Campus and Data Center Networking Priorities

Webtorials Editorial/Analyst Division

Produced and distributed by:

Webtorials

Survey Population Highlights

- The following charts represent the views of a strictly filtered subset of all respondents:
  - All professionals involved in enterprise communications networks
  - All from organizations with > 1000 employees
  - All having at least some purchasing power or influence
- Majority of these respondents are in the US/Canada
  - About 77% US/Canada based; No significant differences worldwide
- Variety of job titles and involvement in network planning
  - Network engineers or administrators most common, followed by directors or managers of MIS/IT/IS/networking
- Details at end of slides on target and full base
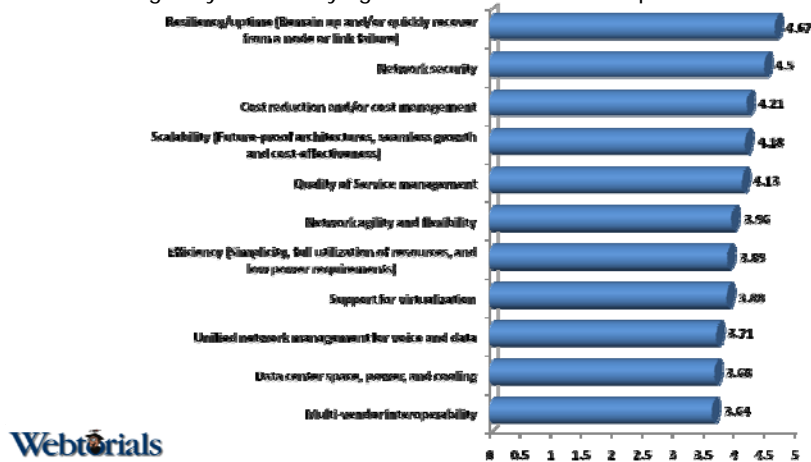
Webtorials

Key Findings

- Resiliency/uptime, network security, and cost management rated most important overall for networks supporting implementation of Unified Communications
- When asked to consider various properties of their networks, survey respondents considered
  - "Consistent high availability" and "In-service maintenance and repair" most important for network resiliency and uptime
  - "Low Total Cost of Ownership" and "Optimized designs" most important for network efficiency
  - "High-end capacity throughput" and "Future-ready architectures" most important for network scalability

Webtorials

3

Methods

- Respondents were asked to rate importance on a scale from "Not at all important" (1) to "Critical" (5). The first graph will display the average of these ratings for the subset of interest
- The second graph will show the total percentage of respondents who rated a given item "Critical" (5) or "Important" (4)
- The third shows the percentages of those rating a given item "Critical" or "Important" individually.

Webtorials

4

Overall Network Needs

- As your company implements Unified Communications (real-time video, presence, messaging, collaboration, and conferencing), how important are the following for your underlying data network in the campus and data center?
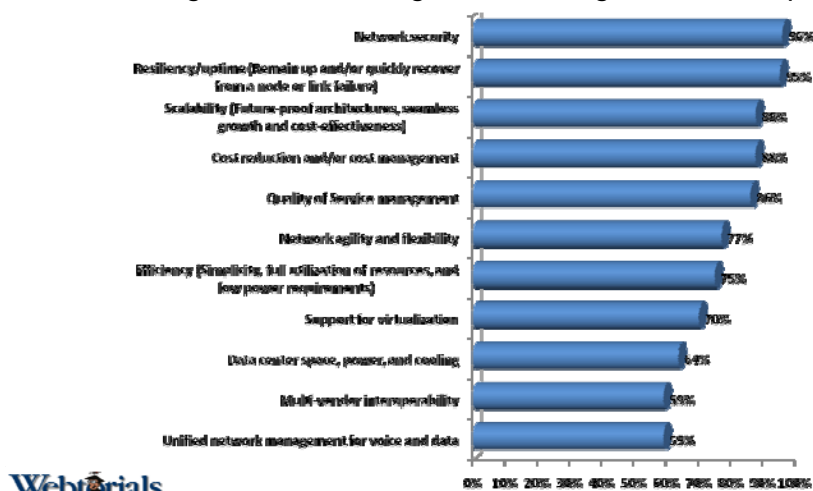
Need	Rating
Resiliency/uptime (Remain up and/or quickly recover from a node or link failure)	4.67
Network security	4.5
Cost reduction and/or cost management	4.21
Scalability (Future-proof architectures, seamless growth and cost-effectiveness)	4.18
Quality of Service management	4.13
Network agility and flexibility	3.96
Efficiency (Simplicity, full utilization of resources, and low power requirements)	3.89
Support for virtualization	3.83
Unified network management for voice and data	3.71
Data center space, power, and cooling	3.68
Multi-vendor interoperability	3.64

5

Overall Network Needs

- Percentage of those rating the following critical or important:

Need	Percentage
Network security	96%
Resiliency/uptime (Remain up and/or quickly recover from a node or link failure)	95%
Scalability (Future-proof architectures, seamless growth and cost-effectiveness)	88%
Cost reduction and/or cost management	88%
Quality of Service management	86%
Network agility and flexibility	77%
Efficiency (Simplicity, full utilization of resources, and low power requirements)	75%
Support for virtualization	70%
Data center space, power, and cooling	64%
Multi-vendor interoperability	59%
Unified network management for voice and data	55%

6

Overall Network Needs

- Percentages of those rating the following critical or important:

Network security — Critical 54%, Important 42%
Resiliency/uptime (Remain up and/or quickly recover from a node or link failure) — Critical 69%, Important 26%
Scalability (Future-proof architectures, seamless growth and cost-effectiveness) — Critical 29%, Important 59%
Cost reduction and/or cost management — Critical 33%, Important 55%
Quality of Service management — Critical 26%, Important 60%
Network agility and flexibility — Critical 17%, Important 60%
Efficiency (Simplicity, full utilization of resources, and low power requirements) — Critical 13%, Important 63%
Support for virtualization — Critical 20%, Important 50%
Data center space, power, and cooling — Critical 9%, Important 55%
Multi-vendor interoperability — Critical 14%, Important 45%
Unified network management for voice and data — Critical 16%, Important 43%

Legend: ■ Critical ■ Important

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

7

Network Resiliency/Uptime

- In terms of network resiliency and uptime, how important are the following for your data networking solutions for your network in the campus and data center?

Consistent high availability regardless of network size or budget — 4.22
In-service maintenance & repair — 4.02
Sub-second failover for application survivability, including voice & multimedia — 3.93
Industry-leading resiliency (failure recovery) — 3.98
Embedded safety checks to minimize outages due to human error — 3.84

3.60 3.70 3.80 3.90 4.00 4.10 4.20 4.30

8

Network Resiliency/Uptime

- Percentage of those rating the following critical or important:

In-service maintenance & repair	82%
Consistent high availability regardless of network size or budget	81%
Sub-second failover for application survivability, including voice & multimedia	75%
Industry-leading resiliency (failure recovery)	75%
Embedded safety checks to minimize outages due to human error	69%

62% 64% 66% 68% 70% 72% 74% 76% 78% 80% 82%

Webtorials

9

Network Resiliency/Uptime

- Percentages of those rating the following critical or important:

	Critical	Important
In-service maintenance & repair	22%	60%
Consistent high availability regardless of network size or budget	43%	38%
Sub-second failover for application survivability, including voice & multimedia	27%	48%
Industry-leading resiliency (failure recovery)	25%	51%
Embedded safety checks to minimize outages due to human error	17%	52%

■ Critical
■ Important

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%
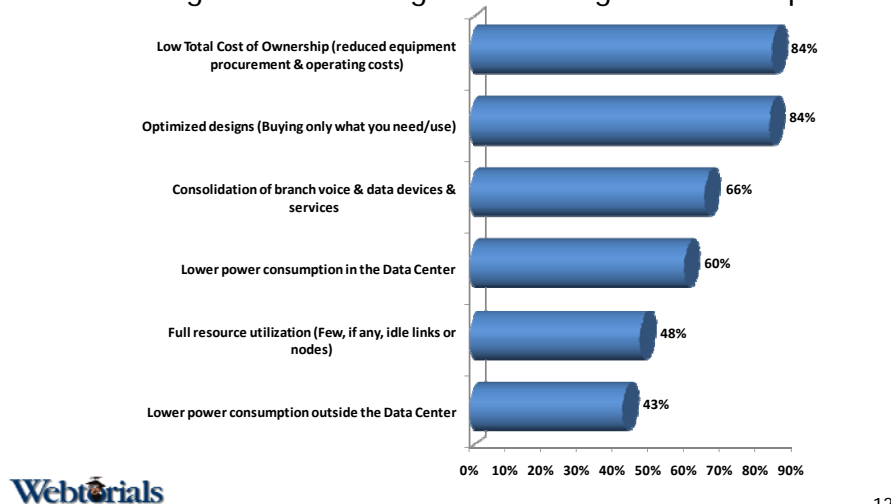
Webtorials

10

Network Efficiency

- In terms of network efficiency, how important is it that your data networking solutions for your network in the campus and data center feature:
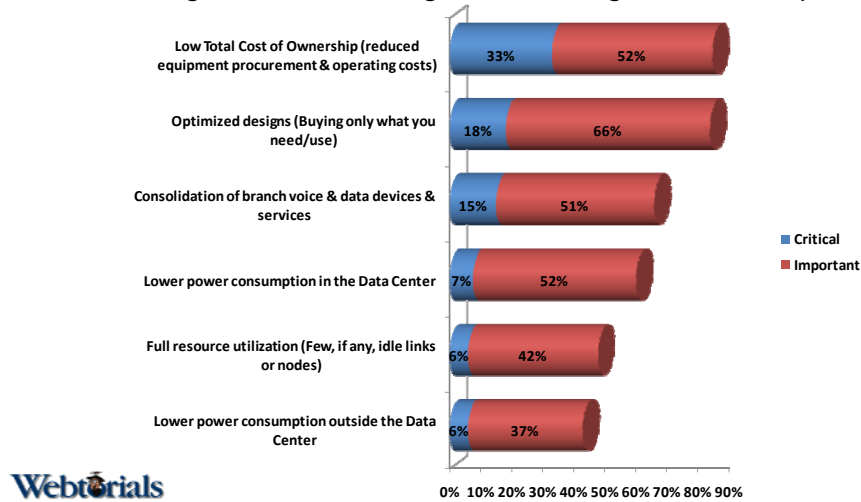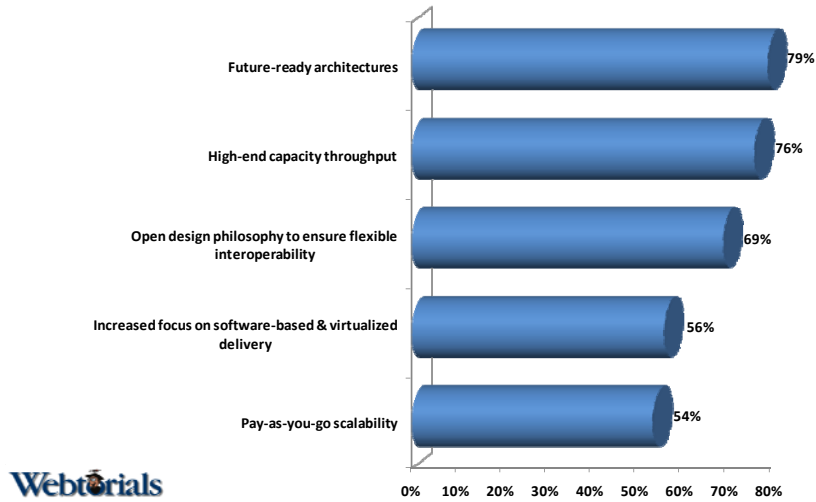
Low Total Cost of Ownership (reduced equipment procurement & operating costs)	4.18
Optimized designs (Buying only what you need/use)	4.02
Consolidation of branch voice & data devices & services	3.76
Lower power consumption in the Data Center	3.61
Full resource utilization (Few, if any, idle links or nodes)	3.44
Lower power consumption outside the Data Center	3.35

Scale: 2, 2.5, 3, 3.5, 4, 4.5

Webtorials

11

Network Efficiency

- Percentage of those rating the following critical or important:

Low Total Cost of Ownership (reduced equipment procurement & operating costs)	84%
Optimized designs (Buying only what you need/use)	84%
Consolidation of branch voice & data devices & services	66%
Lower power consumption in the Data Center	60%
Full resource utilization (Few, if any, idle links or nodes)	48%
Lower power consumption outside the Data Center	43%

Scale: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%

Webtorials

12

Network Efficiency

- Percentages of those rating the following critical or important:

	Critical	Important
Low Total Cost of Ownership (reduced equipment procurement & operating costs)	33%	52%
Optimized designs (Buying only what you need/use)	18%	66%
Consolidation of branch voice & data devices & services	15%	51%
Lower power consumption in the Data Center	7%	52%
Full resource utilization (Few, if any, idle links or nodes)	6%	42%
Lower power consumption outside the Data Center	6%	37%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

Webtorials

13

Network Scalability

- In terms of network scalability, how important is it that your data networking solutions for your network in the campus and data center feature:

High-end capacity throughput	3.98
Future-ready architectures	3.95
Open design philosophy to ensure flexible interoperability	3.78
Increased focus on software-based & virtualized delivery	3.55
Pay-as-you-go scalability	3.53

3.3   3.4   3.5   3.6   3.7   3.8   3.9   4

Webtorials

14
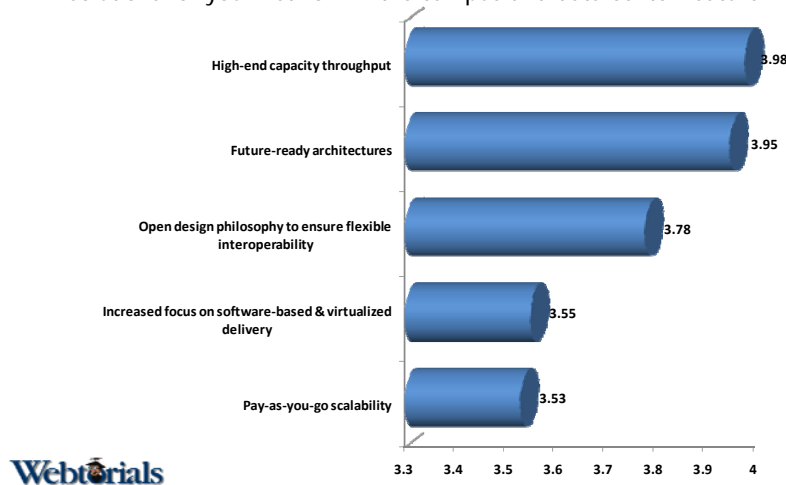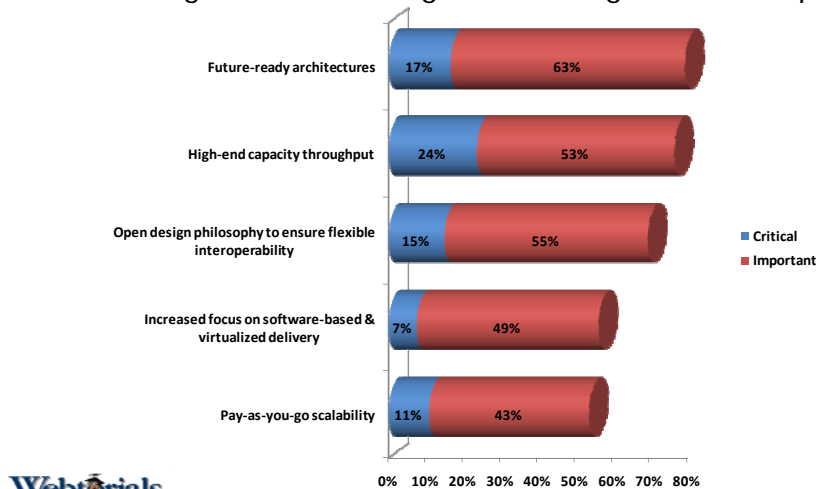
Planned Spending

- Approximately two-thirds of the planned spending is with Cisco. However, among the other spending, Avaya is in firm control of second place.
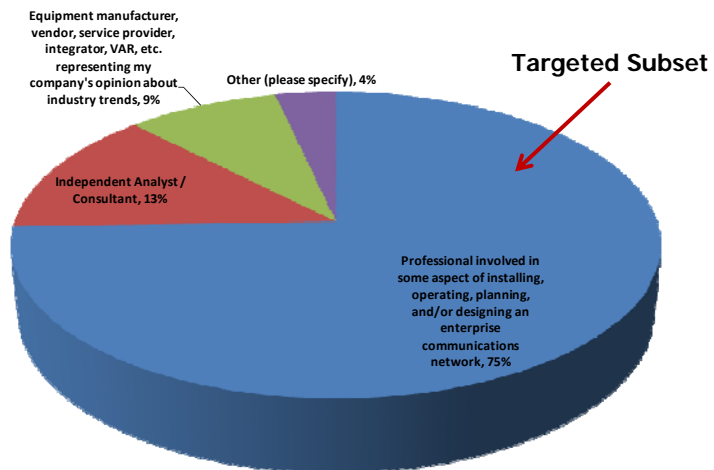
Extreme, 3% Enterasys, 3%

Brocade, 7%

Alcatel-Lucent, 10%

Avaya/Nortel, 27%

Juniper, 14%

HP Procurve/3Com, 22%

Other, 15%
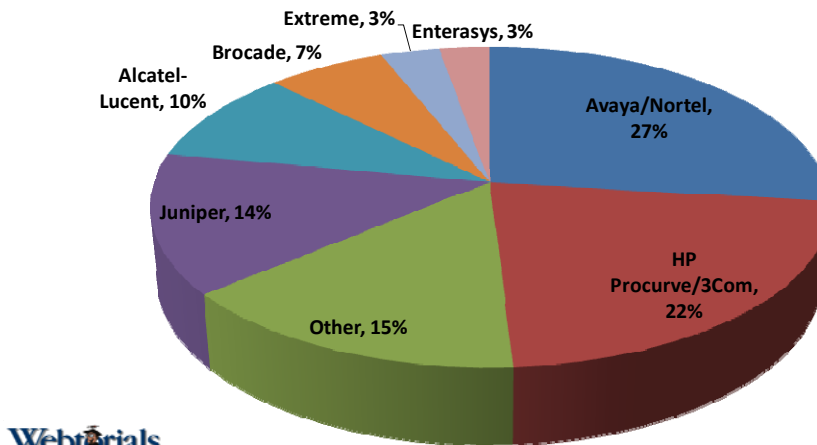
Webtorials

17

Demographics (All)

- Please indicate which of the following best describes the perspective from which you will be answering this questionnaire.
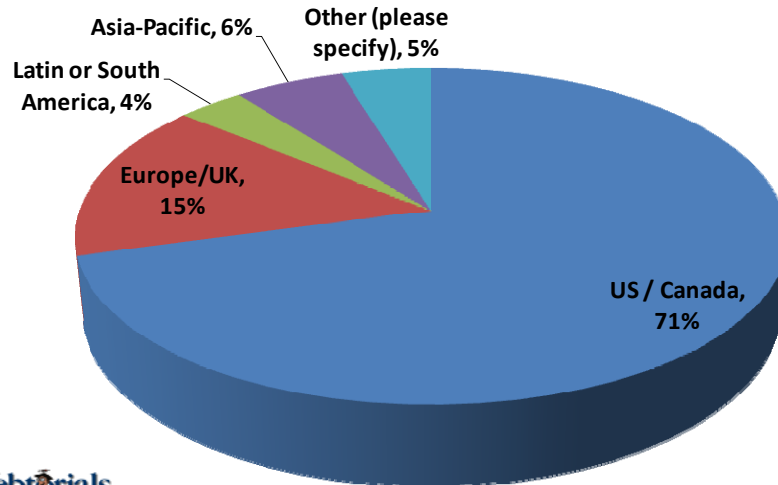
Equipment manufacturer, vendor, service provider, integrator, VAR, etc. representing my company's opinion about industry trends, 9%

Other (please specify), 4%

Targeted Subset

Independent Analyst / Consultant, 13%

Professional involved in some aspect of installing, operating, planning, and/or designing an enterprise communications network, 75%
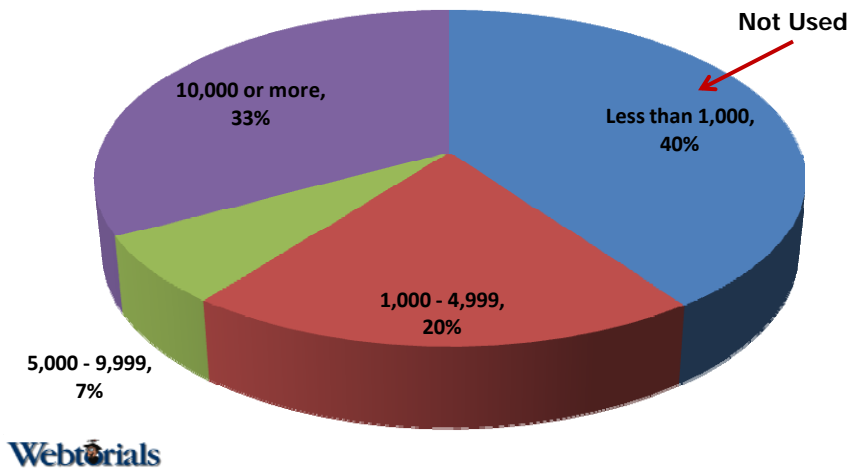
Webtorials

18
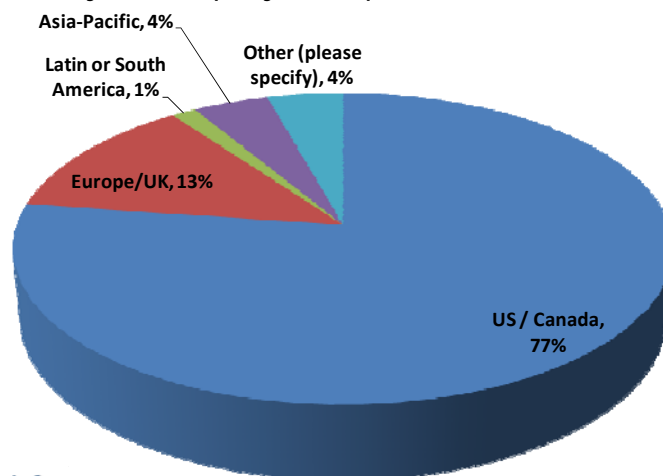
Demographics (All)
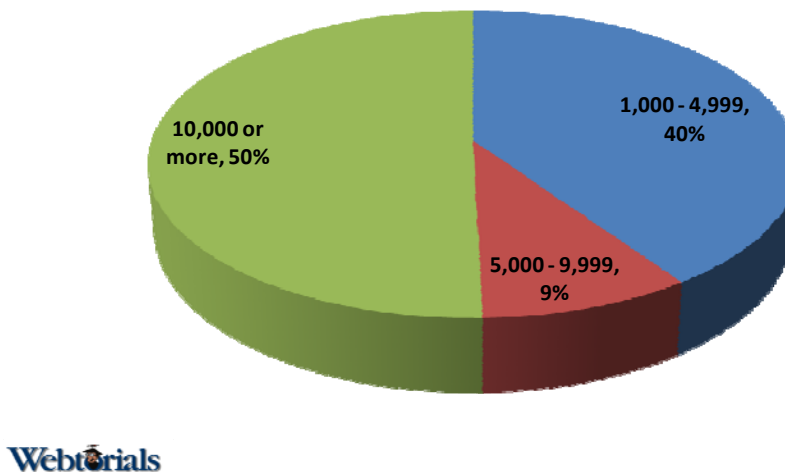
- Approximately how many full-time employees does your company employ worldwide, including all locations, branches, divisions and subsidiaries?

Not Used

10,000 or more, 33%

Less than 1,000, 40%

1,000 - 4,999, 20%

5,000 - 9,999, 7%

Webtorials

21

Demographics (Targeted Subset)
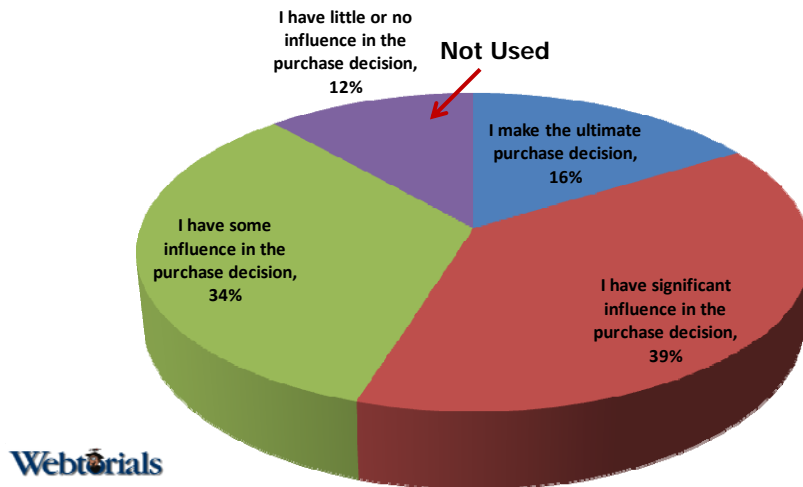
- Approximately how many full-time employees does your company employ worldwide, including all locations, branches, divisions and subsidiaries?

1,000 - 4,999, 40%

10,000 or more, 50%

5,000 - 9,999, 9%

Webtorials

22

Copyright 2010, Webtorials Analyst Division

Demographics (General)

- To what degree are you personally involved in purchase decisions regarding your company's data networking products/solutions?

I have little or no influence in the purchase decision, 12%

Not Used

I make the ultimate purchase decision, 16%

I have some influence in the purchase decision, 34%

I have significant influence in the purchase decision, 39%

Webtorials

23

Demographics (Targeted Subset)

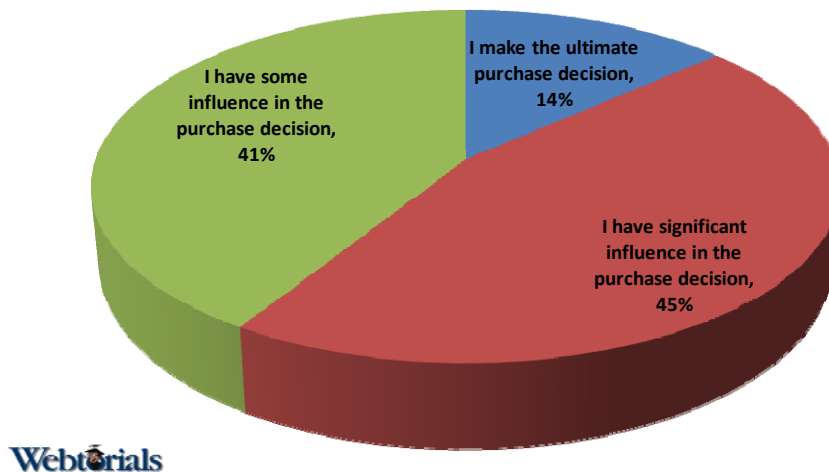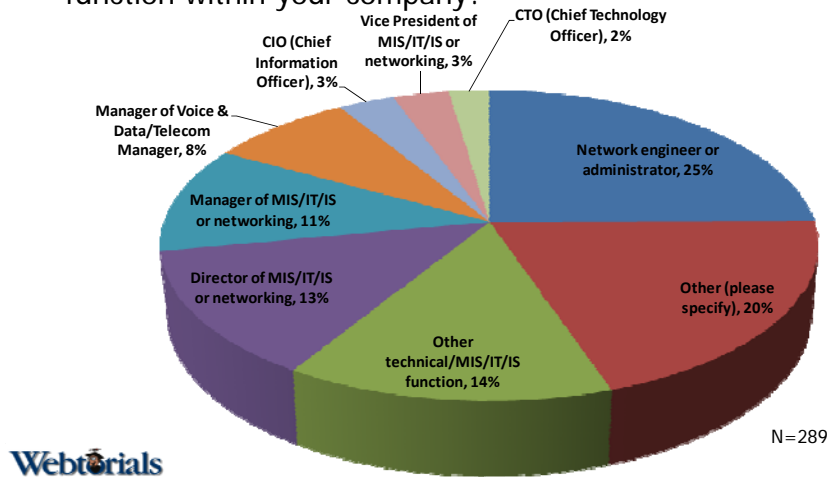- To what degree are you personally involved in purchase decisions regarding your company's data networking products/solutions?

I make the ultimate purchase decision, 14%
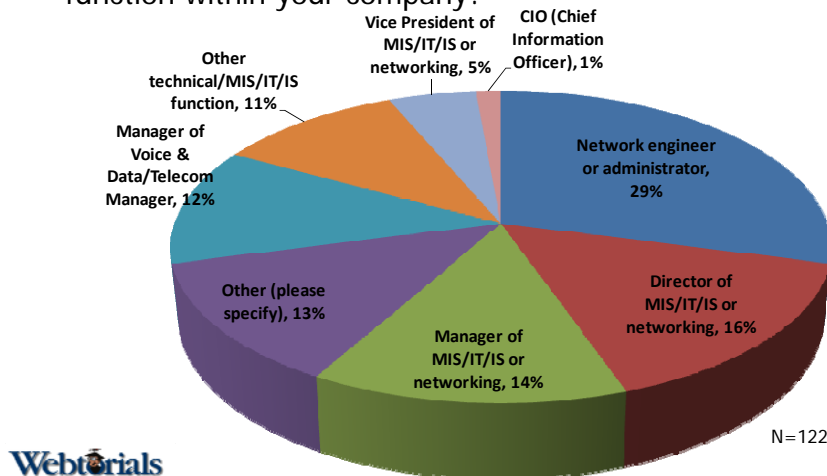
I have some influence in the purchase decision, 41%

I have significant influence in the purchase decision, 45%

Webtorials

24

Demographics (All)

- Which one of the following best describes your primary job function within your company?

CTO (Chief Technology Officer), 2%
Vice President of MIS/IT/IS or networking, 3%
CIO (Chief Information Officer), 3%
Manager of Voice & Data/Telecom Manager, 8%
Manager of MIS/IT/IS or networking, 11%
Director of MIS/IT/IS or networking, 13%
Other technical/MIS/IT/IS function, 14%
Network engineer or administrator, 25%
Other (please specify), 20%

N=289

25

Demographics (Targeted Subset)

- Which one of the following best describes your primary job function within your company?

Vice President of MIS/IT/IS or networking, 5%
CIO (Chief Information Officer), 1%
Other technical/MIS/IT/IS function, 11%
Manager of Voice & Data/Telecom Manager, 12%
Other (please specify), 13%
Manager of MIS/IT/IS or networking, 14%
Network engineer or administrator, 29%
Director of MIS/IT/IS or networking, 16%

N=122

26