

Gartner

MarketScope for DNS, DHCP and IP Address Management

4 April 2012 ID:G00229075

Analyst(s): Lawrence Orans

VIEW SUMMARY

DNS, DHCP and IP address management solutions help improve network manageability and reliability. IPAM and the requirement to improve DNS and/or DHCP stability are the two most common drivers for these solutions.

What You Need to Know

Domain Name System (DNS), Dynamic Host Configuration Protocol (DHCP) and IP address management (IPAM) solutions tend to be "sticky." Enterprises don't change vendors often because of the mission-critical nature of DNS and the operational workflow that organizations build around their IPAM tools. When adopting new solutions, large enterprises should plan for a five- to 10-year time horizon. Small and midsize businesses (SMBs) have more flexibility — mainly because their requirements are less complex.

[Return to Top](#)

MarketScope

Gartner estimates that IPAM is the primary driver in more than 60% of DNS, DHCP and IPAM (DDI) projects. Many enterprise networks are still managing their IP address space manually via spreadsheets (approximately 75%), via homegrown applications or a combination of the two.¹ IPAM solutions enable network administrators to work more efficiently. Key capabilities include automating workflow processes, highlighting shortages and potential issues with IP address space inventory, and enabling tiered administration (senior-level administrators delegate tasks and sign off on changes performed by lower-level administrators).

In nearly 40% of enterprises, improving the stability of DNS and/or DHCP is the primary driver for purchasing DDI solutions.¹ Many organizations use a DDI project to consolidate a heterogeneous DNS name server environment (for example, Windows DNS and Bind) into a common DNS name server platform. The same approach applies to DHCP, where multiple servers (for example, Windows DHCP and router-based DHCP) can be consolidated into a common DHCP server. Dedicated DNS/DHCP appliances (or dedicated software appliances) create a more stable environment, because other software services are not sharing the platform. DDI solutions also enhance network stability when

they are deployed in overlay mode (see the Market/Market Segment Description section) to unify management and administrative functions across heterogeneous DNS and DHCP servers.

IPv6 support continues to be heavily marketed by several vendors, particularly BlueCat Networks and Infoblox, although it is not a significant driver for DDI sales in today's market. The main benefit of DDI solutions comes from their implementation in internal networks; however, IPv6 is not being deployed internally, with the exception of U.S. federal government agencies and military organizations (see "Internet Protocol Version 6: It's Time for (Limited) Action"). In fact, Gartner's position is that enterprises should IPv6-enable their Web presence first, before migrating their internal networks to IPv6. DDI vendors need to add IPv6 support and compete to be recognized as leaders in this area, because there is demand in some verticals, as well as in the carrier and Internet service provider (ISP) markets. However, mainstream enterprises are at least five years away from requiring IPv6 support in DDI solutions.

Domain Name System Security Extensions (DNSSEC) is another advanced feature that all vendors support (it is not marketed as heavily as IPv6), but is also not a significant driver for DDI (see "DNS Root Zone Signing Ushers in the Era of DNSSEC"). DNSSEC adoption is driven by government mandates and some verticals (for example, financial), but it is rarely mentioned by Gartner clients as a driver for purchasing a DDI solution. Gartner expects that most enterprises are at least three to four years away from requiring DNSSEC support in DDI solutions (although a high-profile cache poisoning attack would dramatically accelerate DNSSEC adoption).

[Return to Top](#)

Market/Market Segment Description

The DDI market is composed of solutions that provide and/or manage DNS and DHCP services, and IPAM is a critical component of these solutions. The market for external DNS services is separate and distinct from the DDI market, where solutions are primarily deployed in internal networks. The external market consists primarily of ISPs, Web hosting providers and DNS-managed service vendors (such as Afilias, Akamai, Neustar, VeriSign and others) that provide primary and/or secondary authoritative DNS servers with varying degrees of reliability, security and additional features. The administrative and operational requirements for internal and external DNS are quite different. The internal DDI market is primarily product-focused; the external DNS market is primarily service-focused. There are three categories of DDI solutions: bundled offerings, overlay management solutions and managed services (see "DNS, DHCP and IPAM Market Overview" for more information).

[Return to Top](#)

Bundled Offerings

Bundled offerings, in which DNS and DHCP services share an integrated database, represent the fastest-growing segment of the DDI market. Bundled offerings are available as physical appliances, software or virtual appliances, although physical appliances are the dominant form factor. Vendors of bundled offerings provide IPAM via two models — as an embedded function or as an optional component.

[Return to Top](#)

Overlay Management Solutions

Overlay management solutions are meant to complement, not replace, existing DNS and DHCP services. They are simpler to deploy than bundled offerings, which require replacing the DNS/DHCP infrastructure or integrating with existing DNS servers. Overlay solutions provide help in two areas — adding enterprise management capabilities to DNS and DHCP, and adding IPAM functions. Several overlay solutions can manage heterogeneous DNS (ISC Bind and Microsoft DNS) and DHCP environments (ISC DHCP, Microsoft DHCP and Cisco routers running DHCP). Market momentum is shifting away from overlay solutions, as enterprises increasingly prefer appliance-based offerings.

[Return to Top](#)

Managed Services

There is a small market for managed DDI services, although Gartner estimates that it represents less than 10% of the total spending on DDI solutions. Managed service vendors deploy DDI solutions on their customers' premises, and then manage DNS and DHCP services remotely.

[Return to Top](#)

Inclusion and Exclusion Criteria

To be included in this MarketScope, a vendor's solution must be categorized in at least one of the three market groups outlined above and in "DNS DHCP and IPAM Market Overview."

Additional criteria include:

- The products with the required features and functions must have shipped as of 1 March 2012.
- The vendor must have generated at least \$2.5 million from DDI solutions during its last fiscal year.

These solutions have been excluded from this analysis:

- Global load balancers and application delivery controllers from F5, Citrix Systems and others that include DNS functionality. These are specialized solutions that do not offer the broader DDI feature set.
- Managed external DNS services from ISPs, Web hosters or managed DNS providers.
- DDI managed services providers (this MarketScope analyzes product vendors only).
- Solutions that are optimized for the service provider market. For example, DNS vendors InfoWeapons, Nominum and Secure64 all primarily target service providers and do not meet the criteria for this MarketScope.
- Microsoft and Cisco were excluded, because their DDI offerings are new and were not shipping during the evaluation period.

[Return to Top](#)

Rating for Overall Market/Market Segment

Overall Market Rating: Positive

We have upgraded the overall market rating from Promising to Positive based on several factors, including a consistent record of more than 20% growth each year since we first sized the market in 2009. In 2011, Gartner estimated that the DDI market generated approximately \$290 million, representing a 36% increase over 2010. Gartner estimates that the market will grow another 29% in 2012, to approximately \$380 million, as more enterprises seek tools to improve the operational effectiveness and the overall stability of DNS and DHCP.

Several partnerships and other market developments reflect the growing significance of IPAM and DDI. With Windows Server 8 (in beta, at the time of this writing), Microsoft enters the market with the integrated Windows Server IP Address Management solution. Because the initial version supports Windows-only DNS/DHCP environments, Gartner believes that it will appeal primarily to SMBs. Cisco has re-emerged as a competitor in large enterprises, by licensing BT Diamond's IPAM solution and packaging it as a component in its DDI offering, known as Cisco Prime Network Registrar. These vendors, and others in this MarketScope, recognize that DDI solutions will help enable the transition from virtualized data centers to private cloud and public/hybrid cloud environments by automating the provisioning of IP addresses and related administrative tasks. Also, Infoblox's planned initial public offering has drawn positive attention to the broader DDI market.

[Return to Top](#)

Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Product/Service	We analyzed the breadth of the product's feature sets. IPAM features and advanced capabilities (for example, discovery/reconciliation and tiered administration and workflow) were heavily weighted. Support for DNSSEC and IPv6 were assigned lower weighting, because DDI inquiries from Gartner clients reflect low interest for production deployments in 2012. However, we have highlighted vendor innovations in these areas to give guidance for early adopters.	High
Customer Experience	This criterion was assessed via an online survey, by conducting qualitative interviews with vendor references and by obtaining feedback from Gartner clients. Customer input regarding the product's ease of deployment, and the vendor's service and support capabilities are key factors.	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Viability includes an assessment of the vendor's overall financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit continuing to invest in a DDI solution.	Standard
Marketing Execution	This criterion assesses the effectiveness of the vendor's marketing programs, and its ability to create awareness	Standard

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
	and "mind share."	
Offering (Product) Strategy	This provides an evaluation of the vendor's strategic product direction, including an analysis of its road map. We also assess whether recent technology partnerships and investments reflect a good understanding of customer requirements and future market direction.	High
Geographic Strategy	This looks at a vendor's strategy for targeting prospects and providing support beyond its home market.	Low

Source: Gartner (April 2012)

[Return to Top](#)

Figure 1. MarketScope for DNS, DHCP and IP Address Management

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Alcatel-Lucent			X		
BlueCat Networks					X
BT Diamond				X	
EfficientIP			X		
Infoblox					X
Men & Mice		X			
Nixu Software		X			

As of 4 April 2012

Source: Gartner (April 2012)

[Return to Top](#)

Vendor Product/Service Analysis

Alcatel-Lucent

Alcatel-Lucent's VitalQIP solution dates back to 1998, when it was first released as a product by a startup known as Quadritek. It can operate as an overlay solution, and it is available as a complete DDI solution via hardware- or software-based appliances. Several large managed services providers base their offerings on VitalQIP. The solution is highly scalable, and it has some advanced features (including an internally developed multithread DHCP server) that enable it to target the service provider market. Gartner estimates that 30% to 35% of VitalQIP revenue comes from service providers.

Use Case: Large enterprises should consider VitalQIP. Alcatel-Lucent's limited focus on the midmarket makes VitalQIP a less attractive option for SMBs.

Strengths

- VitalQIP supports flexible deployment options. It is available in the following form factors: hardware appliances, software appliances (packaged with Red Hat Linux), software (supported on Red Hat, Solaris or Windows) and a virtual machine in VMware. All form factors can be mixed and matched.
- VitalQIP provides a broad overlay solution. It can manage Bind and Microsoft DNS, and it can also manage Microsoft DHCP, as well as manage its own DNS/DHCP services.
- The solution includes several features that appeal to large enterprises. For example, its reconciliation feature offers flexible controls and can automatically reclaim unused IP addresses. The Audit Manager application provides a database that some customers use to store gigabytes of data for audit purposes.

Challenges

- Alcatel-Lucent's consistently weak marketing investment in VitalQIP has limited the product's visibility in the market.
- Some common features are missing or require additional components. For example, VitalQIP lacks the ability to map IP addresses to LAN switch ports. The DHCP lease history feature, a common requirement for forensic analysis, requires the Audit Manager application (available at no extra charge).
- VitalQIP lacks some features that are important in SMB environments. For example, it lacks an agentless approach to managing Windows-based DNS and DHCP servers, and it also lacks a "recycle bin" feature for easily backing out administrative errors.

[Return to Top](#)

BlueCat Networks

BlueCat Networks was founded in 2001 and is based in Toronto, Canada. It is a DDI pure-play vendor that offers the Adonis family of integrated DNS and DHCP appliances. BlueCat also offers a dedicated IPAM appliance, Proteus, which manages Adonis appliances and can be used as an overlay to manage Windows DNS and DHCP. The Adonis and Proteus components are also available as virtual machines in VMware and Microsoft Hyper-V environments. BlueCat and Infoblox have resolved the legal issues that were highlighted in the 2011 version of this MarketScope (see Note 1).

Use Case: SMBs and large enterprises should consider BlueCat.

Strengths

- Proteus is a strong IPAM tool that includes several advanced features, including IP reconciliation and flexible permissions controls (for establishing tiered administration).
- Network discovery and the ability to map endpoints to LAN switch ports are included as core IPAM features.
- A partnership with IBM strengthens BlueCat's sales and distribution channel. IBM has built cloud service offerings based on BlueCat's Proteus IPAM tool. IBM and HP have built IPv6 service offerings based on BlueCat technology.

Challenges

- Some references cited that Proteus' reporting features could be improved. Requests included more canned reports, and the ability to produce customized reports.
- Because BlueCat charges separately for its Proteus IPAM appliance, its overall DDI solution can be expensive for SMBs.
- BlueCat could strengthen its global sales and distribution channel. The company is still heavily focused on North America.

[Return to Top](#)

BT Diamond

British Telecom (BT) acquired the Diamond IP product in 2007, when it acquired International Network Services, a professional services company. Diamond IP is available as software, as an appliance and in a virtual environment on the VMware platform. IPAM capabilities are embedded in Diamond IP at no extra charge. BT Diamond's solution is highly scalable, and approximately 15% of its revenue comes from the service provider market. Diamond IP addresses all three market categories: overlay, bundled and managed services (through parent company BT). The overlay solution manages Bind and Microsoft DNS, and it can also manage ISC DHCP and Microsoft DHCP, as well as its own DNS/DHCP services.

Use Case: Large enterprises should consider Diamond IP. The focus on large enterprise requirements makes BT Diamond a less attractive option for SMBs.

Strengths

- Diamond IP includes several advanced IPAM features, including a reconciliation capability that can automate the recovery of unused address records. Other capabilities include flexible tiered administration, templates for automating the deployment of remote locations and user-defined fields in the database (for example, device location and other metadata attributes). An address block allocation feature helps to reduce typing errors via a point-and-click interface.
- Network discovery and the ability to map endpoints to LAN switch ports are included as core IPAM features.

- BT's Global Services division, which has a worldwide reach, has developed IPv4/IPv6 migration planning and other service offerings around Diamond IP.
- In 2012, Cisco began licensing IPAM technology from BT Diamond. Cisco plans to re-enter the enterprise DDI market by integrating BT Diamond's IPAM functionality with the Cisco Prime Network Registrar DNS/DHCP solution. The deal should boost revenue for Diamond IP, although it may also present some channel conflicts.

Challenges

- Low-profile marketing efforts have resulted in weak name recognition in the DDI market.
- Diamond IP's distribution channel, which remains heavily weighted to direct sales, has had difficulty in penetrating the growing midmarket. In 2011, however, the company did grow its value-added reseller channel.
- The IPAM component lacks a recycle bin feature for easily correcting mistakes made by administrators.

[Return to Top](#)

EfficientIP

Founded in 1997, EfficientIP is a pure-play DDI provider based in France. Its customer base is also largely in France, with some customers in other parts of Europe. EfficientIP's offering functions as a bundled offering and/or an overlay solution. Components are available as physical appliances or virtual appliances.

Use Case: SMBs and large enterprises in Europe should consider EfficientIP. Enterprises outside of Europe should do their due diligence to evaluate EfficientIP's ability to support them.

Strengths

- EfficientIP's Smart Architecture uses an innovative approach to automate the configuration and management of DNS and DHCP servers. Administrators select one of several templates that reflects their desired architecture (examples include DNS multimaster and stealth, or DHCP many-to-one failover and other common DNS/DHCP architectures). The centralized management component configures the devices and establishes the architectural dependencies.
- EfficientIP provides a broad overlay solution. It can manage open-source DNS (Bind) and DHCP from the Internet Systems Consortium, Microsoft DNS and DHCP, and Cisco IOS DHCP. It can also manage Nominum DNS and DHCP servers.
- Its IPAM solution provides flexible options for searching and filtering. Several references commented on the flexibility of EfficientIP's graphical interface, including the ability to be customized.

Challenges

- Brand awareness is a challenge for EfficientIP, particularly outside of France.

- EfficientIP has yet to demonstrate that it can build an effective partnership channel outside of Europe. It has taken steps to grow its channel, primarily through a partnership with value-added distributor Computerlinks, although much work remains to be done.
- Some DNS administrators with advanced knowledge of Bind may find that the Smart Architecture approach, which masks the complexity of DNS/DHCP design and operations, limits their ability to granularly administer DNS name servers at the level to which they are accustomed. DNS administrators who are used to root-level access with their existing Unix/Linux-based name servers may find EfficientIP's interface limiting. (Smart Architecture prohibits root-level access.) Organizations that require root-level access have the option to not implement the Smart Architecture feature.

[Return to Top](#)

Infoblox

Founded in 1999, Infoblox is based in Santa Clara, California. In January 2012, it filed an S-1 statement with the Securities and Exchange Commission, which puts it on a path to go public in the second quarter of 2012. Infoblox sells integrated DNS/DHCP appliances, which include IPAM capabilities at no extra charge. The company also provides overlay capabilities for Windows DNS and DHCP. Infoblox's solutions are also available as virtual machines in a VMware environment. Infoblox and BlueCat have resolved the legal issues that were highlighted in the 2011 version of this MarketScope (see Note 1).

Use Case: SMBs and large enterprises should consider Infoblox.

Strengths

- A strong global sales and distribution channel has enabled Infoblox to maintain its dominant market share in the DDI market. (Gartner estimates its market share at more than 40%, as measured by revenue.)
- The Infoblox Grid simplifies several operational tasks, because all appliances in the grid share a database (data, log and configuration files) that is automatically replicated to each grid member. Infoblox references report that the grid helps automate the process of applying software upgrades, and that it enables replacement appliances to be up and running in a matter of minutes.
- Infoblox provides innovative features for supporting IPv6 and DNSSEC. Its management application includes a visualization of the IPv6 address space. Its DNSSEC implementation supports automated key rollover (for zone signing keys) and support of hardware security modules (Thales and SafeNet) for the secure storage of DNSSEC keys.
- Infoblox's early focus on automating the DDI elements of virtual environments positions it well for enterprises that are planning private cloud environments. Its integration with VMware vCloud Orchestrator automates the key workflow processes associated with IP address assignment and DNS zone file updates, although customer adoption of this feature has been limited to date.

Challenges

- Infoblox's S-1 filing indicates that it has a history of losses, with 2010 as its only profitable fiscal year. As it makes the transition to a publicly traded company, its ability to grow revenue and manage expenses will come under greater scrutiny.

- Achieving large enterprise-class DDI functionality with Infoblox requires several add-on components at an additional cost. Either Infoblox's IPAM Insight appliance or its more advanced NetMRI solution (for network configuration and change management) is needed to discover and map IP addresses to LAN switch ports. An additional Trinzic Reporting appliance provides reports based on historical data. A separate workflow module must run on a designated grid member. These add-ons operate within a single grid. Organizations with multiple grids will need to replicate the additional components within each grid.
- Some DNS administrators with advanced knowledge of Bind commented that Infoblox's Grid system, which masks the complexity of DNS/DHCP design and operations, limits their ability to granularly administer DNS name servers at the level to which they are accustomed. DNS administrators who are used to root-level access with their existing Unix/Linux-based name servers may find Infoblox's interface limiting, because the Grid prohibits root-level access.

[Return to Top](#)

Men & Mice

Founded in 1990, Men & Mice is a small privately held company based in Iceland. Unlike other vendors in this MarketScope, Men & Mice does not sell integrated DNS/DHCP appliances (or software appliances). It is a software-based overlay solution that is designed to manage DNS and/or DHCP services from other vendors. In 2011, Men & Mice added device discovery to its product line by licensing technology through an OEM. In this update to the MarketScope, Men & Mice moves into the Caution category (from Promising) because of challenges that it will face from Microsoft's entry into the IPAM market and because of a loss in market share. The company has faced setbacks in its plans to deliver an enterprise-class appliance and has placed the project on hold.

Use Case: SMBs and large enterprises that are seeking an overlay solution with strong administrative controls should consider Men & Mice.

Strengths

- Men & Mice provides broad overlay support. It enables the management of Bind and Microsoft DNS, and it can manage DHCP services from Microsoft, ISC and Cisco routers. The solution scales well and provides consistent administrative controls in heterogeneous environments.
- Customers report that the Men & Mice solution deploys easily, because it is an overlay product that allows them to keep their DNS and DHCP infrastructures unchanged.
- Tight integration with Microsoft Active Directory eases some operational tasks, particularly site/subnet management.

Challenges

- Microsoft's planned entry into the IPAM market represents a threat to Men & Mice in pure Windows DNS/DHCP environments. However, Men & Mice still offers a strong value proposition in heterogeneous environments.
- The market for overlay solutions is shrinking. Gartner's inquiry trends indicate a strong preference for integrated DNS/DHCP appliance-based solutions. This trend is causing Men & Mice to lose market share.

- Men & Mice's IPAM tool lacks some features that are common in competitors' offerings. For example, it lacks a dashboard interface that gives a snapshot into IP address space utilization. The dashboard does not show the percentage of IP addresses available in a DHCP scope, although this information is available in a report. Also, some features require a software client, because the tool is not completely Web-based.

[Return to Top](#)

Nixu Software

Nixu Software is based in Finland, and is a subsidiary of Nixu Group, an IT security consultancy that was founded in 1988. Nixu Software's DDI components are available only as software appliances, all of which can be run in virtualized environments (VMware and Citrix Xen). Its NameSurfer Suite includes DNS management and IPAM functionality, and separate software appliances provide DNS and DHCP services. NameSurfer Suite pricing is based on the perpetual software model (with annual maintenance charges), and the DNS and DHCP servers are priced at an annual subscription rate. Enterprise licenses are available for large environments.

Use Case: SMBs that require an inexpensive software-based DDI solution should consider Nixu Software.

Strengths

- Customers consistently cite Nixu Software's low prices as a primary reason for adopting its solutions.
- Nixu Software licenses its technology to several OEM partners, including ApplianSys and Nokia Siemens Networks (service provider focus).
- NameSurfer supports a broad multivendor environment. In addition to Nixu Software components, it also supports Microsoft DNS/DHCP, Bind, Secure64 DNS, Nominum products (ANS, Vantio and DCS) and the open-source name server daemon (NSD).
- All Nixu Software DDI components are available as software and can run virtually.

Challenges

- Nixu Software's name recognition and branding are weak.
- It has yet to demonstrate that it can successfully develop a sales channel outside Europe and the Middle East.
- Microsoft's planned entry into the IPAM market represents a threat to Nixu Software's ability to target SMB customers.
- Nixu Software's graphical interface lacks a container or "smart folder" concept for organizing subnets. This capability is common in competing solutions.

[Return to Top](#)

EVIDENCE

¹ Based on online surveys conducted from 2010 to 2012 with a sample size of 75.

NOTE 1 RESOLUTION OF LITIGATION BETWEEN BLUECAT AND INFOBLOX

Under the terms of an agreement settled in December 2011, BlueCat and Infoblox agreed to dismiss their pending patent and other litigation. The companies also agreed not to commence patent litigation against each other on any other patents for at least five years.

VENDORS ADDED OR DROPPED

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

GARTNER MARKETSCOPE DEFINED

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

We define the various ratings below.

MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

Caution

Faces challenges in one or more areas:

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas:

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

© 2012 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information. This publication consists of the opinions of Gartner's research organization and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice. Although Gartner research may include a discussion of related legal issues, Gartner does not provide legal advice or services and its research should not be construed or used as such. Gartner is a public company, and its shareholders may include firms and funds that have financial interests in entities covered in Gartner research. Gartner's Board of Directors may include senior managers of these firms or funds. Gartner research is produced independently by its research organization without input or influence from these firms, funds or their managers. For further information on the independence and integrity of Gartner research, see "Guiding Principles on Independence and Objectivity" on its website, http://www.gartner.com/technology/about/ombudsman/omb_guide2.jsp.

EVIDENCE

¹ Based on online surveys conducted from 2010 to 2012 with a sample size of 75.

NOTE 1 RESOLUTION OF LITIGATION BETWEEN BLUECAT AND INFOBLOX

Under the terms of an agreement settled in December 2011, BlueCat and Infoblox agreed to dismiss their pending patent and other litigation. The companies also agreed not to commence patent litigation against each other on any other patents for at least five years.

VENDORS ADDED OR DROPPED

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

GARTNER MARKETSCOPE DEFINED

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

We define the various ratings below.

MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

Caution

Faces challenges in one or more areas:

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas:

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.