



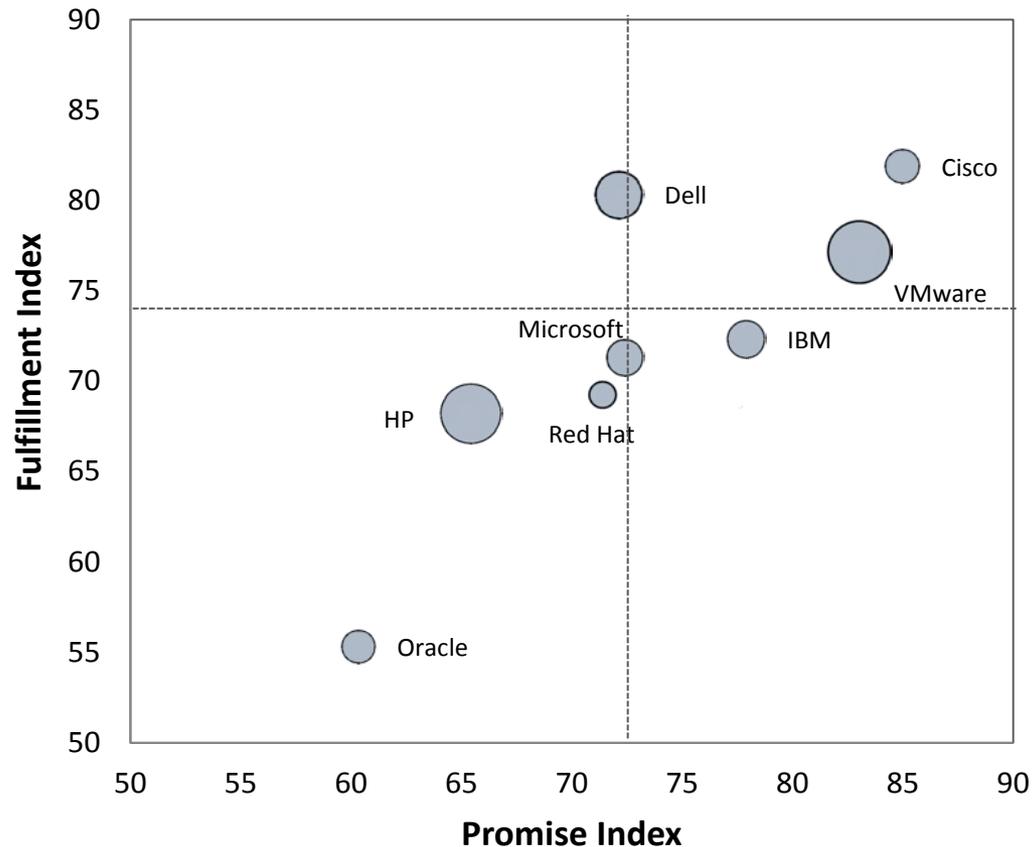
TheInfoPro Servers and Virtualization Study, Wave 12, December 2012

The following slides are excerpts from TheInfoPro Servers and Virtualization Study, Wave 12, December 2012. The report is based on interviews of 175 IT professionals to assess key industry trends and track performance of individual vendors including Cisco, its partners and competitors.



Customer Ratings

Cisco ranked highest among customers for Promise and Fulfillment, significantly leading HP, IBM, and Dell.



Vendor	Promise Score	Fulfillment Score
Average	74	73
Cisco	85	82
Dell	72	80
HP	65	68
IBM	78	72
Microsoft	72	71
Oracle	60	55
Red Hat	71	69
VMware	83	77

TheInfoPro's Servers and Virtualization Study Wave 12: Vendor Market Windows and Ratings by Peter ffoulkes, Dec 2012

Cisco UCS Tops Customer Ratings

- Cisco tops the charts in both promise and fulfillment among large and midsize enterprises, significantly leading HP, IBM, and Dell.
- Cisco ranks highest of all vendors in strategic vision and technical innovation.
- Cisco's rating is extremely positive, above average in 13 out of 14 categories.
- Cisco is the ONLY server vendor to be ranked in the leading quadrant in 2010, 2011, and 2012 of the TheInfoPro study.
- "Cisco UCS is a great, innovative product. It allows us to have a logical representation of our physical server footprint. It does a great job of storing metadata!"
--LE, Consumer Goods/Retail

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TheInfoPro Research Principal Findings

Vendor Perception

- As organizations are increasingly virtualizing business-critical production workloads, it is hardly surprising that vendors closely associated with the technologies required to build cloud-ready, virtualized datacenters top the list of exciting vendors.
- With business value and continuity functions becoming more focused on virtual infrastructure in preference to the physical under-layer, mindshare is becoming increasingly focused on the software components. This strongly favors VMware as the dominant virtualization provider for x86-based infrastructure, the dominant hardware platform for virtualized, cloud-ready datacenters.
- VMware leads the list of exciting vendors, cited by 38% of respondents, a 13-percentage-point increase over last year.
- Cisco leads the list of hardware vendors, with 20% of the company mentions. While this is down from last year's level of 33%, it is double the 'excitement' score for any other vendor with the exception of VMware.
- HP has seen the largest year-over-year decline, dropping from 24% last year to 10% this year, in a tie with IBM.
- Microsoft has seen a substantial improvement in the 2012 survey at 10%, up from 3% in the prior survey.

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TheInfoPro Research Principal Findings (Cont'd)

Customer Ratings: Market Window

- Well aligned with perceptions in the exciting vendors ratings, Cisco and VMware stand out as the only two vendors to exceed the average values for both promise and fulfillment, with Cisco achieving the highest scores in both categories and strengthening its position since the prior survey.
- IBM shows the greatest improvement since the prior survey, exceeding the average for promise and just one point below the average for fulfillment. Microsoft also shows improvement since the prior survey but still falls slightly short of both averages.
- Dell has achieved scores that are very consistent with last year's results, slightly below average for promise this year, but scoring well above average on fulfillment, second only to Cisco.
- Red Hat has seen a reversal of fortune on its fulfillment score this year, ending below average on both indexes.
- HP continues to lag this year, with some improvement in fulfillment but falling further behind on the promise index.
- Oracle trails the pack, continuing to disappoint on all counts, ranking behind all the other hardware vendors from an excitement perspective and once again being the poster child for well-below-average scores for promise and delivery.

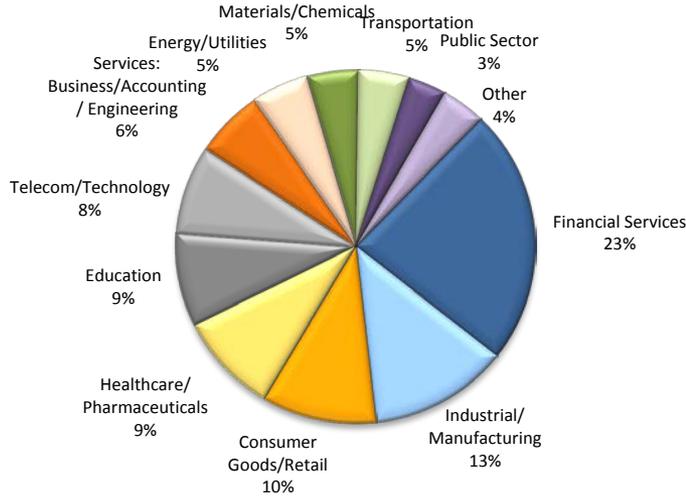
Customer Ratings: Complete Results

- Overall, there is less variation between scores for the 14 separate criteria in comparison to last year's survey.
- Cisco, VMware and Dell stand out, each with two scores significantly above average – Cisco for strategic vision and technical innovation, VMware for technical innovation and brand/reputation, and Dell for value for money and ease of doing business.
- HP, IBM, Microsoft and even Oracle have seen some small improvements in scores since last year.
- The most notable difference year-over-year is Red Hat, which this year had three scores significantly below average, for product quality, delivery as promised and features/functions.
- More-detailed analysis for individual vendors can be found in the Customer Assessment for Individual Vendor report.

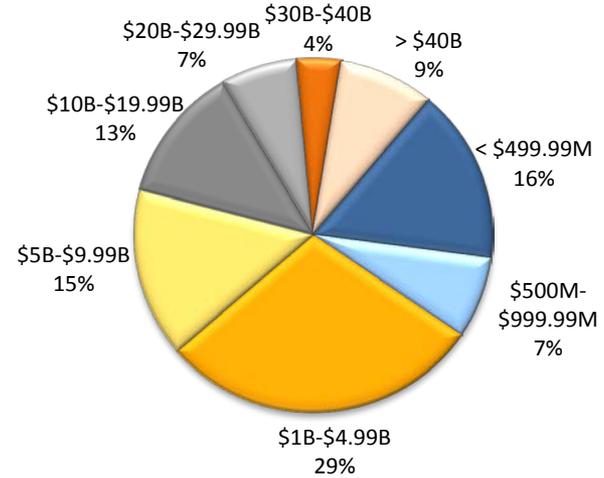
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TheInfoPro Research: Demographics

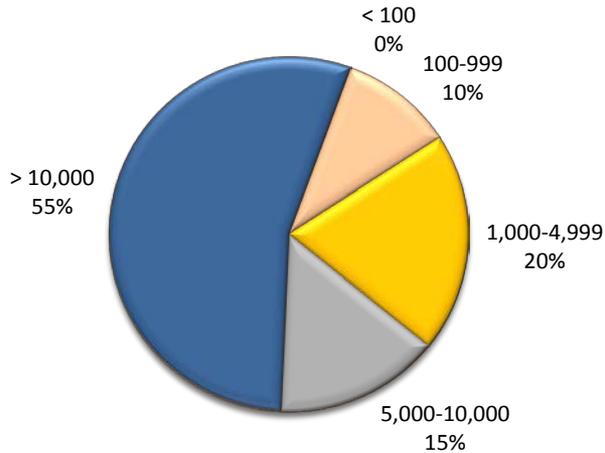
Industry Verticals



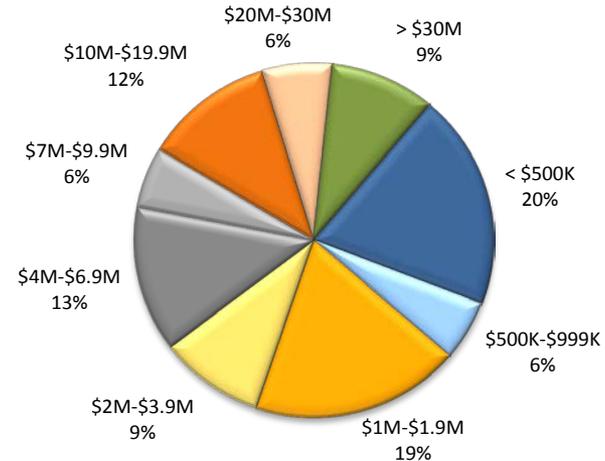
Enterprise Revenue



Employee Size



Servers and Virtualization Budget Level



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