

Magic Quadrant for Power Generation Enterprise Asset Management Software

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For power generation companies searching for EAM maintenance software solutions, we analyze stand-alone (component) and suite-based software products that support asset management strategies.

WHAT YOU NEED TO KNOW

This research provides guidance for companies that are investing in EAM software for physical assets and equipment, and it updates the 2009 “Magic Quadrant for Power Generation Enterprise Asset Management Software.” We evaluate EAM products for transmission and distribution utilities (power, gas and water) in a separate document, “Magic Quadrant for Delivery Utility Enterprise Asset Management,” because of differing functional requirements, and, consequently, differing vendor performance.

Component (aka, best-of-breed) EAM products suitable for power generation companies are a specialized area of software. Some suite vendors also actively market their EAM modules as component offerings and sell them as specialized maintenance solutions. Other suite vendors only offer EAM modules as part of the ERP suite being marketed, and, thus, these vendors have a market for EAM that is limited to their own customer base. In the past, these differences have often been simplistically reduced to the “better functionality” of the component vendors contrasted with the better integration of a single-vendor ERP. This is no longer such a simple argument, since the EAM investment by ERP vendors has steadily reduced the functional difference to the point where functionality is not such a gap between the different types of vendors serving this market.

In this sector, clients need to look at their overall application portfolios and plan how their EAM solutions will interact with other related components, such as failure detection, operational information and shutdown/outage planning. As evidenced by the growth forecasts and the inquiries we receive on this topic, many utilities are considering upgrading to or reinvesting in asset management software. With increased concerns about aging assets, the aging workforce and network reliability, regulators are likely to decide favorably on cost recovery for these investments. Utilities should be able to justify these projects with better asset availability and utilization to maximize the return on asset.

Generating companies should make key application architectural decisions, such as choosing between a component approach or an ERP suite solution, as part of their EAM selection processes. Based on the relative importance of asset reliability and availability to the overall success of the business, a company should select the vendor that best fits its application architecture, while offering the optimum mix of functionality for the generating portfolio (e.g., nuclear, fossil fuel, wind farms, hydroelectric power). Vendors vary in scalability and functionality, and a solution that is appropriate for one client may lack key features needed by another client. Long-term vendor and product viability are factors in most customer evaluations, and potential buyers should examine current profitability, as well as a long-term commitment to EAM and the power industry.

Although the scope of this assessment is global, some vendors specialize in geographies and may be small globally but significant regionally, so do not choose vendors based on size alone. Because the Magic Quadrant process is, by necessity, an “averaging” of vendor offerings and performance, we always recommend consulting the authoring analyst to get specific advice on your needs, location and industry subsector, such as nuclear, renewable or hydroelectric.

MAGIC QUADRANT

Positioning on this Magic Quadrant (see Figure 1) reflects the customer view of the market. It also focuses on the solutions available; includes the suite offerings; and takes into consideration functionality, the experience available and the fit to purpose.

Clients should bear in mind that the market for EAM products is very broad and populated with hundreds of vendors. Gartner has reviewed what we consider to be the most relevant products for the clients operating in this market segment. As such, while this Magic Quadrant has widely distributed vendor positions, all those listed are active and successful in this market, and are the top echelon. In essence, this Magic Quadrant represents the top-right corner of a much larger “virtual” Magic Quadrant of vendors that are not considered herein.

Figure 1. Magic Quadrant for Power Generation Enterprise Asset Management Software



Market Overview

EAM packages that are focused on power generation company needs primarily have material and maintenance management functionalities (or at least the vendor packages and sells in that format) that are scalable to multiple sites and cater to advanced maintenance management functions. (An older, more limited term that is sometimes used is “computerized maintenance management system [CMMS] packages,” which include material and maintenance functionalities, but are simpler in scope and are focused on single-site deployments. They may be used by large enterprises if a site-by-site or departmental solution is required.)

The global EAM market wasn't completely immune to the effects of the global economic downturn, but, overall, it held up reasonably well in 2009, with a slight decline of 3% to a market value of \$1.2 billion in total software revenue (while many other segments in the software industry saw much steeper declines). Gartner remains cautious, but optimistic, that this market will enjoy a slow but steady growth of 2% by year-end 2010, with more robust growth expected in the ensuing years, provided the economy remains on a recovery track. (By 2014, we expect the EAM software market to grow to approximately \$1.5 billion in total software revenue.) Higher growth may return to the market faster, but one of the influencing factors is public-sector infrastructure plans, which, in many economies around the world, are currently in doubt as governments look to reduce spending plans.

For generating companies, the functionality provided must be capable of complex fixed-plant support, with particular importance attached to hierarchical plant structures, condition and performance monitoring (essentially operational technology [OT] integration), preventive maintenance, and outage/shutdown planning for refurbishments. This is reflected in the requirements listed here, which will be satisfied by the best software products in this category:

- Detailed asset registry, combined with detailed parts and support descriptions
- Long-term maintenance, project and work schedules
- Support for complex inventory relationships for indirect – i.e., blue-collar maintenance, repair and overhaul, such as maintenance, repair and operations (MRO) – goods that are associated with forecasts of planned and unplanned work on installed assets
- Supply chain capability for indirect goods, with demand planning linked to maintenance and repair schedules
- Probability-based “just in case” inventory and procurement, rather than “just in time”
- Support for manufacturers’ logistic processes for equipment under warranty
- Human capital management capabilities to match skills, training and availability with work requirements
- Statistical analyses of equipment performance and reliability
- Remote electronic monitoring of asset health and performance (OT integration)
- Serial number tracking and tracing for equipment and parts
- Financial support via detailed cost analysis
- Integration with whatever financial and HR package is deployed
- Extensive warranty tracking to component levels
- Shutdown project planning

We are seeing the emergence of new requirements in some areas. Economic changes mean that power companies are ensuring maximum returns on their assets, so generation asset optimization becomes more important. This, in turn, means further refining the relationship between generation dispatch and maintenance scheduling, so requirements are emerging to connect maintenance scheduling to power dispatch. For power companies involved in renewable power, the challenge of distributed assets creates new requirements. Wind generation, solar, tidal, wave and geothermal power sources often mean that equipment is remotely located – often over a wide area. The functionality needed is more akin to transmission and distribution (T&D) needs for remote monitoring and field service. The high availability, fixed location, precision, safety, and complex engineering of these facilities create a different set of functional requirements from other industrial uses of EAM.

Market Definition/Description

Gartner bases the concept of a Magic Quadrant on a customer-oriented market analysis. Consistent with the approach espoused by business author Geoffrey Moore, a market is “a set of actual or potential customers for a given set of products or services who have a common set of needs or wants, and who reference each other when making a decision.”

Buyers often refer to the majority of the EAM market as the “best of breed” or “point solution” market for EAM, but the market might be more correctly described as the EAM “component” market. Buyers usually evaluate products from multiple vendors and look for component solutions rather than suites (on a ratio of 3:1, based on a Gartner analysis of license fee expenditures), so the ability to sell the EAM module by itself is an important criterion for a successful vendor, corresponding to the market seeking specialized and flexible solutions. However, clients already invested in an ERP suite would be wise to review the EAM capabilities offered by the ERP vendor suite.

Power generation companies evaluate and procure EAM products to resolve physical asset care requirements – that is, they provide maintenance support in the power generation facility, which may be fueled by coal, gas or oil, and might be hydroelectric, nuclear (with some specialized additional functionality) or renewable (such as wind generation).

An EAM solution includes work order creation, planned maintenance history, MRO inventory and procurement, as well as equipment, component and asset tracking for hierarchical assemblies of equipment. In its most evolved form, the functionality is extended by the addition of basic financial management modules, such as accounts payable, cost recording in ledgers, and HR management for rostering and skill recording.

Technically, the EAM applications are designed to scale to larger numbers of users (typically, more than 100 concurrent users) and run on multiple sites from a single central database, thereby catering to whole-of-business requirements, rather than departmental or site requirements.

What the EAM Market Is Not

The market does not include IT asset management, facilities workplace management (i.e., an integrated workplace management system) or financial asset management, which are separate markets for software covered elsewhere by Gartner. In addition, the market does not encompass the related service parts planning market, which is related to EAM because it supports the provisioning of spare parts for a repair environment. Clients should separately consider coverage of these topics, particularly financial asset management, to plan and manage the depreciation of and investment return from generating assets over time. There may also be some confusion with generation asset optimization, which deals with issues related to fleet dispatch (i.e., bringing the power generation output, which is a specialized area, online and offline), while EAM deals with ensuring that the equipment is available, not when to use it.

Inclusion and Exclusion Criteria

Software products must address the majority of functional capabilities listed here. Globally, there are more than 400 vendors in the EAM class of software, and most of them are too small in company size or product scope to be of interest to Gartner clients. For this Magic Quadrant, we evaluated only the top products worldwide. They have demonstrable track records in power generation (i.e., a significant portion of their license revenue is from power generation companies), they have generated estimated license fee revenue of at least \$2 million during the past 12 months, and they cover multiple geographies.

We believe that the products assessed in this Magic Quadrant are of the greatest interest to our clients. The vendors actively sell and market their products in the U.S. and at least one other market. However, there may be reasons for other products to be included in an enterprise's shortlist, including prior use, price or specific geographic presence. Only products that have been implemented and are in production have been evaluated.

Added

This industry-specific Magic Quadrant includes only those vendors that focus on and have capabilities relating to power generation. Some vendors that serve other sectors are omitted, but may be included in the EAM reviews for their appropriate targeted industries. Oracle E-Business Suite and SAP have been added because they have a significant focus and presence in utilities, although they are not implemented as component solutions.

Dropped

Oracle PeopleSoft was not included in this iteration due to a shortfall in new business signed in this category. This does not reflect a decreased capability of the product, however, and existing users of PeopleSoft EAM need not be concerned. However, users in an evaluation process should consider the development direction of this product against their own needs for power generation functionality.

Evaluation Criteria

Ability to Execute

For electricity-generation companies seeking EAM software, the ability to execute is primarily a combination of factors driven by product functionality, global strength, and the ability to deliver a component solution (or "best of breed," as it is sometimes known) in the market (see Table 1).

We specifically looked at customer experience in our surveys. Customers were asked about vendor performance in four areas (from extremely dissatisfied to extremely satisfied):

- Does the software do what it is supposed to do?
- Is the software reliable/bug-free?
- How good is the vendor at fixing problems?
- How satisfied are you with the overall relationship?

Using a numeric scale, and taking the entire pool of all references from all vendors in the manufacturing and concurrent utilities Magic Quadrant process, an average of overall customer satisfaction was determined, and then each vendor was ranked according to the scoring of responses specific to that vendor versus the average.

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	High
Marketing Execution	Standard
Customer Experience	Standard
Operations	Standard
Source: Gartner (September 2010)	

Completeness of Vision

For electricity-generation companies seeking EAM software, completeness of vision is primarily a combination of focus on the EAM segment, an appropriate go-to-market strategy, and focus on innovation in EAM functionality (see Table 2).

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	Standard
Vertical/Industry Strategy	Standard
Innovation	High
Geographic Strategy	Standard

Source: Gartner (September 2010)

Leaders

Leaders in this market have a global presence, an installed base in generation companies of all kinds, strong viability and a combination of rich features, including functionality, interfaces with different ERP applications, and a capable and global implementation partner community. IBM Maximo Asset Management is the Leader in the component EAM space. Although it also has clients outside of power generation, it remains the vendor that should be on any generation company's shortlist of EAM applications for evaluation.

Challengers

Challengers in this market show good execution, but may lack a focus on functional or technological innovations, which restricts their desirability – particularly as a stand-alone application. There are no Challengers in this market.

Visionaries

Ventyx, an ABB company, exhibits classic Visionary characteristics. It has a strong focus on EAM and increasingly broad functionality, it is suitable for all types of generation companies, and it has displayed technical and functional innovation. The acquisition of Tech-Assist Shift Operations Management System (eSOMS) and other customer successes boost its credentials in the nuclear sphere. With Ventyx's acquisition by ABB, its overall viability, while not transparent, is likely to be more stable – and, thus far, the combination of resources to separate IT and OT software responsibilities is being managed well. However, Ventyx's geographic presence is smaller than the performance of its industry peers, and its rate of new deals is below some other competitors' rates.

Invensys Operations Management (Avantis) is also considered a Visionary due to its ability to link to OT systems from Foxboro, Wonderware and others.

Niche Players

The Niche Players quadrant contains three classes of vendors:

- Those that offer EAM as part of a suite, which is not designed to be used in conjunction with a different application suite (e.g., Oracle E-Business Suite and SAP)
- Those that can be delivered as a component or as a suite (IFS and Mincom)
- Those that are delivered only as a component solution (Mainsaver)

Clients need to consider the choice of Oracle EAM applications. Because of its growth through acquisitions, Oracle has six distinctly different offerings covering EAM. Oracle E-Business Suite eAM is assessed here as being most relevant for power generation companies. However, some Oracle EAM offerings are not assessed here because they lack applicability to generating companies in this sector: Oracle PeopleSoft Enterprise Maintenance Management (sometimes referred to as "Enterprise"), Oracle Complex MRO (cMRO – for aerospace and transportation), Oracle Utilities Work and Asset Management (for distribution), EnterpriseOne (the old JD Edwards OneWorld product) and the JD Edwards World product.

In the case of suites with inseparable EAM modules, the constraint of being usable (for all practical purposes) only within the larger ERP suite, along with the client cost associated with that strategy, limits demand and affects execution and vision. We have found that two-thirds of EAM implementations are of a component solution. For suite vendors, often no more than half of their client bases use the "standard" EAM module. Increasingly, it is an important buying criterion, as clients avoid vendor lock-in and look to have more limited-scope projects in current economic times. However, it must be noted that SAP and Oracle continue to invest in their EAM modules as integral parts of their ERP suite strategies. In both cases, EAM functionality has improved (e.g., SAP via the use of Enhancement Pack releases, and Oracle by recoding the IP from other Oracle products and other sources into the E-Business Suite) to a point where SAP and Oracle should always be included in EAM evaluations, if the utility is already invested, or plans to invest, in that ERP suite.

EAM component vendors are classed as Niche Players due to one or more of several factors:

- Narrow platform support
- Lack of global presence

- Inability to assess long-term viability due to nontransparent or poor financial performance
- Limited presence in the power generation market

Vendor Strengths and Cautions

IBM Maximo Asset Management

IBM Maximo Asset Management continues to have a strong product and presence in the industry. Functionality is being expanded, and the links between IT and OT are being integrated within the product. There is also high user satisfaction for the product, although clients frequently experience negotiating challenges because IBM knows it has a leading product.

Strengths

- Under IBM ownership, Maximo has moved to extremely high viability.
- Global sales and implementation resources make the solution widely available.
- Combined with Tivoli software, IBM Maximo Asset Management is able to manage IT-enabled assets with the same solution used to manage traditional EAM assets, and is also useful for combined IT/OT management.
- A specialized version is available for nuclear operations.
- It supports integration with a wide variety of ERP suites.
- It has versatility across multiple platforms.
- High EAM investment and the leverage of IBM's research capabilities are bringing advanced maintenance functionality to market.

Cautions

- Contracts and negotiations continue to be challenging for clients since Maximo became part of IBM.
- IBM is not known as a business application software company, and it has limited business application products in the market.
- IBM Maximo Asset Management is one of the most expensive products on the market (but with very high functionality).

IFS

IFS does well with its product set and has had expanded sales in new geographies; however, there are still no power industry sales in the U.S.

Strengths

- IFS's solution can be implemented as part of an ERP suite or as a component EAM.
- It supports nuclear requirements and has a growing list of hydroelectric, wind and solar power clients.
- Its componentized service-oriented architecture (SOA) provides high flexibility.
- It has an innovative and rich maintenance functionality.
- It offers very competitive pricing.
- Good customer references for satisfaction are available.
- It is very strong in construction project management, which is integral to the EAM component.

Cautions

- IFS only supports the Oracle Database.
- It is not widely deployed in power generation utilities outside certain parts of Europe (e.g., the Nordic countries and Poland) and Asia.
- Available resources need to be examined closely prior to project commencement in regions where IFS has not had significant industry sales. There is an increasing number of system integrator partnerships, but their relevant experience needs to be evaluated.
- There is limited global marketing in and commitment to this sector.

Invensys Operations Management (Avantis)

Invensys Avantis has shown vision by making good use of the Invensys Foxboro linkages, and is more adept at the important integration of IT and OT requirements because of its Invensys family "DNA." However, relatively speaking, the moves of other vendors mean that Invensys is lagging.

Strengths

- Invensys Avantis has a well-regarded and efficient implementation methodology.
- It has good native business intelligence.
- It has a broader asset strategy of OT system links and support for reliability-centered maintenance functionality.
- Generation is the best performing of Avantis' target markets.
- Avantis has a global sales and support presence from Invensys.
- It has versatility across multiple platforms.
- There is a very high degree of customer satisfaction.

Cautions

- EAM is not central to the Invensys product portfolio.
- It has fewer resources (internally) for development.
- The EAM product has no nuclear industry experience or focus.
- The EAM product's pricing is at the upper end of affordability for midsize companies.
- It has a Microsoft-centric user interface and platform focus (a strength for some clients).

Mainsaver

As a more-straightforward solution with an expansive partnership network outside the U.S., Mainsaver is coming into its own as the lower-cost choice to get quick, practical results.

Strengths

- Mainsaver has a component EAM application with open integration and multiple ERP suites.
- It is affordable with a high functionality/cost ratio.
- It has good customer satisfaction.
- It has a good rate of new sales and continued sales to its customer base.

Cautions

- Implementation outside North America is exclusively via channel partners.
- Mainsaver is a privately held small company with limited resources for development.
- Some advanced users of maintenance may find the functionality constraining.
- Mainsaver has fewer "ready to use" partners than the more prominent major vendors.

Mincom

Mincom has emerged from a transition to new ownership and new management. There is now an evident focus on improving the technical platform, extending functionality and leveraging partnerships. There is also a refinement of its dual strategy of suite and component offerings. While its U.S. utilities EAM performance still lags other vendors, and its international performance is uneven, there are positive signs of financial stability.

Strengths

- Mincom's solution is flexibly deployed as a component or a suite.
- It has a high level of functionality.
- The Ellipse system has been recoded in Java, and the technology strategy for reporting has been revisited.
- It is focused on asset-intensive industries, such as generation (not manufacturing).
- It has versatility across multiple platforms.
- It is highly scalable.

Cautions

- Mincom has few recent EAM utilities wins, and its financial position is slowly improving, but is not transparent in its current ownership structure.
- Its only strong generation performance is in its home country of Australia.
- It has a limited presence in Asia/Pacific, North America and Europe.

- Mincom is smaller compared with its multinational competitors.
- There is no nuclear or explicitly renewable strategy.
- It has OT integration capabilities, but limited OT utilities experience.
- Only Oracle Database support is provided.
- It has OT integration strategies and capabilities, but limited OT utilities experience.
- It is unclear how future EAM applications will unfold with Fusion.

Oracle E-Business Suite

Oracle E-Business Suite continues a steady progression of functional improvements approaching a complete ERP suite solution for power generation. Although the partnership program is not as evolved as other major EAM vendors, and the concepts of OT integration are not adopted to a great extent, there is a growing, global customer base in power generation. Existing clients of Oracle E-Business Suite should look first at the Oracle eAM module and benchmark any component alternative against the suite's module. The advantages of built-in integration may outweigh any functional shortfalls, of which there will be few.

Strengths

- Oracle E-Business Suite eAM functionality is approaching parity with best-of-breed applications after Release 12.
- It is starting to have good customer references and a global presence.
- It has good usability.
- It has growing power generation experience, including nuclear.
- There are strong project management and plant shutdown functionalities natively and with Primavera P6 integration.
- Oracle's eAM application should be on the shortlist in any evaluation of EAM solutions for Oracle E-Business Suite customers.

Cautions

- Oracle eAM has not been integrated with other ERP solutions as a component solution, and is not marketed as such. For non-Oracle customers looking for an EAM solution, Oracle eAM is not a practical candidate.

SAP

SAP has steadily worked to address functionality shortfalls. Now, through its enhancement packages since ECC 6, this is a nonissue. We are long past the time when SAP customers would always consider a competitor's component solution, and SAP ERP users should benchmark any component offering against the latest evolution of the SAP EAM solution. The last remaining user objections are pricing and the negative sentiment toward the user interface, which can be mitigated by a number of Web browser overlays.

Strengths

- SAP has the majority of EAM functionality that most power companies would require.
- It has a well-developed partner program to fill functional gaps.
- SAP Business Suite 7 (previously referred to as ECC 6), as a combined solution, provides a single view into all aspects of work and asset management – from HR to materials management.
- Its program of enhancement packages has provided progressive functional improvements with fewer disruptions than a traditional upgrade.
- Its enhancements aid project planning and execution.
- It is available on multiple platforms and databases.

Cautions

- SAP's EAM application, while theoretically capable of being implemented as a stand-alone application, requires extensive implementation of other components of SAP's suite solution, such as materials management, financial and HR. Thus, for all practical purposes, it is always marketed, sold and implemented in the context of a full SAP ERP deployment.

- SAP EAM is very rarely integrated with other ERP solutions as a component solution, and it is not marketed as such. For non-SAP customers looking for an EAM solution, SAP is not a practical candidate.
- Clients must check whether functionalities, such as an improved user interface and a visual parts selection (which requires additional software products and NetWeaver), are needed by their users.
- The mobile workforce solution is still evolving, but may be complicated by the acquisition of Sybase. It is also not globally supported to the same degree that SAP software is.
- SAP's Industry Value Network (IVN), which was half-focused on EAM for utilities, has essentially ceased to exist for asset management needs.

Ventyx, an ABB Company

Ventyx was recently acquired by ABB, which eases viability concerns and reinforces the commitment to the utilities industry. However, the focus on power (networks in particular) might leave generation, gas and water clients feeling neglected. Ventyx has executed key acquisitions that bolster performance, and it is the nuclear system of choice in many regions.

Strengths

- Ventyx is a focused utilities specialist with the terminology and functionality to suit the industry.
- It has a long history and experience in the nuclear industry, with high customer loyalty.
- It has a vision for expanding the solution set through complementary acquisitions.

- The transition to the Asset Suite product included a Web services architecture as well as Java-based tools.
- Clients are steadily migrating to the new versions.
- Its additional functionality from Tech-Assist eSOMS strengthens its capabilities.
- Recently, it has had strong customer performance, particularly in nuclear, and is the only vendor to inherently comply with the U.S. nuclear fatigue rule.

Cautions

- Its current product, Asset Suite, is based on a combination of older technologies from Empac and Passport.
- It has limited resources in Asia/Pacific.
- As part of ABB, changes in the performance of the Ventyx division will not be easily detected, although there appear to be good sales activities.

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.

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 and skills, 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 that the individual business unit will continue investing in the product, will continue offering the product and will 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 initiatives, 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 to 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 website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products 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 sets 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 vertical markets.

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.