

Magic Quadrant for E-Mail Active Archiving, 2006

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New e-mail archiving vendors are entering the market every day, but few can fulfill the need of enterprise customers for a single product that can support compliance, discovery and mailbox management requirements. Continued investment is required to meet this need.

WHAT YOU NEED TO KNOW

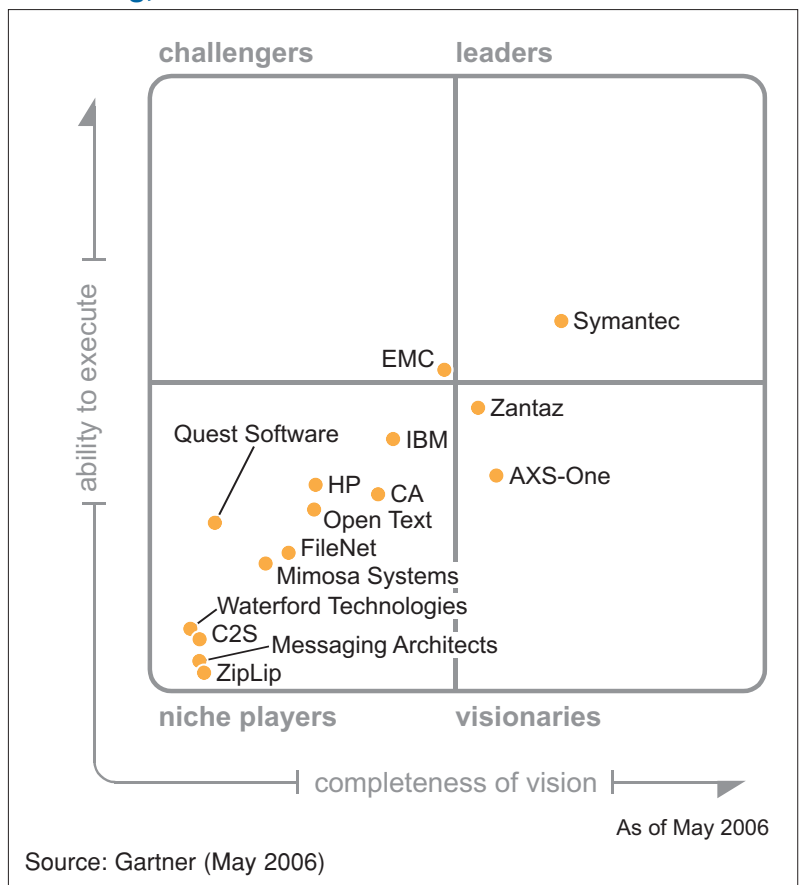
The e-mail active-archiving Magic Quadrant is focused on enterprise-class products that meet the criteria defined below and that were able to prove through strong references their ability to address the need of a market looking to support thousands of users. Organizations with limited requirements or a modest number of users may still wish to start with one of these products, knowing that they will eventually need the scalability and functionality they provide. Products that are not included in this research may just be too new to the market or may provide a tactical solution to an immediate problem.

While many vendors have made significant improvements to their products, there are still many areas of concern, not the least of which is the complexity of deployment and management of growing archives. Clients continue to ask for better archive management and monitoring tools. Migrating personal stores into the archive continues to be a pain point in the quality of the available tools and in the time it takes to accomplish the archiving. Some users would like to maintain the folder structures created in their mailboxes, but taking those to the archive for historical stores is cumbersome to accomplish with most currently available tools. As the archives grow, the indexes generated for the content also grow. The time to create those indexes for clients receiving large volumes of messages on a daily basis, plus the time to search them, is a growing concern. Vendor promises continue to

exceed production-quality feature delivery, sometimes by many months. And enterprise-class support is increasingly expected but not always available.

Expect these products to change. There will be improved search engines, new XML-based data stores and better indexing architectures. Vendors will provide ways to federate older data with newer approaches. Waiting for the perfect product is like deciding when to buy a new PC. Next month's technology is always better and faster. The value delivered by today's archiving products is substantial – but as e-mail products themselves provide better support for archiving, as search and categorization

Figure 1. Magic Quadrant for E-Mail Active Archiving, 2006



capabilities improve, and as archiving vendors get more experience working with larger volumes of data, expect change.

STRATEGIC PLANNING ASSUMPTION

By 2010, 50 percent of the archiving implementations will use the archive created for compliance and/or discovery to improve e-mail management through message stubbing (0.7 probability).

MAGIC QUADRANT

Do not compare last year's placement to this year's. The market has changed, and the criteria continue to evolve. Vendors that did not change will naturally move to the left on Completeness of Vision. Vendors who have not yet delivered proven solutions to the new market requirements measured per the defined criteria for this year's Magic Quadrant may also have moved to the left on Completeness of Vision. This does not imply that the products evaluated last year are now deficient. It just means that new requirements have added new challenges to the market that have yet to be met.

Market Overview

The growing size of e-mail data stores, coupled with the requirement to retain e-mail records for regulatory compliance and legal discovery, has created a market for e-mail active-archiving tools. An e-mail active-archiving product provides a searchable archive of all e-mail messages for a defined period of time. It can be used independently or as part of a corporate records repository for legal and business uses. It also can be used as a solution to reduce the size of production e-mail data stores to gain operational efficiencies (reduce backup time, improve recovery and eliminate the need for quotas while still keeping the active data store lean).

While many vendors can provide products with some level of compliance capture and archiving, to be considered an enterprise e-mail active-archiving vendor the solution must offer mailbox management and compliance archiving. This is still a relatively new market, with half the vendors included in this Magic Quadrant entering the market since 2002. And just when these vendors can claim solutions with mailbox management and compliance capture, compliance supervision and discovery support have emerged as key requirements. Product scalability continues to be a significant issue. However, the biggest change happening in this market is the emerging interest in extending the archiving platform to include other kinds of content. Many storage administrators are now looking beyond the e-mail archiving project to the next archiving requirement and selecting an e-mail archiving vendor that will also be able to help with file, SharePoint or some other archiving requirement.

Market Definition/Description

As defined by Gartner, the e-mail active-archiving market targets vendors that not only provide for the capture of all e-mail messages but also use that archive to allow for the purging of messages from the active mail data store while giving the end user the illusion of an infinite mailbox. E-mail active-archiving products should:

- Capture and archive all e-mail messages entering and leaving the company and messages between users on an e-mail server as unique, indexed records
- Provide access to the archive via a Web client and through the e-mail client
- Include auditing capabilities to track access to archived records

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- Support the secure storage of increasingly large archives offering multiple storage options for the archive, including disk, optical, tape, and write once, read many (WORM) tape and emerging content-focused devices, including those targeted at tamper-proof content storage, such as the EMC Centera, IBM DR550, HP Reference Information Storage System (RISS), Nexsan Technologies Assureon, Archivas ArC, and Network Appliance NearStore with SnapLock
- Exploit hierarchical storage management technology to automatically prune the active e-mail data store for more-efficient operation
- Offer personal data store migration tools and temporary offline local store options to eliminate the storage of e-mail messages outside the control of the archive system
- Provide or integrate with a robust records management solution to manage the life cycle of the records to ensure proper retention and deletion

Leading vendors will also:

- Package tools for sampling and management of the compliance process
- Package or integrate with tools to manage the discovery process, narrowing the search and managing the steps needed to deliver records

Inclusion and Exclusion Criteria

To be included in this Magic Quadrant, a vendor must be the developer of the product and not just a reseller or value-added reseller (VAR). The company should have at least five large enterprises (1,000 mailboxes or more) that are using the software in a production environment for mailbox management and compliance archiving and that are able to be referenced to Gartner to support compliance to the criteria. Included vendors are worldwide in scope and industry-independent.

Added

FileNet, HP, Mimosa Systems, Quest Software and Waterford Technologies were added to the Magic Quadrant for 2006. Symantec acquired Veritas Software in July 2005, and CA acquired iLumin October 2005; thus, both these vendors are now part of this Magic Quadrant.

Dropped

CommVault continues to offer an e-mail archiving product and an e-mail migration product. However, Gartner was not able to identify and validate enterprise-class production customers that met the inclusion criteria, so the company was removed from the 2006 Magic Quadrant.

Evaluation Criteria

Ability to Execute

Several factors contribute to the vendors' ability to execute ratings. The product capabilities were evaluated separately for basic and advanced functionality. Special focus was placed on archive scalability and storage management capabilities, mailbox management, compliance supervision, legal discovery, and integration with other related technologies. Because this market contains 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. As the products become more complex, as the archives grow, and as the need to use the information in those archives becomes more mission-critical, strong customer support becomes increasingly important.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner

Completeness of Vision

A vendor's completeness of vision is 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 is 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	standard
Marketing Strategy	high
Sales Strategy	high
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	low
Innovation	standard
Geographic Strategy	standard

Source: Gartner

Leaders

Leaders have the highest combined measures of an ability to execute and a completeness of vision. They have the most-comprehensive and most-scalable products. They have a proven track record of financial performance and established market presence. In terms of vision, they are perceived as thought leaders, with 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 archive management, personal store migration, ease of use and deployment, and archive recovery. Leaders must not only deliver to current market requirements, 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 expanded archive management. As a group, leaders can be expected to be considered as part of most new purchase proposals and have high success rates in winning new business.

Challengers

Challengers can execute today but have a limited or still-evolving vision. They have capable products and can perform well for many enterprises. These vendors have the financial and market resources and capabilities to potentially become leaders, but the important question is whether they have the understanding of market trends and market requirements needed to succeed tomorrow. Also, they may not devote sufficient development resources to deliver a product with broad market appeal and leadership features.

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 completeness of solution or the sales and marketing success 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 they 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, they have not yet developed complete functionality or the ability to execute.

Vendor Comments

AXS-One

AXS-One has focused on large companies with complex compliance, discovery and operational archival requirements. The AXS-One Compliance Platform has strong support for Lotus Domino, Microsoft Exchange and SMTP-based formats, such as Critical Path, which supports large-scale legacy ingestion of previously stored e-mail into the archive for discovery. The company has added support for Sun Microsystems' Java Messaging Server, which will become available later in 2006 with the next release of Sun's Java software stack. Development

efforts have focused recently on improving large-scale searches, and the company now offers Rapid-AXS, a grid-based software option that lets users create a fast solution for searching very large archive indexes. The company is one of the few in this report having engineered and delivered in production all the components of a complete e-mail archiving solution. A small but worldwide public company, with offices in the U.K., Asia, Africa, Australia and the U.S., AXS-One's challenge continues to be to engage partners (or grow the company's sales organization) to deliver this solution to a broader base of customers. Part of that challenge includes streamlining the many configuration options within the standard shipping product and to add new features that address broader market requirements rather than offering frequent changes to respond to the demands of its large customers. The Sun partnership has resulted in limited new sales, but a recent partnership with Deloitte and Sun looks promising because Deloitte will bring needed compliance consulting expertise. AXS-One's e-mail archiving solution is part of an integrated content archiving platform that includes connectors for Bloomberg mail, instant messages, SAP, .Personal Folder Storage (PST) files, desktop office documents and reports. An engineering-focused company, AXS-One needs to increase its name recognition and deliver a more-packaged solution that can be delivered by a broader channel.

C2C

C2C offers Archive One Compliance for compliance and legal discovery and Archive One Policy for mailbox management. Archive One Policy is a replacement for Archive One Capacity, which archived messages to another Exchange server. Archive One Policy still requires messages to pass through a public folder, a requirement that C2C plans to remove by mid-2006. Related products include Max Compression, which can be used to compress attachments, and Active Folders Content Manager, which is an e-mail content discovery product that can be used to search an active Exchange information store, including public folders and local or server-based PST files. The Archive One products archive to disk and/or integrate with backup or hierarchical storage management products to support archiving to a greater range of storage targets, including tape.

The company has been most successful targeting the less-than-5,000-mailboxes niche of the market, in which users are looking for a lower-cost solution that is easy to deploy.

CA

CA appears on this Magic Quadrant because of the October 2005 acquisition of iLumin and its Assentor product. The product has been re-branded as CA Message Manager, and it supports Exchange, Domino, Oracle Collaboration Suite, Sun One, Sendmail, Scalix, Bloomberg and GroupWise. The product is best-known for its compliance supervision capabilities, which support pre- and post-review of messages. New work has been done to extend the product's categorization capabilities beyond its natural-language-processing-based supervision to include auto-classification and expanded numeric tagging. While its historical strength has been in compliance supervision, the product has enhanced its mailbox management and litigation support features, allowing it to compete in a broader market. CA brings expanded engineering, sales and support resources, but its integration efforts are still in the early stages. CA's relationship with IBM for resale of the compliance module and integration into the IBM DB2 Content Manager product has ended, which is more of an issue for IBM than CA. While financial viability is no longer an issue, the product is at risk of getting lost among CA's other offerings, especially with the name change.

EMC

In April 2006, EMC announced Documentum Archive Services for Email, an e-mail archiving product that's part of a new integrated content archiving platform based on Documentum technology. The e-mail solution is a version 1 product, with no support for e-mail management or full text indexing. EMC plans to expand the offering to include most of the features in its other e-mail archiving product, EmailXtender. While the EMC sales force has been successful in selling the EmailXtender product, work on new features (such as a discovery module) was delayed as EMC worked to improve product deployment and support and as engineering focused on the Archive Services for Email offering. The company has stated that it will continue to improve both products in

parallel, but Gartner believes that the company will eventually look to offer a single product (0.7 probability). Until then, expect some confusion as sales tries to properly represent the two similar products with very different features and futures. Documentum Archive Services for Email is an alternative to EMC's EmailXtender offering. While EmailXtender may better meet many companies' current needs, it should be considered as a tactical, stand-alone solution.

FileNet

FileNet acquired Yaletown Technology Group in October 2005. Yaletown was a VAR focused on supporting FileNet deployments. It had developed an e-mail archiving solution that worked with the FileNet enterprise content management (ECM) offering. Prior to the acquisition, FileNet had just begun to offer its own e-mail archiving and management solution based on the Yaletown technology. With version 3.5, the first version released since the Yaletown acquisition, customers have a choice of FileNet Content Services, FileNet Image Services or FileNet P8 Content Manager as the repository for e-mail captured and managed by Email Manager. Customers who want to use FileNet Records Manager to declare and manage e-mail and attachments as records can use FileNet P8 Content Manager as the repository or FileNet Content Federation Services to manage e-mail and attachments as records in FileNet and non-FileNet content repositories. Although the company provides a solution for e-mail archiving, FileNet places special emphasis on managing e-mail in the context of its ECM environment. FileNet P8 customers or FileNet prospects wanting a mail archiving solution that will integrate with FileNet Records Manager solution should evaluate FileNet Email Manager.

HP

HP's StorageWorks Reference Information Manager (RIM) for Messaging is specifically designed as an application connector for and runs exclusively on the HP StorageWorks RISS. Customers report that the integrated solution was key to their decision in selecting the solution. The messages are usually stored in one repository per user, with a logical repository architecture that allows for viewing groups

of data across multiple (or all) repositories. The product supports capture of Exchange and Domino. There are no special modules for compliance supervision or litigation support. HP's current strategy is to integrate with partners for this added functionality. The company is offering other archive connectors for RISS, such as RIM for Databases, File Migration Agent and RIM for Files. Support for the RISS array by Systems Insight Manager was added with the recent 1.5 release of RISS.

IBM

IBM has continued to improve the CommonStore module for its IBM DB2 Content Manager solution. In 2005 and 2006, it delivered significant upgrades to CommonStore for Exchange to provide almost the same functionality as CommonStore for Domino. IBM also delivered the ability to use the policy engine in the IBM DB2 Content Manager Records Manager to manage e-mail retention. The company has a services-led discovery solution for Domino, with a product supporting Domino and Exchange planned in mid-2006, but has terminated its relationship with CA for its compliance solution. The company is now partnering with Orchestra for supervision capabilities. As a result, most of its installed customers are using CommonStore to push messages selectively or automatically into the content management repository for mailbox management. A new user-based pricing model has made the product more appealing to smaller customers and to the VARs that service that market. The list price is still very high, and while IBM's heavy Passport Advantage discounting puts the resulting price in the middle of the list of vendor prices, the resulting maintenance service contract (which is based on list price) will be high for customers that don't qualify for a very high Passport Advantage discount. Large enterprises wishing to do compliance capture and mailbox management will find this product appropriate if they have also deployed IBM's content management solution.

Messaging Architects

Messaging Architects focuses on solutions for the GroupWise market, including an e-mail archiving solution. While a few large companies still run GroupWise, the product still has a strong base,

particularly in state/local government and education markets. The capabilities of the GroupWise product make supporting the full range of features that an Exchange or Domino customer would expect technically impossible, but Messaging Architects' GWArchive product is one of the few on the market from a company that has a business focused on solutions to support the Novell GroupWise messaging product. The product is "Novell Yes Certified." Messaging Architects has been partnering with Network Appliance for tamper-proof disk storage and with Nexsan to get single instance store capabilities.

Mimosa Systems

Mimosa Systems' NearPoint for Exchange is a unique offering that combines e-mail archiving and continuous data protection. The product began shipping in May 2005. NearPoint first replicates the entire Exchange database, then as Exchange log files fill, it copies the log files to the NearPoint server and applies them to the database replica and the archive. The Disaster Recovery Option provides for replicating the NearPoint data to a remote site for disaster recovery. Because of the high price for the software, the product will appeal most to companies looking for more than just an archiving solution. Exchange administrators with fewer than 10,000 mailboxes, who need to improve Exchange recovery times and reduce data loss in an outage, and who have yet to implement an archiving solution will be the most-ready market for this type of offering.

Open Text

Open Text offers three different Exchange and Domino archiving products that vary in data extraction and levels of integration with Livelink Enterprise Server, its ECM platform. Livelink ECM-Email Archiving is a "superset" of Open Text's Email Management product, and Livelink ECM-Email Monitoring can be deployed along with one of the other two. Customer references are still older IXOS-based code customers, and Open Text's strongest sales for this product have been in Europe. Known for its SAP archiving through the 2004 acquisition of IXOS, Open Text has added file archiving and updated SharePoint archiving to the platform, which, along with e-mail archiving, will now all share the

common services offered by Livelink, such as retention management, indexing and search. Open Text has introduced an add-on option for automated sampling and compliance review of e-mails, but it has partnered with Technology Concepts & Design for legal discovery and case management. Because of the effort and price to implement this solution, target customers are Fortune 500 companies looking to implement a full content management solution, with archiving just one component of that project.

Quest Software

Quest Software acquired New Zealand-based AfterMail in January 2006 and re-branded that company's product as Quest Archive Manager, replacing a Quest-engineered product by the same name. The product supports Microsoft Exchange and Novell GroupWise for compliance archiving. Support for mailbox management for Exchange was added in mid-2005, and mobile support was added in early 2006. While customers report that the product is easy to install and use, the product is still missing some key features that will be needed for it to fully address the compliance market it's targeting. Quest should, however, be able to capitalize on its large worldwide sales organization and installed customer base from its other products to expand Archive Manager's market penetration in geographies that smaller vendors cannot address. The Quest sales force has established relationships with Exchange managers worldwide through its many other Exchange tools, such as Recovery Manager for Exchange, a tool for extracting messages from backup tapes.

Symantec

The July 2005 release of Enterprise Vault version 6.0 was the first major update of the product since Veritas acquired KVS in September 2004 and came just as Symantec was completing its acquisition of Veritas. This version expanded the platform to include compliance capture of Lotus Domino mail and began to use its application programming interface (API) to expand Enterprise Vault beyond e-mail, files and SharePoint to include, via integration with third parties, database archiving (Princeton Softech), Bloomberg (via Globanet), SAP (via Gamma ArchiveBridge), BlackBerry (via CommonDesk) and fax (via Omtool). API-level integration allows

Orchestria, Recommind or MessageGate to be used to provide added content filtering and classification. The product now provides for migration to tape via IBM Tivoli Storage Manager (or the IBM DR550) or through NetBackup. Symantec has the largest installed base of large and small e-mail archiving customers, and it has had a compliance supervision and a discovery module available since 2002. TotalTec has built an appliance-like solution that packages servers and storage with the software for ease of deployment for customers with less than 1,500 users. Symantec continues to heavily invest in the product family, and while no vendor has a lock on "best" design, Symantec does offer a robust solution that continues to improve. Scaling the services to match product growth and increased customer demand and expectations has been a challenge that the company continues to face. And the company has yet to deliver deep integration with Hummingbird or other major records management vendors as required by some prospects.

Waterford Technologies

Waterford Technologies has expanded from a being company focused on providing intelligence into corporate e-mail activity and usage to include e-mail archiving capabilities. The MailMeter Archive solution captures, encrypts and digitally signs all e-mails as they are placed into the read-only archive and offers stubbing of attachments only. The company targets midmarket customers (50 to 5,000 mailboxes) looking for an easy-to-deploy solution that can provide e-mail reporting and legal discovery capabilities. The product includes a set of standard reports but does not offer the user with the ability to create custom reports without exporting the data into a third-party reporting tool. A compliance module is targeted for availability by mid-2006. The company is headquartered in Irvine, California, with offices in the U.K. and Waterford, Ireland. While lacking the robust retention and scalability of solutions targeted at the higher end of the market, the product fills a need in the small-to-midsize market and could provide a tactical solution to larger clients who are still not sure what their long-term approach to mailbox management will be.

Zantaz

Zantaz has continued to invest in product, marketing and channels since acquiring the Exchange-focused Enterprise Archive Solution from Educom TS in February 2004. In 2005, the company released support for Lotus Domino and added a legal discovery option, and it now includes a dashboard for monitoring the health and status of the solution. Zantaz has continued to expand its operations in North America and Europe, supporting the rest of the world through partners. The company's corporate focus is on integrating and extending its archiving products and services with its litigation support solution into the Zantaz Information Retention and Discovery Management solution set. Announced in March 2006, its First Archive On Demand will offer mailbox management capabilities coupled with a hosted compliance archive. While Zantaz offers a strong archive product and has succeeded in increasing its name recognition, the company needs to continue its efforts to improve delivery, packaging, documentation, support and usability as it looks to develop its direct and indirect channels to take the product into more geographies.

ZipLip

ZipLip has begun to establish a reference base for its Unified Email Archival Suite, primarily in the compliance market for Microsoft Exchange in which it supports pre- and post-supervision of messages. The platform was initially developed to target secure messaging requirements. ZipLip hopes to capitalize on existing Japanese channels for the company's secure messaging product to promote its archiving product in that market. ZipLip is a small company with limited financial resources targeting a very broad market. Clients looking for a compliance solution with pre- and/or post-review requirements may find this solution interesting, but the company may need to narrow its platform focus to deliver a more-complete solution.

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, and so on, 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 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, and so on

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.