

# The Big Picture

RANK 2008		RANK 2007	Overall	Value							
Vendor			Average of individual value and reliability ratings*	Meets expectations for increasing revenues*†		Meets expectations for lowering costs*		Solves the business problem paid to solve*		Meets ROI expectations*	
				RANK	RANK	RANK	RANK	RANK	RANK	RANK	RANK
1	N/A	<b>RSA Security</b> (division of EMC)	82%	78%	3	72%	6	88%	2	80%	2
2	2	<b>Google</b>	81	80	2	81	1	83	5	83	1
3	5	<b>Check Point Software</b>	80	83	1	74	4	89	1	75	7
4	7	<b>Cisco Systems</b>	79	76	6	67	9	88	2	77	4
5	7	<b>Dell</b>	77	77	4	77	2	78	11	78	3
5	2	<b>VeriSign</b>	77	75	7	65	12	85	4	76	5
7	2	<b>Hewlett-Packard</b>	75	73	9	74	4	81	8	76	5
7	1	<b>Red Hat</b>	75	73	9	76	3	76	14	74	9
9	5	<b>Research in Motion</b>	74	77	4	67	9	78	11	67	16
10	7	<b>Citrix Systems</b>	73	71	12	72	6	78	11	72	10
11	N/A	<b>Juniper Networks</b>	72	75	7	62	16	80	9	69	14
11	12	<b>Adobe</b>	72	72	11	61	18	83	5	71	11
11	7	<b>McAfee</b>	72	68	14	69	8	80	9	70	12
14	14	<b>Apple</b>	70	69	13	54	27	83	5	67	16
15	N/A	<b>3Com</b>	68	66	19	65	12	73	17	75	7
15	17	<b>IBM</b>	68	67	17	59	20	74	15	67	16
17	11	<b>Trend Micro</b>	67	61	24	66	11	73	17	70	12
18	16	<b>Motorola</b>	66	56	33	63	15	67	29	67	16
19	13	<b>EMC</b> (except for RSA Security)	65	60	26	55	26	72	19	62	25
19	18	<b>Sun Microsystems</b>	65	68	14	57	24	68	26	65	20
19	31	<b>Sprint Nextel</b>	65	68	14	65	12	70	23	64	21
19	N/A	<b>Lenovo</b>	65	64	20	62	16	72	19	63	24
19	26	<b>Novell</b>	65	63	21	60	19	61	35	68	15
19	15	<b>Symantec</b>	65	62	22	59	20	74	15	60	28
25	29	<b>Nortel Networks</b>	64	67	17	58	23	71	21	56	33
25	21	<b>Verizon Wireless</b>	64	59	27	59	20	68	26	64	21
27	27	<b>Avaya</b>	62	57	31	54	27	66	31	59	31
27	N/A	<b>Salesforce.com</b>	62	62	22	53	31	66	31	64	21
29	21	<b>Microsoft</b>	61	61	24	50	33	71	21	61	27
30	36	<b>Cognos</b>	60	59	27	54	27	67	29	60	28
31	24	<b>Business Objects</b>	59	59	27	56	25	66	31	62	25
31	33	<b>Qwest Communications</b>	59	57	31	54	27	69	24	60	28
33	29	<b>Oracle</b> (including PeopleSoft)	57	56	33	45	36	68	26	54	34
34	19	<b>SAP</b>	54	58	30	41	39	64	34	44	39
34	20	<b>T-Mobile</b>	54	50	38	52	32	52	39	52	35
36	25	<b>SunGard</b>	53	55	35	40	40	69	24	43	40
37	37	<b>AT&amp;T</b> (including Cingular)	52	51	37	47	34	59	37	52	35
37	35	<b>CA</b>	52	50	38	47	34	61	35	51	37
39	27	<b>Palm</b>	50	53	36	45	36	52	39	57	32
40	33	<b>Verizon Communications</b>	49	47	40	42	38	57	38	50	38

\*Percentage of IT executives rating vendor as excellent or good for this category. †Or for achieving mission, if a not-for-profit organization.

Reliability						Loyalty		Nature Of Relationship <sup>‡</sup>						Worked with during the past 12 months	No. of respondents	RANK 2008
Meets commitments on time and on budget*		Is flexible and responsive*		Meets quality expectations*		If had a choice, would continue to do business with		Consultant	Outsourcer	Telecom	Hardware	Software	Security			
RANK		RANK		RANK		RANK		■ 10-24%	■ 25-49%	■ 50-74%	■ 75-100%					
83%	1	86%	1	88%	2	95%	2	■			■	■	■	11	64	1
81	2	74	5	84	4	93	3	■	■		■	■	■	19	109	2
74	9	76	2	91	1	93	3	■			■	■	■	10	58	3
80	3	75	4	87	3	96	1	■		■	■	■	■	63	358	4
80	3	73	8	79	11	89	10	■			■	■		64	361	5
77	5	76	2	84	4	89	10					■	■	18	104	5
76	6	69	9	79	11	93	3	■			■	■		54	305	7
70	15	74	5	80	9	92	8	■				■		19	106	7
76	6	74	5	81	7	92	8			■	■	■		24	135	9
72	12	68	11	77	13	89	10				■	■	■	33	188	10
70	15	69	9	81	7	93	3			■	■	■	■	10	55	11
71	13	67	12	80	9	93	3					■		42	236	11
75	8	63	17	75	16	87	14					■	■	27	151	11
73	11	64	15	82	6	88	13				■	■		22	127	14
71	13	59	22	70	22	83	20	■		■	■	■		13	73	15
70	15	64	15	77	13	86	16	■	■		■	■	■	46	259	15
74	9	58	25	68	26	81	26					■	■	15	84	17
70	15	65	13	71	20	87	14	■	■	■	■	■		9	53	18
66	23	65	13	76	15	85	18	■			■	■		26	146	19
66	23	59	22	72	17	83	20	■	■		■	■	■	18	102	19
66	23	58	25	66	29	79	30			■	■			16	92	19
65	26	58	25	69	23	81	26				■			20	113	19
68	20	61	19	72	17	72	37	■				■	■	11	65	19
67	22	60	21	71	20	83	20					■	■	32	179	19
68	20	59	22	69	23	77	33	■	■	■	■	■	■	14	80	25
64	27	62	18	68	26	84	19			■	■	■		31	176	25
70	15	57	28	69	23	81	26	■	■	■	■	■		16	89	27
58	33	61	19	68	26	86	16	■	■			■		10	58	27
64	27	54	31	65	31	83	20	■				■	■	82	463	29
63	29	52	33	66	29	78	31	■				■		13	76	30
57	35	50	35	63	33	82	24	■				■		14	77	31
59	30	53	32	60	34	76	34		■	■	■			10	54	31
55	36	52	33	72	17	80	29	■	■			■		37	210	33
58	33	49	36	65	31	82	24	■	■			■		11	65	34
59	30	56	29	57	35	69	40	■	■	■	■			9	49	34
55	36	55	30	54	39	75	35	■	■		■	■	■	12	69	36
54	38	48	37	55	38	75	35	■	■	■	■	■		44	252	37
47	39	47	38	56	37	71	38	■				■	■	18	103	37
59	30	35	40	50	40	78	31			■	■	■		9	51	39
47	39	47	38	57	35	71	38			■	■			20	112	40

‡ In what capacity respondents said they worked with each vendor.

## The Competition

### Security

The remarkable drop in satisfaction levels for Symantec, McAfee and Trend Micro should make these vendors sit up and take notice—particularly at Symantec, which is still adjusting to its acquisition of Veritas three years ago. “Symantec needs to worry less about growing their portfolio and more about making sure their products work,” says John Manchester, CTO of Glenkirk, a Northbrook, Ill., social service agency. Check Point Software maintained its second-place position, proving its staying power by showing how a security vendor meets vital business needs, as the top vendor measured in our survey for helping with revenues, solving business problems and quality.

RANK 2008	RANK 2007	RANK 2006	RANK 2005	Vendor	Average of all ratings 2008	Value	Reliability	Would continue to do business (% yes)
1	-	-	-	<b>RSA Security</b> <i>(division of EMC)</i>	82%	79%	86%	95%
2	2	2	-	<b>Check Point Software</b>	80	80	80	93
3	1	2	2	<b>VeriSign</b>	77	75	79	89
4	3	2	1	<b>McAfee</b>	72	72	71	87
5	4	1	-	<b>Trend Micro</b>	67	67	66	81
6	5	4	3	<b>Symantec</b>	65	64	66	83
AVERAGE 2008					74	73	75	88
AVERAGE 2007					75	75	77	91
AVERAGE 2006					71	70	72	87
AVERAGE 2005					76	75	76	91

### Networking

Cisco's dominance is under serious challenge from a host of smaller, nimble companies such as Juniper Networks, which debuts in this year's survey in a strong No. 2 position. But Cisco remains more than just a popular choice; it continues to excel in meeting customer's needs and expectations. Juniper and 3Com products are simpler to deploy and maintain, as well as less expensive—serious considerations when cost is increasingly an issue. And Juniper's high loyalty level shows that the company has found a solid place for itself in the network infrastructure market.

RANK 2008	RANK 2007	RANK 2006	RANK 2005	Vendor	Average of all ratings 2008	Value	Reliability	Would continue to do business (% yes)
1	1	1	1	<b>Cisco Systems</b>	79%	77%	81%	96%
2	-	-	-	<b>Juniper Networks</b>	72	72	73	93
3	-	-	-	<b>3Com</b>	68	70	67	83
4	2	2	2	<b>Motorola</b>	66	63	69	87
5	4	3	5	<b>Nortel Networks</b>	64	63	66	77
AVERAGE 2008					66	65	68	84
AVERAGE 2007					65	64	67	85
AVERAGE 2006					65	64	66	81
AVERAGE 2005					65	63	67	83

## Telecommunications

Two of the five most-improved vendors in this year's study are telecom vendors. But they seem to have improved at the expense of their competitors. T-Mobile was one of the five vendors that fell most, and Verizon Communications also dropped significantly. For all Sprint Nextel's challenges on the service side—and staffers who have to deploy or maintain its installations give the company much lower marks—its value proposition is clearly attractive to IT execs. Verizon Wireless is the most flexible and responsive vendor in the category. "They are very good at reviewing our services and making recommendations about plan changes that can save us money over time," says CIO Jackson of Triad Guaranty Insurance.

RANK 2008	RANK 2007	RANK 2006	RANK 2005	Vendor	Average of all ratings 2008	Value	Reliability	Would continue to do business (% yes)
1	4	2	1	Sprint Nextel	65%	67%	63%	79%
2	2	1	-	Verizon Wireless	64	63	65	84
3	5	7	4	Qwest Communications	59	60	57	76
4	1	2	-	T-Mobile	54	52	57	69
5	7	5	6	AT&T (including Cingular)	52	52	52	75
6	5	6	5	Verizon Communications	49	49	50	71
AVERAGE 2008					57	57	57	76
AVERAGE 2007					57	57	57	77
AVERAGE 2006					55	56	54	72
AVERAGE 2005					58	58	58	75

## Hardware

Dell has recently pushed aggressively into the same enterprise-level services space as IBM, Hewlett-Packard, Sun and EMC. Dell's offerings are nowhere near as robust or complete (think software), which is why it's not highly rated for solving business problems. HP, a true full-service hardware vendor, remains a clear top choice among IT executives, and has one of the strongest loyalty ratings in our survey. But companies that sell full-service solutions must beware of the concerns about flexibility and responsiveness that weigh down IT executives' judgment of their overall reliability as vendors.

RANK 2008	RANK 2007	RANK 2006	RANK 2005	Vendor	Average of all ratings 2008	Value	Reliability	Would continue to do business (% yes)
1	2	2	1	Dell	77%	77%	77%	89%
2	1	1	2	Hewlett-Packard	75	76	75	93
3	4	4	3	IBM	68	67	70	86
4	3	3	4	EMC (except for RSA Security)	65	62	69	85
4	5	5	5	Sun Microsystems	65	65	66	83
AVERAGE 2008					65	64	65	83
AVERAGE 2007					70	69	72	88
AVERAGE 2006					68	66	70	87
AVERAGE 2005					72	70	73	87

## Software

**Google's continued innovation and strong moves in the mobility space succeeded in doing something no software vendor has done yet: knocking Red Hat out of the No.1 position for software.** But Red Hat remains strong, its ratings this year sustaining typical historical levels, and the open-source software company's responsiveness to customers' needs engenders high loyalty levels. SAP is the victim of rising unhappiness with usability and cost of operation due to feature bloat. "Too often, software vendors lose sight of the concept of simple is good," says Glenkirk CTO John Manchester.

RANK 2008	RANK 2007	RANK 2006	RANK 2005	Vendor	Average of all ratings 2008	Value	Reliability	Would continue to do business (% yes)
1	2	-	-	Google	81%	82%	79%	93%
2	1	1	1	Red Hat	75	75	75	92
3	3	2	2	Citrix Systems	73	73	73	89
4	4	-	-	Adobe	72	72	73	93
5	9	5	5	Novell	65	63	67	72
6	-	-	-	Salesforce.com	62	61	62	86
7	6	6	7	Microsoft	61	61	61	83
8	12	11	8	Cognos	60	60	60	78
9	7	8	3	Business Objects	59	61	57	82
10	10	8	10	Oracle (including PeopleSoft)	57	56	59	80
11	5	7	6	SAP	54	52	57	82
12	7	10	-	SunGard	53	52	55	75
13	11	12	9	CA	52	52	50	71
AVERAGE 2008					61	60	61	81
AVERAGE 2007					64	63	64	83
AVERAGE 2006					60	60	60	77
AVERAGE 2005					61	60	62	78

➔ For more Vendor Value survey results visit [go.cioinsight.com/VendorValue08](http://go.cioinsight.com/VendorValue08).

## Methodology

**What does the survey measure?** CIO Insight's 2008 Vendor Value Survey measures how United States-based IT executives perceive the value of their vendors' product and service offerings, and those executives' overall satisfaction with the support these vendors provide.

**How we selected the vendors.** The published results include only vendors that received 49 or more qualified responses on all ratings. To create our initial list of IT vendors for the survey, we relied on the Fortune 500 and Global 500 lists and Ziff Davis Enterprise Research continuing vendor studies in 30 technology categories.

**How we conducted the survey.** IT executives were invited to take the online survey and to speak with CIO Insight editors directly about their experiences. In all, 568 qualified respondents

(257 from companies with at least \$5 million, but less than \$100 million in 2007 revenues—or budget, if not for profit; 185 with at least \$100 million but less than \$1 billion; and 126 with \$1 billion or more) replied and completed the survey between October 3 and October 15, 2008. Of the respondents, 204 were C-level executives at their company, and the rest held titles of director of IT or higher.

**How we rated vendors.** After identifying the vendors their firm has had a business relationship with in the past 12 months, respondents were asked to rate those vendors on seven criteria. The overall rating given for each vendor is the average percent of "good" or "excellent" responses for each criterion.

A more detailed explanation of the methodology can be found at [go.cioinsight.com/VendorValueMethod](http://go.cioinsight.com/VendorValueMethod).