451 Research® TheInfoPro™

Excerpts: Vendor Market Windows And Ratings

TheInfoPro's unique Market Window uses IT professionals ratings of vendors on 14 separate criteria to calculate scores for Vendor Promise and Vendor Fulfillment, allowing comparison of vendors' effectiveness at strategy, marketing, delivery and execution. In prior studies, this research appeared in the Vendor Performance report.

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About TheInfoPro Networking Study

451 Research® TheInfoPro™

TheInfoPro's Networking Study takes an in-depth look at key industry trends and tracks the performance of individual vendors. Now in its eighth year, this study was finalized in July 2013 and is based on 155 interviews.

TheInfoPro's methodology uses extensive interviews with a proprietary network of IT professionals and key decision-makers at large and midsize enterprises. Each interview explores several fundamental areas, including the implementation and spending plans for technologies, evaluations of vendors observed from business and product perspectives, macro IT influences transforming the sector, and factors affecting decision processes. Results are collated into comprehensive research reports providing business intelligence in the form of technological roadmaps, budget trends and vendor spending plans and performance ratings.

Examples of Vendors Covered in the Study

AT&T	Dell	Microsoft
AirWatch	F5 Networks	Palo Alto Networks
Arista Networks	Fortinet	Polycom
Aruba Networks	Hewlett-Packard	Riverbed Technology
Blue Coat Systems	IBM	SolarWinds
Brocade	Juniper Networks	Splunk
Cisco Systems	Meru Networks	Verizon

About the Author

This report was written by Daniel Kennedy, Research Director for Networking and Information Security.

Daniel Kennedy is an experienced information security professional. Prior to joining 451 Research, he was a partner in the information security consultancy Praetorian Security LLC, where he directed strategy on risk assessment and security certification. Before that, he was Global Head of Information Security for D.B. Zwirn & Co., as well as Vice President of Application Security and Development Manager at Pershing LLC, a division of the Bank of New York.

Kennedy has written for both Forbes online and Ziff Davis, has provided commentary to numerous news outlets, including The New York Times and The Wall Street Journal, and his personal blog, Praetorian Prefect, which was recognized as one of the top five technical blogs in information security by the RSA 2010 Conference.

Kennedy holds a master of science degree in information systems from Stevens Institute of Technology, a master of science in information assurance from Norwich University, and a bachelor of science in information management and technology from Syracuse University. He is certified as a CEH (Certified Ethical Hacker) from the EC-Council, is a CISSP, and has a NASD Series 7 license.

Principal Findings

Market Window

- According network managers that self-selected to rate their vendors, two firms emerged as having both positive promise and fulfillment index scores (an index of a series of customer ratings of different categories): F5 Networks and Aruba Networks. In addition, Riverbed and SolarWinds both had scores that put them at the edge of the upper right (or best) quadrant.

- Dell, Avaya, and Check Point had aggregate scores for promise and fulfillment that placed them in the lowest quadrant overall according to their customers.

- Cisco's ratings for both promise and fulfillment increased compared to last year.

- NetScout, Juniper Network, and SolarWinds posted better than average on the fulfillment side, but not as well on the promise side.

Comparison of Vendors

- Vendor excitement has not changed year over year for the network manager, who is perhaps guarded in his or her excitement. Cisco captures top honors, albeit at a lower percentage than last year (34% to last year's 44%). Juniper Networks retains second place at a distance and Palo Alto Networks secures third with a slightly improved percentage of responses over last year. Aruba Networks has slipped to fifth from fourth in vendor excitement, making way for Riverbed to capture the fourth slot this year.

- Avaya, Check Point and Dell scored poorly in the greatest number of categories. HP received average scores for the most part, but fell below the average for strategic vision and technical support.

- Juniper Networks posted average scores across the board, as did Cisco, which only fell below the study average in 'value for the money' based on the expense of its product lines.

- Aruba Networks beat the study average for both competitive positioning and features/functions, mainly around their wireless solutions.

- F5 Networks posted above average scores in a number of categories including strategic vision, innovation, delivery as promised, features/functions and product performance.

- NetScout and CA were received high ratings for their sales forces. SolarWinds was weak in the same category.

Networking Market Window
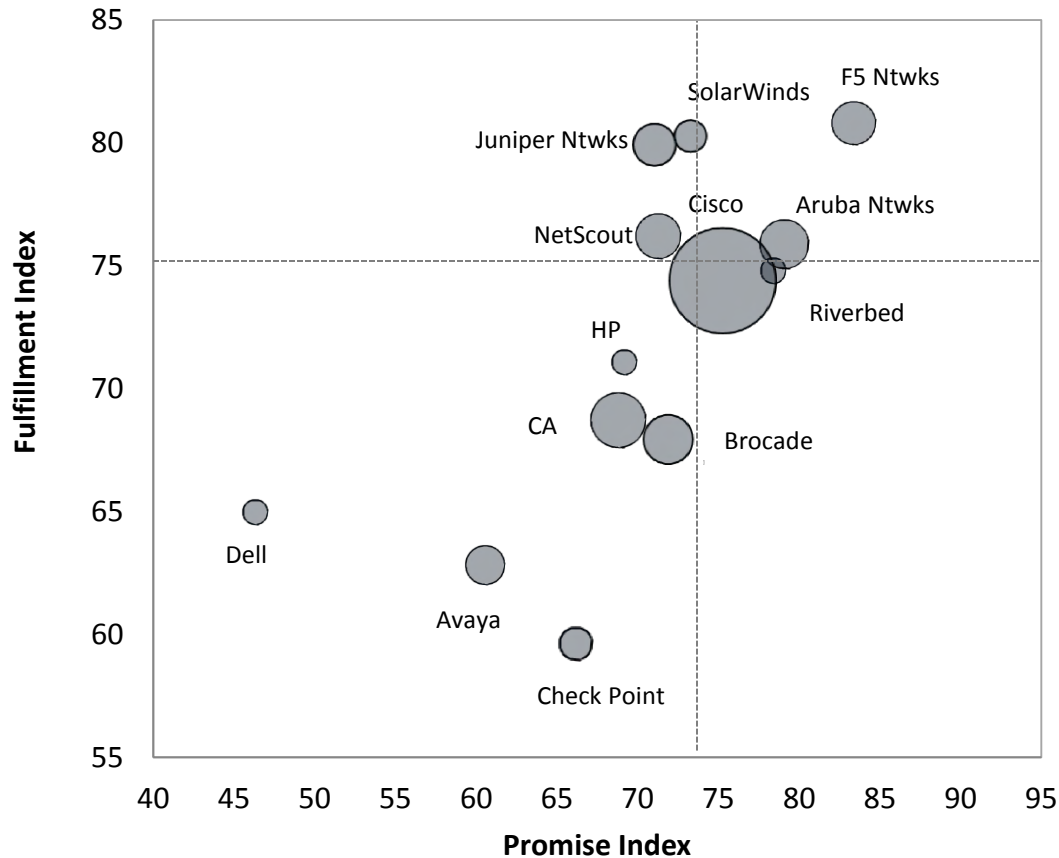
Vendor	Promise Score	Fulfillment Score
Average	**74**	**75**
Aruba Ntwks	79	76
Avaya	61	63
Brocade	72	68
CA	69	69
Check Point	66	60
Cisco	75	74
Dell	46	65
F5 Ntwks	83	81
HP	69	71
Juniper Ntwks	71	80
NetScout	71	76
Riverbed	78	75
SolarWinds	73	80

The **Market Window** plots the Promise and Fulfillment Indexes to compare vendors' effectiveness at marketing and execution. A vendor placing in the upper right quadrant is rated highly for both its promise and ability to execute – underpromising and overdelivering – relative to its peers. Conversely, a vendor in the lower left quadrant rates poorly on the same criteria. **The Vendor Promise Index** is designed as a measure of marketing effectiveness. It uses 4 of the 14 customer ratings criteria (Competitive Positioning, Technical Innovation, Management's Strategic Vision, and Brand/Reputation), which are related to global concepts conveyed to potential customers prior to actual product/service delivery and use. The **Vendor Fulfillment Index** is designed as a measure of execution effectiveness. It uses 4 of the 14 customer ratings criteria (Value for the Money, Product Quality, Delivery as Promised, and Technical Support Quality), which are related to the physical product/service delivery and customer experience of using the product or service.

The size of the circle indicates the relative volume of ratings a vendor received. The intersecting lines indicate the average vendor score, including those for companies not depicted in the chart.

Low Promise, High Fulfillment	High Promise, High Fulfillment
Low Promise, Low Fulfillment	High Promise, Low Fulfillment

Networking Market Window – Time Series
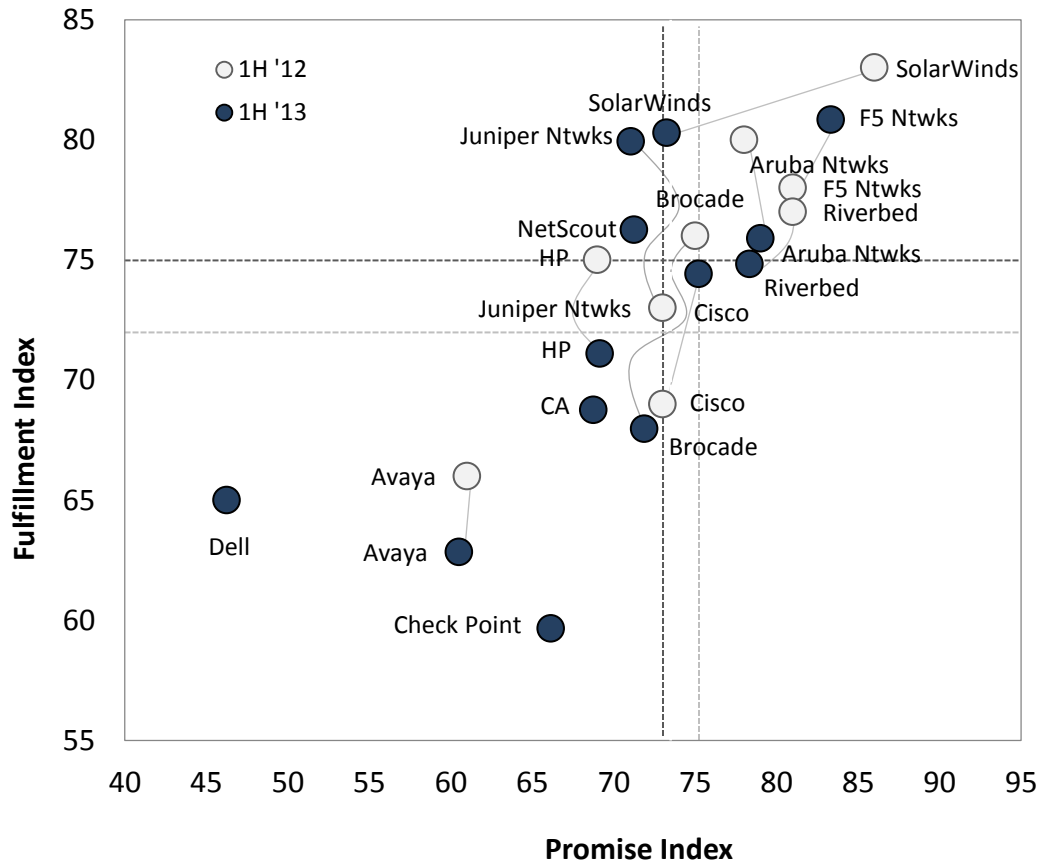
Promise Scores		
Vendor	**1H '12**	**1H '13**
Average	**74**	**74**
Aruba Ntwks	78	79
Avaya	61	61
Brocade	75	72
CA	—	69
Check Point	—	66
Cisco	73	75
Dell	—	46
F5 Ntwks	81	83
HP	69	69
Juniper Ntwks	73	71
NetScout	—	71
Riverbed	81	78
SolarWinds	86	73

Fulfillment Scores		
Vendor	**1H '12**	**1H '13**
Average	**72**	**75**
Aruba Ntwks	80	76
Avaya	66	63
Brocade	76	68
CA	—	69
Check Point	—	60
Cisco	69	74
Dell	—	65
F5 Ntwks	78	81
HP	75	71
Juniper Ntwks	73	80
NetScout	—	76
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Low Promise, High Fulfillment	High Promise, High Fulfillment
Low Promise, Low Fulfillment	High Promise, Low Fulfillment

Customer Ratings

	AVG	Cisco	Dell	F5 Ntwks	HP	Juniper Ntwks
Strategic Vision	3.8	3.8	2.8	4.3	3.3	3.6
Technical Innovation	3.9	3.8	2.6	4.4	3.7	3.8
Brand/Reputation	4.2	4.6	3.2	4.4	4.1	4.0
Competitive Positioning	3.9	3.8	2.8	4.2	3.9	3.9
Value for Money	3.8	3.3	4.2	4.1	4.1	4.2
Product Quality	4.3	4.4	4.0	4.5	4.4	4.3
Delivery as Promised	4.0	4.0	2.8	4.5	3.8	4.3
Technical Support	4.0	4.2	3.4	3.9	3.1	4.1
Interoperability	3.7	3.5	3.8	3.9	4.1	3.9
Features/Functions	4.0	3.9	3.4	4.6	3.9	4.1
Product Performance	4.2	4.4	3.8	4.7	4.3	4.4
Product Reliability	4.3	4.5	3.8	4.3	4.1	4.2
Sales Force	3.7	3.9	3.2	4.0	3.4	3.6
Ease of Doing Business	3.9	4.0	4.0	4.1	3.7	4.1

Raw Scores: Respondents rated vendors using a 1-5 scale, with '1' being poor and '5' being excellent. Red highlighting indicates that the average score is at least .5 standard deviations below the mean ratings and green highlighting indicates that it is at least .5 standard deviations above the mean.

Cisco, n=88; Dell, n=5; F5 Ntwks, n=15; HP, n=16; Juniper Ntwks, n=19.

Blue Box Customer Ratings

	Cisco	Dell	F5 Ntwks	HP	Juniper Ntwks
Strategic Vision					
Technical Innovation					
Brand/Reputation					
Competitive Positioning					
Value for Money					
Product Quality					
Delivery as Promised					
Technical Support					
Interoperability					
Features/Functions					
Product Performance					
Product Reliability					
Sales Force					
Ease of Doing Business					

Understanding the Chart:
Blue Boxes = the quintile this vendor's score falls into.

Current Performance

< 20%	
20%-40%	
40%-60%	
60%-80%	
80%-100%	

Poor ⟶ Excellent

Cisco, n=88; Dell, n=5; F5 Ntwks, n=15; HP, n=16; Juniper Ntwks, n=19.

Select Narratives From Vendors' Customers
(Full Compilation in the Narratives Report)

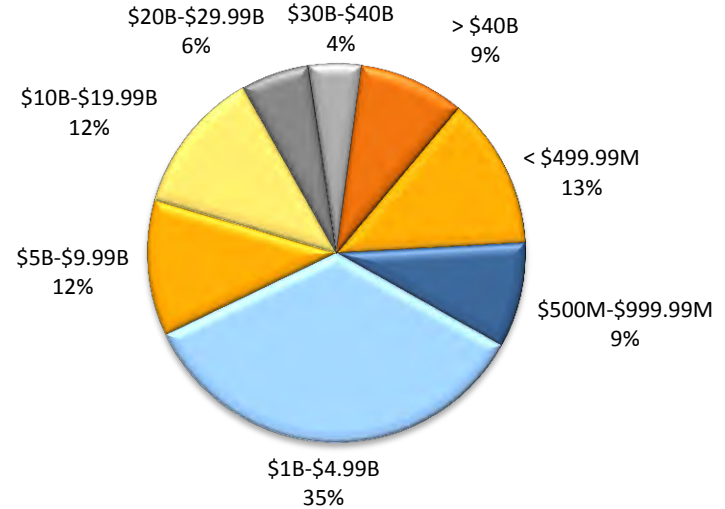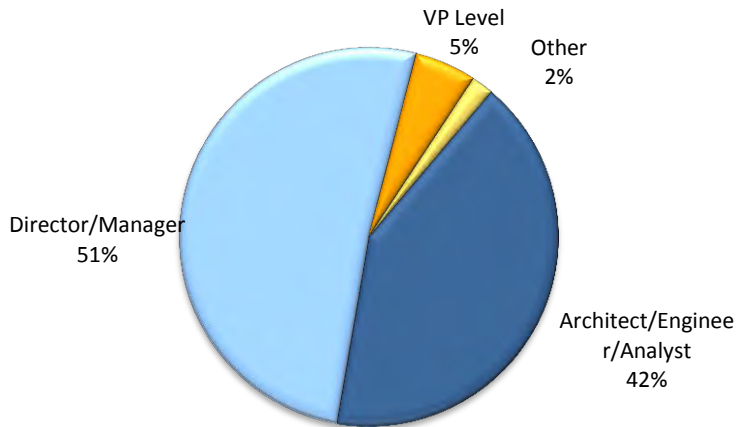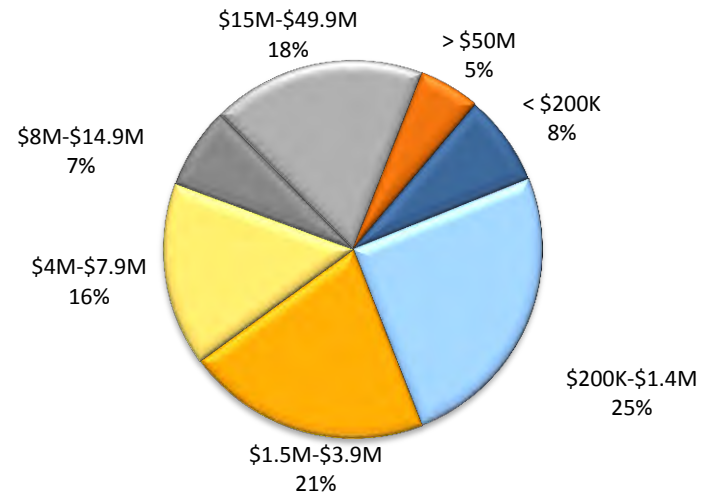| Vendor	Are there any additional comments you would like to add regarding this vendor (strengths, weaknesses, etc.)?	Enterprise Size and Industry
Aruba Ntwks	They have done some very unique things, historically. Now Cisco has caught up, and I'm not sure that Aruba understands the change.	LE, Consumer Goods/Retail
Aruba Ntwks	Aruba is not very intuitive for setup and configuration. It takes a consultant, an expert, to set it up correctly. We deployed it ourselves, had tons of problems. Now we're redoing the whole setup with a professional integrator, and the system works just beautifully. Not something you can just do yourself. I was blindsided by that.	LE, Other
Avaya	Avaya needs to make sure that they can deliver on the technology promises that they have made. There are a couple of times in which they showed great technology which didn't pan out – implemented, but not very well.	LE, Energy/Utilities
Brocade	Brocade is doing a good job with coming up with new products that are functional and robust. It is not always the same old same old. Downside: they are not the biggest fish in the pond; I think that Cisco may continue its dominance, but could HP or Dell take them over?	LE, Education
Brocade	Strengths – they do offer a fairly decent port price for 10Gb infrastructure. Weaknesses – where to start? Product fragmentation, interoperability, engineering and their code base is lacking. Basic stuff Cisco and Juniper do, like bare-metal restoration, Brocade doesn't support that. The product line is so heavily fragmented – setup and management is different across products because they bought different vendors and slapped the Brocade name on them. We don't see any signs of them unifying.	LE, Energy/Utilities
Cisco	I rank Cisco higher now than a year ago because they seem to support their larger customers better. We get a lot more attention than my former company did. When they come in, they want to sell you everything they make!	LE, Consumer Goods/Retail
Cisco	I actually hate Cisco, but they have great products. The prices and ability to do business with them make them not a favorite of mine.	LE, Consumer Goods/Retail
Dell	With buyout of Force10 by Dell, some of the personnel moved, and there was a change in the roadmap – to appliances from routers in general. Functionality changes – I bought a product that was to be upgraded to 40Gb. Then they killed the product and said that they wouldn't provide the new functionality again.	LE, Public Sector
F5 Ntwks	They have a great vision for where ADCs and networking are heading – they are trying to position themselves right in the middle of it. Nothing is too hard for them; you come up with a problem, and the technical people are right on it with various possible solutions – iRules are a thing of wonder. Their commitment to the community is outstanding and fosters sharing and collaboration. Only minor thing is that their support out of Asia is not that great. We come in early to get USA support.	MSE, Education

Appendixes

Demographics

Industry Verticals

- Education 15%
- Materials/Chemicals 5%
- Telecom/Technology 8%
- Services: Business/Accounting/Engineering 6%
- Transportation 3%
- Other 3%
- Energy/Utilities 5%
- Industrial/Manufacturing 11%
- Financial Services 21%
- Consumer Goods/Retail 11%
- Healthcare/Pharmaceuticals 6%
- Public Sector 6%

Enterprise Revenue

- $20B-$29.99B 6%
- $30B-$40B 4%
- > $40B 9%
- < $499.99M 13%
- $500M-$999.99M 9%
- $1B-$4.99B 35%
- $5B-$9.99B 12%
- $10B-$19.99B 12%

Respondent's Title

- VP Level 5%
- Other 2%
- Director/Manager 51%
- Architect/Engineer/Analyst 42%

Networking Budget Level

- $15M-$49.9M 18%
- > $50M 5%
- < $200K 8%
- $200K-$1.4M 25%
- $1.5M-$3.9M 21%
- $4M-$7.9M 16%
- $8M-$14.9M 7%

Top Left Chart: n=155; Top Right Chart, n=155; Bottom Left Chart, n=154; Bottom Right Chart, n=115.

Methodology and Sample Variation

METHODOLOGY

This TheInfoPro's Networking Study relied on a proprietary network of IT professionals and is based on in-depth interviews with 155 networking professionals conducted from December 2012 through May 2013. TheInfoPro's interviewers are current and former IT managers and executives. They ask open-ended questions that enable TheInfoPro to gain an excellent understanding of the issues and decision-making process related to strategic planning, technology benchmarking, and vendor selection and negotiation.

The Commentator Network has a variety of industry types and levels of technology adoption. TheInfoPro screens potential commentators to ensure that they can discuss in detail their enterprises' technology roadmap and relationships with pertinent vendors. To participate, a commentator had to work for a large or midsize enterprise. For the purposes of this study, large enterprises have over $1 billion of revenue and midsize enterprises have annual revenue of $100 million to $999 million.

SAMPLE SIZE VARIATION

Because the interviews are designed to be flexible to the needs and knowledge of the commentator, not every interviewee is asked every question. As a result, many charts have a sample size varying from the total number of interviews.

RECENT CHANGES TO THE STUDY

Many respondents have detailed knowledge of all technology areas, but some do not. Beginning this year we are reporting percentages based upon the full survey sample of respondents, and showing the percentage of respondents that indicated that they did not have detailed status knowledge for certain technologies.

TheInfoPro's Technology Heat Index® and Adoption Index have been updated. The indexes were reengineered to provide a stronger picture of user demand and investment in technologies. The calculations now account for planned changes in a technology's spending and the relevant sector's budgets.

How to Interpret the Data

TECHNOLOGY ROADMAP AND INDEXES

The **Technology Roadmaps** highlight the percentage of respondents with a technology 'in use,' the percentage that are likely to use the technology for the first time in the next two years, and those who have no plans. The size of the gap between 'in use' and 'not in plan' status indicates the potential opportunity for a technology in the next two years.

This data is combined with spending and budget data to calculate the Heat and Adoption index values for each technology.

The **Technology Heat Index®** measures user demand for a technology based on several factors including: usage or planned usage, changes in planned spending, an organization's budget for the relevant IT sector, and future changes in the organization's budget. A high score means a technology is expected to see significant growth.

The **Technology Adoption Index** measures aggregate investment in a technology based on several factors including: usage or planned usage, changes in planned spending, and an organization's budget for the relevant IT sector. A high score means the technology is already experiencing healthy adoption.

Technologies with a high Heat Index score and a low Adoption Index score have the largest near-term market opportunity for vendors. Technologies with a high Heat Index score and a high Adoption Index score are experiencing near-term growth but have limited opportunities for new market entrants. A low Heat Index paired with a low Adoption Index indicates a technology with limited near-term growth potential.

CUSTOMER RATINGS

Respondents rated vendors on 14 criteria using a 1-5 scale, with '1' being poor and '5' being excellent.

The **Market Window** is TheInfoPro's unique methodology to visualize comparative vendor ratings on a single chart. It plots the Promise and Fulfillment Indexes to compare vendors' effectiveness at marketing and execution. A vendor placing in the upper right quadrant is rated highly for both its promise and ability to execute – underpromising and overdelivering – relative to its peers. Conversely, a vendor in the lower left quadrant rates poorly on the same criteria.

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Each individual report summarizes interesting portions of TheInfoPro's Wave 10 Networking Study and does not comprehensively review the hundreds of pages of research that form the full study. **For access to TheInfoPro's reports and services, please contact sales@451research.com.** Methodology questions may be addressed to **client.services@451research.com.**

451 Research, a division of The 451 Group, is focused on the business of enterprise IT innovation. The company's analysts provide critical and timely insight into the competitive dynamics of innovation in emerging technology segments. Business value is delivered via daily concise and insightful published research, periodic deeper-dive reports, data tools, market-sizing research, analyst advisory, and conferences and events. Clients of the company – at vendor, investor, service-provider and end-user organizations – rely on 451 Research's insight to support both strategic and tactical decision-making.

TheInfoPro, a service of 451 Research, is widely regarded as 'The Voice of the Customer', providing independent, 'real world' intelligence on key IT sectors including Cloud Computing, Information Security, Networking, Servers and Virtualization, and Storage. Using one-on-one interviews conducted within a proprietary network composed of the world's largest buyers and users of IT, TheInfoPro provides data and insights that are used for strategic planning, technology benchmarking, competitive analysis, and vendor selection and negotiation.