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NetQoS Offers An Experience Monitoring Solution For Global Performance Management

The Forrester Wave™ Vendor Summary, Q2 2007

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EXECUTIVE SUMMARY

NetQoS is dedicated to performance analysis and performance management. The company's SuperAgent module — part of NetQoS Performance Center — was a pioneer in the appliance-based monitoring market. The solution will especially appeal to network operation centers, where early alerts and identification of issues on any type of IP-based application is a key advantage.

NETQOS' SOLUTION IS BEST SUITED FOR IT OPERATIONS

NetQoS is based in Austin, Texas, was established in 1999, and specializes in network monitoring and network performance management. *Inc. Magazine* named the company as one of the fastest-growing private companies in 2006, with three-year growth of 578%. NetQoS has just over 200 employees, as well as transatlantic bases in EMEA and Asia. End-to-end performance monitoring is through NetQoS SuperAgent, a module of the NetQoS Performance Center. It tracks and measures end user response time by monitoring TCP application packets as they travel from the network through the data center and out again.

Forrester evaluated NetQoS' current offering and strategy for appliance-based end user experience monitoring against approximately 35 criteria (see Figure 1). Overall, the product has strong anomaly detection and performance analysis ability, but lacks an elaborate reporting feature, especially for nontechnical users. This means that the product is an especially good fit for buyers that:

- **Are interested in the performance of their networked environment.** NetQoS SuperAgent provides strong support for other network analysis features of the NetQoS Performance Center. It offers the capability to quickly diagnose any performance issue's root cause.
- **Are technically minded.** SuperAgent is a technical product made for specialists. It does not offer a high level of business analysis, but does offer strong IT operations support.

To see how NetQoS stacks up against seven other competitors, see the Forrester Wave™ evaluation of the appliance-based end user experience monitoring market.¹



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Figure 1 NetQoS' Solution Evaluation Overview

CURRENT OFFERING	
Architecture	Two product architecture configurations are available: 1) a standalone version, where all functions are included in a single unit; and 2) a distributed version, where up to five collectors can feed into a centralized management console. OS and hardware are typically Windows 2003 Web Edition on Dell 1900/2900 series servers.
Data collection	One collection appliance per server-side switch. The collector connects to a span port or a tap. It sends less than 1MB/min to its management console.
Reporting links/interface	A Web interface with an email option provides report access.
Monitoring capabilities	Any TCP-based application can be analyzed and reported.
Real-time capabilities	Baselining occurs automatically for 10 metrics on each combination of client network, server, and application. Additionally, two levels of thresholds are available (automatically calculated or manually assigned) for eight core metrics across the same combinations. SNMP trap or email notification of threshold violation is available in real time or based on "time over threshold" conditions. Incidents are classified by network or server issue to consolidate related events into a single incident.
Console integration	SNMP traps are forwarded to any chosen destination. Web services links within traps provide detailed enumeration of incident details.
Reporting capabilities	The product supports the analysis of any TCP-based transaction.
Product scalability	SuperAgent scales to the largest enterprise networks. It measures all TCP application traffic and can distinguish HTTP traffic by URL string matches.
Integration with other products	SuperAgent includes a built-in SLA management system. SuperAgent integrates with the NetQoS performance management suite of products via the NetQoS Performance Center. The suite includes a traffic analysis product and a device management product. SuperAgent is also able to export views to third-party products.

Source: Forrester Research, Inc.

Figure 1 NetQoS' Solution Evaluation Overview (Cont.)

STRATEGY	
Focus	53% of revenue is derived from this product.
Planned evolution	Within the next 12 months, there are plans for releases to incorporate three types of strategic integration, as well as incremental improvement of existing technology: 1) integration with WAN optimization vendors; 2) integration with line-rate packet-capture-to-disk technology providers to add retrospective network analysis to SuperAgent investigations; and 3) other third-party integrations that are yet to be announced.
Go-to-market strategy	NetQoS generates revenue from its domestic direct sales force paired with international resellers to address the global market. NetQoS has resellers throughout Europe and Asia as well as regional sales offices in London and Singapore. Fluke Networks rebrands and sells the NetQoS product line under the Fluke name. Revenue originates from sales of NetQoS functional modules (SuperAgent, ReporterAnalyzer, NetVoyant, and Allocate), maintenance contracts, and professional services. NetQoS expanded its professional services offerings in 2005, and the program now includes product implementation, training, and advisory services, as well as a new line of product- and vendor-neutral consulting services.
Pricing	Pricing is by appliance, not per seat.
MARKET PRESENCE	
Installed base	388 clients have purchased the product.
Employees	Confidential.
Revenue	Confidential.
Cash	Confidential.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.



SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this vendor.

This detailed data and scores for this vendor are also available online through an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Forrester evaluated leading appliance-based end user experience monitoring vendors across 35 criteria and found that although all vendors use a very similar technology, they now target their products to at least four specific end user experience monitoring markets: business marketing, global application performance debugging, Web-based application performance, and J2EE/.NET application performance management. Tealeaf Technology is a leader in serving business marketing needs, while Coradient is a leader in monitoring and debugging the performance of Web applications, followed by Europe-based Moniforce. HP is a leader in providing an end user experience monitoring tool that complements its application management suite; CA, Compuware and Quest Software closely follow in this category. Finally, NetQoS leads Compuware in offering a performance analysis tool that provides performance information on any IP-based protocol. The Compuware solution is also very strong in HTTP/HTTPS transaction performance, which makes it the most versatile solution of this evaluation. At the end of the day, all these products compete very closely with each other — to the extent that the major differentiator resides in how well their reporting capabilities suit the target audience. See the June 21, 2007, “The Forrester Wave™: Appliance-Based End User Experience Monitoring, Q2 2007” report.