quick Take "Microsoft Adds Virtual Server To The Dynamic Systems Initiative — But Needs More Automation."

FORRESTER

Helping Business Thrive On Technology Change

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617/613-6000
Fax: +1 617/613-5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

Research and Sales Offices

Australia	Japan
Brazil	Korea
Canada	The Netherlands
France	Sweden
Germany	Switzerland
Hong Kong	United Kingdom
India	United States
Israel	

For a complete list of worldwide locations, visit www.forrester.com/about.

For information on hard-copy or electronic reprints, please contact the Client Resource Center at +1 866/367-7378, +1 617/617-5730, or resourcecenter@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.

FORRESTER