



**2011 Frost & Sullivan Asia Pacific ICT Awards
Application Delivery Controller Vendor of the Year
F5 Networks**

FROST & SULLIVAN

2011 BEST PRACTICES AWARD

Asia Pacific ICT Awards
Application Delivery Controller Vendor of the Year

Best Practices in the Asia Pacific ICT Industry

2011 Frost & Sullivan Asia Pacific ICT Award for Application Delivery Controller
Vendor of the Year

Overview of Application Delivery Controller Market in Asia Pacific Region

The Application Delivery Controller market recorded a YoY increase 15.7% on a YoY basis in 2010. The recovery of APAC ADC market after the decline in 2009 could be explained by the growing migration of business processes over to the Web front, and the evolution of ADC segment beyond the scope of server load balancing across markets in the region. As such, APAC ADC market is expected to experience a CAGR of 14.6% in the next seven years.

In the diversified APAC region, enterprises were observed to attribute growing importance to application security capabilities compared to application acceleration, with the Web application firewall becoming a regular feature on the ADC platform. As such, security vendors offering application-centric products could find more business opportunities in the region. Moving forward, the evolution of the ADC segment in APAC is expected to continue being driven by technology convergence trends, with enterprises likely to demand greater application intelligence for their Web deployments in order to achieve the required synergies. Similarly, with cloud computing rapidly emerging on the horizon, the critical roles played by both virtualization and ADC technologies in enabling cloud deployments will also see greater convergence happening between the two segments.

Growing enterprise concerns pertaining to application performance and security issues caused them to no longer be satisfied with ensuring only the availability of a website. Instead, with more business processes moving over to the Web front, enterprises were hoping to leverage on the Web as a competitive tool, which led many of them to look closely at areas such as application acceleration and application security to enhance user experience levels. This also meant that more upselling opportunities opened up for ADC vendors, and the transformation of the ADC solution into a multi-faceted platform would significantly enhance its growth potential moving forward.

We have observed the following key trends/happenings in the APAC application networking market in 2010:

- Increasing budget for IT investment, which meant more business applications were used by APAC enterprises, and the demand for ADC was

driven up. The larger IT budget also meant that APAC customers were able to spend on big and high-end ADC models.

- Greater migration of business process towards the usage of applications and Web 2.0 technology as a result of the increasing dependence of business activities on IT. This also led to greater demand for ADC products.
- Growing convergence was witnessed on application networking platform. Besides, the role of convergence on the ADC platform will be key to the technology's evolution as a critical component for the Web infrastructure of enterprises in APAC. Adoption of the extended capabilities on the ADC platform will also continue, particularly with more APAC enterprises wanting to customize the solutions according to their exact Web infrastructure needs.
- The expansion of local team and channel network continued to help vendors retaining the existing customer base and winning new customers. Due to tougher competition in the APAC application networking market, it was critical for vendors to get closer to customers and quickly bring the innovation to potential buyers.

AWARD DESCRIPTION

The Asia Pacific Frost & Sullivan ICT Awards are an acknowledgement of companies that excel in their business segments, and are noted for their efforts to improve the industry as a whole.

The Frost & Sullivan Asia Pacific ICT Award for Application Networking Vendor of the Year recognize the exemplary growth, performance and achievement by a vendor in Asia Pacific's application networking market.

The contenders of this Award were evaluated on the following key criteria:

- Revenue and Revenue Growth
- Service Portfolio/Diversity
- Regional Coverage
- Keys Innovations/Achievements

METHODOLOGY

Creating a shortlist of nominees

The companies short listed for each of the Frost & Sullivan Asia Pacific ICT Awards were selected by our analysts, based on their expert knowledge and analysis of the market.

The companies were typically studied on their revenues, market share, capabilities, and overall contribution to the industry. The short listed companies were interviewed, and the analysts compared the data collected with proprietary Frost & Sullivan resources, as well as secondary research available from public sources.

Selecting the Award recipient

The companies' profiles were presented to an independent panel of judges to determine the most deserving recipient for each Frost & Sullivan Asia Pacific ICT Award.

For this Award, the judges were:

Ho Khai Leng

- Group Director/Group Chief Information Officer, National Healthcare Group
- Integrated Health Information Systems

Eric Lauzon

- Chief Information Officer
- International Baccalaureate

Loke Chee Meng

- Director, IT
- ST Aerospace



2011 FROST & SULLIVAN ASIA PACIFIC ICT AWARD FOR APPLICATION DELIVERY CONTROLLER VENDOR OF THE YEAR

F5 Networks

The 2011 Asia Pacific Frost & Sullivan ICT Award for Application Delivery Controller Vendor of the Year is presented to F5. F5 was chosen as the Application Delivery Controller Vendor of the Year in the Asia Pacific region due to its strong performance in the review period across most APAC markets. F5 extended the lead at the top of the APAC ADC market, as the vendor recorded an impressive 27.0 percent growth rate on a YoY basis in 2010. Its impressive growth was attributed to F5's excellent mindshare in ADC segment, best-in-class products, strong technology partnership and effective go-to-market strategies in APAC region.

Excellent mindshare in ADC segment

The vendor's strong performance could be attributed to the excellent mindshare it gained across most APAC markets. Having penetrated into many APAC countries earlier than most competitors, F5 continued to enjoy first mover's advantages in the review period. The well-established brand in ADC segment meant that customers in developed markets already had trust in the vendor, while many new customers from emerging countries only heard of F5 when the vendor first came to ADC. Year 2010 witnessed the vendor's significant success being achieved in such markets as Australia, New Zealand, Greater China, Japan. Particularly with regards to its ability to offer an extensive range of application-centric capabilities on top of the traditional server load balancing function, F5 retained its leading position in ADC as a whole.

Best-in-class ADC technology

2010 saw ADC evolving rapidly into a multi-faceted platform. F5's vision of offering an all-encompassing approach in the ADC arena straddling across the three components of availability, acceleration and security was a powerful message which interested APAC enterprises and enabled the vendor to uncover more upselling opportunities in their Big-IP deals. TMOS architecture is a modular universal platform which allows networks to be application-aware and application intelligent. This enables F5 to be an application-centric vendor with extensive application accelerating and monitoring capabilities. Besides, the VIPRION platform was well received in such markets as ASEAN and Japan, for providing industry-leading layer 7 and SSL performance, and being able to manage the most demanding applications. VIPRION's massive performance and scalability enabled customers to reduce the number of ADC they needed for their network, which appealed well to big customers that already deployed many appliances at their premises.

Technology Partnerships

F5 already formed partnerships with leading enterprise application vendors such as Microsoft, Oracle and SAP. F5 works with these leading application vendors on integration and interoperability, and documenting optimal configurations so as to enable customers to deploy the products quickly and accurately. As such, it was able to develop application-centric products that were compatible with the above vendors' technologies. The partnerships also helped F5 leverage on partners' network to market the vendor's ADC products to more customers. A number of the largest enterprise software companies have recommended F5 products for delivering their applications.

Effective Go-to-Market Strategy

Not only reaching out to new customers via technology partners' network, F5's strategies of expanding their presence across APAC markets and focusing on customer touch-points were also critical in enabling F5 to achieve the tremendous traction which it recorded in 2010. Its sales team was increased in such big markets as Australia, mainland China. F5's both local team expansion and channel expansion was also observed in ASEAN region, where there were lots of opportunities to tap on in emerging markets. In more mature and competitive market such as Japan, F5 introduced the new marketing strategy such as the revision of product's price list in 2010.

Conclusion

Frost & Sullivan believes that a successful combination of innovative technology initiatives and effective business strategies was critical in propelling F5 into the leading vendor in ADC market, and a major player in application networking market as a whole. Therefore, Frost & Sullivan is pleased to recognize F5 with the presentation of the 2010 Asia Pacific Application Networking Vendor of the Year.

About Best Practices

Frost & Sullivan Best Practices Awards recognize companies in a variety of regional and global markets for demonstrating outstanding achievement and superior performance in areas such as leadership, technological innovation, customer service, and strategic product development. Industry analysts compare market participants and measure performance through in-depth interviews, analysis, and extensive secondary research in order to identify best practices in the industry. awards.frost.com

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best-practice models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 40 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.