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Cisco Is A Leader Among WAN Optimization Vendors

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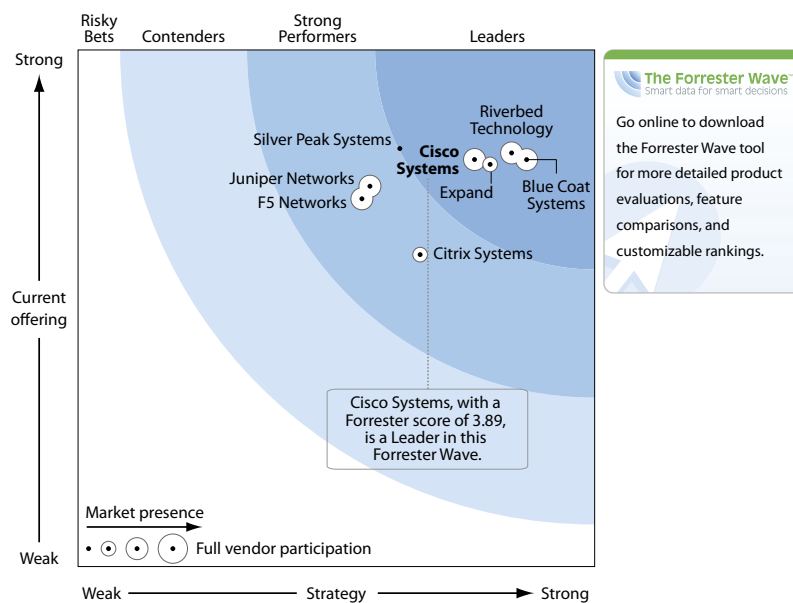
with Lauren E. Nelson and Simon Yates

CISCO IS A LEADER AMONG WAN OPTIMIZATION VENDORS

Another leader in the WAN optimization market, Cisco offers eight products. The major change since our past analysis of the Cisco offering is the introduction of standalone WAN appliances from the blade-based product evaluated previously. The Cisco Wide-Area Application Services (WAAS) Central Manager (CM) supports up to 2,500 managed devices per node. Cisco provides a mobile client solution called WAAS Mobile, which supports Windows CE, 98, ME, 2000, XP, and Vista and is certified by Microsoft for interoperability. Cisco can support up to 1 Gbps throughput on a single WAAS device. Cisco currently offers the ability to virtualize Microsoft servers on its WAAS appliances — Windows on WAAS (WoW) — through the use of virtual blades. This virtualization will extend to WAAS modules in the future. Cisco has tested and validated the WAAS technology for interoperability with VMware View VDI platform. Additional support for better optimization of ICA, RDP, and other VDI-related protocols is currently planned. Even though Cisco scores low in focus, that should not be a significant deterrent for your WAN optimization selection given the amount of resources invested in WAN optimization in relation to its competitors — as shown in number of dedicated engineers and financial resources to support strategy. However, Cisco needs to work on improving its application visibility and application monitoring: Supporting only 150 traffic classifiers and not providing an observation mode are significant shortcomings in a market that is increasingly focused on application visibility.

See below for more information on Cisco's current offering, strategy, and market presence.

Forrester Wave™: WAN Optimization, Q4 2009



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Source: Forrester Research, Inc.



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Cisco Evaluation Overview

CURRENT OFFERING

Product portfolio	Cisco offers eight separate WAN optimization appliance SKUs and three router-based WAN optimization modules in its WAN optimization product portfolio.
Architecture	Cisco has increased its suite of products in the WAAS family with the introduction of WAVE appliances to complement its blade-based strategy. Its other strength is its optimization architecture.
Optimization techniques	Cisco offers a strong suite of optimization techniques across caching, traffic management, and protocol optimization.
Application-specific optimizations	Cisco's data backup and replication capabilities illustrate its strength in data center deployments; the vendor also excels in its approach to security.
Manageability and usability	Cisco, given its ability to tap into other parts of network infrastructure that it provides, has a unique advantage in the devices it can cluster together and its integration with other management tools.
Scalability	Throughput is another facet of the vendor's scale, essential to its role in high availability and data center environments.
Reliability	Cisco has the following architectural options: software watchdogs, hardware RAID, software RAID, stateful process restartability, redundant/hot-swap power supplies, and redundant fans.
Monitoring and reporting	While Cisco offers strengths in the monitoring space to complement its management capabilities, the vendor needs to improve its strengths in application visibility.

STRATEGY

Product strategy	Cisco's introduction of Windows on WAAS virtualization option provides added value for its optimization appliances. Cisco, given its presence in the networking industry, also has a cadre of strong technology partnerships and managed services partners.
Corporate strategy	Cisco is a large vendor, and while it has invested heavily in its WAAS technology, it is worth noting that WAN optimization, while critical to a cohesive network offering, is a comparatively small portion of the vendor's overall business.
Financial resources to support strategy	Cisco is a publicly traded major network infrastructure vendor, although the WAAS WAN optimization products are a small portion of the vendor's overall business.
Cost	Due to the variations for deployments, some of which require an existing investment in Cisco infrastructure, the vendor loses marks on the simplicity of its pricing strategy; however, it still fares quite favorably in its deployment and average solution pricing in comparison to competitors.

Cisco Evaluation Overview

MARKET PRESENCE

Installed base	The vendor, while a force in the networking industry, scores close to the middle of the pack in market presence due to its comparison with WAN optimization pure-play vendors.
Revenue	Cisco reported revenue of \$39.5 billion for the year ending December 31, 2008.
Revenue growth	The vendor reported 10% year-over-year revenue growth from 2007 to 2008, in large part due to the wide diversity of its product mix.
Services	Cisco represents the largest, most globally diverse services organization among the vendors in this analysis.
Employees	Cisco scores high in this category due to its size and market presence compared with smaller vendors in this analysis.
Channel partners	Cisco offers a strong set of resellers, although the vendor does not license its technology.

EXECUTIVE SUMMARY FROM THE FORRESTER WAVE™: WAN OPTIMIZATION, Q4 2009

In Forrester's 65-criteria evaluation of wide-area network (WAN) optimization vendors, we found that Blue Coat Systems and Riverbed Technology lead the pack, in part due to the changes these vendors made over the past year through acquisition of complementary products. This year's analysis reflects emerging end user interest in WAN optimization use cases, such as the ability of the solutions to enhance virtualization performance, act as a platform for virtualization, and empower consolidation initiatives in branch offices. The diversity of vendors evaluated ranges from those with a strong focus on small, branch deployments, such as Expand Networks, to those with a strong focus on the data center, such as Silver Peak Systems, plus vendors that cover both ends of this spectrum, along with network equipment major vendors Cisco Systems, Juniper Networks, and F5 Networks. WAN optimization pure plays such as Blue Coat and Riverbed continue to provide strong technology offerings by developing their solutions further with the addition of application visibility, while vendors with a strong heritage in virtualization — such as Citrix Systems — are showing how their road maps include extending virtualization to their WAN optimization infrastructure while continuing to develop enhancements for virtualized client and application performance.