

Magic Quadrant for Application Delivery Controllers

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The market for ADCs is consolidating. However, innovation continues, especially among some select smaller players. Although there are clear leaders in the ADC market, enterprises should focus their buying decisions on a vendor's ability to support specific application requirements.

WHAT YOU NEED TO KNOW

The key criterion in the Magic Quadrant for Application Delivery Controllers (ADCs; see Figure 1) focuses on the vendor's ability to provide products and services that solve complex application deployment challenges. Success in this market goes beyond features. It involves a deep understanding of how the elements of applications perform across the network.

MAGIC QUADRANT

Market Overview

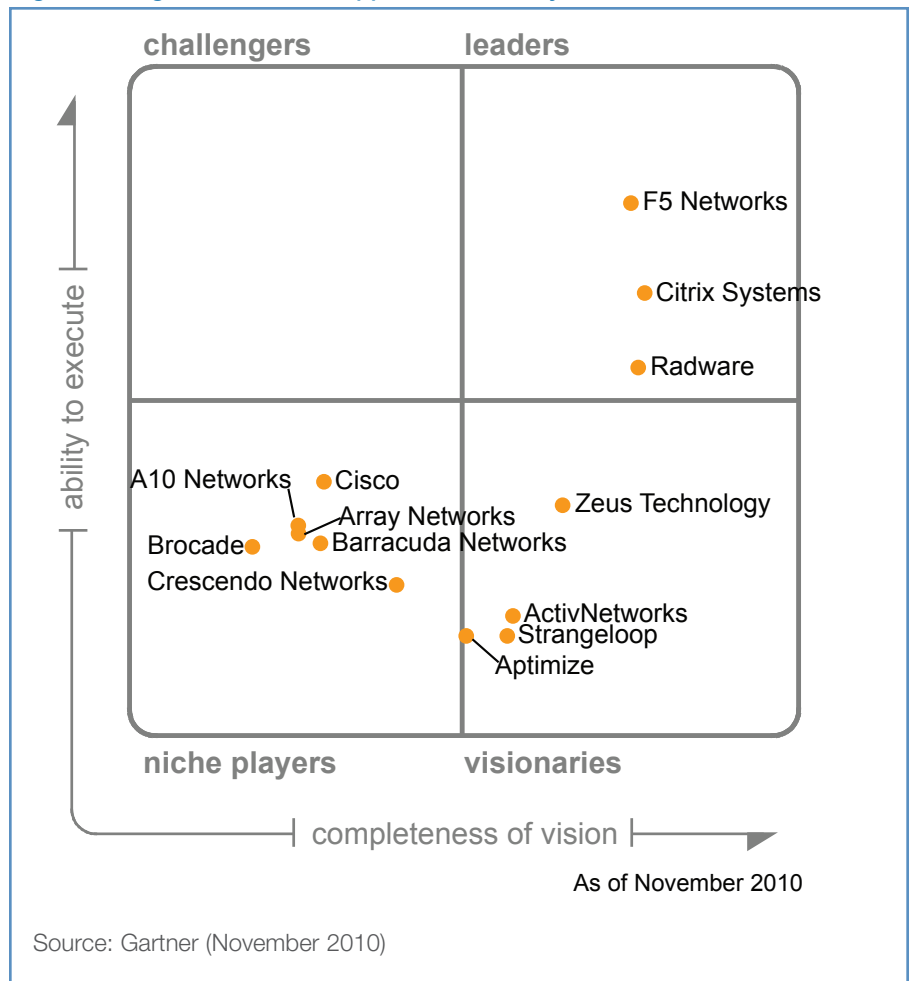
The market for data-center-based solutions to optimize the delivery of applications across the network continues to develop, and our expectations increase with each revision of this Magic Quadrant. As a result, the Magic Quadrant axis depicts a shift up and to the right with each revision. Consequently, vendors must progress to maintain their positions in each new Magic Quadrant.

The ADC market provides asymmetrical solutions to improve the performance, efficiency, deployment and security of a wide range of applications. New use cases of the ADC technology continue to emerge, reflecting significant innovation in the market. These technologies apply across a growing base of enterprise applications that may use the Internet, or may have little or no roots in Internet and browser-based technologies. Although the market emerged from load-balancing solutions designed to improve the availability and reliability of websites, load balancing and Secure Sockets Layer (SSL) termination for basic HTML traffic are no longer viable by themselves.

ADCs are often key components of diverse environments, such as portals, ERP systems, Microsoft Outlook and Office Communications Server (OCS), control points for virtualization, adjuncts to enterprise service buses (ESBs) or a service within service-oriented architecture (SOA), and, increasingly, as an element of application development environments. A more recent innovation is the emergence of software-based ADCs (softADCs) that can be deployed in more-flexible form factors. The primary interest has come from cloud providers that can more easily scale their environments as business dictates.

Most advanced platform (AP) ADCs incorporate rule-based extensibility that enables customers to customize the behavior of their AP ADCs. In addition, many AP ADCs incorporate programmatic control interfaces – open APIs – that enable them to be controlled by external systems, including application servers, data center management and provisioning applications, and network and system management applications.

Figure 1. Magic Quadrant for Application Delivery Controllers



Market Definition/Description

ADCs provide functions that optimize enterprise application environments. The market evolved from the load-balancing systems that were specifically developed to ensure the availability and scalability of websites. Enterprises use ADCs to optimize reliability, end-user performance, data center resource use and security for a variety of enterprise applications.

Inclusion and Exclusion Criteria

Criteria for inclusion in the Magic Quadrant for ADCs include the vendor's ability to:

- Release products for general availability and demonstrate commitment to this market.
- Deliver solutions directly to the enterprise market or indirectly through service provider bundled solutions.
- Demonstrate relevance to Gartner clients via noticeable mention during client interactions or via specific innovations that will drive and shape the market.

Added

We have added ActivNetworks, Aptimize and Strangeloop to this year's Magic Quadrant to recognize the innovation these smaller, emerging players bring to the market.

Dropped

None

Evaluation Criteria

Ability to Execute

We analyze the vendor's capabilities across broad business functions. Vendors that have expanded their products across a wider range of protocols and applications, improved their service and support capabilities, and focused on improving enterprise applications will be more highly rated in the Magic Quadrant analysis.

Product/Service evaluates the capabilities of the products or solutions offered to the market. Key items to be considered for the application delivery market are how well the products address enterprise application needs, the breadth of the products (in terms of different functions) and how well they scale – from entry-level products to high-end products and features. A key aspect that demonstrates continued execution in this area is how the vendor expands the types of applications that are optimized.

Overall Viability (Business Unit, Financial, Strategy, Organization) includes an assessment of the 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 the product, offer the product and advance the state of the art in the organization's product portfolio.

Sales Execution/Pricing looks at the vendor's ability to get the product into the market efficiently. In this market, we look for specialist capabilities – that is, a vendor and associated channels that understand and deliver solutions for optimizing a range of data center applications. In this emerging market, pricing is a secondary decision criterion. As the market matures and expands to include small or midsize businesses (SMBs), customer pricing will become more important. Additionally, we expect global distribution and support to serve large-enterprise accounts.

Market Responsiveness and Track Record focuses on the vendor's capability 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 provider's history of responsiveness.

Marketing Execution measures the clarity, quality, creativity and efficacy of programs that are 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 of the product/brand and organization in the minds of buyers. This mind share can be driven by a combination of publicity, promotions, thought leadership, word of mouth and sales activities.

Customer Experience looks at a vendor's capability to deal with postsales issues. Because of the specialized nature of the application delivery market, and the impact of product bugs on an enterprise's capability to conduct critical business functions, vendors are expected to escalate and respond to issues in a timely fashion with dedicated and specialized resources, and to have detailed expertise in many specific application environments. Another consideration is a vendor's capability to deal with increasing global demands. Additional support tools and programs are indications of a maturing approach to the market.

Operations looks at the organization's capability 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.

Ability to Execute reflects the market conditions and, to a large degree, it is our analysis and interpretation of what we hear from the market. Our focus is assessing how a vendor participates in the day-to-day activities of the market (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	standard
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	standard
Customer Experience	standard
Operations	low
Source: Gartner (November 2010)	

Completeness of Vision

These criteria have been fine-tuned to reflect the expanding use of these technologies in the enterprise.

Market Understanding looks at the technology provider's capability to understand buyers' needs, and to translate those 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 and needs with their added vision. An example of the expectations in this category is how vendors have enhanced their portfolios to address new application environments.

Marketing Strategy examines the messages and methods that vendors use to disseminate their messages. Are they clear and differentiated? Are they consistently communicated throughout the organization, and externally through the website, advertising, customer programs and positioning statements?

Offering (Product) Strategy looks at a vendor's product road map and architecture, which we map against our view of enterprise requirements. We expect product direction to focus on optimizing enterprise application performance and security. Specific technologies may include connection management, security enforcement, application enhancements, and emerging solutions for enterprise WAN deployment and related technologies. The timely incorporation of new application architectures – such as SOA, Web services, Ajax and Session Initiation Protocol (SIP) – also contributes to this score.

Business Model assesses a vendor's approach to the market. Does the vendor have an approach that enables it to scale the elements of its business (for example, development, sales/distribution and manufacturing) cost-effectively, from startup to maturity? Does the vendor understand how to leverage key assets to grow profitably? Can it gain additional revenue by charging separately for optional, high-value features? Other key attributes in this market would be reflected in how the vendor uses partnerships to increase sales. The ability to build strong partnerships with a broad range of application vendors and associated system integrators demonstrates leadership.

Innovation measures a vendor's ability to move the market into new solution areas, and to define and deliver new technologies. In the application delivery market, innovation is key to meeting rapidly expanding requirements and to keeping ahead of new (and often more-agile) competitors.

Completeness of Vision distills a vendor's view of the future, the direction of the market and the vendor's role in shaping that market. We expect the vendor's vision to be compatible with our view of the market's evolution. A vendor's vision of the evolution of the data center and the expanding role of ADCs in an SOA are important criteria. In contrast with how we measure Ability to Execute criteria, more of the rating for vision is based on direct vendor interactions, and on our analysis of the vendor's view of the future (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	low
Sales Strategy	no rating
Offering (Product) Strategy	standard
Business Model	standard
Vertical/Industry Strategy	no rating
Innovation	high
Geographic Strategy	no rating
Source: Gartner (November 2010)	

Leaders

A Leader exhibits the ability to shape the market by introducing additional capabilities in its product offerings, and by raising awareness of the importance of these features. Key capabilities for a Leader revolve around the AP ADC capabilities that focus on enterprise application capabilities. We expect a Leader to have strong or growing market share, especially in the AP ADCs, and to have solutions that resonate with an increasing number of enterprises. Expertise in complex data center application deployment is also necessary to be a Leader in the Magic Quadrant for ADCs.

Challengers

A Challenger in this market is a follower, from a product or innovation perspective, but has demonstrated the capability to take its products into the market and show their relevance to a wide audience.

Visionaries

Visionaries are vendors that have provided key innovative elements that illustrate the future of the market. However, they lack the capability to influence a large portion of the market; they haven't expanded their sales and support capabilities on a global basis; or they lack the funding to execute with the same capabilities as a vendor in the Leaders quadrant. Examples of innovation include the ability to deal with XML traffic or to be an early developer of client capabilities.

Niche Players

Niche Players provide more-limited capabilities and haven't demonstrated enough vision or focused execution to warrant a stronger position in our analysis.

Vendor Strengths and Cautions

A10 Networks

A10 continues to increase awareness in the market. Its primary approach is to deliver high-performance offerings at budget pricing. We see little innovation from A10; however, it is emerging as a fast follower and creating a level of price disruption that this market

has not seen before. Consider A10 for a low-cost solution in cases where detailed application engineering and professional services are not required.

Strengths

- A10 Networks presents a straightforward and cost-effective approach to ADCs. A10 has shown growing success in the enterprise and service provider markets, primarily in Asia and, more recently, in North America.
- A strong set of advanced ADC features, including compression and caching, as well as scripting and APIs, enables A10 to solve many application deployment issues. These features are available across the range of hardware platforms and come as part of the base platform.
- During the past 12 months, A10 has introduced new high-end platforms, a softADC and a range of features to ease IPv4 address shortages with a range of IPv6 support.

Cautions

- A10 has shown little innovation beyond price/performance. As a late entrant, it has attempted to follow the best of the ADC market vendors without adding much to the state of the art.
- A10 has not demonstrated sufficient expertise to work in complex enterprise application and data center environments.

ActivNetworks

ActivNetworks has built an innovative virtual appliance AP ADC, combined with specific optimization for mobile traffic and video streaming. Its list of European reference customers is impressive for such a small company. ActivNetworks' latest fundraising and its expansion into the North American market may provide it with the resources to establish itself as a mainstream player in the ADC market.

Strengths

- ActivNetworks delivers feature-rich, high-performance AP ADCs based on the customer's choice of off-the-shelf hardware. These solutions range from systems for SMBs to large enterprises.
- ActivNetworks' advanced features go beyond typical Web application firewall and content transformation to include PDF optimization, Cascading Style Sheets (CSS), JavaScript and custom image compression, along with custom optimization for dynamic Web applications.
- ActivNetworks provides a number of optimizations targeting delivery of applications and rich media to mobile handsets.

- ActivNetworks products are available through IT service providers in EMEA (e.g., IBM, Capgemini and Atos Origin).

Cautions

- ActivNetworks is a small company, with limited financial and personnel resources. As a result, ActivNetworks focuses primarily on Europe.
- Although ActivNetworks has recently opened a sales/support office and joint development projects with Institut Telecom in Silicon Valley, the company has limited visibility outside Europe.

Aptimize

Aptimize focuses on improving the performance of poorly coded, dynamic, browser-based applications. Fortunately for Aptimize, many commercially available applications fit this description. Aptimize's WAX is usually deployed in tandem with an AP ADC or with WAN optimization controllers (WOCs) to improve the effectiveness of these solutions. Consider Aptimize as an ADC adjunct when diverse client support is required, and a high level of performance optimization is the primary goal.

Strengths

- Aptimize's WAX goes beyond TCP/HTTP optimization to perform real-time optimization for poorly coded, browser-based applications, including JavaScript merge; minification and shrinking; image resampling; spriting; inlining; and CSS merge, minification and shrinking.
- Aptimize's WAX can be deployed in tandem with ADCs to deliver additional application performance and can also be installed as a service on Microsoft IIS servers or Apache Web servers. Evidence of this synergy can be found with the recent partner agreement with Citrix Netscaler.
- Aptimize's technology has been hardened in demanding environments, including Google and Microsoft and Ingram Micro public websites.
- Aptimize's WAX can be customized to obtain the maximum performance for critical applications.

Cautions

- Aptimize is a small company based in Wellington, New Zealand. As a result, its primary sales method is Web-based downloads, although it's starting to build distribution and reseller capabilities.
- The product is generally deployed beside an existing ADC, making the solution an incremental expense.

- Advanced WAX customization can be tricky, and it must be well-tested before deployment. Time zone differences can complicate this and other support activities.

Array Networks

Array has quietly built a significant presence in Asia, primarily in China and Japan. However, that success has not translated into visibility or any significant number of account wins in North America and Europe. Consider Array when looking for a cost-effective ADC solution in countries where Array has focused resources.

Strengths

- Array Networks has demonstrated strong execution in the markets it is targeting. With 70% of its sales coming out of China and Japan, and a growing presence in India, Array represents a strong alternative in these markets.
- Array's offering continues to broaden with increasingly high-performance, application-focused platforms with hardware options for compression and SSL to boost performance.
- Array has enhanced its clustering solution to enable the product to scale into larger environments.
- Array delivers a strong price/performance alternative to more-mainstream vendors, especially in its focused markets.

Cautions

- Array's geographic focus requires that enterprises check local coverage capabilities in the other regions into which Array is selling.
- Array delivers a mainstream feature set, but has not demonstrated the ability to deal with complex enterprise application environments.

Barracuda Networks

Barracuda's integration of its server load balancer and its AP ADC will give its customers an easy upgrade path from a simple device to a full-function AP ADC. Unfortunately, many AP ADC buyers do not consider Barracuda, because of its reputation for cost-effective midmarket solutions. This perception is not in line with the strong security-focused capabilities Barracuda offers in this market. Consider Barracuda when a low-cost, security-focused solution is the primary requirement.

Strengths

- Barracuda Networks has developed a broad reach and is a well-known brand.
- The Barracuda Web Application Firewall product contains a solid feature set for ADC and security.

- Barracuda is the price point leader for offerings for SMBs.

Cautions

- The level of investment in the application delivery features is somewhat limited, due to a focus on security features and the lower price points offered by Barracuda. Don't look for Barracuda to innovate (outside of price).
- Barracuda's professional services are not as strong as the leading vendors when complex implementations are involved.
- Despite some movement toward a common code base and an upgrade path from the Barracuda Load Balancer to the Web Application Firewall product, there is still confusion between these two products in the market.
- Barracuda's brand for ADCs is not as well-known in the large enterprise market.

Brocade

Brocade continues to focus on the market for high-performance, basic ADCs. Its recent Application Resource Broker announcement demonstrates that the product team understands the potential of the ADC to bring greater value in the emerging virtualized data center. Consider Brocade where scalability and high throughput for a limited ADC feature set is a good match.

Strengths

- Brocade delivers performance-oriented, standard ADC solutions that scale to the highest performance levels in the market.
- Brocade's Application Resource Broker links with VMware vCenter to provide user experience monitoring and dynamic resource provisioning to ensure SLAs are met while keeping compute resources to a minimum.
- Brocade has a large installed base in SP and hosting facilities, which shows the proven reliability of Brocade's solutions.

Cautions

- Despite a noticeable improvement in features, Brocade has shown limited expertise in solving application performance challenges in the data center and generally focuses on solutions that do not require customization.
- Brocade has been slower than the leading vendors to embrace AP ADC features and open APIs for external integration to provide more-extensible capabilities to the ADC.
- Brocade has not yet executed on its vision for virtual ADCs.

Cisco

Cisco is bundling its Application Control Engine (ACE) into larger Cisco solutions – including the Cisco Virtual Data Center Solution and Cisco WebEx Solutions – to broaden the product’s appeal. However, lack of extensive application knowledge and features restricts Cisco’s abilities in this market to areas where its virtualized solution and traffic management features meet customer requirements. Although it remains the second largest player in the market, Cisco sells a large proportion of load-balancing solutions (not advanced ADC solutions) and lost 3.5% of market share during the past year. Consider Cisco when you need basic features with scalable, multitenant virtual ADCs.

Strengths

- Cisco has a large and loyal customer base, combined with a substantial installed base of legacy load-balancing solutions. These customers represent an opportunity for Cisco to sell its higher-performance load balancers.
- On the ACE module, Cisco pioneered virtualized load-balancing features that are attractive for basic, but large-scale, infrastructure load-balancing requirements.
- Cisco has developed a “pay as you grow” licensing model to reduce the number of platforms to a minimum and to provide flexibility to its customer base.
- A focus on bundled solutions will appeal to organizations that do not have sophisticated ADC requirements.

Cautions

- Based on client feedback, Cisco has demonstrated limited application knowledge, compared with its competitors, making it difficult for the vendor to help enterprises solve complex application deployment problems.
- Cisco plans for a next-generation service architecture are not complete and have not encompassed ADC functionality, which puts the future of Cisco’s current ADC hardware solutions in question. Cisco will need to update its ACE portfolio to fit into the emerging service architecture.
- We continue to see a decline in client requests concerning Cisco’s ADC solutions. This is also reflected in its continued market share decline – down to 19% in 2Q10, which is a decrease from 22.5% in 2009.

Citrix Systems

Citrix was the first of the established vendors to deliver a virtual appliance version of its ADC, stealing the limelight from F5. Citrix offers a broad set of feature-rich products, along with innovative go-to-market programs that include pay as you grow for hardware upgrades and leases for virtual appliances. Consider Citrix for all ADC requirements, particularly where a mix of physical and virtual instances is required.

Strengths

- Citrix NetScaler has shown a comprehensive application delivery vision that rivals F5’s, and it has backed this up with the first virtual ADC offering from a major supplier.
- Citrix has a reputation for delivering high-performance ADCs with increasingly rich sets of advanced features. The NetScaler VPX Virtual ADC opens up new opportunities for broader deployment of ADCs, bundling ADCs into development environments and integrating into Citrix Xen Desktop hosted virtual desktop solutions.
- With its traditional software business, Citrix has a good understanding of the applications environment.
- Citrix is in a solid financial position, with an increasing share in the ADC market (13% as of 2Q10).

Cautions

- Citrix has yet to establish a broad online user community to promote and support its products.
- Although easy to use, the NetScaler ADC products have somewhat limited rule-processing capabilities, when compared with programmatic approaches.
- Not all the Citrix channels are capable of selling and supporting the full spectrum of NetScaler features; therefore, enterprises need to select their Citrix channels more carefully if they expect to take advantage of the full range of Citrix solutions.

Crescendo Networks

Crescendo continues to build an account base among Web 2.0 companies and high-traffic public websites. Its clustering promises a scalable, pay-as-you-grow approach. Consider Crescendo for ADC uses where its focused feature set is a good fit, particularly for public-facing Web 2.0 applications.

Strengths

- Crescendo Networks has a broad set of AP ADC features, with a strong focus on Web 2.0 applications, particularly for high-demand public websites. These capabilities are delivered at an aggressive price.
- Crescendo maintains performance, even with multiple features enabled, via its hardware-based implementation.
- Crescendo developed an inference engine (termed “Elastic Resource Control”) that dynamically adapts ADC behavior to application load and mix, which simplifies configuration challenges.

- Crescendo's cluster solution (HyperScale) enables customers to expand capacity without replacing existing CN7000 AP ADCs.

Cautions

- Crescendo is a relatively small vendor in a market dominated by a number of larger vendors.
- Crescendo trails larger ADC vendors in delivering the broadest set of mainstream AP ADC features.
- Crescendo has achieved limited market/brand visibility in the enterprise.

F5 Networks

F5 has remained the market leader during the past 12 months, and strong sales performance has enabled it to grow its market share (to 47%) and expand its lead over its competitors. However, despite this success, continued application and software-focused innovation around application performance demands, virtualized data centers and cloud services will be needed. Consider F5 for all ADC requirements.

Strengths

- F5 is a strong market leader, with a growing share and a strong financial base.
- F5 Networks has a broad and comprehensive vision, with industry-leading understanding of the needs of application development, deployment and management.
- F5's investment in iRules and iControl results in strong partnerships and loyal customers that would find it difficult to migrate away from F5. Integration with popular integrated development environments (IDEs), such as Eclipse and .NET/Visual Basic, also contributes to customer stickiness.
- F5 has developed a large community of committed users (using F5's DevCentral portal) that fuels the use of iRules to solve unique data center application challenges, creating an increasingly loyal and engaged user base.

Cautions

- F5 relies too much on hardware development and platforms to drive innovation. Its six hardware platforms are too many to choose from.
- Continued restrictions on what software options run on lower-end platforms restrict F5's ability to meet requirements for midsize organizations. This has forced some customers to buy more-expensive platforms just to get features, not because they need raw performance.

- F5 has spent too much time expanding in adjacent areas and has not kept pace with innovations in performance optimization, softADCs and the development of a universal ADC architecture.

- Enterprises need to engage with knowledgeable engineering and online resources to ensure they get maximum value from the product offering.

Radware

Radware has shown significant improvements during the past 12 months. The acquisition of the Nortel Alteon business has benefited the Radware and the Alteon customer bases. Radware continues to broaden its portfolio to appeal to specific use cases (SIP Director, Mobile Internet Gateway), and its vision on how to deploy ADCs across hybrid public and private clouds is compelling. Consider Radware for all ADC requirements.

Strengths

- Radware's OnDemand Switch enables customers to scale environments through license keys, reducing the number of platforms that cover a wide range of performance requirements. Combined with its five-year platform availability guarantee, Radware provides a platform approach that grows with customer requirements for an extended period of time.
- Radware has a strong vision of how ADCs fit into a seamless virtualized and cloud-based architecture, and recently announced its Virtualized ADC Infrastructure (VADI) architecture.
- Behavior-based security capabilities are well-suited to emerging threats and illustrate Radware's commitment to integrated security capabilities.
- Radware continues to leverage the Alteon assets acquired from Nortel (growing Radware's total market share to 9%) and has provided a comprehensive set of upgrades and support for this installed base.

Cautions

- Radware lags in performance acceleration features that smaller vendors have introduced to the market.
- Radware needs to execute on its vision, which includes new offerings for virtual ADCs and cloud solutions.
- Despite showing significant improvement in the past year, Radware must improve its presence in North America.

Strangeloop

Strangeloop is an innovator in HTTP performance optimization. The company heritage stems from a deep understanding of .NET deployments and optimization techniques. The 2009 slowdown gave Strangeloop time to expand its solution, the Strangeloop Site Optimizer, and to focus on performance optimization for all HTTP applications. Site Optimizer is normally deployed with an existing ADC, but an OEM arrangement allows Strangeloop to offer a full ADC solution. Consider Strangeloop (possibly as an ADC adjunct) when diverse client support is required and a high level of performance optimization is the primary goal.

Strengths

- A detailed understanding of modern development environments enables Strangeloop to provide some of the most effective optimization algorithms on the market.
- Strangeloop performs customized optimization for each type of browser, making it a good fit when mobile clients are deployed.
- Strangeloop has done a commendable job of tying performance gains into business value via analytics deployed during proof-of-concept trials.

Cautions

- Strangeloop is a small company, with limited resources, so prospective customers will need to ensure that engineering and support resources are appropriately committed to their projects.
- The Strangeloop Site Optimizer is generally deployed beside an existing ADC, making its solution an incremental expense.
- At this stage of its development, Strangeloop is restricted predominantly to North America.

Zeus Technology

Zeus pioneered software-based solutions for mainstream, scalable ADC applications. It is finding increasing traction among cloud infrastructure vendors. Its Zeus Elastic Application Delivery (ZEAD) platform attempts to make this a seamless architecture between the cloud and the enterprise. Consider Zeus for all ADC requirements, particularly where virtual ADCs are required.

Strengths

- Zeus Technology has demonstrated excellent performance and price/performance on off-the-shelf hardware.
- Zeus has had a clear and compelling vision for the AP ADC market, with solid products to back it up. Zeus understands the links between ADCs, application development and deployment in a virtualized world.
- Zeus supports the broadest range of hypervisors, including VMware, Xen, HyperV, KVM and Oracle/Sun.
- Zeus was the first vendor to deliver softADC with flexible licensing suitable for cloud hosting centers, application developers and a range of enterprise solutions. Zeus ADCs are available from a number of cloud infrastructure-as-a-service (IaaS) providers, including AWS, Joyent, Logicworks, Datapipe, Voxel and Rackspace.

Cautions

- Some larger and more-established vendors (e.g., F5 and Citrix) with broad product offerings and strong brands have introduced virtual ADCs with similar licensing programs. This could affect Zeus' ability to increase its opportunities.
- Zeus is a small vendor, with limited sales resources. Although reports of support capabilities are favorable, large enterprises should ensure that Zeus can provide the required level of support.

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.