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Magic Quadrant for WAN Optimization Controllers, 2009

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The WOC market is maturing rapidly, but remains dynamic, with a high level of innovation from vendors. Organizations looking to acquire WOC capabilities should identify their specific needs and conduct real-life trials before committing to any purchase.

WHAT YOU NEED TO KNOW

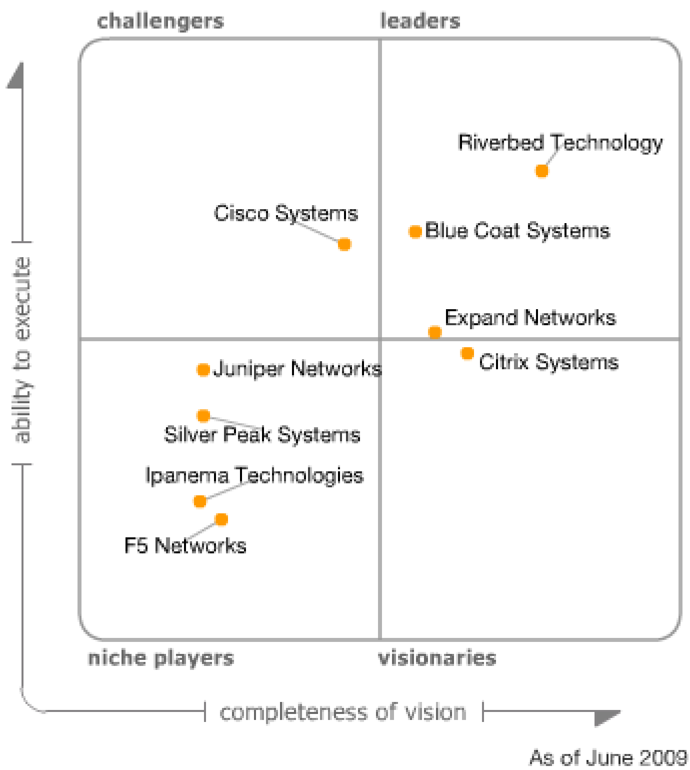
Optimization techniques for wide-area networks (WANs) can improve most organizations' application response times, particularly where network latency is high, which is often due to centralization of servers and IT resources. Typically, WAN optimization controllers (WOCs) serve to prevent network latency having a severe impact on the performance of applications and underlying protocols. Through data reduction and prioritization techniques, WOCs can also help organizations avoid costly bandwidth upgrades.

The WOC market is maturing rapidly, but it is still dynamic with a high level of vendor innovation. This has led to different vendors offering different combinations of features. So, before choosing a vendor, ensure that you understand the applications and services running on your network, and the protocols they use. Also, conduct a detailed analysis of your network traffic to identify specific problems — for example, excessive latency, bandwidth oversubscription or lack of prioritization for certain types of traffic. Finally, insist on a real-life trial before committing to any purchase. Performance measurement and service-level agreement (SLA) reporting are other features well aligned to WOCs that vendors can add to increase value. At present, WOC capabilities are delivered by dedicated equipment, usually purchased by the user organization. As the market develops, we expect to see increasing deployment of managed WAN optimization services, increasing "openness" of WOC platforms to third-party applications, and some integration of WOC features into other network equipment, such as routers. We also expect software-only "virtual" WOC implementations to emerge.

Our advice on selecting stand-alone WOC equipment should therefore be considered in light of these anticipated changes in the market, and we recommend that selection is made on the basis of relatively short payback times (typically less than three years), and on current and near-term product capabilities.

Note: as the inclusion criteria and feature expectations have changed since our "Magic Quadrant for WAN Optimization Controllers, 2007," one cannot compare a vendor's absolute position on the 2007 Magic Quadrant with its position in the 2009 edition. A shift in the absolute position of a vendor since the 2007 version does not imply that Gartner's opinion of the vendor has improved or deteriorated.

Figure 1. Magic Quadrant for WAN Optimization Controllers, 2009



Source: Gartner (June 2009)

Market Overview

WAN optimization is about improving the performance of business applications over WAN connections. Most networks carry a variety of traffic types, of differing characteristics and importance. Many organizations are striving to manage this traffic to optimize the response times of critical applications and reduce costs, given that bandwidth continues to represent a significant proportion of operating expenditure for wide-area data networks. But the cost of bandwidth isn't the only consideration — matching the allocation of WAN resources to business needs is also important. And as resources are increasingly centralized, minimizing the effect of latency on application response times is becoming a critical requirement. In addition, virtualization and new application environments, like cloud computing and Web services, can put an unexpected strain on the network.

Different types of traffic and IT architecture present both difficulties and opportunities for improving the response times of essential applications. For example:

- Traffic that isn't time-sensitive, like e-mail, backups and personal Web access, can swamp WAN links, leading to slow response times from business-critical applications.

- Applications, such as Microsoft SharePoint, that make extensive use of dynamic content can swamp WAN links while delivering poor end-user response times.
- Global centralization of branch office servers and data centers can expose latency-sensitive protocols, again leading to slow response times.
- File transfers, operating system patch distribution and similar applications, such as the delivery of training videos, can quickly saturate WANs.
- Repeated transmission of the same, or similar, files, objects or data patterns can create opportunities for data compression.

Since optimizing overall application response times is a requirement for many organizations, this Magic Quadrant reviews vendors that address the common need to make more efficient and effective use of wide-area connections, regardless of the type of traffic or application. The predominant need is still to optimize the connection between users (both in remote branch locations and single remote users) and IT-centralized resources. However, we are also beginning to see the emergence of the need to optimize connections between data centers. We are also seeing early signs of the need to optimize traffic to mobile devices.

The development of the application acceleration market has been driven by customer demand for highly integrated solutions that employ a wide range of techniques to optimize network traffic, and that offer scalability and fault tolerance. Vendors in this space initially addressed either the traffic shaping/quality of service (QoS) market, or the compression/caching market. These two segments have now largely merged, with most products supporting both sets of capabilities. While these capabilities address the problem of inadequate bandwidth, network latency has become a limiting factor on remote application performance. We therefore see an increasing need for both generic and application-specific optimizations to mitigate the impact of network latency on remote application performance.

Some vendors are now merging their enterprise content delivery network (ECDN) and WOC products, or are adding ECDN features to their WOC products. ECDN offers the capability to deliver live and on-demand streaming of media content, by splitting unicast streams and by pre-positioning content in the cache. This increases the scalability of media servers and helps to improve the response times for semi-static content, such as business procedures and software upgrades. The ECDN market is now merging into the WOC market.

In addition, the following WOC product trends are emerging:

- In branch offices, the capabilities of WOCs will evolve to the point where they can support server-less branch operations, also described as branch office boxes (BOBs). This will require (as a minimum) the addition of supporting features including Dynamic Host Configuration Protocol (DHCP), Domain Name System (DNS), active directory caching and print serving.
- Customers often need to maintain one or two key applications in the branch. BOBs are now leveraging operating system capabilities, including virtualization, to host one or more applications on the BOB hardware.
- There is an increasing focus on security — including the acceleration of encrypted protocols such as Hypertext Transfer Protocol Secure (HTTPS) and the security of data stored on WOC systems.
- As basic acceleration capabilities mature, we expect a resurgence of interest in visibility and control, both as a means to demonstrate WOC effectiveness, and as a

bandwidth/response-time planning tool. Providing application and user performance measurement and SLA reporting are key emerging requirements for WOC equipment.

Market Definition/Description

A WOC is customer premises equipment that is typically connected to the LAN side of WAN routers, or is software integrated with client devices. WOCs are deployed symmetrically — in data centers and remote locations — and improve the performance of applications that are accessed across a WAN. They address application performance problems caused by bandwidth constraints and latency or protocol limitations. The primary function of WOCs is to improve the response times of business-critical applications over WAN links, but they can also help to maximize return on investment in WAN bandwidth, and sometimes avoid the need for costly bandwidth upgrades. To achieve these objectives, WOCs use a combination of techniques, including:

- Ensuring fair access for mission-critical applications during periods of congestion by prioritizing business-critical traffic, through QoS policing and traffic shaping, for example.
- Minimizing the effects of network latency using methods like protocol- and application-specific optimization.
- Reducing the bandwidth required to transfer WAN traffic; by compressing it, for example.

Inclusion and Exclusion Criteria

Inclusion Criteria

To help organizations with their WAN optimization needs, Gartner has assessed vendors that offer generic, multifunction WOC products, rather than those that only offer application- or protocol-specific capabilities for Web caching, HTTP compression or remotely mounted file systems, or single functions such as QoS.

While WOC technology is maturing, there remains significant variation between different implementations, so we are focusing on evaluating the different feature sets available. Therefore we have only included vendors that were substantially the original developer of their WOC products (either directly or through acquisition). We have excluded vendors that source the bulk of their technology under OEM or resale agreements.

As this market develops, we expect vendors that offer a combination of techniques, both generic and application- or protocol-specific, to be the most successful. To be included in the 2009 Magic Quadrant, vendors' products must include capabilities in each of the four broad categories of WAN acceleration techniques:

- Traffic management capabilities such as WAN QoS classification, enforcement or traffic shaping.
- Compression, caching and/or data deduplication or reduction capabilities.
- Generic protocol acceleration (for TCP or HTTP, for example).
- Application- or higher-level protocol-specific optimization features, such as acceleration of the Common Internet File System (CIFS) file-sharing protocol.

Due to the wide geographical reach of the networks that will benefit most from this technology, included vendors need to have a global installation and support capability. As this Magic

Quadrant is intended to inform enterprise purchasing decisions, we have only included vendors that have a specific focus on enterprise customers.

Since this is the third iteration of Gartner's WAN Optimization Magic Quadrant, covering substantially the same set of vendors, our focus this time is on informing our clients' vendor selection process. In addition to the other inclusion criteria, we are therefore only including vendors that achieved measurable client interest in 2008. Vendors that were included in the 2006 and 2007 Magic Quadrants, but which failed to achieve measurable client interest in 2008, have been dropped. Our definition of "measurable client interest" is a 2008 appearance in the "Vendor Mentions" table in our "Customer Insights: Inquiry Statistics and Wizard for Communications, 4Q08." On the same basis, we have also only included vendors with worldwide 2008 WOC revenue in excess of $20 million, as measured by our market share methodology.

Vendors Added

No vendors have been added.

Vendors Dropped

Packeteer has been dropped because the company was acquired by Blue Coat Systems in 2008.

Exinda, Certeon, Stampede Technologies and ICT have been dropped, because they did not meet the revised inclusion criteria.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT providers' performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, technology providers are judged on their ability and success in capitalizing on their vision.

Product/Service

Core goods and services offered by the technology provider that serve the defined market. These include current product and service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements and partnerships, as defined in the market definition and detailed in the subcriteria. For the WOC market, this criterion evaluates both the capabilities of the product (as fully released and generally available at 2 April 2009) and the underlying hardware and software platform(s) upon which the vendor's products are based, the breadth of the product range, and the products' suitability for supporting additional features in future.

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 to invest in and offer the product, and advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing

The technology providers' 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. For the WOC market, the sales execution subcriterion is rated higher than the pricing subcriterion.

Marketing Execution

The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of 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, thought leadership, word-of-mouth and sales activities. We consider the success and mind share of products in the WOC market, including the installed base and market share, as well as the maturity and breadth of the organization's distribution channels. Also considered are the quality of customer case studies and the level of interest from Gartner clients.

Customer Experience

Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways that customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), the availability of user groups and SLAs. For the WOC market, the vendor's global installation and support capabilities are key components of the customer experience .Also considered are the quality of customer references, and Gartner clients' experience of the vendor.

The following evaluation criteria have not been used:

- Market Responsiveness and Track Record is evaluated under Marketing Execution.
- Operations is covered under Overall Viability.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	standard
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	high
Market Responsiveness and Track Record	no rating
Marketing Execution	high
Customer Experience	high
Operations	no rating

Source: Gartner (June 2009)

Completeness of Vision

Gartner analysts evaluate technology providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs and competitive forces, and how well they map to Gartner's position. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunities for the provider.

Market Understanding

The technology provider's ability to understand buyers' needs and translate these needs 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 wants with their added vision. For the

WOC market, we expect to see a consistent track record of feature enhancements, together with a sound product road map.

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. For the WOC market, as well as a well-developed global distribution strategy, we expect to see a vision to address the increasing importance of managed WOC services.

Business Model

The soundness and logic of a technology provider's underlying business proposition.

Innovation

Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. WOC vendors with a track record of early introduction of new features and capabilities will be highly rated. As well as feature innovation in the four broad categories defined in the inclusion criteria, we expect to see innovation in the scope of product availability (for instance, breadth of product range, including data center, branch and remote access products), in high-availability options, and in manageability and maintainability.

Geographic Strategy

The technology provider's strategy for directing 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. For the WOC market, we expect to see a sales and support strategy that recognizes the global nature of many user organizations' WOC needs.

The following evaluation criteria have not been used:

- Offering (Product) Strategy is covered under Market Understanding and Innovation.
- Vertical/Industry Strategy is not relevant because WOC equipment is being adopted across a broad range of industries, and is a generic technology that is not industry-specific.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	no rating
Business Model	standard

Evaluation Criteria	Weighting
Vertical/Industry Strategy	no rating
Innovation	high
Geographic Strategy	standard

Source: Gartner (June 2009)

Leaders

Leaders exhibit an ability to shape the market by introducing additional capabilities in their product offerings and by raising awareness of the importance of these features. We expect a Leader to be growing the market as a whole, and to have solutions that resonate with an increasing number of enterprises. Leaders in the WOC market need to have a broad feature set, including QoS, generic compression, protocol acceleration and file system acceleration, with the majority of features proven in substantial real-world implementations. They also need to be able to offer sales and support on a global basis.

Challengers

A Challenger in this market is a follower from a product or innovation perspective, but has demonstrated the ability to take its products into the market and to show their relevance to a wide audience. Challengers may have less-complete feature sets than Leaders, or they may have new products that are as yet unproven in substantial real-world implementations.

Visionaries

Visionaries need to address the whole market and must exhibit strong market understanding and innovation. They can be pointers to the market's future. However, they currently lack the ability to influence a large portion of the market, and have yet to expand their sales and support capabilities globally. In addition, they may have new products that are as yet unproven in substantial real-world implementations, or may lack the funds to execute with the same capabilities as a vendor in the Leaders quadrant.

Niche Players

Niche Players provide a more limited set of capabilities, and have not demonstrated enough vision or focused execution to warrant a stronger position in our analysis. They may be indicative of emerging requirements and features. Niche Players may have yet to expand their sales and support capabilities globally. Additionally, they may have new products that are as yet unproven in substantial real-world implementations, or may lack the funds to execute with the same capabilities as a vendor in the Leaders quadrant.

Vendor Strengths and Cautions

Blue Coat Systems

Blue Coat's WOC appliance software, MACH5, runs on the vendor's range of ProxySG appliances, which can also support Blue Coat's Proxy Edition secure Web gateway software. Blue Coat also offers a software WOC client, and the PacketShaper visibility, control and compression appliances from its 2008 acquisition of Packeteer.

Strengths

- Blue Coat has shown strong vision in merging security, visibility, optimization and control into its ProxySG appliances.
- ProxySG appliances offer integrated acceleration and security for direct Internet access from branch offices.
- The company offers a broad feature set that includes QoS capabilities, caching/compression and acceleration, including HTTP, HTTPS/Secure Sockets Layer (SSL), CIFS, FTP, SharePoint, mail and video.
- Competitive pricing, especially for the SoftWOC client, which is free of charge for user licenses, requiring only an appliance at the central site.

Cautions

- A current lack of integration of PacketShaper visibility and control capabilities into ProxySG.
- A lack of bandwidth scalability for core and data center to data center devices — for both ProxySG and PacketShaper.
- Somewhat limited SoftWOC acceleration capabilities.

Cisco Systems

Cisco's WOC product portfolio consists of Wide Area Application Services (WAAS) software, which runs on a range of appliances and on modules for Cisco's Integrated Services Router (ISR), and the WAAS Mobile software client.

Strengths

- The broadest overall network equipment product portfolio in the industry, backed by a strong channel and a very strong balance sheet.
- Excellent reputation for global support.
- Broad managed service provider (MSP) partnerships, with nine announced services from global and regional carriers.
- A partnership with Microsoft for Windows Server on WAAS.
- Competitive product pricing, and competitive total cost of ownership with its router WOC module.

Cautions

- Cisco has been slow to release WOC features, with a tendency to follow rather than lead. For example, Cisco's introduction of a full-function WOC, SoftWOC and Messaging Application Programming Interface (MAPI) acceleration lagged other vendors, and its HTTPS/SSL acceleration only went on general release in April 2009.
- A lack of functional integration makes for a complex and potentially expensive solution. QoS, some monitoring capabilities and SoftWOC are not integrated into the WAAS product: QoS capabilities are provided by Cisco IOS devices, and additional monitoring capabilities by other Cisco products including the Network Analysis Module and third-

party tools (such as NetQoS and others). Cisco's SoftWOC requires a separate headend server and separate management application.

- Overall software quality is much improved, although initial software quality for major releases remains a concern. Product performance and compatibility remain an issue in some accounts.
- It can still be difficult to make its product work on complex networks. The more complex the network, the more likely it is that there will be problems making WAAS work.

Citrix Systems

Citrix's WOC product range (formerly known as WANScaler) comprises the Branch Repeater and Branch Repeater with Windows Server appliances for branch offices, Repeater appliances for data centers and larger sites, and the Citrix Repeater Plug-in software WOC client.

Strengths

- A broad suite of products sold by a channel with excellent coverage, particularly in small and midsize business (SMB) markets.
- A focus on XenApp and XenDesktop hosted virtual desktop users, with credible capabilities for other optimizations.
- A partnership with Microsoft for platform and add-on applications.

Cautions

- No HTTPS/SSL-specific acceleration, and currently no MAPI acceleration.
- Windows is the branch-office-embedded OS for the BOB product, which may disqualify the platform from many opportunities.
- The product is still early in its life, so its demonstrated capabilities in very large and complex networks are limited.
- Limited disk-based compressed throughput at the high end.

Expand Networks

Expand's WOC capabilities are delivered either as appliances, or as a software-only virtual accelerator.

Strengths

- The company's vision of an appliance-less branch with distributed caches and cooperative QoS.
- A focus on hosted virtual desktops, terminal services, branch office server replacement, QoS, and visibility and control.
- A broad feature set, including User Datagram Protocol (UDP) optimization and good capabilities for Citrix and Remote Desktop Protocol (RDP) acceleration.
- An early provider of WOCs as virtual appliances.

Cautions

- A lack of MAPI and HTTPS/SSL-specific acceleration.
- The WOC client (SoftWOC) was only announced in May 2009, and is not yet generally available.
- Limited compressed throughput in high-end devices.
- Expand is a small, privately held company in a market led by large companies.

F5 Networks

F5's WOC features are now available under the vendor's TMOS architecture supported on its BIG-IP platforms. Advanced WOC features require BIG-IP's WAN optimization module. Some features are also provided by F5's WebAccelerator, also available as a module for BIG-IP platforms.

Strengths

- The company's vision of integrated application delivery services available on a range of platforms from branch to data center core.
- Asymmetrical or symmetrical acceleration for HTTP(S).
- Very high throughput device for data center to data center links.

Cautions

- F5's WOC products are currently in transition from the original WANJet platform to the vendor's mainstream BIG-IP/TMOS platforms. Features, although broad, are spread over a number of different products, making product selection complex.
- The lack of a branch office platform at this time, resulting in high entry-level pricing that will limit applications.
- There is currently no EMC E-Labs qualification for BIG-IP WAN optimization platforms.
- Very basic SoftWOC.
- The product lacks demonstrated capabilities in large and complex networks.

Ipanema Technologies

Ipanema's WOC capabilities are delivered through the vendor's ipEngine appliances.

Strengths

- A strong vision of WAN optimization delivered as a managed service, with end-to-end application SLAs matched by products designed to serve that market.
- Asymmetrical and symmetrical visibility and QoS/control.
- A credible set of go-to-market MSP partners, including BT, Orange Business Services, Cable & Wireless, Belgacom, Swisscom, Reliance and Tata Communications.

Gartner

Cautions

- Focused on service provider partners, resulting in limited market visibility in the general end-user market.
- Protocol-specific optimizations (including CIFS acceleration) are not yet proven in complex environments and at scale.
- No SoftWOC or HTTPS/SSL-specific compression or MAPI acceleration.
- Limited compressed throughput in high-end devices.
- Ipanema is a small, privately held company in a market led by large companies.

Juniper Networks

Juniper's WOC products include the WXC Series of appliances, and the WXC ISM 200 module for the vendor's J-Series routers.

Strengths

- A broad product suite, from switches to routers to security to WOCs, with an excellent reputation for quality and support.
- Competitive product capabilities (including UDP acceleration), and competitive prices.
- A vision for merging security, visibility and optimization in the branch office box.
- Service provider partners include Sita, Verizon, Orange Business Services and IBM.

Cautions

- The company is nearly invisible in the broad general market, with low, and declining, market share.
- It currently has no SoftWOC.
- Limited compressed throughput at the high end.

Riverbed Technology

Riverbed's WOC capabilities are delivered through its Steelhead appliances, and the Steelhead Mobile client software.

Strengths

- A leading vision combined with great brand recognition and an excellent product reputation.
- Ease of installation, even in complex networks.
- A broad suite of accelerations, including Exchange 2003/2007 (MAPI with encryption), SSL (HTTPS and other), CIFS (with SMB signing) and others.
- A broad set of MSP partnerships, including BT, SingTel, NTT America, Orange Business Services, AT&T, T-Systems and Bell Canada.
- A partnership with Microsoft for Windows on Steelhead.

Cautions

- Riverbed's QoS capabilities are weaker than most other leading vendors.
- Its channel and sales force can be perceived as being arrogant.
- Its pricing and discounting policies can sometimes result in high prices compared with other WOC vendors.
- The lack of a multi-gigabit device for storage applications.
- No specific Citrix/RDP acceleration.

Silver Peak Systems

Silver Peak's WOC capabilities are delivered through the vendor's NX appliances, which include Advanced Encryption Standard disk encryption.

Strengths

- A strong focus on storage replication, backed up by segment-leading products.
- Differentiated optimizations, including UDP as well as TCP, and compensation for error-prone links.
- Very high performance systems with very low insertion latency.

Cautions

- A very limited suite of application-specific optimizations.
- The company's solutions can be expensive for small sites with low-speed WAN links (for example, T1 and below).
- No SoftWOC or HTTPS/SSL-specific acceleration.
- Silver Peak is a small, privately held company in a market led by large companies.

RECOMMENDED READING

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

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, skills, etc., 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 of the individual business unit to continue investing in the product, to continue offering the product and to 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 in order 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, 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, etc.

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 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 product 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 set 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 verticals.

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.

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