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Magic Quadrant for Combined Storage Resource Management and SAN Management Software, 4Q05

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Managing the growing complexity of storage resources is a challenge, with vendors still only addressing parts of the problem. Leading vendors are delivering useful tools that address increasingly larger parts of the problem as they work to deliver more-complete offerings.

WHAT YOU NEED TO KNOW

Last year, Gartner had two Magic Quadrants: one for storage area network (SAN) management software and one for storage resource management (SRM). The market is increasingly looking for solutions that include SAN management as part of an overall SRM suite. Thus, Gartner has merged SAN management software into the SRM Magic Quadrant. Requirements for the individual and the combined markets have continued to advance. For a vendor to improve its position in a Magic Quadrant, that vendor must not only continue to track to the new market requirements, but it must also move ahead of those requirements. As Gartner combines these two Magic Quadrants, vendors are now positioned against the combined requirements, and Gartner advises clients that comparing vendor placement on the new combined Magic Quadrant with the previous separate Magic Quadrants is not relevant.

Three vendors, EMC, Symantec and HP, have moved into the Leaders Quadrant with solutions that address a broad spectrum of the storage resource (and SAN) management problem and with road maps that will help them keep up with the changing market requirements. Other vendors continue to increase value to the markets they address, and some have a vision that may well take them beyond their current markets. More is needed to deliver a complete solution that not only scales to meet the growing complexity of networked storage environments but that also automates key components of the management and monitoring process. The cost of development to support all the various components of the storage networking environment and the applications, the cost of testing labs, and finding knowledgeable workers for development and customer support make the cost to enter this market very high. While vendors are entering this market with a focus on smaller companies or specific components of the management problem, the cost to enter and stay in the market has proved too high for some vendors, as evidenced by those leaving the market or changing focus. Microsoft's quota and capacity management tools announced for Windows 2003 R2 (see "Windows Server 2003 R2 Features Translate Into Unique Functions for Microsoft's NAS Platform") will put pressure on the set of products that focus primarily around those tools. And user demand for better storage performance management tools will require device and application vendors to better instrument their solutions, an activity that is under way but that continues to be a limiting factor.

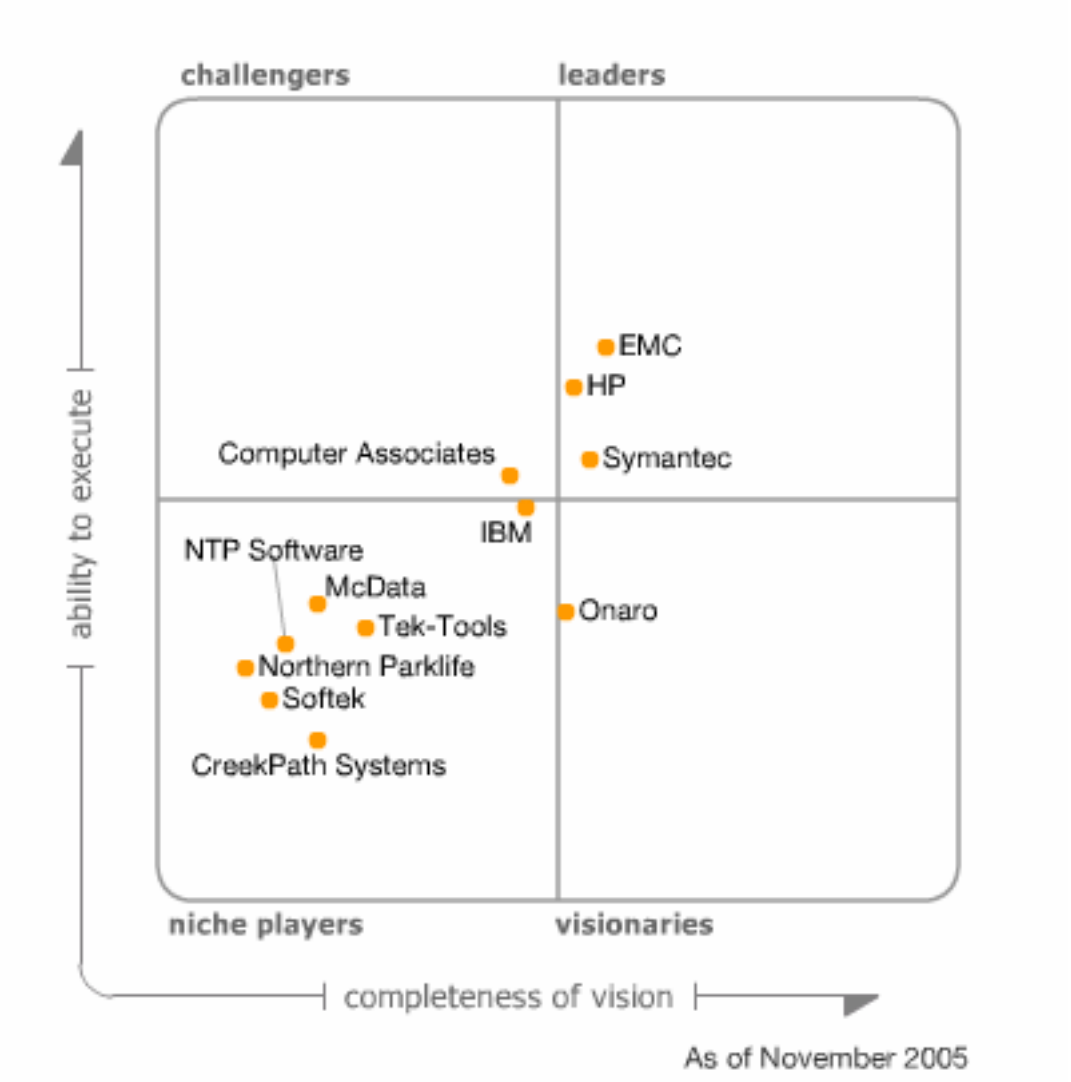
STRATEGIC PLANNING ASSUMPTION

Through 2008, managing to the file level will provide the highest return on investment of any SRM function (0.8 probability).

MAGIC QUADRANT

SRM software that includes SAN management is a mix of solutions that target end-to-end management of the storage infrastructure and those that focus on a single or limited set of functionality within the storage infrastructure. In previous years, we produced separate Magic Quadrants for SRM and SAN management software, but increasingly customers are taking advantage of products that integrate the two capabilities. This year, a single Magic Quadrant reflects the merger of these markets. Market requirements continue to advance, with some vendors just barely keeping up while others have made significant progress.

Figure 1. Magic Quadrant for Storage Resource Management Software, 4Q05



Source: Gartner (November 2005)

Market Overview

The SRM segment, including SAN management software, reported 30.8 percent growth in 2004 to reach $612 million and is forecast to grow at a compound annual growth rate of 14.8 percent, taking the segment to $1.2 billion in 2009 (see "Forecast: Storage Management Software, Worldwide, 2002-2009"). This segment includes products that monitor and manage the capacity and performance across multiple storage and server platforms. Growth is being driven by enterprises looking to better manage storage capacity utilization and begin to automate some of the management functions. Most SRM products focus on collecting data from the array, file or file system. A good SRM solution incorporates multiple views equally to manage physical and logical storage capacity. Understanding storage use allocated to a database or application is also a must, and leading vendors add high-level monitoring of the backup process to ensure that recovery is possible. Performance management is a particular area of focus, requiring

performance instrumentation at the application, database host, file and device level. For some companies, the need to manage IT as a utility with service-level agreements between IT and the business units is also driving new requirements and increased interest in SRM.

The SAN management component of SRM is used to discover, monitor, configure and otherwise manage the SAN fabric and devices connected to the edge of the fabric. These products increasingly are also a discovery and instrumentation layer for the overall SRM product. Storage device vendors have widely embraced the Storage Management Initiative Specification, providing an expanding, standardized view into storage devices, including tape, disk, switches and host bus adapters (HBAs). And while most SRM vendors now offer an agentless option to support a quick view of the server environment, the use of an agent is now being used to provide a deeper view into databases, e-mail, file systems and other applications.

Networked storage is now the norm in larger enterprises, and virtualization and thin provisioning provides tools to better use that shared resource. However, a renewed interest in file-level management is now turning the focus to deleting or migrating files that have not been accessed over a defined period of time, freeing up expensive disk resources and decreasing the time and resources needed to back up and recover. Thus, the need to integrate SRM tools with data classification and archiving solutions is becoming more critical. While backup tools provide their own product-specific management and reporting tools, SRM vendors are adding the ability to view across multiple backup infrastructures to provide the needed management reports to prove that data is being backed up per compliance requirements.

But the requirements for SRM solutions continue to expand. Root-cause analysis and performance monitoring of the storage environment from the application, server, HBA, Fibre Channel switch, logical unit number (LUN) and virtual storage configurations, and IP networks are needed. As storage topologies grow and change, resource management, event management, change and configuration management, analytics, and policy and workflow need to be more tightly integrated and better managed together. While most SRM products have moved beyond simple administrator password access to more-complex role-based security systems, overall security management still needs focus at the infrastructure level and at the data access level.

Market Definition/Description

SRM products provide data collection and automation that consolidate and operate on information from multiple platforms and applications supporting storage management tools on multiple operating systems, storage and SAN devices. Key functions include capacity reporting and analysis, root-cause analysis, performance reporting and analysis, capacity and performance management automation, storage provisioning, storage management product integration, application and database integration, and hardware integration. Basic network and systems management integration should provide the ability of the SRM product to externalize events to other management products. Integration with device resource management products and backup management products should include launch of hardware configuration utilities from the SRM console, collection and reporting of agent information, and integration of logical level data. Products that provide for discovery, topology mapping and monitoring, and change management of storage components are also included in this segment because this capability, which initially was offered as a separate product (and thus covered in its own Magic Quadrant report), is increasingly becoming a component of a broader SRM suite.

Key components of an SRM solution include the following:

- Central administrative console — The console is increasingly Web-based and provides a way to get a view of storage resources and metrics based on the user's profile. The product's security features will define the level of access and the breadth of view a user will have.

- Discovery and storage information repository — The SRM tool must be able to automatically identify new storage objects and to collect and store information on those objects in an information base. Data must be collected and stored so that they can be used to not only identify the current state of the environment but also to do historical views. Data on managed storage objects would include information on data files (size, data of creation and owner) and physical storage systems (capacity and performance characteristics). The repository also ties the storage information to the application and the user. The repository should be based on a commercially available relational database so that it can be queried via standard database reporting tools. There should be the ability to manually add data about a given object, such as acquisition date, location and asset tag number. And the data should be exportable to another relational database management system, including configuration management database technology, asset management products and chargeback systems.

- Capacity monitoring and management — This includes the activities to identify resource usage. It also provides tools for reclaiming space for better resource usage and making sure storage is available as needed.

- Quota management — This is a special capacity management function. A quota management application implements a corporate policy around the amount of disk space allowed per user. Many products offer only soft quota management, which is informational in nature. Hard quotas, those that actually stop the user from storing once the defined level of storage space is used, have most commonly been implemented in the e-mail and Windows environment. Filters also provide capacity management by preventing certain types of files from being saved to disk or tape.

- Performance management — This monitors the application, server, HBA, storage network and storage device performance. It might identify that the most used table in a database is on the slowest disk in a redundant array of independent disks (RAID) system or that a Microsoft Exchange server is bottlenecked by one port on a SAN switch. When performance issues are identified based on defined thresholds, events can be sent to trigger actions to correct the problem. Performance functions should take advantage of historical views of the environment and event correlation and root-cause analysis techniques.

- Event management — This collects events sent from applications and devices that indicate, for example, a disk failure or out-of-space condition. It then initiates the appropriate notification or triggers a pre-defined response to correct the problem.

- Root-cause analysis — This function should sort out and report the difference between underlying problems and the many symptoms they generate. It is a function that cuts across many of the other categories in this list.

- Reporting — This provides basic reports, real-time and historical, and the capability to use reporting tools (including powerful business intelligence and online analytical processing tools) to create custom reports and views. The goal is not to have several reports but to have a few useful ones and the ability to generate custom reports easily.

- Chargeback — This acts as the accounting mechanism for billing users for storage resources.

- Configuration and change management — This provides the capability to monitor and track changes to the storage environment. Some products take snapshots of the storage environment at set intervals so that, in the case of a problem, the current configuration

can be compared with the last-known working state and can also be used to look at dependency mapping, change impact analysis and supported configuration checking.

- Provisioning — This is the process of adding, deleting or modifying the configuration of storage required for a given application, including devices, replicas and network paths.
- Integration with other management solutions — This will be increasingly important to support the real-time enterprise as it looks to adjust resources on demand. Application management, database administration, recovery management and SRM should work hand in hand. The application management tool ensures general application and system performance and capacity, with the SRM optimizing the performance, capacity and robustness of the storage infrastructure that supports the application. And the SRM product will need to integrate with commercial chargeback and service-level agreement products, even if the SRM product has capabilities in these areas. To support end-to-end infrastructure management, the storage tools will need to integrate with network and system management tools, including asset management and event management integration.

Heterogeneous platform coverage should at a minimum include Solaris, HP-UX, AIX, Windows and Linux. Products should also support the popular disk arrays, tape drives and libraries, storage networking devices, and network-attached storage filers. Support for an expanding list of databases and applications, such as Oracle, Microsoft SQL Server, IBM DB2, Microsoft Exchange, SAP, PeopleSoft, and other financial and customer management applications, is also a requirement.

Inclusion and Exclusion Criteria

Included vendors must be the developer of the product or have made significant functional additions or modification of the product code, and not just be a reseller or value-added reseller (VAR). The company should have at least five large (more than 150 servers managed from a central location) enterprises that are using the software in a production environment and that are able to be referenced to Gartner. The vendors are worldwide in scope and industry-independent.

Added

Onaro was the only new vendor added to the SRM Magic Quadrant this year. The company offers SANscreen Change Management. Other vendors have entered the market, mostly with a focus on the small and midsize business (SMB) market, but none met the inclusion criteria. Symantec is included because of its acquisition of Veritas in June 2005.

Dropped

Storability, AppIQ, and TeraCloud were dropped from this year's SRM Magic Quadrant. StorageTek acquired the assets of Storability in September 2004. StorageTek was then acquired by Sun Microsystems in August 2005. Sun will continue to resell the HP/AppIQ SRM product as a component of the Sun StorEdge Enterprise Storage Manager (ESM) suite. In early 2006, Sun intends to incorporate the reporting functionality of GSM, specifically the business analytics and advanced backup reporting modules, into the ESM suite. TeraCloud is no longer promoting its SpaceNet SRM product because it is returning to its original focus on mainframe management tools. AppIQ was acquired by HP in October 2005, and the Storage Authority offering, now renamed Storage Essentials, is replacing the HP OpenView Storage Area Manager (OVSAM) offering.

Evaluation Criteria

Ability to Execute

Several factors contribute to the vendors' execution ratings. The product capabilities were evaluated separately for basic and advanced functionality. Special focus was placed on capacity management, change management, policy automation, performance management, integration and root cause. Because this market includes many small vendors with uncertain futures, financial viability was an important factor. The ability of a vendor to anticipate and respond to changes in the market and achieve competitive success as market dynamics change was also highly rated.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	high
Marketing Execution	standard
Customer Experience	standard
Operations	low

Source: Gartner (November 2005)

Completeness of Vision

A vendor's completeness of vision was evaluated based on its ability to convincingly articulate its future product direction and demonstrate innovation in meeting customer needs, allowing the vendor to more effectively compete in the market. The credibility of the vendor's vision will be weighed against its past ability to execute against previously stated plans. Market understanding should be the guiding factor in new product development to ensure that the product engineered meets customer needs. Managing the complexity of storage environments requires innovative approaches that will distinguish leaders and delight customers.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	no rating
Vertical/Industry Strategy	no rating
Innovation	high
Geographic Strategy	low

Source: Gartner (November 2005)

Leaders

Leaders have the highest combined measures of an ability to execute and a completeness of vision. They have the most comprehensive and scalable products. They have a proven track record of financial performance and an established market presence. In terms of vision, they are perceived as thought leaders, having well-articulated plans for ease of use, how to address scalability and product breadth. For vendors to have long-term success, they must plan to address the expanded market requirements for change management and root-cause and performance analysis. Leaders must not only deliver to the current market requirement, which continue to change, but they need to be able to anticipate and begin to deliver on future requirements. A cornerstone for leaders is the ability to articulate how these requirements will be addressed as part of their vision for resource management. As a group, leaders can be expected to be considered as a part of most new purchase proposals, and they have high success rates in winning new business.

Challengers

Challengers can execute today, but they have limited vision. They have capable products and can perform well for many enterprises. Vendors in this group have the financial and market resources and capabilities to potentially become leaders, but the question is whether they have an understanding of the market trends and market requirements needed to succeed tomorrow. In addition, challengers may not devote sufficient development resources to achieve leadership.

Visionaries

Visionaries are forward-thinking, but their execution has not propelled them into a leadership position. These vendors are differentiated by product innovation, but they have not achieved a completeness of solution or the sales and marketing expertise required to give them the high visibility of leaders.

Niche Players

Niche players are either narrowly focused on an application, market or product mix, or offer broad capabilities without the relative success of competitors in other quadrants. Niche players may focus on a segment of the market and do it well, or they may simply have modest horizons and lower overall capabilities compared with competitors. Others are simply too new to the market or have fallen behind, and while worth watching, have not yet developed complete functionality or ability to execute.

Vendor Comments

Computer Associates

The BrightStor SRM solution from Computer Associates (CA) has a broad set of functionality, especially around backup reporting and SAN design. The product integrates with and is able to use the broad set of CA management tools, which will make the offering particularly appealing to CA customers that have implemented those solutions. BrightStor SRM can also integrate with CA's mainframe SRM tool, CA-Vantage, to offer a holistic view of storage capacity and consumption across the data center. CA has rounded out some of the previously missing features. DB2 and Sybase database support and a global dashboard have been added. SAN Designer now has the capability to support server clustering and multipath configurations. The tool also checks configurations against a compatibility reference that CA engineering maintains. A Process Automation Manager module has been added to allow for role-based creation and tracking of manual and automated tasks. While CA has captured a sizable base of customers for

capacity and backup management, its lack of depth and vision around device and performance management may be a concern for enterprises with large, complex environments.

CreekPath Systems

CreekPath Systems continues to sell its CreekPath Suite, releasing version 3.5 in June 2005, but the company is looking to narrow its focus to do fewer things better. The company will target management reporting, capacity management and planning, and decision support for provisioning, an area that it is known for today. CreekPath has a small customer base and small revenue stream against a sizable venture capital investment. Clients evaluating an SRM solution from CreekPath today will need to factor in the risk to future development of the current offering as the company rolls out its new product direction.

EMC

EMC leads with the penetration of its SAN management component of the ControlCenter suite. Less penetrated is the StorageScope component for capacity management, although it still has strong sales compared with similar products from other leading vendors. ControlCenter now has Web access for monitoring, and infrastructure overhead has been reduced with improved agent-to-management processor ratios. A new wizard enables agent installs and upgrades and performs extensive prerequisite checking prior to installation. Users can view zoning changes without the need to rediscover the entire SAN. SAN Advisor can be used to validate the existing SAN for optimal interoperability and to model planned changes before execution. Backup reporting has been added through an original equipment manufacturer (OEM) agreement with WysDM. The company has focused on helping the user base get more benefit out of the suite of tools through user forums, newsletters and a customer advocacy program. EMC is targeting a major product upgrade in 2006, which must deliver on promised usability improvements and deeper support for IBM, HP, Engenio Information Technologies and Network Appliance (NetApp) storage systems, in addition to integrating root-cause capabilities from the SMARTS acquisition.

HP

HP acquired AppIQ in October 2005. It offers the AppIQ product under the Storage Essentials name and has integrated it with HP Systems Insight Manager to offer unified server and storage management. The technology is also resold by Hitachi/Hitachi Data Systems, Silicon Graphics, Engenio and Sun. HP will transition its OVSAM customers to Storage Essentials over the next year. The offering has become known for its ease of deployment and well-integrated management interface. The user interface offers application down to array spindle views, displaying host, fabric and array resources, with in-context capacity and performance metrics optionally displayed across the topology. There is strong platform support for operating systems, databases (with the exception of DB2) and Exchange. Storage Essentials offers provisioning through a dashboard that guides the administrator through all steps of provisioning: selecting a suitable LUN, zoning and ensuring that any multipath requirements are enforced. Scalability for worldwide deployments is assisted by the ability to roll up information from individual SRM servers to a master console.

IBM

IBM offers its full SRM offering under the TotalStorage Productivity Center (TPC) name, with modules for Data, Fabric, Disk and Replication. IBM previously offered these as individual products, but it is gradually combining them into an integrated suite. This year, IBM delivered a unified agent and capacity-based pricing, and it improved the installation and configuration experience by reducing the number of product CDs. A "light" version, TPC Limited Edition, will ship with all IBM disks to increase market penetration and to offer greater capabilities than the

previously included Enterprise Storage Server (ESS) Specialist and the charged-for ESS Expert offerings. In its current form, TPC for Disk has weak support for non-IBM hardware, but by year-end 2005 IBM will ship a major product update that will offer component integration under a single new graphical user interface, reduced infrastructure requirements, improved device support and an integrated reporting utility that is built on a common database for the suite. While this new version promises to give IBM renewed competitiveness, additional investment in automation and provisioning, performance and change management, and backup reporting will be needed if IBM is to advance its positioning on the Magic Quadrant.

McData

McData is focused on delivering storage network management services and continues to integrate its heterogeneous SAN Navigator SAN management product with Enterprise Fabric Connectivity Manager (EFCM) and SANvergence, the element managers for its switches. EFCM will become the brand name for the combined suite. Within its storage networking niche, McData offers heterogeneous product support and a focus on SAN, metropolitan-area network (MAN) and WAN implementations. While most of McData's OEMs have their own SAN management tools and only resell the McData-specific management components, McData VARs are using the full suite as part of their storage network management practices.

Northern Parklife

Northern Parklife is one of the three vendors offering quota management software for Windows systems, a market that will come under increased pressure as Microsoft includes more functional quota and capacity management capabilities within the operating system. And while market interest in quota management continues among SMBs, larger companies are moving to archiving and tiered storage solutions. The Northern Storage Suite is the company's attempt to move beyond just quota management by adding some basic capacity management and chargeback features, but the offering is very basic and will not take Northern much beyond its current target market.

NTP Software

NTP Software is best-known for its QFS quota management suite, but it is looking to move beyond that with its Software Storage Modeling & Analysis offering and related services. The company's Deep Scan technology allows for the identification of targeted files, even if the file extension has been changed. The company is looking for growth through its enhanced support for NetApp filers and through expanded global marketing initiatives.

Onaro

Onaro's SANscreen predictive change management software addresses a very specific area of the SRM market, but it is very innovative compared wit the basic capability present in other vendors' products. It uses change analysis to detect root causes and advise on how to fix application service errors before, during and after changes are made to the storage network. In addition, dependency mapping provides the end-to-end application visibility for policy-based monitoring of storage services. The agentless solution requires only a Windows PC to manage thousands of ports. While its offering could be a complement to many of the other leading SRM vendor products, the company has yet to close a partnership and has seen only modest market penetration with its limited sales channel.

Softek

Softek is seeing most sales for its Storage Manager product in Japan through its partner Fujitsu. Over the past year, Softek has focused most of its marketing on its data migration tools. While the

company has indicated that it will continue to support and enhance the SRM offering, it expects to get the most benefit in the future from using some of the management capabilities to create better migration management tools. Softek has articulated plans to offer a new product to address downtime during data migrations by using automated SRM-based discovery and visualization technologies to better assess, plan, activate and validate data movement.

Symantec

Symantec has completed the migration of its several SRM components to the CommandCentral suite. The offering has strong database, backup and platform support; comprehensive role-based management; a single agent; and a comprehensive workflow engine that ships with best practices templates. Provisioning is guided with wizards that use terminology consistent with the device under management. The configuration management feature is capable of indicating all modifications over a given period of time. There is deep integration and management for the Veritas NetBackup product and also for Veritas Cluster Server. CommandCentral also offers the ability to track replication and snapshots from multiple array vendors. Scalability for worldwide deployments is assisted by the ability to roll up information from individual SRM servers into a master console. Marketing focus on this product has been limited, but the company continues to fund engineering to add needed change and performance management capabilities. Symantec also offers Storage Exec, part of the Backup Exec family, for active and passive Windows file filtering and blocking and quota management.

Tek-Tools

Tek-Tools added a policy engine to its Profiler suite of backup reporting and capacity management tools in 2005. Backup reporting has been the biggest growth driver for Tek-Tools' business, but partnerships with Xiotech and Crosswalk have also helped grow the capacity management side of its business. The Java-based product supports a wide range of platforms. Although Tek-Tools has seen good growth over the last year, employee size and limited marketing have served as limiting factors.

RECOMMENDED READING

"Hewlett-Packard's AppIQ Acquisition Will Shift the SRM Market"

"Poll Shows Many Organizations Lack the Foundation for Successful SRM"

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

Acronym Key and Glossary Terms

CA Computer Associates

EFCM Enterprise Fabric Connectivity Manager

ESM Enterprise Storage Manager

ESS Enterprise Storage Server

GSM Global Storage Manager

HBA host bus adapter

LUN logical unit number

NetApp Network Appliance

OEM	original equipment manufacturer
OVSAM	OpenView Storage Area Manager
SAN	storage area network
SMB	small and midsize business
SRM	storage resource management
TCP	TotalStorage Productivity Center
VAR	value-added reseller

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, etc.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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