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Brocade

Piranha Program – Partner Version
August 2012

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- **Revenue:** \$2.15B in FY2011 (up from \$2.1B in FY2010)
- **Gross Margin:** 61%
- **Operating Margin:** 8.4%
- **Financial Strategy:** Try to stay a float through balancing Ethernet and Fibre Channel business and making a profit while at the same time repaying Debt and fending off private investor takeover attempts
- **Core Products/Technology:** Storage and Local Area Networking products and services
- **Portfolio Breadth:** Limited to Ethernet and SAN switching. Beginning to message cloud through offering a Cisco Vblock-like solution
- **Channels Strategy:** Storage Networking: 80% indirect Local Area Networking: 80% direct - Dell, HP, IBM all major OEM customers

Product Portfolio

Products Offered

Fibre Channel Storage Networking	Fibre Channel fixed switches and directors for storage networking				
Ethernet Switching	Ethernet fixed and chassis switches for LAN and Data Center switching				
Security	Limited... some security features baked into Brocade Ethernet switches				
Enterprise Routing	Very limited L3 routing function though Foundry L3 switches				
Collaboration	None				
		2008	2009	2010	2011
SAN Switching (Source: Dell'Oro)	Cisco (MDS)	28.3%	23.3%	30.4%	29.5%
	Brocade	66.8%	72.3%	65.3%	66.8%
Ethernet Switching (Source: Dell'Oro)	Cisco (Catalyst/Nexus)	73.8%	70.3%	72%	68.5%
	Brocade	1.8%	2.2%	1.8%	1.6%

Brocade – Go to Market Positioning

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Enterprise: Brocade is highly focused on the enterprise with both its storage and Ethernet networking products/services. Brocade sells/markets a fairly complete LAN and data center switching portfolio, but is not an end to end competitor of Cisco's as they are lacking many major technologies such as compute, telephony, routing that allows them to supply an entire enterprise infrastructure solution

SMB/Commercial: While Brocade lacks solutions suitable for SMB's, it does focus a fair amount of effort in the commercial space. While Brocade offers networking products and services, its portfolio is lacking some key elements critical to commercial customers such as a comprehensive security posture and application services including WAN Optimization and application acceleration

Public Sector: Brocade services public sector segments including Government and education with their networking products, but like other market segments, they cannot address many of the other services these agencies require such as telephony, teleconferencing, and security. The latter is critical to these groups as cyber attacks are at an all time high

Cisco Assertion

Response: While Brocade covers the bases of Ethernet and Fibre Channel networking fairly well, customers will need to engage many other vendors to complete their end to end infrastructure. In contrast, Cisco offers an extensive array of technology that caters to Enterprise customers including [Borderless Networks](#), [Data Center/Virtualization](#) and [Collaboration](#) solutions to name a few. Cisco's offered solutions are flexible, scalable and resilient. Solution validation is provided by [Cisco Validated Designs](#) (CVD). A complete set of [Cisco Advanced Network Services](#) is available to customers

Response: While Brocade can offer some of the key components in solutions for commercial customers, they lack many key elements and cannot deploy an end to end solution that integrates with switching, routing, and security to form a comprehensive architecture

Response: While Brocade does place sales emphasis on Government and educational accounts - Cisco has a long standing reputation as a trusted business partner in the Public Sector space and services the key educational and government segments with specific products designed for their particular needs and dedicated sales teams that understand their business needs

Brocade Assertions and How to Compete!

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Brocade Assertions

- **Network Leader:** Brocade claiming they lead in the industry and are the only vendor offering an end to end network
- **Standards based products:** Brocade makes specific claims that their products are standards based – where Cisco's feature proprietary technologies
- **Reduces complexity:** Brocade uniquely claim that their architectures reduce complexity – not add layers to it
- **Non-Stop Networking:** Brocade delivers unmatched levels of performance, scalability, and uptime in the industry
- **Best in Class Investment Protection:** Brocade delivers best in class investment protection where others just promise it

Cisco Counter Positioning

- **Response:** Brocade's product portfolios missing key technology and total solution has large voids
- **Response:** Cisco innovates new, groundbreaking technologies and drives them to standardization – Brocade benefits from many standards based on technology Cisco innovated
- **Response:** To reduce complexity – there needs to be some level of integration amongst various products. Brocade has no integration between products
- **Response:** Brocade's switching is merchant silicon-based which ultimately imposes limit on performance and scalability and makes it very difficult to design a truly resilient and redundant system. In contrast, Cisco Catalyst and Nexus switching systems are known for their innovations including non-stop forwarding and Stateful Switch Over and scale extensively thanks to Cisco FabricPath
- **Response:** Cisco's reputation in building switching products that are extensible and offer extended functional lifecycles is unparalleled in the industry. Brocade and Foundry both have past reputations for building misguided products that were pre-maturely replaced with the next – short circuiting the customers investment

Brocade – Positioning with Customer Trends

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BYOD: Brocade does not develop or market desktop virtualization (VDI) or BYOD. While a Brocade network could carry VDI streams, it falls far short of being an architecture that has been specifically designed to optimize the performance of VDI. While Brocade does casually mention VDI, it does not specifically call it out as a solution or co-market VDI/BYOD with either Citrix or VMWare

Cloud: Just as the industry has moved to support and embrace the cloud – so has Brocade. Besides repositioning all their networking products to claim support for the cloud, Brocade also launched a marketing solution for cloud called CloudPlex and a unitized infrastructure offering called Virtual Compute Blocks (Claimed to be like VCE)

Big Data: Brocade does not message any products or solutions specifically for Big Data installations, although some of their products would be applicable if they applied them

Cisco Assertion

Response: Brocade's limited scope and applicability prevents them from focusing on selling and/or marketing BYOD. In contrast, Cisco goes beyond BYOD and mobility to architect a [comprehensive solution](#) so you can connect, communicate & collaborate "your way" without compromising the way of business. Cisco WAAS supports Citrix ICA and VMWare PCoIP optimizations as an integral part of the complete VDI/BYOD architecture. It is these features/services that Brocade neglects to support that limits support for key initiatives like VDI

Response: While cloud has become one of Brocade's primary focus areas – its solution focus is still fairly limited to networking. Brocade cannot provide anything close to a complete cloud infrastructure solution which includes networking, computing infrastructure, management, and applications. In contrast – Cisco [CloudVerse](#) is a comprehensive view where private, public, hybrid and community clouds are addressed. Cisco's [Cloud Enablement Services](#) and our comprehensive ecosystem of partners deliver a wide range of integrated solutions to accelerate data center migration and cloud success while helping customers realize the full value of cloud technology

Response: Again, Brocade's limited scope prevents them from focusing in depth on much more than network infrastructures for clouds. Comparatively, Cisco fully addresses BigData customers with application-specific infrastructure and services that leverage Cisco Nexus and MDS networking where applicable as a key element to the deployment success

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Element	Cisco Differentiators	Brocade Positioning	Brocade Weakness
Borderless Networks	<ul style="list-style-type: none"> • Network architecture enables desktop and mobile devices with native apps (e.g. BYOD) and VDI delivered applications • Integrated wired-wireless-VPN access policy enforcement with ISE • Integrated wired/wireless access management with NCS • Cisco EnergyWise delivers energy efficiency and savings to IT and facilities • A medianet ready borderless network ensures that your network not only delivers a high-quality video experience but also help ensure that your network is ready for changing bandwidth demands • End-to-end policy framework that allows IT to support any device, securely and at scale • AnyConnect provides endpoint services to desktops, laptops, netbooks and smartphones • Services include connection management, security, device and policy management 	<p>BYOD</p> <ul style="list-style-type: none"> • Brocade does not actively position itself for VDI or BYOD or borderless networks <p>Security</p> <ul style="list-style-type: none"> • Brocade does offer basic network and firewall security, but is unable to protect the entire network infrastructure, Virtual Machines, or provide perimeter security 	<ul style="list-style-type: none"> • Brocade is limited in scope to switching, network security, and services that are associated with the switching domain. They lack any sort of architecture blueprint that supports a broader borderless network architecture and lack any sort of emphasis on BYOD or comprehensive network infrastructure security

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Element	Cisco Differentiators	Brocade Positioning	Brocade Weakness
Data Center and Virtualization	<ul style="list-style-type: none"> Unified compute/networking fabric supporting next generation VM-oriented data centers Unified Fabric technology converges all server IO over a single Ethernet connection – less complex, better TCO Nexus switching family supports next generation single tier DC networks via Cisco FabricPath VN-Link technology assigns unique id to each VM used to enforce policies and grant services Nexus switching is VM aware and can prioritize or route traffic accordingly Nexus 2000/5000 allows investment protected migration of server I/O ports from 1GB to 10GB to 10GB FCoE 	<ul style="list-style-type: none"> Brocade Fibre Channel switching portfolio features both fixed fabric and director chassis switches Brocade Ethernet switching, while traditionally weak in data center, have gained in acceptance slightly since acquiring Foundry 	<ul style="list-style-type: none"> While Brocade can offer both Fibre Channel and Ethernet networking with some security adjunct – they lack compute, applications services, and a full architecture security posture. Additionally, Brocade’s cloud solutions are pitches as equivalent to Cisco’s, however they lack the application and computing resources that are an integral part of Cisco Vblock whole solutions
Collaboration	<ul style="list-style-type: none"> Offers complete stack of collaboration apps (IM, Enterprise Voice, web conferencing, social software) Strong enterprise voice story Ability to layer security on top of collaboration solution Strong story on ubiquitous video Strong story around enabling mobile devices for collaboration Networking expertise to ensure good QoS 	<ul style="list-style-type: none"> Brocade does not offer any Collaboration Solutions 	<ul style="list-style-type: none"> Brocade does not sell or partner for collaboration solutions – its well outside their scope

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Element Cisco Differentiators

Brocade Weakness

Servers	<p>UCS Differentiators</p> <ul style="list-style-type: none"> ● Unified Fabric: Increase workload agility, lower costs, lower power, higher reliability, simplified setup, higher asset utilization, higher application performance ● Revolutionary Embedded Management: Simplified setup, increased control, lower costs, faster deployment, higher reliability, higher productivity, fewer errors ● Policy Computing (Stateless): Servers waiting for their identity based on Application needs. Service Profiles push out configuration to available HW ● Optimized for Virtualization: Higher workload agility, better VM performance, More workloads virtualized, lower cost per VM ● Extended Memory: Lower cost per VM, higher consolidation, better performance ● Rack Server Integration: All of the benefits of blade servers applied to rack servers 	<ul style="list-style-type: none"> ● Brocade does not design, market, or sell servers
Routing	<ul style="list-style-type: none"> ● Full featured enterprise routing for campus, branch offices and WAN ● Integration of routing platforms with security, switching, WLAN, and WAAS 	<ul style="list-style-type: none"> ● Brocade does not support routing beyond basic L3 features
Switching	<ul style="list-style-type: none"> ● Full featured enterprise switching for campus, distribution access and branch office deployments ● Integration of switching platforms with security, WLAN and routing 	<ul style="list-style-type: none"> ● LAN Switching is one of Brocade's focus areas, however they have not been able to grow the business since acquiring it from Foundry
Security	<ul style="list-style-type: none"> ● Enterprise firewall, content security, email security, VPN, user policy establishment and control (TrustSec) ● Identity Services Engine for integrated wired and wireless identity, access control, and management platform (Positron) 	<ul style="list-style-type: none"> ● F5 does support network-oriented security, however this cannot provide a complete and comprehensive security posture to protect the entire data center architecture

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Element Cisco Differentiators

Brocade Weakness

WLAN

- Advanced RF features across a family of 11n APs delivering Enterprise-Class RF performance, reliability and lower TCO
- WCS 8.0 with unified wired/wireless provisioning, management, monitoring and troubleshooting for borderless user services (Lumos)
- WLAN controller on Cisco Services Ready Engine provides zero-touch deployment and centralized management for wireless service rollout in the branch offices

- Brocade offers fairly standard WLAN OEM products supporting typical WLAN capabilities

WAAS

- Full featured enterprise WAAS solution that supports extensive optimizations and is deployable as a physical appliance, virtual appliance, router-resident HW accelerated module, or light weight IOS application allowing many deployment and integration options

- Brocade does not support WAN Optimization

Service & Support

Cisco Has a Great Strength in Services Compared to the Competition

- Brocade's services staff is limited when compared to Cisco's and spread very thin geographically
- Cisco's services address Borderless Networks at an architectural level; Brocade's services do so only at a technology level
- Cisco's optimization services have no peer and include extensive smart network analytics; Brocade offers nothing of the kind
- Cisco's on-line support tools are so powerful they resolve 80% of network issues; Brocade reports no similar metric. Why not?
- Cisco outscored all competitors when Gartner recently asked customers to rate their vendors' professional services
- Cisco consistently ranks first when surveyed customers to rate vendors' technical support; what top rankings can Brocade cite?
- J.D. Power has certified Cisco five times for its "outstanding" technical service experience but has never done so for Brocade
- Brocade offers no proactive technical support; Cisco provides SMARTnet Total Care, Smart Care and Smart Call Home

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Why Cisco Services

Deep Borderless Networking Expertise: Cisco's services bring deep, industry-leading expertise to wireless, security, routing/switching and rich media (medianet)

Smart Professional Services: Cisco's Network Optimization Service comes with smart analytics that use intuitive graphics to monitor compliance with industry best practices

Cisco Innovation: Cisco has led innovation in the switching industry for over 15 years. Cisco switching innovations have led to the majority of standards used today to operate Ethernet Networks. Cisco has also revolutionized storage networking to provide customers with the best solution

Quality Leadership: Cisco ranked first in service and support when 684 customers rated their suppliers in the 2010 version of CIO Insight magazine's annual Vendor Value survey. Cisco's services also ranked first in a recent customer survey by Infonetics

Why Not Brocade Services

Brocade's network expertise is limited to wireless and wireless security

Nothing in Brocade's or its partners' portfolios of professional even begins to compare with the rich functionality and business value of Cisco's smart network analytics

Brocade's Ethernet switching platforms are based on merchant switching silicon. Merchant switching silicon vendors benefit by Cisco's past innovations that were driven to standards. Cisco leads

No customer ratings of technical or advanced services by vendor-neutral third parties ever mention Brocade as topping or even challenging Cisco in quality and effectiveness of support

Why It Matters

Cisco's expertise addresses all Borderless Networks Architecture technologies to deliver a complete service solution for customers. Brocade only addresses a small fraction of customer needs

The smart analytics in Cisco's Network Optimization Service give customers a simple means to boost operational excellence, mitigate risks, cut cost and complexity, and benchmark their policy compliance

Cisco constantly innovates new switching technologies, which it folds into its own custom switching ASICs. This ensures that customers benefit from the latest features and technologies. Brocade lags in new technology availability as it needs to wait for the merchant silicon vendor to first implement new technology into their chips, then Brocade can implement the new chips into new switches

To achieve their full potential, Borderless Networks need effective enablement and support by services that range from planning to optimization. Customers can rest assured that they can gain the necessary services breadth, quality and effectiveness from Cisco. The same is untrue of Brocade

Brocade – Questions to Ask Customers

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Why Not Brocade

Business Reasons

- Unprofitable, high debt implies high financial risk
- Limited product breadth: LAN and SAN switching
- Shrinking differentiation over competitors (mostly Cisco)
- Declining R&D budget casts shadow on future development roadmap

Solution and Architecture Reasons

- Ethernet products based on Merchant silicon may lead to unpredictable life cycle and no investment protection
- No enterprise routing, limited security and app networking
- Significant voids: security, app switching, servers
- Brocade/Foundry products have reputation for short life cycles

Technology/Product Reasons

- FCoE solution developed with little experience and focused on Fibre Channel – not Ethernet
- Brocade WLAN products are OEM's from Motorola – source stability questioned
- Merchant silicon-based LAN products – little control over hardware feature roadmap

Questions to Ask Customers

Business Questions

- For how long can Brocade invest without strong positive profits?
- How will Brocade evolve its go to market strategy?
- What's Brocade competitive advantage?
- How can you innovate and expand in new areas without investing in R&D?

Solution and Architecture Questions

- What is Brocade technology innovation?
- How is Brocade integrating Foundry portfolio?
- How does Brocade compete on Architectures?
- Can it provide integrated technologies in Data Centers, or in Campus networking?
- What is Brocade investment protection track record?

Technology/Product Questions

- What's Brocade strategy in the Data Center?
- Are Foundry switches designed for the DC?
- Do Motorola wireless product provide a solution for wired-wireless integration?
- How does Brocade provide security throughout the network?
- What is Brocade roadmap for foundry switches?

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Why Cisco

- **Switching:** Industry leading Catalyst and Nexus switching feature many innovations and technology advancements as well as a long standing reputation for years of service. Cisco Catalyst/Nexus provide many tangible advantages over Arista switches including:
 - Feature maturity and breadth
 - Modular services engine options
 - Superior high availability/resiliency
 - Proven track record for reliability and extensibility (extended lifecycles)
- **MDS:** True multi-layer, multi-service design allows platform to handle Fibre Channel and Ethernet traffic equally well making it the ideal storage traffic convergence platform
- **UCS Servers:** Converged compute/network fabric the reduces complexity, energy consumption, and TCO while increasing application/workloads, optimizing VM performance, and removing traditional management application stack of legacy servers
- **Unified Fabric:** Increase workload agility, lower costs, lower power, higher reliability, simplified setup, higher asset utilization, higher application performance
- **Security:** Comprehensive security portfolio that provides extensive protection to critical corporate resources through a unique layered approach covering the entire architecture

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VoDs and Documents

- [Brocade: Recent Financial Summary](#)
- [Brocade Solution Competitive Analysis](#)
- [Brocade Network Subscription Program](#)
- [Brocade Competitive Overview](#)
- [Brocade VCS - Competitive Overview](#)
- [Brocade Strategy Analysis](#)
- [Brocade Battle Card](#)

Sales Deal Registration

- Deal Registration/GOT Tool: <http://www.in-tools.cisco.com/emea-idc/cat/dispOpportunity.do#>

Resources - Where to Go for More Help

- [SMO: Brocade Competitive Site](#)
- ['Beat-brocade' Email Alias](#)
- [ISBU Competitive Wiki](#)
- [Cisco Competitive Partner Portal](#)
- [Cisco IWE Competitive Community - Brocade](#)

Promotions to Leverage

- [CTMP](#)
- [Nexus Competitive Promotions](#)