

PilotHouse Award Summary

For the past three years Nemertes Research has asked IT decision-makers (2,004 of them this year) to rate their primary vendor for WAN optimization, a key component in overall Application Delivery Optimization (ADO). Nineteen vendors received votes; six received enough for awards consideration.

What makes this project so different from any other research available? *The results are based 100% on the experiences of WAN optimization users and decision-makers.* Nemertes' staff determines the methodology, conducts the research, and analyzes the findings, but we have no influence over how any given vendor performs in the ratings; that rests with their customers. No vendors sponsor this research. (For detailed methodology, please see the complete report.) Because they represent the distilled experiences of current users of WAN optimization solutions, these results can help companies creating, reassessing, or refreshing an ADO strategy.

IT practitioners rated their vendors on a 1- to 5-scale (5 is the highest score) in the following areas: technology (encompassing features, functionality, robustness, and performance); customer service and support (encompassing everything from sales support through end-of-life transitions); and value (bang for the buck, or how well price matches technology and support). Nemertes divides vendors into two classes for purposes of ratings: Market Leaders, who have hundreds or thousands of customers, and who typically account for a majority of the market among them in terms of revenues or units shipped; and Market Challengers, who have fewer customers and who share a minority of the market.

Blue Coat wins the Market Leader award for WAN Optimization. It led its nearest competitor, Riverbed, on technology and value, and led the other market leader, Cisco, in all three categories.



Why Blue Coat Won

Winning the Market Leader category this year, Blue Coat has made notable improvements in every area compared to last year: technology, service, and value.

The increase was sharpest in technology: a 9% increase year over year. Next most improved was customer service and support, with a 7% increase. In value, Blue Coat's scores increased by 4% over 2009. This was particularly impressive in a year when Blue Coat's nearest competitor (Riverbed) saw significant decreases in two of three categories.

In addition to delivering a solid set of technologies around optimization and security, Blue Coat builds solid relationships with IT professionals. As the technology manager in a professional-services firm says, "I have refreshed the network twice, shifted to MPLS (have gone through two vendors) and QoS/CoS is not great yet. But Blue Coat does it [traffic prioritization] for us, so we stay clear of carriers on it and can easily swap MPLS vendors (as we did a couple months ago)." Retaining some agility and leverage with respect to larger partners such as carriers is important to small companies,

and in our ratings pool, 44.3% of the companies using Blue Coat were small.

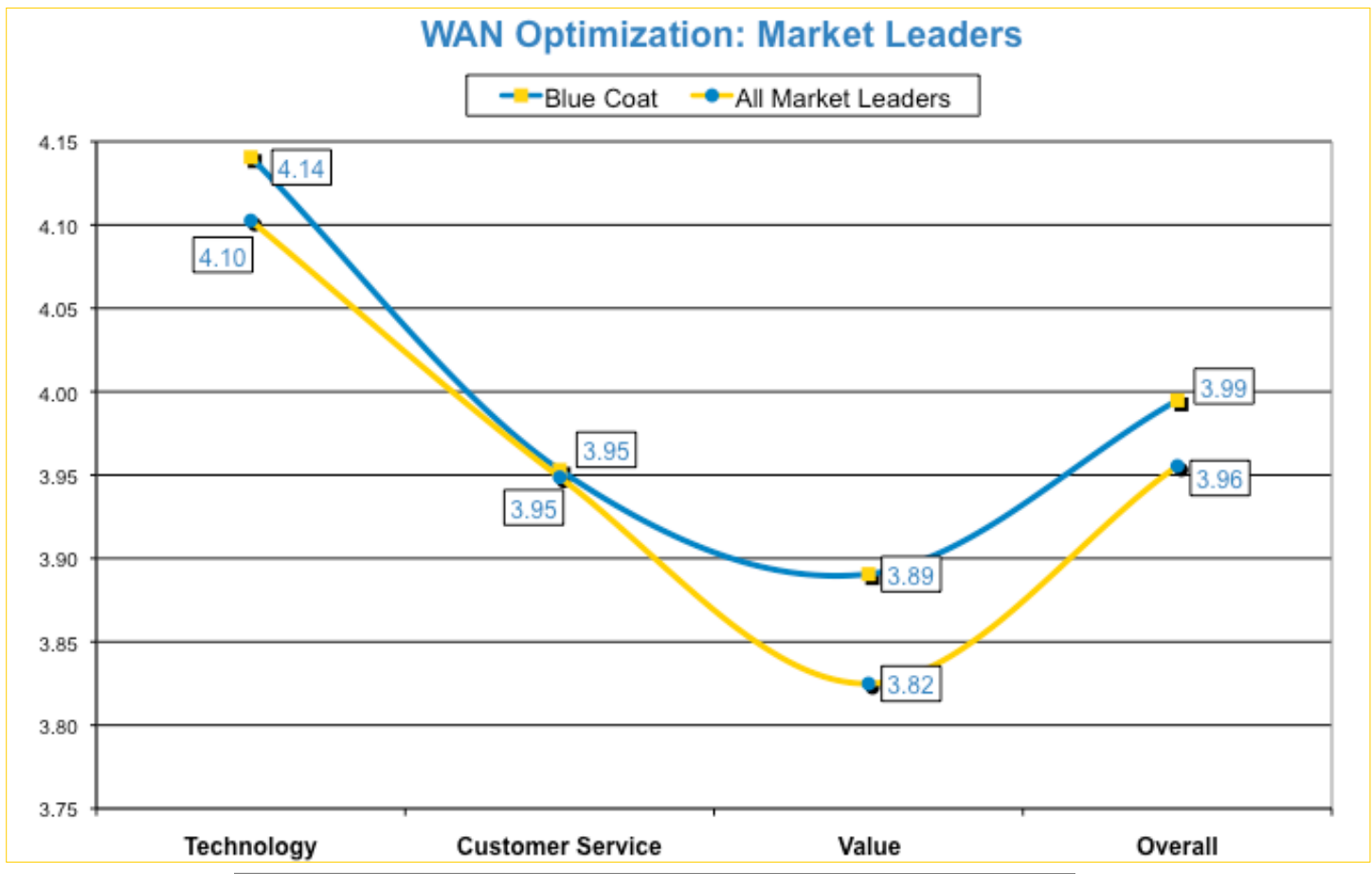
On technology, the typical sentiment among users is, “No issues with it whatsoever,” as a CIO in a midsize healthcare firm says. The solution is by most accounts both easy to install and configure and easy to manage and maintain over the long haul.

Of course, that layer of abstraction that can shield an organization from its carrier’s QoS idiosyncrasies creates an “extra layer of complexity,” says a healthcare CIO. But, with Blue Coat’s highest score in technology (4.14 of 5), such issues are of relatively minor consequence to

customers overall. And, of course, almost any appliance-based solution is going to add that layer of complexity.

The only area in which Blue Coat did not lead was in customer service, where it was exactly average. However, its 3.95 out of 5 score represents a significant improvement compared to the previous year, suggesting good progress in resolving some unevenness in support reported last year.

The fact that its value ratings are well above average implies that, overall, customers perceive strong technology and support at a reasonable cost.



About Nemertes Research: Nemertes Research is a research-advisory firm that specializes in analyzing and quantifying the business value of emerging technologies. You can learn more about Nemertes Research at our Website, www.nemertes.com, or contact us directly at research@nemertes.com.