

PCQUEST

THE INDIAN SME'S **FAVORITE** TECH PRODUCTS

- Their brands of choice
- How they compare with enterprises
- Survey results across 35 product categories



PCQuest Users' Choice Survey 2011 Survey Results

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PCQuest
CyberMedia India Ltd
Cyber House
B-35, Sec-32 Institutional, Gurgaon
Haryana-122001

www.pcquest.com
pcquest@cybermedia.co.in

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The Indian SMEs' Favorite IT PRODUCTS

The only survey in India that has been influencing IT purchase decisions of large enterprises for years now reaches out to Indian SMEs for the same. We present the tech preferences of Indian SMEs having 100-499 employees and how they compare with those of large enterprises with 500-1000 employees

Anil Chopra, Adeesh Sharma, Rahul Sah, and Gurjot S. Sachdeva

Till last year, the Users' Choice awards purely targeted large and very large enterprises, which comprised of organizations with more than 500 and 1000 employees respectively. But given that small and mid-sized enterprises in India are seeing a significant growth, we decided to shift gears and also target our survey toward this segment this year.

So this time, we have reached out to two types of organizations—those with 100-499 employees (SME) and those with 500-1000 employees (large). Since the IT needs of companies in these segments varies, their choice of IT brands is also likely to differ. To see this difference, we've analyzed both segments and reported their results separately. The results are

interesting, showing a clear pattern of differences in brand preferences between the two segments. Presented here are the key highlights about the SME segment after doing this survey.

Low IT brands awareness

This would be a rare occurrence in large and very large enterprises, but in the SME space, there are several product categories that don't have a dominant IT brand. In fact, there are many categories that are dominated by lots of small/local players and very few known names. The only time we found this happening amongst larger enterprises was many years ago when office PCs were ruled by local assemblers because the branded PCs were far too expensive. Even that changed gradually as the pricing gap between the two narrowed to a point where there was hardly any difference in pricing.

Low penetration in managed IT services by the biggies

Like the local PC assemblers, even this space has lots of small, local players offering complete managed IT services. We noticed that in most managed IT services categories, there were one or two dominant brands that managed to make it to the Users' Choice club. The rest were all local players. In

some cases, we had to drop a category in the SME space (like DR and BCP provider) because we didn't get sufficient votes in the same. Overall also, the number of votes in most categories under managed IT services were pretty low, except for the very common ones like Internet service provider, managed systems services, etc.

IT/ITeS SMEs have the highest average IT spending

Based on the annual IT spends data, we found that IT/ITES companies had the highest average annual IT spending as compared to other verticals we reached out to. It came on an average to 45L per annum. The next closest vertical was the education sector at around 26L/year, followed by process manufacturing at around 23L/year. The lowest IT spending is from the discrete manufacturing segment. In large enterprise space, the BFSI segment has the highest IT spends, followed by the process manufacturing companies.

Initial price and after sales service/support are concerns

Apart from finding out which IT brands are the respondents likely to buy in the future, we also delved into their reasons for

About the Users' Choice Awards

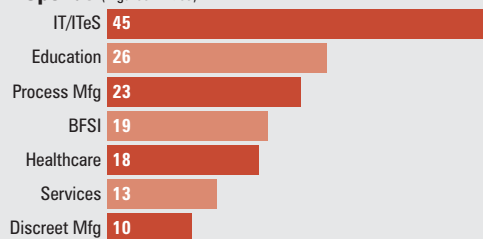
The PCQuest Users' Choice awards are decided based on a survey that determines the mind share that various IT brands enjoy in the minds of IT decision makers, who decide what IT hardware, software, services, and solutions to buy for their organizations. This mind share is by responses to five very simple questions—which IT brands come to top of mind, which ones do users currently own and why, and which IT brands are they likely to buy in the future, and why. These provide some amazing insights about the strength of various IT brands in the minds of the users. So in effect, the survey is about mind share and not market share, and adds further logic by providing key reasons for the same.

The Users' Choice awards therefore acts as a ready reference for all users who want to know which IT products should they consider buying. For IT product vendors, it serves as an eye-opener because it helps them understand where their brand really stands viz-a-viz competition in the users' minds.

About the Survey Respondents

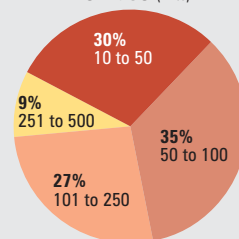
SMEs (100-499 Employees)

IT Spends (Figures in lacs)



The IT/TeS segment amongst SMEs surveyed had the highest annual IT spend of 45L, followed by the Education segment. Discrete manufacturing has the lowest IT spends in this segment.

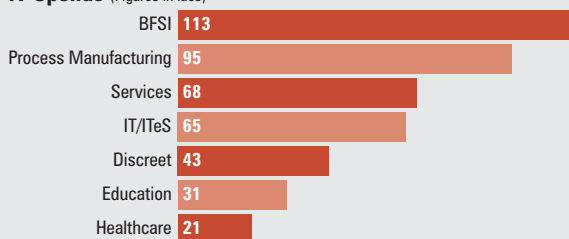
PC Base (in %)



A majority of the survey respondents were from companies with 50-100 PCs, followed by those with 10-50 PCs. A third of them had over a 100 PCs or more.

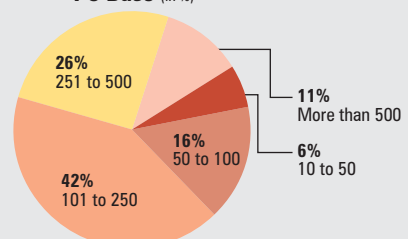
Large Enterprises (500-1000 Employees)

IT Spends (Figures in lacs)



BFSI segment has the highest spend of all large enterprises surveyed, at well over a Crore per year, followed by process manufacturing and services.

PC Base (in %)



A majority of the survey respondents had between 100 to 500 PCs, and surprisingly, there were even a few who had 10-50 PCs. These are possibly large enterprises where IT penetration is still very low.

doing so. Not only that, but we also delved into the reasons why companies already owned specific IT products. The four reasons that respondents had to choose from were brand value, product reliability, initial price, and after sales service/support. Of these, brand value and product reliability emerged as the key reasons for choosing most of the IT products. The other two reasons received relatively much lower responses.

We can't really say that price and support don't matter to

the buyers. In fact, when you look at the SME space, these two are perhaps equally if not more important than brand value and product reliability. What this means is that none of the IT product vendors have been able to establish their products as extremely cost effective or superb after sales service/support. A foray into establishing a mindset for these two reasons could therefore be very beneficial, both for the SMEs and the vendors. □

Survey Methodology

The survey reached out to 415 IT decision makers across 8 Indian cities and 8 industry verticals. The survey aimed to identify the best IT brands across 30+ categories for organizations with 100-499 and 500-1000 employees separately

Survey conducted by CMR team—led by Suman Dutta and assisted by Ritesh Mathur, Poonam, Nehal Basedia

The Users' Choice survey this time was conducted among two categories of organizations—those with 100-499 and 500-999 employees. We reached out to the top IT decision makers in these organizations across the top 8 Indian cities through face to face interactions. Here, we reached out to 8 different industry verticals viz. Discrete Manufacturing, Process Manufacturing, BFSI, IT/ITeS, Healthcare, Education and Services (Logistics, Hospitality, Professional services).

- Reasons for using current brand.
- Reasons for preference of future brand.

To identify the users' choice for each product category, three parameters were analyzed-- TOM Recall, Current Brand Owned and Future Preferred brand. Here, the future preferred brand was further divided into two data point-- loyalty (percentage of loyal respondents for a particular brand out of total loyal customers) and shift (percentage of shift in

Samples Achieved (100-499 Employees)		Samples Achieved (500-1000 Employees)	
Industry Vertical	Sample Achieved	Industry Vertical	Sample Achieved
Process Manufacturing	32	Process Manufacturing	30
Discreet Manufacturing	31	Discreet Manufacturing	30
IT/ITeS	30	IT/ITeS	30
BFSI	30	BFSI	30
Services (Logistics, Hospitality, Professional services)	32	Services (Logistics, Hospitality, Professional services)	28
Healthcare	30	Healthcare	30
Education	30	Education	22
Total	215	Total	200

We originally started off with 38 product categories divided into 4 sections i.e. Hardware, Software, Solutions and Managed Services. The survey questionnaire sought information on 5 basic areas:

- 'Top of Mind recall' for various brands in each product category.
- Primary brand owned.
- Brand preference for future purchase.

respondents for a particular brand out of total customers planning to shift).

Each of these parameters was assigned certain weightage after a discussion between CMR and PCQuest. Further, a weighted score was calculated based on these scores, and then indexed to highest as 100.

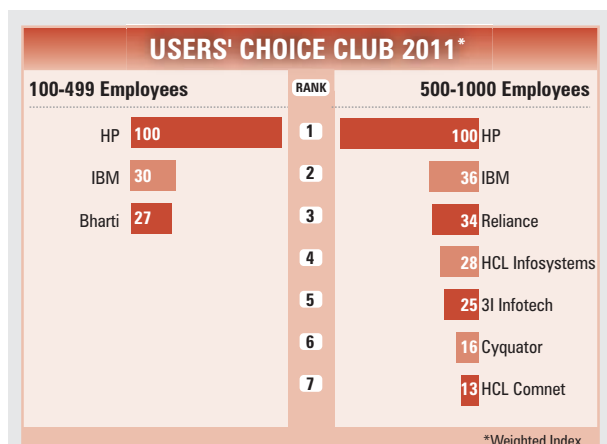
Finally on the basis of derived Index score, users' choice was identified for each brand category. □

How to Read the Graphs and Tables

The Users' Choice Awards are determined through a complex survey, which analyzes various aspects of different IT brands. Here's a walkthrough of all the graphs and tables we've covered in this survey so that you can truly understand and appreciate the results

This time, we've analyzed IT brands across 35 different product categories. The winner in each was determined through a complex process as explained in the survey methodology. To understand and appreciate how we arrived at the winner, it's important to understand all the survey findings. We've summarized all of them in three tables, which have been carried

along with the write-up for each product category. These are tables for the Users' Choice club, brand loyalty, and reasons using a particular brand or shifting to one in the future. Not only that, but each table reports the findings across both segments we surveyed—organizations with 100-499 and 500-1000 employees. Here's how to understand each of the tables:



This table cum graph represents the top brands in each segment. Only the brands with current ownership of 5% or higher are reported in this table. The topmost brand in each category gets 100 points, while the remaining brands are scored relative to it.



The real success of a brand occurs if users who currently use the brand stay with it in the future as well. This is called brand loyalty. In this table, brand loyalty is shown as percent of users who currently own a particular brand and are likely to choose the same brand in the near future as well.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP - Compaq	86	72	61	45	83	63	35	39
	Dell	70	75	31	57	71	56	31	41
500-1000	Dell	72	87	43	40	71	72	17	35
	HP - Compaq	73	76	59	40	68	73	27	37

If you want to know the key reasons why users chose a particular brand, then this table will give you a pretty good idea. For each brand, we determined why users were using it, and why are they likely to use it in the future. All figures are in percentages. Please note that the percentages don't add up to a hundred, because respondents gave multiple responses.

The Winners and Runners Up

ENTERPRISE HARDWARE

Category	100 to 499 employees		500 to 1000 employees	
	Winner	Runner up	Winner	Runner up
Desktop PCs	HP-Compaq	Dell	HP-Compaq	Dell
Laser Printers	HP	Canon	HP	Canon
LCD Monitors	Samsung	HP	HP	LG
Network Routers	Cisco	D-Link	Cisco	D-Link
Network Storage	HP	IBM	HP	IBM
Network Switches	D-Link	Cisco	Cisco	D-Link

ENTERPRISE SOFTWARE

Notebooks	HP-Compaq	Dell	Dell	HP-Compaq
Power Conditioning Equipment	APC	Emerson	APC	Emerson
Racks & Enclosures	HP	APC	APC	HP
Server Virtualization	VMware	Sun	VMWare	Citrix Xen
Workgroup Servers	HP-Compaq	IBM	IBM	HP-Compaq
Application Servers	MS IIS	IBM Websphere	MS IIS	Oracle 9i/10g
BA/BI	MS SQL Server	SAP (Business Information Warehouse)	MS SQL Server	SAP (Business Information Warehouse)
CRM	Oracle	SAP	Oracle	SAP
Desktop OS	Win XP	Win Vista	Win XP	Win Vista
Email and Messaging	MS Exchange	Lotus Notes/Domino	MS Exchange	Lotus Notes/Domino

ENTERPRISE SOLUTIONS

ERP	Inhouse/Custom Developed	SAP	SAP	Oracle
HRM	Inhouse/Custom Developed	mySAP ERP	mySAP ERP	Oracle -e-Business Suite
Network Infra Mgmt	IBM Tivoli	HP OpenView	IBM Tivoli	HP OpenView
RDBMS	Oracle	MS SQL Server	Oracle	Microsoft SQL Server
Server OS	Win 2003 Server	Windows Server 2008	Win 2003 Server	Windows Server 2008
Data Backup Solutions	HP	IBM	IBM	HP
Enterprise Security Solutions	Symantec	McAfee	Cisco	McAfee
Structured Cabling Solutions	D-Link/DIGILINK	Finolex	D-Link/DIGILINK	Systemax
Unified Communication	Cisco	IBM	Cisco	Microsoft
Video Conferencing	Sony	Avaya	Avaya	Polycom

MANAGED IT SERVICES

DR & BCP	-NA-	-NA-	Airtel	Sify
Internet and WAN Connectivity	Airtel	VSNL/ Tata Indicom	Airtel	MTNL
Applications	HP	IBM	HP	IBM
Data Centers	Airtel	Net4India	Airtel	Sify
Networks	HP	IBM	HP	IBM
Security	HP	IBM	HP	IBM
Servers	HP	IBM	HP	IBM
Storage	IBM	HP	HP	IBM
Systems	HP	IBM	IBM	HP

Office PCs

HP-Compaq and Dell are the winner and runner-up across all respondents in the Users' Choice club as well as in brand loyalty

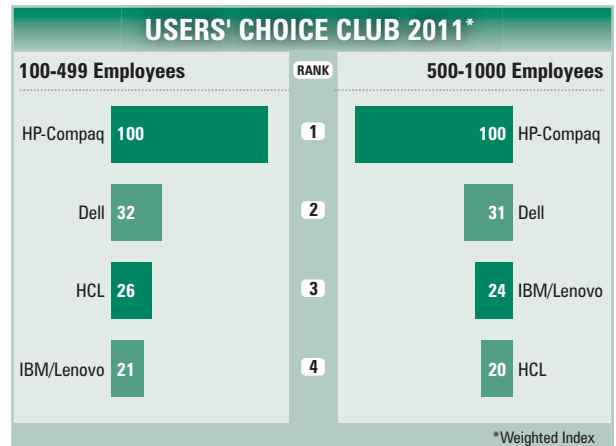
Yes, office PCs still command considerable interest and are equally relevant in today's competitive notebook and tablet inclined market. HP-Compaq remains at the top of the category and clean sweeps the entire segment in both employee categories. The brand enjoys unmatched stats with respect to other winners of the Users' Choice Club when it comes to current brand ownership, ToM recall, overall weighted index score, brand loyalty and brand perception across all industry verticals.

Dell retains its 2nd position from last year and has a presence in both categories. IBM/Lenovo and HCL swap the third and fourth spot between each other in the two employee segments.

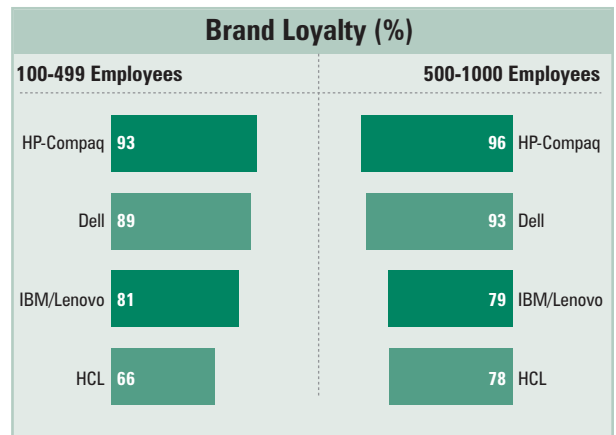
Why should you choose an HP-Compaq or a Dell office PC? While brand value and product reliability are the two key reasons quoted by most respondents, we found users in the 100-499 employees segment generally giving higher votes to brand value over product reliability, and the situation was reverse in the 500-1000 employees segment. This is possibly being caused by lack of awareness about what to buy in the 100-499 segment.

Specifically, 74% of HP-Compaq users in 100-499 employees category gave brand value as the reason for currently using it, and the same reason was given by 73% of respondents who were likely to buy it in the near future. Dell's votes for current ownership were at 75% each for brand value and product reliability. For future likelihood of purchase, a majority voted for brand value as the key reason. In the 500-1000 employees segment, the trend was similar for HP-Compaq and Dell, with the difference that instead of brand value, the votes went in favor of product reliability.

HP-Compaq enjoys the highest brand loyalty of all, at 93% for 100-499 and 96% in 500-1000 employee segments. Dell and IBM/Lenovo also enjoy a decent brand loyalty figure in 80s(%).



HP-Compaq is a clear brand of choice in office PCs, followed by Dell. HCL and Lenovo/IBM fight for the 3rd and 4th spot.



None of the brands enjoy 100% brand loyalty, but both HP-Compaq and Dell have the highest brand loyalty in both segments.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP-Compaq	74	70	46	36	73	64	28	32
	Dell	75	75	29	46	76	59	21	41
500-1000	HP-Compaq	80	86	51	41	73	77	36	34
	Dell	90	93	43	37	68	52	26	42

While brand value is the key reason for currently using or future purchase of HP-Compaq and Dell office PCs, in 100-499 employees segment, it is product reliability that gains top priority amongst users of 500-1000 employees.

Laser Printers

This is practically a one-horse race, with HP taking a clean sweep across both segments, with runner-up Canon trailing behind and Samsung barely making it to the club

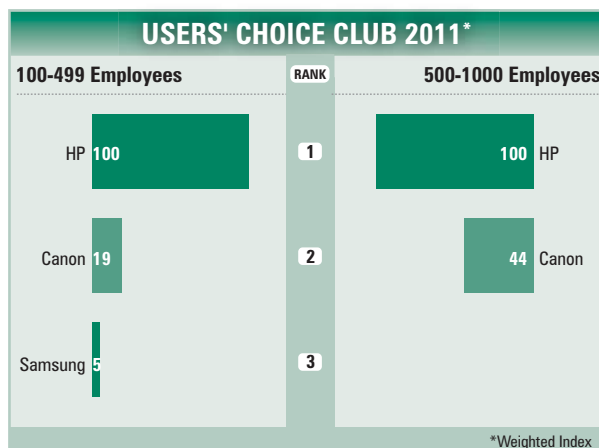
This category continues to remain a no-brainer as far as declaring the winner is concerned. HP continues to rule the world of laser printers, carrying a huge lead over others. Canon remains in the runner-up position across both segments, but its gap is much more wider in the 100-499 employees segment. Samsung barely manages to enter the elite UC club, in the smaller organization segment.

Brand loyalties don't touch 100% in this category, unlike others. In 100-499, HP enjoys 88% brand loyalty, with a fraction of the remaining users likely to switch to Canon and Epson, and the remaining unsure of which brand to switch to. Canon is at 73% brand loyalty, and needs to watch its existing customer base because 13% said they're likely to switch to HP, while another 7% said they might move to brother. Samsung needs to watch out from HP, because that's where many of its existing users are likely to switch to.

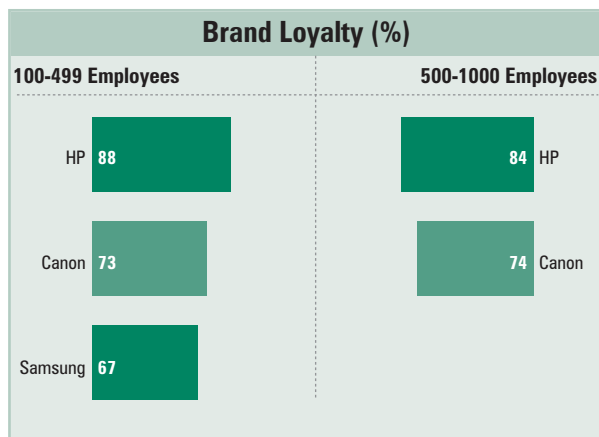
In the 500-1000 employees segment, HP once again has a strong hold on its existing customers. There's a small fraction of its existing users likely to move to Canon, and the rest are unsure about which brand to switch to. Canon has 75% of its existing users who're brand loyal, while a significant 16% said they're likely to move to HP.

In the 100-499 employees segment, a majority of HP's existing users quote product reliability as the key reason for having chosen the brand, while 87% of Canon's existing users quoted brand value as their key reason. For future preference, 74% of the respondents who're likely to choose HP gave brand value as their reason, while 94% of Canon's prospects also gave the same reason. Initial price and after sales/support aren't major reasons for shifting for either of the brands.

In 500-1000 employees segment, a repeat pattern of the smaller organizational segment is visible.



No surprises here, and no prizes for guessing the winner, because HP continues to reign in the laser printers segment.



None of the brands enjoy 100% brand loyalty, and there are some shift outs that brands, except HP, need to worry about.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	71	77	43	45	74	61	28	36
	Canon	87	67	13	33	94	56	31	38
500-1000	HP	76	88	42	38	67	74	25	35
	Canon	71	74	29	45	56	58	33	39

HP scores decently on brand value and product reliability, with 74% and 61% respondents, respectively, endorsing the same in 100-499 category. Au contraire, Canon scored higher on brand value in the SME space with 94% respondents supporting the same.

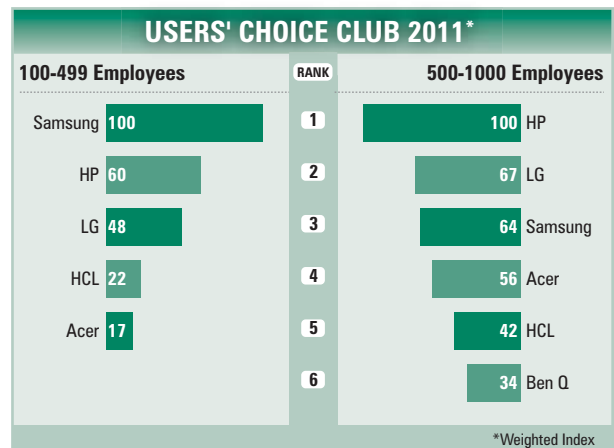
LCD Monitors

HP is the top choice amongst 500-1000 employee enterprises, followed by Samsung, while Samsung is king in 100-499 employee segment, followed by LG

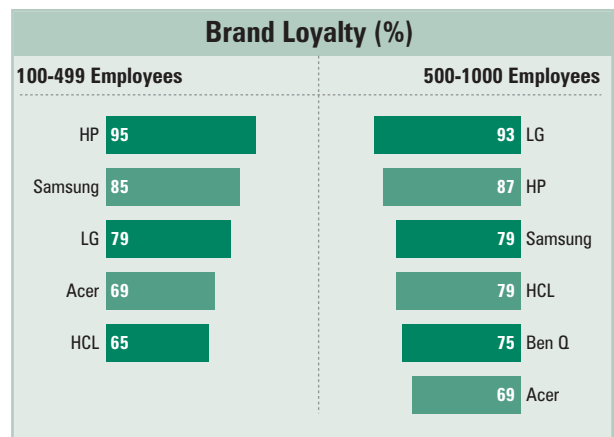
There's an interesting trend we noticed in this segment. While amongst organizations with 500-1000 employees, HP topped the Users' Choice club, in smaller 100-499 employee segment, Samsung takes the top seat. May be this is because smaller organizations also tend to go for assembled desktops where a separate monitor is imperative, while larger organizations tend to buy branded PCs, which come with a monitor by default. Quite a few brands made it to the Users' Choice club this time, as can be seen from the table.

Brand loyalty is average in this category, with HP having 95% loyal customers amongst 100-499 employee enterprises, followed by Samsung at 85% brand loyalty. HCL trails behind all brands in this category with 65% brand loyalty, and likely shift outs to Samsung and LG. In the 500-1000 employee enterprises, it's LG that enjoys the highest brand loyalty at 93%, while Acer sits at the bottom with only 69% of its current users likely to stay with it in the future. The good thing for Acer is that it's likely to enjoy a lot of shift-ins from other brands in this segment.

Should you choose a Samsung, or LG, or HP LCD monitors? And why? Going by the results, we found that Samsung scores over HP in 100-499 employee enterprises for all the reasons, be it brand value, product reliability, initial price, or after sales service and support. This is true for both existing Samsung users as well as those likely to shift to it in the future. In the 500-1000 employees segment, HP has an edge in brand value and product reliability, while its experience is similar as LG's in initial price and after sales service and support amongst its existing users. Among likely future prospects, HP scores over LG in brand value and after sales service and support, but trails behind LG in product reliability and initial price.



Quite a few brands made it to the Users' Choice club this time, and there are different winners in the two segments we surveyed.



HP and LG enjoy the highest brand loyalty among their existing users.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Samsung	48	42	24	17	48	42	20	15
	HP	32	30	15	13	29	29	15	11
500-1000	HP	92	90	48	33	79	64	28	30
	LG	74	74	48	33	62	83	34	28

Samsung is ahead of HP in all the reasons amongst its current and prospective users in the 100-499 employees; in 500-1000 employees segment, LG beats HP in initial price and product reliability amongst future prospects.

Network Routers

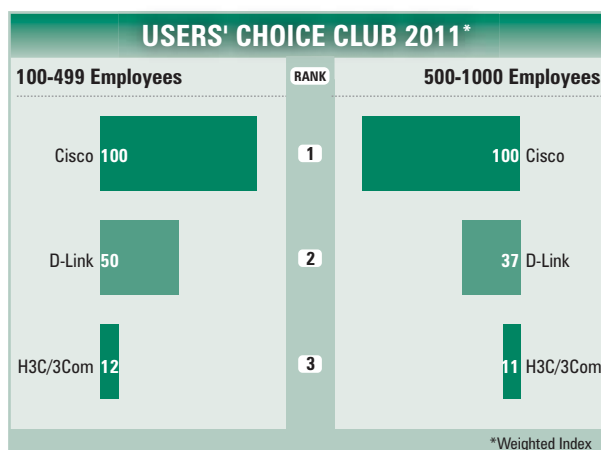
Only three brands make it to the club in this segment out of some 13 that were named by our respondents, and Cisco clearly outshines all other brands by a wide margin

No prizes for guessing the winner in this category—Cisco has always been known for its routers, and it clearly reflects that positioning in the results of our survey as well. The only thing worth noting is that the brand is popular even amongst smaller organizations. Cisco enjoys a huge lead over runner-up D-Link in both segments. The only other brand that made it to the elite Users' Choice club amongst some 13 different brands that were reported by our respondents is H3C/3Com.

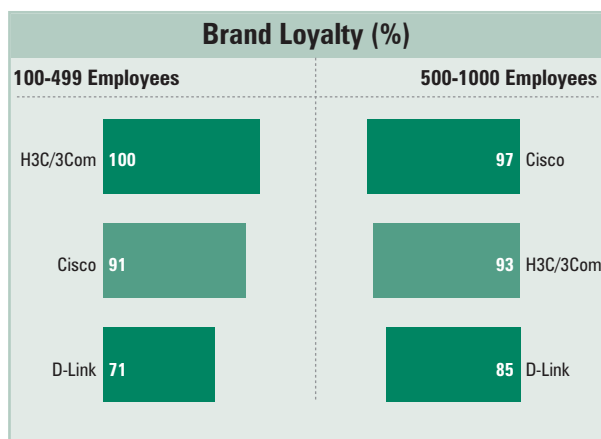
Cisco enjoys the highest ToM (top of mind) recall of all brands, with 46% of the respondents in the 100-499 and a whopping 52% of the respondents in the 500-1000 employee enterprises recalling its name when it comes to routers. Not only that, it also enjoyed the highest brand ownership in both segments.

When it comes to brand loyalty, it's H3C/3Com that enjoys 100% loyalty of its existing users, in the smaller organizations. Cisco stands at 91% and D-Link at 71% in this segment. The biggest gainer from shift outs is Cisco in the segment, and the most impacted is likely to be D-Link, so the latter needs to pull up. In the larger enterprises (500-1000 employees), it's Cisco that has the highest brand loyalty amongst its existing users, followed by H3C/3Com at 93% and D-Link coming last once again at 85%. D-Link once again needs to be careful about protecting its existing customers from shifting out in this segment as well.

D-Link or Cisco? And why? Here again, brand value and product reliability are the key reasons that emerge amongst the users of both brands. However, we'd like to add that D-Link scores higher on initial price and is slightly better off in after sales service/support over Cisco. The latter scores over D-Link in brand value and fights neck to neck for product reliability.



With 13 brands competing for top slot, Cisco and D-Link dominate the club, while H3C-3Com made it with a bit of struggle.



While all brands enjoy high brand loyalty, D-Link needs to pull up a little as some of its existing users are likely to shift to Cisco.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Cisco	74	77	29	28	74	71	20	23
	D-Link	70	79	36	30	68	80	34	26
500-1000	Cisco	82	86	42	33	76	76	31	27
	D-Link	54	79	60	48	59	61	34	27

Votes for brand value tilt slightly more in favor of Cisco than D-Link, while both are almost neck to neck in product reliability. In initial pricing, D-Link is the clear winner, while in after sales service/support, D-Link a slight edge.

Network Storage (NAS/SAN)

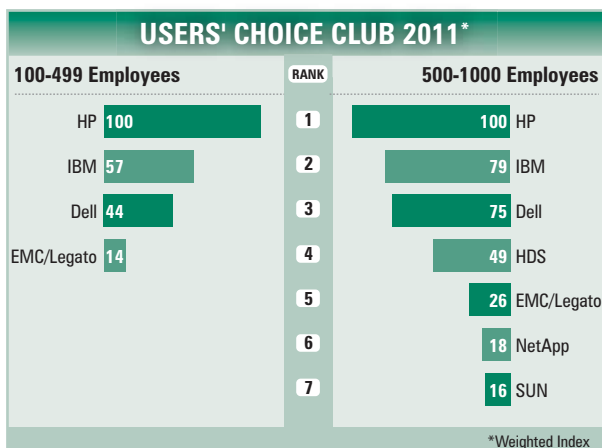
The big brands need to work harder towards establishing a good mindshare for themselves in the 100-499 employee segment. Apart from that, it's HP that takes the top spot in both categories

Until last year, we were using the name large volume storage for this category. However, since we reached out to smaller organizations this time, we felt it would be apt to change the name to network storage (NAS/SAN). In both survey segments, we found HP, IBM and Dell taking the top three spots in that order, with HP taking the Users' Choice award in this category across both segments.

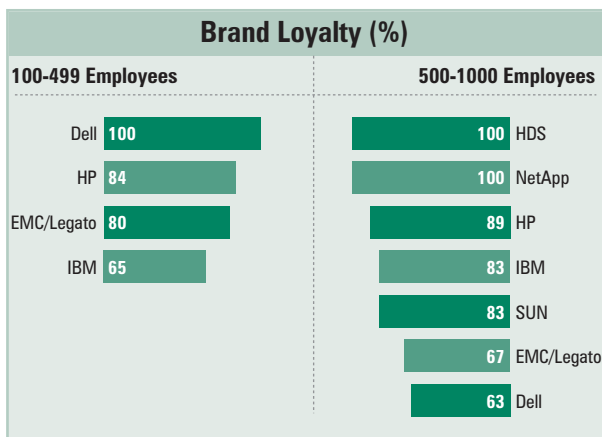
One thing to note is that brand awareness for this category is very low amidst the 100-499 employee enterprises, which is clearly visible when we compare list of brands that made it to the club in this segment vs those in the larger enterprise list. The larger enterprise space is far more competitive.

When it comes to brand loyalty scores, Dell is the only brand to enjoy 100% brand loyal customers in the 100-499 employee enterprises. With a strong current brand ownership of 42% complemented by a brand loyalty score of 84%, HP still emerges a promising brand for the smaller organizations. Only 65% of the current IBM customers are likely to stay with the brand which is the lowest in this employee category. The score is far more promising for IBM in the 500-1000 employee category where it enjoys a brand loyalty of 83%. HDS and NetApp enjoy 100% brand loyal customers in this category.

In the reasons for choosing a future brand, 81% respondents are likely to choose IBM in the 100-499 category for its brand value. This figure is even higher than that for the winner of the category, HP. We did notice though that fewer respondents favored IBM for the initial price as compared to HP in this space. In large enterprise space, both HP and IBM enjoy almost an equal brand value favoring respondents for their future choice. Here again, we noticed that a higher percentage of respondents favored HP over IBM in the 500-1000 employee enterprises for initial price, and after sales service/support.



HP, Dell and IBM show dominance across enterprises. The competition gets harder in 500-1000 employee category.



Even the winning brands have poor brand loyalty in 100-500 employee segment.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	69	75	44	59	65	65	23	35
	IBM	70	95	25	25	81	75	19	38
500-1000	HP	71	79	57	39	82	56	24	50
	IBM	70	77	30	37	85	73	19	35

81% respondents are likely to choose IBM in the 100-499 category for its brand value. This figure is even higher than that for the winner of the category, HP. In large enterprise space, both HP and IBM enjoy almost an equal pull on brand value.

Network Switches

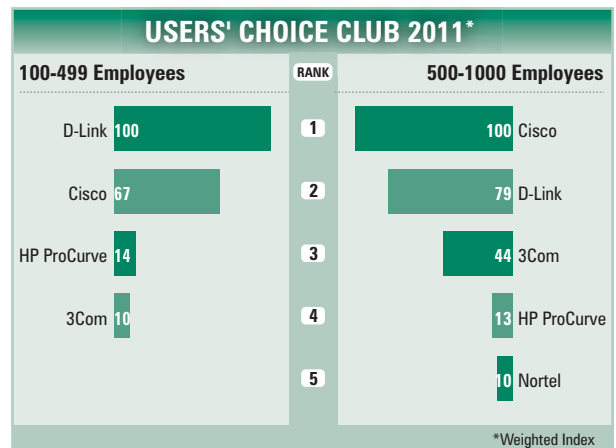
In a market scattered with lots of different brands, D-Link and Cisco emerge winners in their own separate segments with huge leads over others

We have two different winners this time, with D-Link leading the 100-499 employees market segment and Cisco ruling the roost in 500-1000 employees segment. This doesn't come as a surprise because Cisco has always focused at larger enterprises, while D-Link is known as a low-price networking brand for the mass. Interestingly, 3Com still enjoys good mind share, even though it is not so active in the market. HP ProCurve and Nortel are the other two brands that managed to enter the elite Users' Choice club in the 500-1000 employees segment.

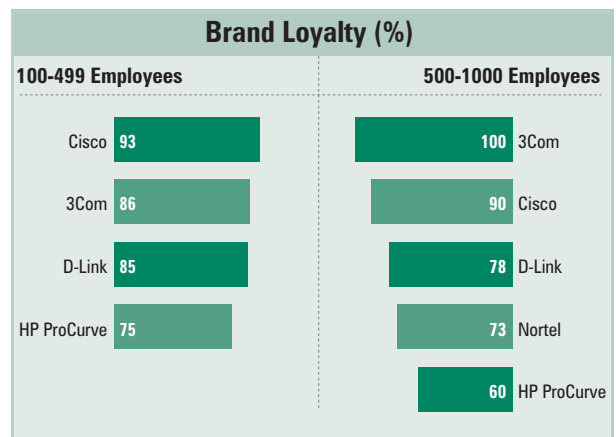
In the 100-499 employees space, D-Link boasts a significant 56% current brand ownership followed by Cisco at 22%. In 500-1000 employee enterprises, both Cisco and D-Link almost share an identical percentage (36%) share when it comes to current brand ownership. The ToM (top of mind) recall also does not vary significantly for both brands in the 500-1000 employees category.

3Com is the only brand that enjoys 100% brand loyalty amongst its existing customers. Cisco follows suite in 500-1000 employee enterprises at 90% brand loyalty, and some customers likely to shift to 3Com and D-Link. Likewise, D-Link has 78% loyal customers, with remaining likely to shift out to either 3Com or Cisco. 9% of Nortel's existing users also are likely to shift to Cisco. HP ProCurve showed the lowest brand loyalty amongst its existing customers and needs to watch out from both Cisco and 3Com. In the 100-499 employee enterprises also, Cisco enjoys the highest brand pull from the likes of D-Link, Nortel, and 3Com.

D-Link or Cisco? Whose network switch should you choose? Like most other categories, brand value and product reliability are the two key reasons given by respondents for choosing these two brands, with highest percentage of votes coming from Cisco's existing users for product reliability.



Results endorse the fact that D-Link is a low-priced networking products provider, while Cisco is a brand for large enterprises.



3Com enjoys highest brand loyalty for large enterprises. Cisco and D-Link score consistent competitive scores across categories.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	D-Link	76	75	44	32	69	61	36	23
	Cisco	70	70	35	33	74	59	35	30
500-1000	Cisco	74	81	38	45	68	70	19	36
	D-Link	68	82	55	36	66	64	33	23

Reliability of product and brand value have come out as significant reasons for future and current brand preference. 82% respondents marked Cisco and D-Link as their current brand preference, courtesy, the reliability factor in the 500-1000 employee category.

Notebooks

HP-Compaq and Dell had a close shave to settle as winners in mid-size and large enterprise categories, respectively. Lenovo enjoys a consistent brand image across employee categories and makes the competition stiffer

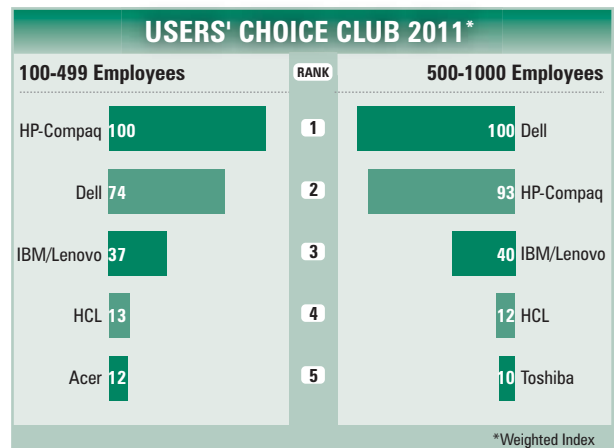
HP-Compaq emerges as the winner in 100-499 employees category while Dell outshines the rest in 500-1000 employees segment. Lenovo holds a strong consistent 3rd position across both segments. The other brands—HCL, Acer, and Toshiba barely made it to the club.

In the 100-499 employees segment, HP-Compaq enjoys the highest brand loyalty amongst its existing users, at 92%, while Lenovo needs improvement in the area with only 55% brand loyalty. In fact, around 30% of the respondents that were using Lenovo said they're likely to shift to either Dell or HP-Compaq. Acer faces the same challenge, with 64% loyal customers and around 27% who're likely to switch to Dell. HCL needs to watch out from HP-Compaq because that's where 18% of its existing customers are likely to switch to in this segment.

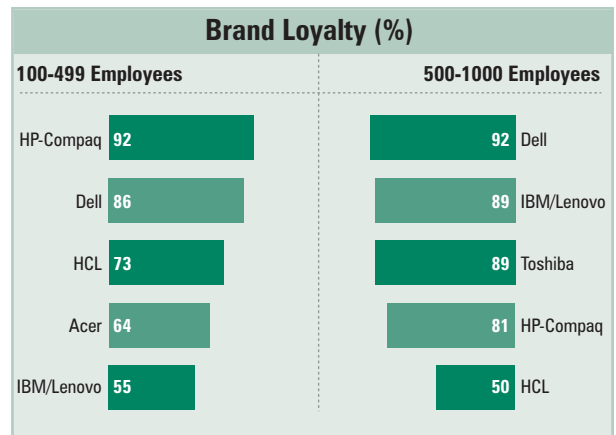
Coming to 500-1000 employee enterprises, Dell tops the brand loyalty chart with 92% loyal customers. Lenovo is better off here as compared to the 100-499 employee segment, having 89% brand loyalty. HCL has the lowest brand loyalty in this space at 50%, with 20% of its existing users likely to shift to Dell, and 10% each to HP-Compaq and Lenovo.

In a deep dive into the reasons for likely purchase of a particular brand in future, 83% respondents that are likely to go with HP-Compaq gave brand value as their key reason for doing so in the 100-499 employees category, while 71% of the respondents who chose Dell gave the same reason. Of the respondents that are currently using Dell, a majority gave product reliability as the key reason. Similarly, of the respondents that are currently using HP-Compaq, majority gave brand value as their key reason.

In the 500-1000 employees category, of the respondents that were likely to go with Dell or HP-Compaq, the majority gave product reliability as their key reason.



HP-Compaq and Dell win the SME and large enterprise segment, respectively. IBM/Lenovo is on third spot across both categories.



Winners in respective categories also enjoy the highest brand loyalty. Lenovo seconds only to Dell in 500-1000 categories.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP - Compaq	86	72	61	45	83	63	35	39
	Dell	70	75	31	57	71	56	31	41
500-1000	Dell	72	87	43	40	71	72	17	35
	HP - Compaq	73	76	59	40	68	73	27	37

83% respondents who are likely to go for HP-Compaq in 100-499 employee category gave brand value as the key reason. Similarly, of the respondents likely to go with either HP-Compaq or Dell, the majority gave product reliability as their key reason.

Power Conditioning Equipment

APC continues its winning streak; Siemens enters the Users' Choice club, but only in the 100-499 employee enterprises, Su-Kam enters the club with a bang

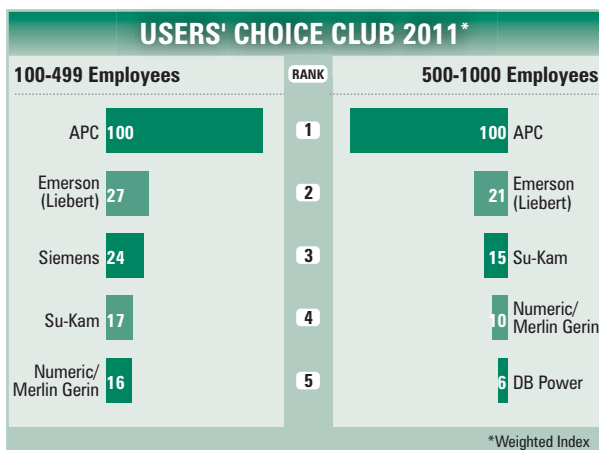
APC is the unprecedented brand of choice in the Users' Choice club across both employee segments. In fact, APC has enjoyed the top spot in all our surveys in the past as well, even when we were reaching out to large enterprises. The brand enjoys highest ToM recall amongst respondents in both employee segments, 42% in 100-499 employees, and 55% in 500-1000 employees segment.

Other players that have made it to the club are Emerson (Liebert), Numeric/Merlin Gerin and Su-Kam. Dominance of the winning brands in both the employee segments, reveal a competitive market in which other players are finding it challenging to make their presence felt. While Siemens enters the league confidently this year at third spot in the 100-499 category, DB Power just makes its presence felt at fifth position in large enterprise space. The most aggressive new entrant this year is Su-Kam, which positions itself strong in both enterprise segments. Besides, it has the highest current brand ownership after APC at 11% for SMEs.

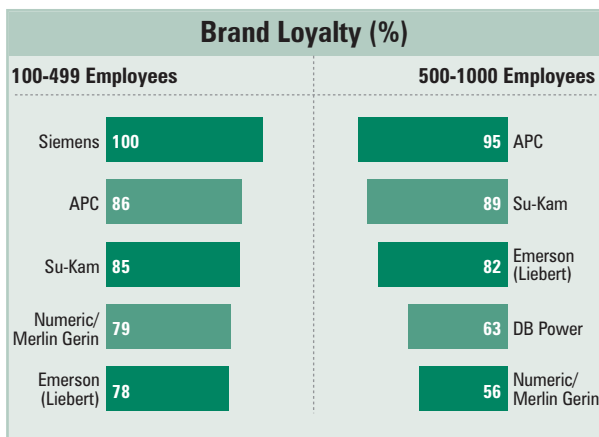
In the 100-499 employee enterprises, customers currently using APC power conditioning equipment give product reliability as the reason, while Emerson's current users chose the brand for its brand value. The trend is similar for users likely to buy these two brands in the future also. In the 500-1000 employee enterprises, highest percentage of votes go to product reliability for both brands.

Coming to brand loyalty, Siemens is the only brand to enjoy 100% brand loyalty amongst its users in the 100-499 employee enterprises, followed by APC, Su-Kam, Numeric/Merlin Gerin, and Emerson. In 500-1000 employee enterprises, APC enjoys the highest brand loyalty, followed by Su-Kam.

It would be interesting to see how things pan out next year, with Su-Kam becoming such a strong contender, and Emerson having acquired DB-Power this year.



APC has such a strong lead over other players, that it would be extremely difficult to dethrone it from the top spot.



Siemens enjoys 100% brand loyalty amongst its customers, while other brands don't face any major threat from each other.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	APC	61	70	39	38	65	68	23	31
	Emerson (Liebert)	78	67	33	28	100	53	12	12
500-1000	APC	68	85	45	41	61	62	21	34
	Emerson (Liebert)	64	91	59	36	68	74	26	26

While product reliability is the key reason for using or choosign APC for the future; Emerson's forte remains its brand value amongst 100-499 employee enterprises; Users in 500-1000 employee enterprises give product reliability as the key reason for both brands.

Racks and Enclosures

HP tops 100-499 employee enterprises, while APC rules 500-1000 employee segment; Top of mind recall is very low in this segment for other brands

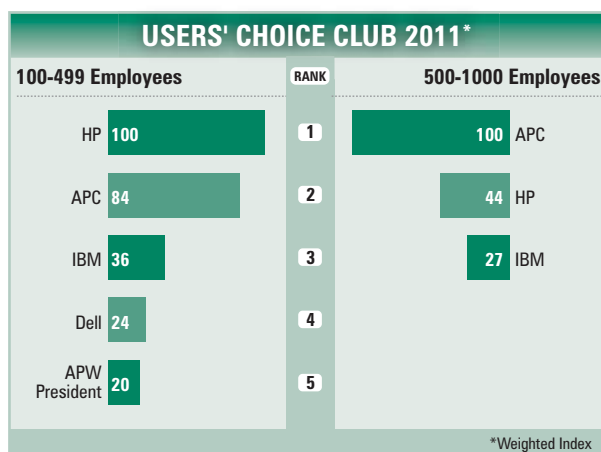
There's no unanimous winner across either employee segment in this category. While HP takes the top spot in the 100-499 employee enterprises, APC is a clear winner in the 500-1000 employee enterprises by a wide margin. IBM is a distant third in both segments.

Top of mind recall of IT brands remains less than 50% in this segment. Only 41% of the respondents could recall APC as a brand in this space from the 500-1000 employee enterprises, followed by HP at 24%. The remaining brands had ToM recall of less than 20%. The situation amongst 100-499 employee enterprises was even worse, with highest ToM recall of only 31% for HP racks and enclosures, followed by 23% for APC. This result clearly indicates the immense potential present in this segment for racks and enclosures.

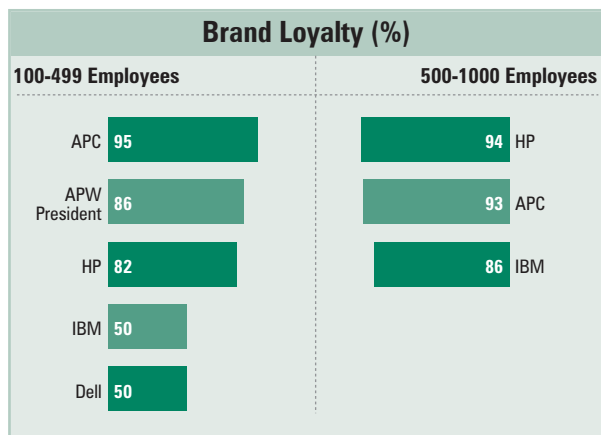
APC enjoys the highest brand loyalty in 100-499 employee enterprises, with 95% of those currently using APC saying that they're likely to stay with the brand in the future as well. APW President follows suite at 86% brand loyalty. Amongst 500-1000 employee enterprises, HP has a brand loyalty of 94%, followed closely by APC at 93%.

65% of those currently using HP in the 100-499 employee enterprises gave brand value as the primary reason. Interestingly however, 53% gave initial price as the key reason, meaning HP is perceived to be a cheaper brand for racks and enclosures over others. 73% of respondents who were likely to go for HP racks and enclosures in the future gave brand value and product reliability as the key reasons. 80% of respondents currently using APC gave product reliability as the key reason for opting for it.

In 500-1000 employee enterprises, 80% of HP's users and 88% of APC's users gave product reliability as the key reason. The same reason was given by a majority of respondents likely to buy these brands in the near future.



APC dominates the 500-1000 employee enterprises, and follows close on the heels of HP in the 100-499 employee space.



Only APC and HP enjoy brand loyalty of more than 90% in both segments. Others need to work on building up their mindshare.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	65	47	53	29	73	73	12	19
	APC	60	80	35	30	78	74	13	26
500-1000	APC	73	80	39	27	64	74	23	34
	HP	59	88	25	44	53	84	41	53

A majority of the respondents who're likely to buy either APC or HP gave product reliability as the key reason for their decision. More than 50% of HP's current users gave initial price as the key reason for having chosen it.

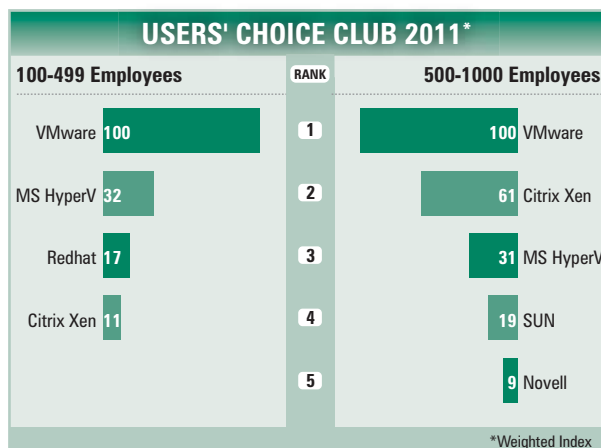
Server Virtualization

One of the hottest buzzwords in IT today is dominated by VMware across organizations of all sizes, but there's plenty of market for all players, which is why there isn't too much of cannibalization amongst brands

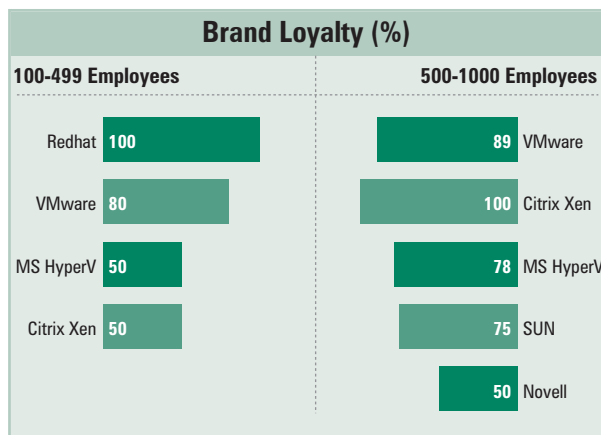
Server virtualization is possibly the hottest buzzword in IT today, with just about every organization planning to adopt the technology if they haven't already. It's no longer considered as a technology for the big boys, but rather, it has become a necessity for every organization today. VMware rules the server virtualization domain across both survey segments we reached out to by a wide margin. The other players are also pretty well known in this segment—MS HyperV, Citrix Xen, RedHat, Sun, and Novell, all of which made it to the Users' Choice club.

RedHat was the only brand to enjoy 100% brand loyalty amongst its existing users in the 100-499 employee enterprises, while Citrix Xen and MS HyperV are at a lowly 50% brand loyalty. While the remaining 50% of HyperV's existing users weren't sure which brand would they switch to in the future, Citrix Xen's customers clearly chose Sun. Interestingly though, Citrix Xen has better grasp over its customers in the 500-1000 employee enterprises, and enjoys 100% loyalty from them. VMware is steady at 80 and 89% brand loyalty in the SME and large enterprise segments. MS HyperV needs to watch out from Citrix Xen, Novell from RedHat, and Sun from both Citrix and RedHat when it comes to possibly customer shift-outs.

VMware is considered for its brand value amongst a majority of its existing users in the 100-499 employee enterprises, while it's product reliability that counts for a majority of them who're likely to opt for it in the near future. In the 500-1000 employee enterprises, Citrix enjoys a slight edge over VMware amongst its current users when it comes to brand value, product reliability, and initial price. VMware has a slight edge over Citrix in after sales service/support. A similar trend exists amongst users likely to buy VMware or Citrix Xen in the future.



VMware continues its winning streak in both categories, while MS Hyper-V and Citrix Xen fight it out for the runner-up position.



All brands enjoy high brand loyalty except MS HyperV and Citrix Xen in the 100-499 employee segment.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	VMware	60	55	25	30	61	67	22	17
	MS HyperV	63	75	13	25	50	75	0	25
500-1000	VMware	71	89	20	46	63	78	25	48
	Citrix	72	89	40	44	70	80	26	38

Both VMware and Citrix are chosen for their product reliability and brand value, but Citrix has a slight edge over VMware in brand value, reliability and initial price. VMware has a clear edge in after sales service/support.

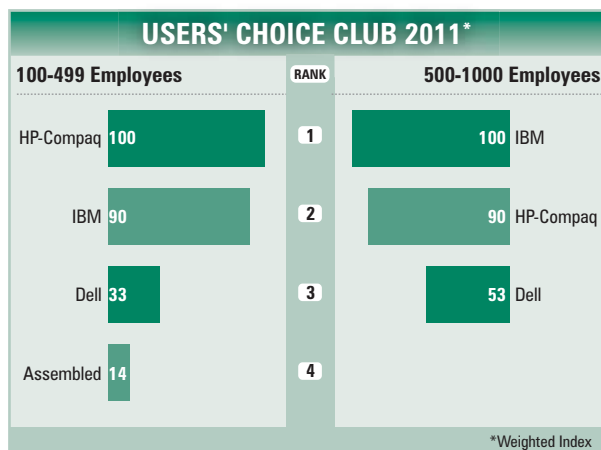
Workgroup Servers

Brand loyalties are very fragile in this category, but HP-Compaq rules both survey segments with IBM close on its heels, and Dell at a constant third

We have two winners in the club—HP-Compaq in 100-499 employee category, and IBM in 500-1000 employee category. Dell remains consistent at the third spot in both employee segments, and interestingly, there's another entry in the smaller organizations of assembled servers. HP-Compaq enjoys the highest top of mind recall, current ownership, and future preference amongst users amongst enterprises with 100-499 employees. IBM follows suite with the second highest percentage across these parameters.

Another interesting fact is that assembled servers reported the highest brand loyalty in the 100-499 enterprise segment at 89%, and Dell seems to be taking the maximum advantage of this. The remaining 11% of users who were using assembled servers said they were likely to shift to Dell in the near future. The overall interesting fact in this segment is that there are shift-outs likely in every brand. HP-Compaq for instance, enjoys 80% brand loyalty, but 10% of the remaining 20% of its existing users are likely to switch to either IBM or HCL, while the remaining 10% are not sure where to switch to. IBM has brand loyalty of 75%, but only 6% of its existing users are likely to shift to other brands. The remaining are not sure which brand to switch to. Dell has 73% brand loyalty in this segment, and about 14% of the remaining users are likely to switch to either HP-Compaq or IBM.

In the 500-1000 employee segment, IBM tops the brand loyalty chart, but only at 79%, and likely shift outs to Acer, assembled, Dell, and HP-Compaq. HP-Compaq enjoys brand loyalty of 78%, with likely shift outs to Acer, Dell, and IBM. Likewise, Dell enjoys a brand loyalty of 78%, and is slightly better off than others, in that only 4% of its remaining users are likely to shift to HP-Compaq, while the remaining 19% weren't sure which brand to switch to.



HP-Compaq is a winner in both categories, with IBM close on its heels, and Dell at a distant third spot.



Brand loyalties are fragile in this segment, with shiftouts likely in every brand. None of the brands enjoy 100% brand loyalty.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP-Compaq	69	86	41	71	57	74	28	41
	IBM	55	90	31	65	64	77	30	45
500-1000	IBM	71	87	45	47	73	81	27	31
	HP-Compaq	63	85	52	52	64	75	23	34

HP-Compaq seems to be winning over its competitors in after sales service/support, with 71% of its current users giving this as the reason for having chosen the brand in 100-499 employee segment. IBM's existing users vouch for its reliability in the same space.

Application Server

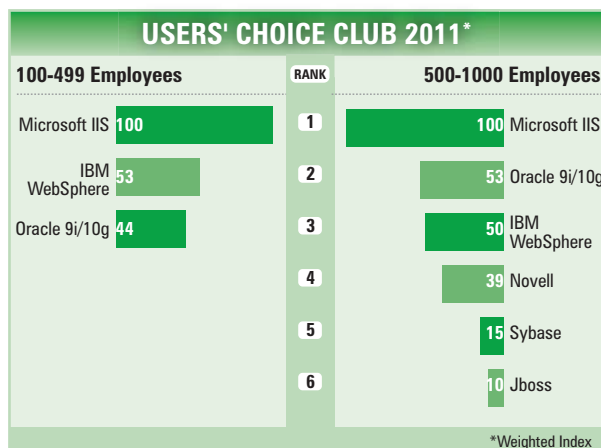
Microsoft IIS comes out as a preferred choice in both 100-499 and 500-1000 employees segments, leaving likes of Oracle and IBM Websphere trailing at almost halfway mark

Microsoft IIS is the application server of choice in both employee segments and therefore takes the coveted top slot of the Users' Choice Club 2011. In the 100-499 employees segment, it is IBM Websphere that stands second to Microsoft IIS followed by Oracle 9i/10g, whereas in the 500-1000 employees segment, the two brands swap their positions for the second and third spot. While only these three brands managed to make it to the Users' Choice club in the 100-499 employees segment, three more brands managed made it in the 500-1000 employees segment—Novell, Sybase, and Jboss.

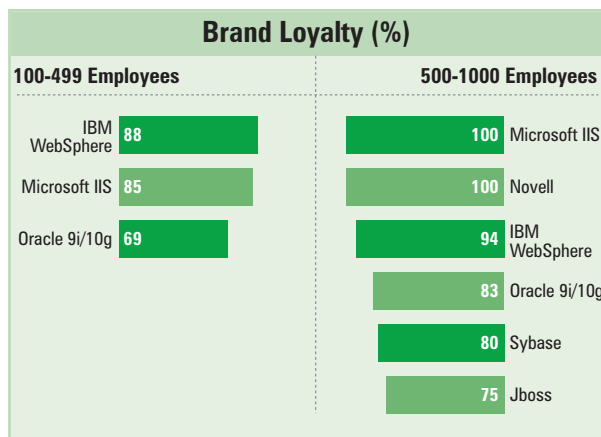
Microsoft IIS had the highest current brand ownership amongst survey respondents in both employee segments. Oracle 9i/10g enjoys the highest top of mind recall in both employee segments, but it seems that when it comes to actual usage or intent to purchase, the votes change in both employee segments.

Respondents in both employee segments gave brand value and product reliability as the key reasons for choosing MS IIS and Oracle. This was true for respondents who were currently using these brands as well as those who were likely to choose them in the future.

Coming to brand loyalty, in the 100-499 employees segment, it is IBM Websphere that enjoys the highest brand loyalty, with 88% of the current users saying that they were likely to stay with it in the future also. MS IIS was close on its heels at 85% brand loyalty, followed by Oracle 9i/10g at a distant three with only 69% brand loyalty. In 500-1000 employees segment, there's a major shift, with MS IIS and Novell enjoying 100% brand loyalty, followed by IBM Websphere at 94%. Sybase had 80% brand loyalty, while the remaining 20% saying that they were likely to switch to MS IIS. In case of Oracle, 11% of the users weren't sure which brand to shift to in the future.



Microsoft IIS dominates the application server category and is far ahead of competition.



MS IIS and Novell enjoy 100% brand loyalty in the 500-1000 employees segment, whereas no brand achieved 100% in the 100-499 employees segment.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Microsoft IIS	70	81	15	19	71	71	21	32
	Oracle 9i/10g	77	92	23	62	60	70	20	30
500-1000	Microsoft IIS	76	62	14	14	74	48	17	30
	Oracle 9i/10g	78	89	28	28	80	80	27	53

Across both segments, product reliability and brand value are the key reasons given by respondents for current usage and future likelihood of purchase for both MS IIS and Oracle 9i/10g.

Business Intelligence & Analytics

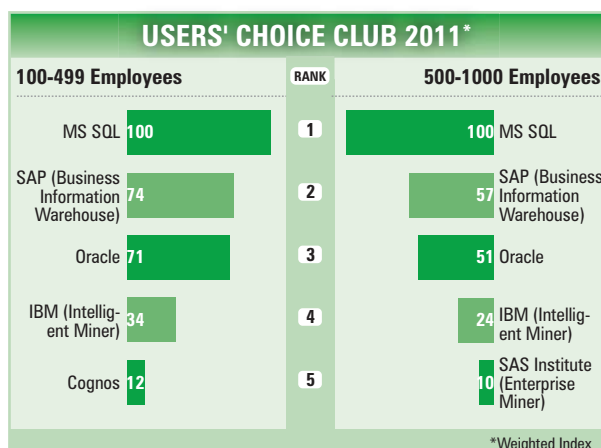
Though MS SQL is the preferred solution in both the segments, it is interesting to find that the respondents in 100-499 employee segment are fully loyal to whatever brand they are using

Microsoft's SQL Server takes the top spot in both segments. This is interesting considering that Oracle is the RDBMS brand of choice in both segments, one would expect organizations to choose Oracle's BI itself. Maybe Oracle's BI solution is too expensive! SAP, Oracle, and IBM follow MS SQL in both segments in that order. The last two entrants who made it to the club are Cognos and SAS Institute Enterprise Miner. Even though IBM acquired Cognos a few years ago, there's no change in the ranking if we add the results of both.

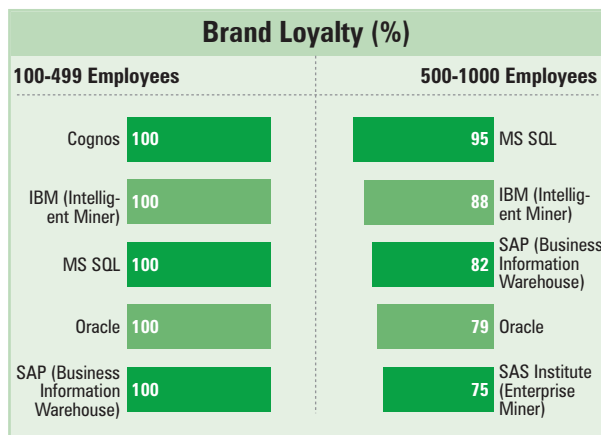
Interestingly, though MS SQL is the winner in this segment, it's Oracle that enjoyed the highest top of mind recall amongst respondents in 100-499 employee enterprises, at 28%, with MS SQL following closely at 24%. Amongst respondents in 500-1000 employees, MS SQL scored higher than Oracle across all parameters with ToM recall from 30% respondents compared to 26% for Oracle; current ownership amongst 28% respondents compared to 26% of Oracle, and brand loyalty amongst 32% of respondents, compared to 25% for Oracle.

The real surprise came in brand loyalty figures in 100-499 employee segment, which stood at 100% for all brands. In 500-1000 employee segment however, none of the brands had 100% brand loyalty. MS SQL had 95% brand loyalty (with remaining 5% not sure where to shift); and IBM at 88% (with the remaining 12% uncertain about future switchover). The two other brands, SAP and Oracle had 82% and 79% brand loyalty, with a part of the remaining respondents likely to switch to MS SQL.

Coming to reasons for shifting, all respondents currently using SAP BI in 100-499 employee segments unanimously gave brand value as the key reason for their choice. 91% of MS-SQL owners also gave the same reason. In 500-1000 employees segment, 75% of MS SQL owners chose it for its reliability, while Oracle BI owners gave reliability and brand value as the key reasons.



In the 500-1000 employee segment MS SQL leads way ahead of the rest, while in 100-499 segment, it is SAP and Oracle that are giving competition to MS SQL.



Whatever brand it is in 100-499 segment it enjoys a 100% loyalty, while in 500-1000 segment MS SQL has highest loyalty along with highest shift-ins from other brands as well.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	MS SQL	92	75	25	25	85	92	31	31
	SAP (Business Information Warehouse)	100	67	67	34	67	88	33	17
500-1000	MS SQL	70	75	35	50	71	75	21	29
	Oracle	74	74	32	42	72	72	17	33

Brand Value and reliability of the product is primary reason that influences the current as well as future purchase of a particular brand across both the segments.

CRM

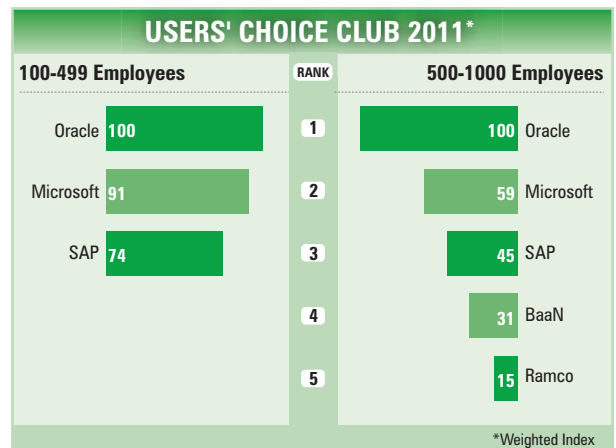
Oracle rules both market segments in this category, followed by Microsoft and SAP. The large enterprise segment has more brands making it to the users' choice club as compared to SME segment

In both SME and large enterprises, Oracle has taken the top spot by a very comfortable lead. In the SME segment—companies with 100-499 employees, Microsoft stands second to Oracle and followed by SAP in the Users' Choice Club 2011. Oracle enjoys the highest ToM (top of mind) recall by 34% of the respondents in the SME segment, while it is Microsoft that enjoys highest current brand ownership of 26% amongst the respondents.

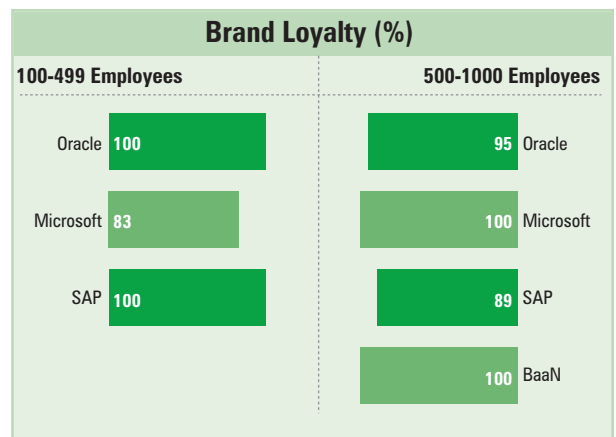
All respondents who currently own Oracle gave product reliability as their key reason for having chosen the CRM, while only 43% of Microsoft's existing users gave the same reason. A majority of them (about 71%) gave brand value as the key reason. This is possibly because Microsoft has been very active in deploying CRM in the SME space. But for the majority who're likely to deploy Microsoft's CRM in the future, the reason changes to product reliability, and interestingly, it becomes brand value in case of Oracle.

In the large enterprise segment (500-1000 employees), we see quite a few CRM brands making it to the Users' Choice club. Apart from Oracle, Microsoft, and SAP, we saw BaaN and Ramco making it to the elite club. Unlike Microsoft and BaaN, both SAP and Oracle do not enjoy 100% brand loyalty. But good news for them is that 11% of SAP owners are undecided to keep the current brand or shift to another, same ways Oracle too has 5% of such undecided owners.

Upon asking the reason for their future purchase of CRM solution, 76% of respondents who plan to own Oracle in near future said their main influencing factor was the brand value, while Microsoft was chosen by nearly 72% among its fan followers.



Both categories have the exact order of preference for the top three brands.



Brand loyalties are pretty high in both segments, so nothing major to worry about for all brands.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Microsoft	71	43	43	14	50	67	33	17
	Oracle	86	100	14	0	83	50	25	0
500-1000	Oracle	91	67	43	29	76	59	24	28
	Microsoft	60	60	60	20	71	57	29	43

Though brand value and product reliability are main factors for current and future users, respondents for Oracle in 100-499 segment didn't give after sales service/support as their reason for choosing the brand.

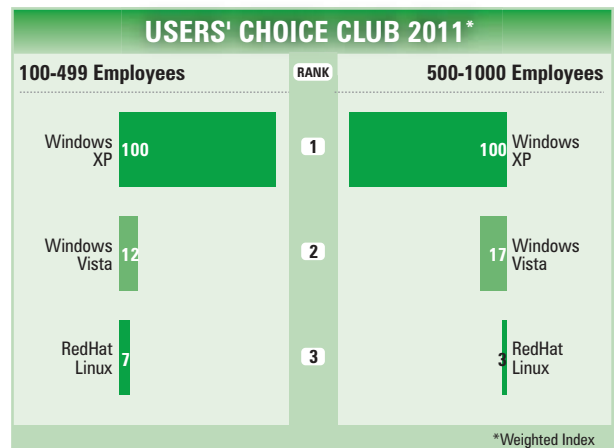
Desktop OS

Windows rules in this segment, but interestingly, it's not the latest Windows 7, not even the Vista, but the XP edition.

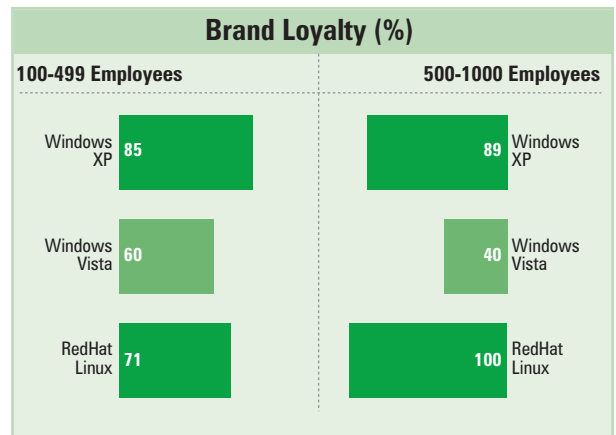
No one will argue to the fact that desktop OS market is dominated by Windows; but which version is at the top is also a child's guess. Windows XP still dominates this space and stands at top of our Users' Choice club 2011 for both the segments. The dominance of Windows XP is such that its nearest competitors just managed to enter the Users' Choice Club. In the SME segment, this shows that Windows XP is still preferred over Vista or Windows 7. The numbers for Windows 7 or other OSes were so small that they could not be considered for any conclusion. One of the reasons that Windows XP is still popular could be the fact that Microsoft has extended the support till 2014, thus people would be deferring their upgrade from XP. Also, most the legacy application still run on XP, so people find it difficult to upgrade to any recent versions of Windows.

Looking into 100-499 employee segment, its Windows XP that dominates current brand ownership, top of mind recall, brand loyalty and shift-ins. Though Windows XP has highest brand loyalty of 85%, the shift out being 15% of which 3% current owners are likely to move to Vista, while 2% would be adopting RedHat Linux and the rest are either undecided of which brand to shift to or would be moving on to other variants of Linux. Likewise RedHat Linux has 71% brand loyalty amongst the respondents, and 14% of current RedHat owners might shift to Windows XP in near future.

Moving on to the 500-1000 employee segment, the story is same, XP dominates across all the sections. But coming to brand loyalty; the highest of 100% is achieved by RedHat Linux, meaning however small but all RedHat Linux owners are satisfied with their current desktop OS and have no immediate plan to shift to any other OS.



Win XP dominates so much in the desktop OS category that the other members in the Users' Choice Club are way behind.



Windows Vista has the lowest brand loyalty of the three Operating Systems that made it to the club.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Windows XP	73	76	40	31	68	66	25	29
	Windows Vista	80	50	20	30	64	36	9	27
500-1000	Windows XP	80	79	44	31	74	67	28	32
	Windows Vista	77	70	46	70	47	80	40	40

Windows XP is still being used and considered for future purchase for its brand value and reliability in both segments. Windows Vista's current owners are happy with its after sales support, maybe because Windows XP support has been discontinued.

E-Mail and Messaging

Three brands stand out amidst a plethora of brands in this segment, with MS Exchange having a strong grip on the top slot and Notes/Domino in runner-up position

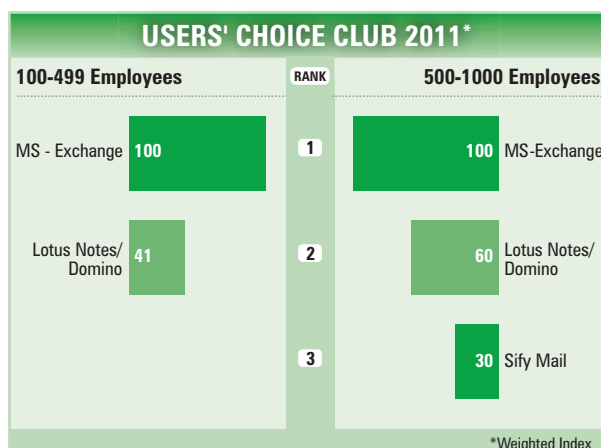
Microsoft Exchange comes out as the most preferred email and messaging software amongst our respondents in both survey segments. Only MS Exchange and Lotus Notes/Domino made it to the club in the 100-499 employees segment, while Sify was the only other brand to have made it to the club besides these two in the 500-1000 employees segment.

In the 100-499 employees enterprises, Exchange enjoys the highest ToM (top of mind) recall with 64% of the total respondents. It also had the highest brand ownership at 58% and also highest brand loyalty amongst 96% of its existing users. Moreover, it even enjoys 11% shift in from other brands in this category. Likewise, Notes/Domino enjoys the highest brand loyalty in this segment at 96%, and there are 10% shift-ins likely to happen from other brands as well.

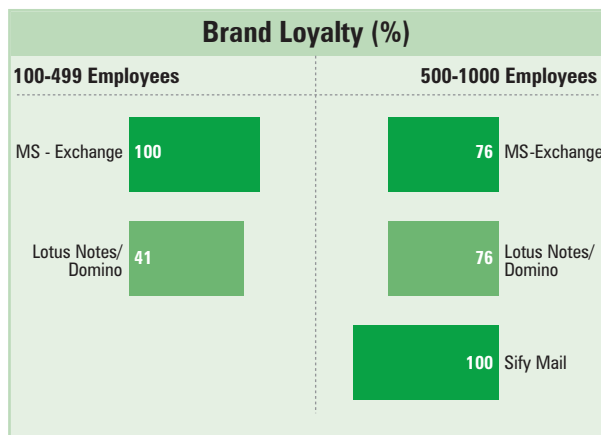
A close look at the reasons for using the two brands in 100-499 employees segment reveals that MS Exchange scores over Notes/Domino in brand value and product reliability amongst its current users, while the latter scores over it in initial price and after sales service/support amongst its current users.

In 500-1000 employees segment, Sify Mail enjoys 100% brand loyalty, while Lotus Notes /Domino and Exchange have similar brand loyalty of 76%. A small point of concern for Exchange is that 6% of its current users said they're likely to move to Lotus Notes/Domino. Whereas 22% of current Lotus Notes/Domino users remained undecided about which brand they were likely to move to.

Exchange scores over Notes/Domino for brand value and product reliability amongst the current users, but falls back a little in initial price and after sales service/support. Among future prospects, there are more votes in favor of Notes/Domino for brand value, product reliability, and initial price, while the two received almost similar votes for after sales service/support.



Only three brands had sufficient votes to make it to the club in this category, because it's a highly fragmented market with lots of players.



In 100-499 segment, MS Exchange has highest brand loyalty, while in 500-1000 employee segment it's Sify Mail that has cent percent brand loyalty.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	MS - Exchange	78	82	28	25	71	64	28	24
	Lotus Notes/Domino	35	38	50	31	68	74	23	16
500-1000	MS - Exchange	84	88	30	28	69	73	15	20
	Lotus Notes/Domino	73	78	35	30	74	76	32	18

Brand value and product reliability came as top two reasons influencing purchase decision in 500-1000 segment. While in 100-499 segment, for Lotus Notes/Domino nearly 50% of owners said they considered initial price as prime factor.

ERP

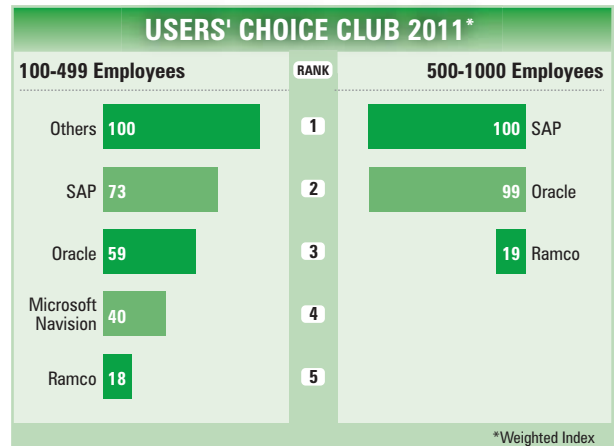
SAP emerges victorious in 500-1000 employee organizations, beating Oracle by a whisker. The smaller, 100-499 employee organizations still rely on inhouse/local ERP software

There's no winning brand in the 100-499 employee segment in this category, because this segment is still using local and inhouse developed ERP software instead of established brands. So the combined index of such ERP software top the UC club in this segment. The ERP brands, viz SAP, Oracle, MS Navision and Ramco fall after this in the same order. In fact, the top brand in this segment, SAP falls behind local brands by a wide margin. One interesting fact from the results is that though the ToM (top of mind) recall for SAP is highest at 41% in this segment, the number of users who currently own it are only a third of the local players.

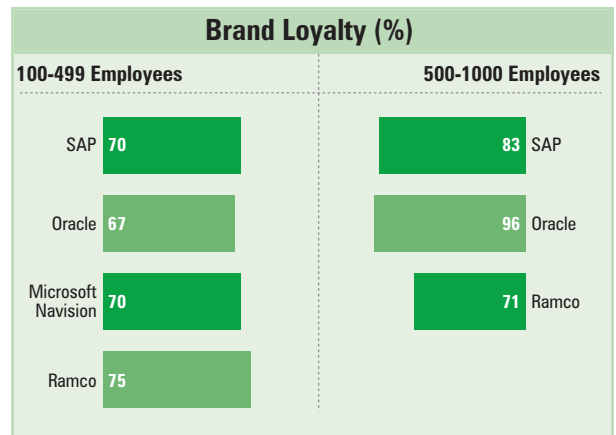
In the 500-1000 employees category, there's cut-throat competition amongst all brands, with the winner SAP beating Oracle by a tiny margin. Ramco was the only other brand that made it to the club in this segment, but falls behind by a wide margin. SAP enjoys highest ToM recall and current brand ownership at 37% and 29% respectively, with Oracle close on its heels.

In the 100-499 employee segment, Ramco has the highest brand loyalty of 75%. For Oracle, despite having brand loyalty lower than others, it can bask upon the fact that 10% of SAP owners are likely to move to Oracle in near future.

Why choose Oracle or SAP for ERP? 80% of SAP's users in 500-1000 employee segment gave product reliability as the key reason, while 82% of Oracle's users gave brand value as the key reason for their having chosen the brand. Product reliability is also the key reason for 71% of the prospects for SAP, while 62% prospects for Oracle quote brand value as the key reason. In the 100-499 employee segment, all of Oracle's existing users stand by it for its reliability, while only 80% stand by SAP for the same reason.



The 100-499 employees segment is dominated largely by local/in-house built ERP software, while there's neck to neck competition between SAP and Oracle in 500-1000 employees segment.



None of the brands enjoy 100% loyalty in this segment, which is surprising considering that ERP requires significant investments, making it difficult to switch to another brand later.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	SAP	60	80	50	30	75	50	17	17
	Oracle	75	100	8	25	54	92	38	23
500-1000	SAP	67	80	43	33	63	71	29	26
	Oracle	82	75	29	18	62	59	38	38

Brand value and product reliability are the key reasons why users opt for either SAP or Oracle ERP.

HRM

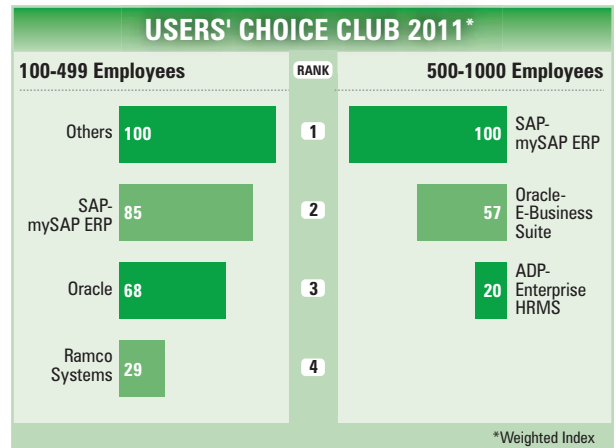
None of the brands emerge as winners in the 100-499 employees segment, and initial price could be the key reason for the same; SAP leads in the 500-1000 employee segment by a wide margin

Like in ERP, none of the HRM brands managed to claim the top spot in the 100-499 employees segment. It's still dominated by local or inhouse brands. The second spot however, is claimed by SAP's mySAP software, followed by Oracle and Ramco Systems in that order. Here, we'd like to add that Oracle's score is a combination of scores for all of Oracle's acquired companies, viz. JD Edwards, Peoplesoft, and Oracle's own e-Business suite. It's praiseworthy that these brands still retain their distinct identities even after so many years. We have reported brand loyalty separately for these brands though.

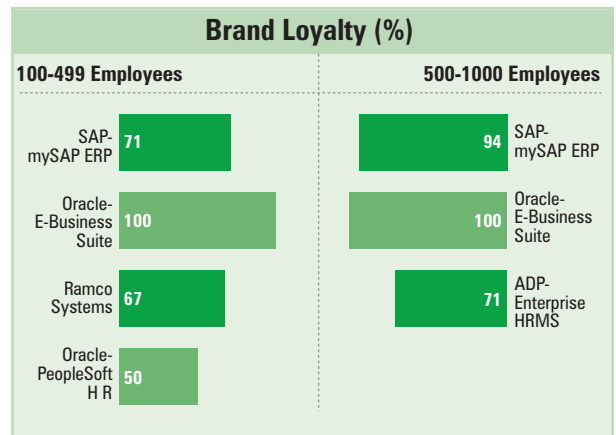
In the 500-1000 employees segment, SAP's mySAP leads the way by a wide margin, leaving runner-up Oracle's e-Business suite far behind, and Automatic Data Processing's HRMS even more further behind on the third spot. SAP's mySAP enjoys highest top of mind recall, current brand ownership and brand loyalty relative to other HRM brands, but it needs to be watchful of Oracle, because its e-Business suite recorded the highest shift-ins from other brands.

Coming to brand loyalty, Oracle's e-Business suite enjoys 100% brand loyalty in both segments. SAP's mySAP had the second highest brand loyalty in 100-499 employees at 71%. The good thing is that the remaining 29% of SAP's existing mySAP users weren't sure which brand would they switch to in the future. So SAP needs to work on holding onto its customers more tightly. Likewise in 500-1000 employees segment also, mySAP has second highest brand loyalty at 94%, with the remaining 6% of its existing users likely to switch to Oracle E-Business.

Why choose Oracle or SAP's HRM software? 86% of SAP's existing users vouch for its brand value and product reliability, in the 100-499 employee segment. A majority of Oracle's existing users quote brand value as the key reason.



Local players/inhouse HRMS dominates the 100-499 employees segment, and mySAP dominates the 500-1000 employees segment.



Oracle's E-Business Suite is the only brand in this category to enjoy 100% brand loyalty. Moreover, some switchovers are also likely to Oracle from other brands.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	SAP - mySAP ERP	86	86	29	29	75	75	8	17
	Oracle - E-Business Suite	89	78	0	0	89	78	0	0
500-1000	SAP - mySAP ERP	87	90	26	39	77	81	10	32
	Oracle - E-Business Suite	80	100	27	53	57	95	19	33

While brand value and product reliability top the reasoning for choosing Oracle and SAP's HRMS offerings, initial price continues to nag the users of this segment. Possibly a re-look at the pricing by these two brands could sway the sentiments in their favor from the local players.

Network Infrastructure Management

IBM's Tivoli is the undisputed leader in this domain with HP's OpenView following at a distant second.

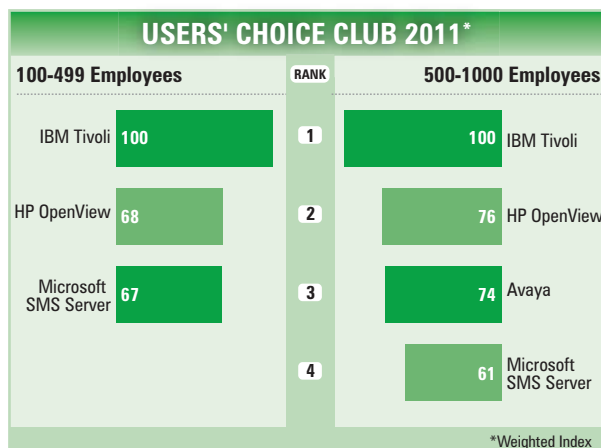
The Users' Choice Club 2011 for this category has three entrants, viz. IBM Tivoli, HP OpenView and Microsoft SMS Server in both the 100-499 and 500-1000 employee segments. Analyzing the 100-499 employee segment, it is IBM Tivoli that comfortably leads over HP OpenView and Microsoft SMS Server, which are at second and third place respectively, separated by a very small margin.

Upon asking our respondents about the prime factor when deciding a particular brand for current purchase and future purchase, we found 67% of IBM Tivoli owners saying they considered both brand value as well as product reliability as key factor. Meanwhile, 73% of respondents considering to buy HP OpenView in near future said they considered after sales/services as the prime factor that influenced their decision.

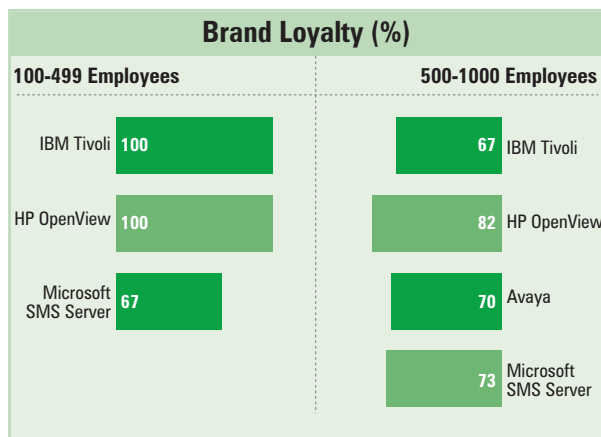
Coming to brand loyalty, both HP OpenView and IBM Tivoli have cent percent brand loyalty amongst their respondents, while Microsoft SMS server had 67% brand loyalty.

Moving onto 500-1000 employees segment, Avaya dislodged Microsoft SMS Server from the third position. The top two members of the Club remain as IBM Tivoli and HP OpenView respectively. Microsoft SMS Server slips to fourth in this segment. Though HP OpenView has the highest brand loyalty of 82%, it also has highest shift-ins from other brands. 5% of current Avaya owners and 7% of MS SMS Server owners are likely to move to HP OpenView in the near future.

The interesting thing for all top four brands is that almost 20% of their current brand owners are still undecided, therefore these brands have opportunity to retain them. When we asked respondents for reasons influencing their future purchase, 83% of respondents, considering IBM Tivoli, vouched for product reliability as prime factor. While 85% of respondents considering HP OpenView said brand value is of prime importance when considering a future brand purchase.



IBM Tivoli emerged as the winner while HP OpenView followed at second place in both the segments.



In SME segment both IBM Tivoli & HP OpenView have 100% brand loyalty. However, brand loyalties are shaky in larger enterprises.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	IBM Tivoli	67	67	33	33	80	80	20	40
	HP OpenView	0	89	67	56	82	64	18	73
500-1000	IBM Tivoli	73	80	33	33	78	83	33	22
	HP OpenView	73	45	18	55	85	69	31	38

Brand value and product reliability came as top two reasons influencing purchase decision in 500-1000 segment. While in 100-499 segment, people planning to buy HP OpenView considered after sales/support as key influencer.

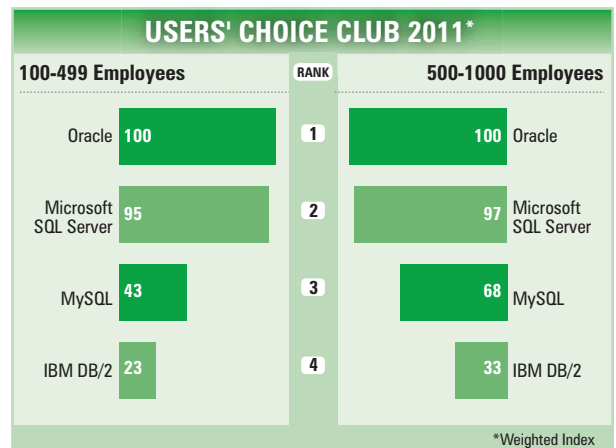
RDBMS

Oracle and right at its tail Microsoft SQL Server are the two database engines that have the highest brand perception amongst our respondents' mind-space

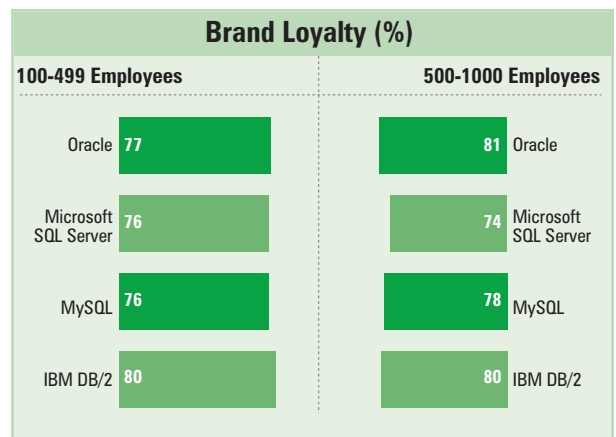
This is another category without any surprises as far as the winning brand is concerned. Oracle continues to top the Users' Choice charts in both segments. A point to note however is that the remaining brands that made it to the club follow the exact same order in both survey segments. MS SQL Server is runner up, and close on Oracle's heels. It's followed by MySQL and IBM DB/2, both of which trail behind by significant margins.

In the 100-499 employee segment, Microsoft SQL Server enjoys highest ToM (top of mind) recall amongst 40% of the users surveyed, current brand ownership of 46% and brand loyalty of 47%. However, it was Oracle that had the highest shift-ins, from other brands. This is made more clear by analyzing the brand loyalty scores in this segment. IBM DB/2 enjoys the highest brand loyalty of 80%, while the remaining 20% of its users are likely to shift to Oracle. Similarly, 5% of MySQL and 2% of MS SQL Server's current owners also said they were likely to move to Oracle in near future. Hence Oracle enjoys the highest shift-ins in this segment amongst the other brands in this category.

Moving to 500-1000 employees segment, the story changes a little bit. It is Oracle here that enjoys the highest ToM recall of 38% amongst the survey respondents. But it was Oracle and MS SQL Server that had equal brand loyalty of 34% and shift-ins of 11% each relative to other brands in the category. Therefore MS SQL Server has been able to give tough competition to the segment winner Oracle. On the brand loyalty front, Oracle enjoys 81% loyal customers, which is the highest amongst our respondents, followed closely by IBM DB/2 at 80%. Here again, 10% of IBM DB/2's users said they were likely to shift to Oracle in the near future while remaining 10% remained unsure.



Interestingly, all four brands follow the exact same order across both segments, something we've not seen in the other categories.



IBM DB/2 enjoys the highest brand loyalty in 100-499 employee segment, while in 500-1000 segment it closely matches brand loyalty of Oracle's current users.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Oracle	86	86	32	27	70	78	13	17
	Microsoft SQL Server	63	83	35	9	60	83	29	9
500-1000	Oracle	67	91	30	37	63	81	16	33
	Microsoft SQL Server	68	83	47	30	64	64	23	38

Amongst current users, Oracle scores over MS SQL Server in product reliability and after sales service/support across both segments, while in future prospects, there's a tooth and nail battle between the two. Users also consider Oracle to be more expensive than MS SQL Server.

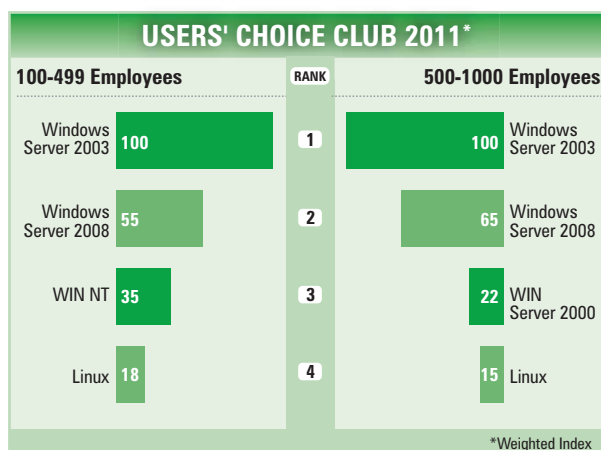
Server OS

Windows dominates the landscape completely, and interestingly, still enjoys very loyal users even for its outdated OS editions like Win NT and 2000 Server

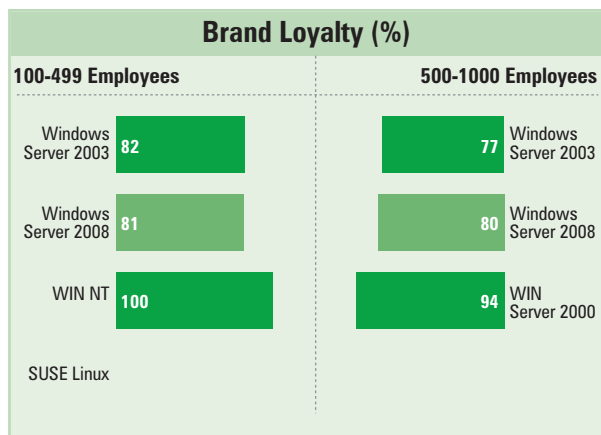
Like the desktop OS category, the server OS category is also predominantly ruled by various versions of Windows. Across both segments, Windows Server 2003 emerged as the winner, and it's even ahead of its successor Windows Server 2008 by a huge margin. The interesting thing we found here was that amongst 100-499 employee organizations, there are still a lot of users that are using the outdated Windows NT OS. This is possibly because many companies are still running their legacy apps on these servers and are therefore not upgrading to newer versions. Another startling fact is that barring SUSE Linux, none of the other Linux distros received sufficient votes individually to make it to the Users' Choice club. We have therefore combined their votes to provide an idea of the mindshare commanded by Linux in the server OS market.

In the 100-499 employee segment, Windows Server 2003 enjoyed the highest top of mind recall amongst 50% of all the survey respondents. However, Windows NT had the highest current brand ownership of 60% amongst the respondents. Not only that, Windows NT is the only OS to enjoy 100% brand loyalty, despite being an outdated OS. Windows Server 2003 commands 82% brand loyalty, with 7% of its existing users likely to shift to Windows Server 2008. This is good for MS, but not definitely better.

In the 500-1000 employees segment, Windows 2000 Server stood third in the Users' Choice Club this year. Windows 2003 Server once again enjoys the highest ToM at 50%, a current brand ownership of 56% and brand loyalty of 77% relative to other brands in the segment. It was Windows server 2008 that enjoys the highest shift-in, 39% of the users from other brands are likely to shift in to it. Windows 2003 Server, despite being a winner, had the lowest brand loyalty of 77% in this segment, with 11% of its users likely to move to Windows Server 2008 in near future.



Different versions of Windows completely dominate user mind share in this space.



While Win NT, an outdated OS enjoys 100% brand loyalty in SME segment, Win Server 2000 enjoys the highest brand loyalty in large enterprise segment.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Windows 2003 Server	82	73	39	32	73	73	58	26
	Windows Server 2008	78	91	28	25	72	58	25	25
500-1000	Windows 2003 Server	74	91	42	29	72	58	24	26
	Windows Server 2008	88	82	46	42	73	75	33	40

Windows 2003 Server still scores over Windows Server 2008 amongst 100-499 employees segment on most of the reasons for using or likely shifts. Users in large have gradually begun accepting Windows Server 2008 over Windows 2003 Server.

Data Backup Solution

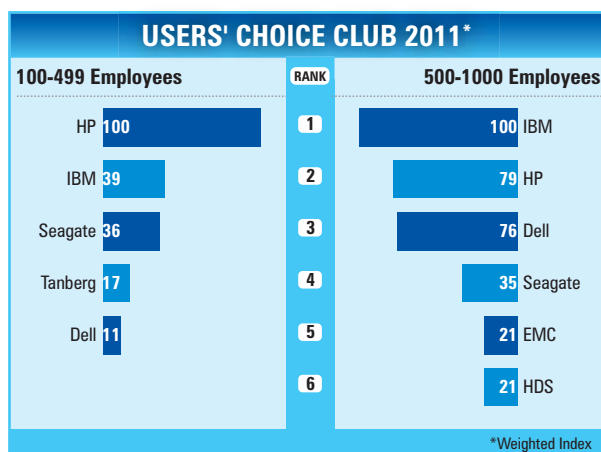
While HP and IBM swap positions for the top spot across both employee segments, we found top of mind recall for brands to be pretty low overall for this category

There's no unity on the winning brand amongst the two employees segments in this product category. While HP is the favorite IT brand in the 100-499 employees segment, it is IBM that enjoys the top spot in the 500 to 1000 employees category. Other prominent contenders include Seagate and Tandberg in 100-499 employees space and Dell, Seagate, EMC, and HDS in 500-1000 employees category.

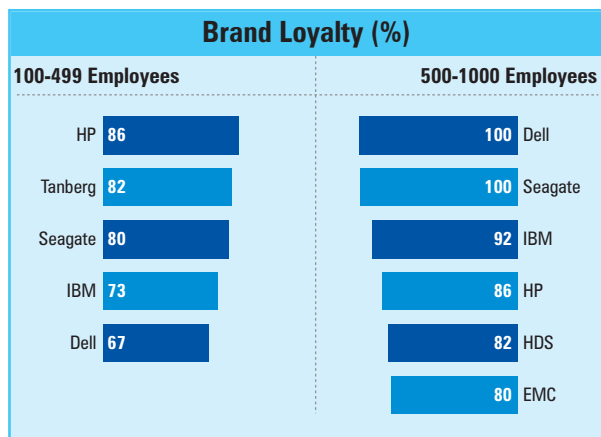
Interestingly, the top of mind recall for data backup hardware is pretty low in both employee segments, with less than 50% of the respondents being able to even recall data backup hardware brands. Having said that, in the 100-499 employees category, HP enjoys the highest ToM recall at 43%, followed by IBM at 17%. In the 500-1000 employees segment, HP enjoys ToM recall amongst a mere 29% of the respondents, followed closely by IBM at 26%. EMC understandably enjoys very low brand recall, because it is a recent entrant in the small and mid-sized enterprise segments. Dell's situation is similar to EMC's.

In the 500-1000 employees space, current owners HP and IBM quote brand value (70% and 84%, respectively) and reliability of product (78% each) as key reasons for making their choice. These are the two key reasons for future likelihood of purchase of these two brands as well. The situation is similar in the 100-499 employees segment. Votes for current ownership as well as future likely purchase remain at less than 50% for initial price and after sales and support.

Coming to brand loyalty, Dell and Seagate enjoy 100% brand loyalty in 500-1000 employees segment, followed by IBM at 92%, and HP at 86%. Some of the respondents currently using HP said that they were likely to shift either to Dell or IBM. In the 100-499 employees segment, HP enjoys 86% brand loyalty, followed by Tandberg closely at 82%.



IBM enjoys greater mind-share amongst larger organizations, while HP enjoys the same in smaller ones.



Brand loyalty is generally high in this segment for all brands, but neither HP nor IBM enjoys 100% brand loyalty in either segment.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	80	82	36	57	78	73	37	41
	IBM	73	82	23	18	60	65	20	25
500-1000	IBM	84	78	27	35	67	75	25	39
	HP	69	78	47	44	86	78	22	39

Brand value and product reliability are the two key reasons voted by the respondents for currently using or choosing HP and IBM in the future.

Enterprise Security

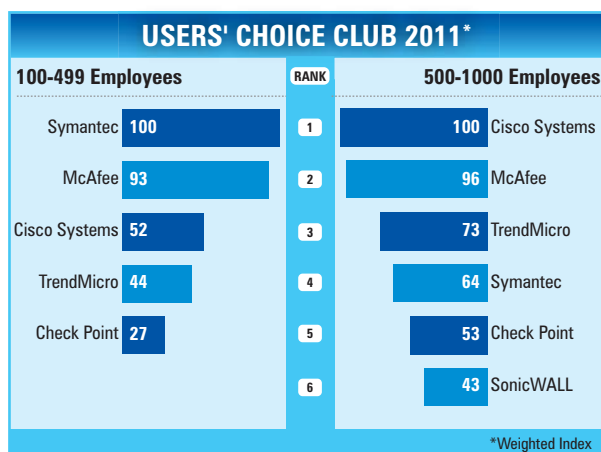
With almost a score of competing brands in the category, Cisco Systems and Symantec emerge winners in 500-1000 and 100-499 employees segments respectively. McAfee is a close second in both categories

This category is competitive vindicated by the presence of a score of brands contesting for Users' Choice Club this year—Symantec, McAfee, Cisco Systems, Checkpoint, Trend Micro, and SonicWALL. We have different winners in each category—Cisco reigning supreme in the 500-1000 employees segment, while Symantec sitting on the top spot in the 100-499 employees. Interestingly, McAfee is not only sitting in the runner-up spot, but also giving a tough fight to both winners because it's not too far behind them.

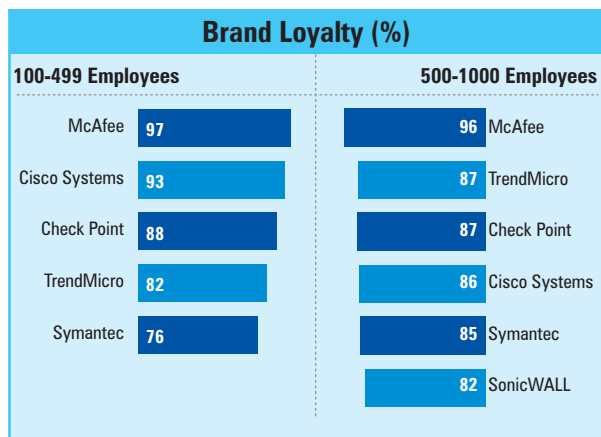
On the brand loyalty front, most members of the Users' Choice Club have more than 85% loyal customers. In fact, McAfee enjoys the highest brand loyalty amongst its users in both segments. Symantec and Trend Micro are the only two exceptions with 76% and 82% brand loyalty in the 100-499 employee organizations. In this segment, some of Symantec's existing users said they were likely to switch to Check Point, Cisco, and McAfee. In case of TrendMicro, the biggest threats were Symantec and McAfee.

Brand value is the key reason given by 73% of the users currently using Symantec in the 100-499 employee organizations, while 77% of the users who are likely to go for Symantec in the future give product reliability as their key reason. McAfee on the other hand scores on brand value amongst a majority of its existing users in the 100-499 space, and the same reason was given by 78% of the users who were likely to buy McAfee security products in the future. Cisco Systems on the other hand is encasing on its brand value both amongst its existing users as well as future prospects.

In the 500-1000 employee segment, 71% of existing users of Cisco Systems quoted brand value as the key reason for doing so, followed by 64% votes going in Cisco's favor for its reliability and after sales service/support.



Security is a competitive market with closely competing brands. McAfee seconds close to winners, Symantec and Cisco.



McAfee enjoys highest brand loyalty in both segments, followed by Cisco in SMEs & TrendMicro/Check Point in large enterprises.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Symantec	73	68	41	37	60	77	23	23
	McAfee	73	87	30	33	78	61	11	42
500-1000	Cisco Systems	71	64	50	64	32	58	42	58
	McAfee	85	81	50	50	75	79	32	36

Brand value and product reliability are key reasons for choosing the top brands, but in case of Cisco, after sales support/service is also a key reason amongst many respondents.

Structured Cabling

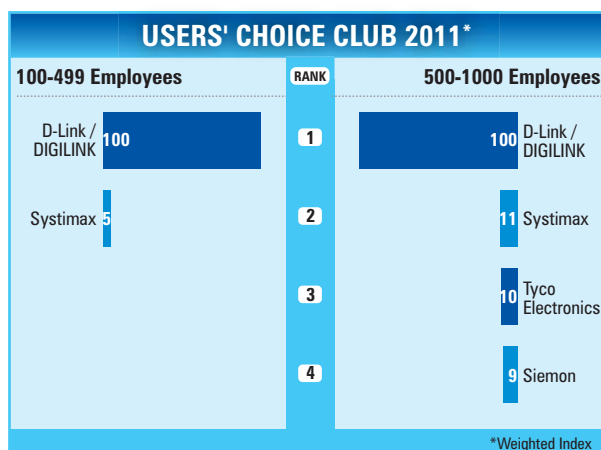
D-Link/DIGILINK continues its winning streak across categories. Systemax, Tyco Electronics and Siemon join the club but do not pose a stiff competition to the winner.

D-Link/DIGILINK continues to be the favorite brand across both categories, leaving all other brands far behind. Systemax was the only other brand that managed to make it to the club in the 100-499 employee category, while the 500-1000 employee enterprise segment had two other brands—Tyco Electronics, and Siemon.

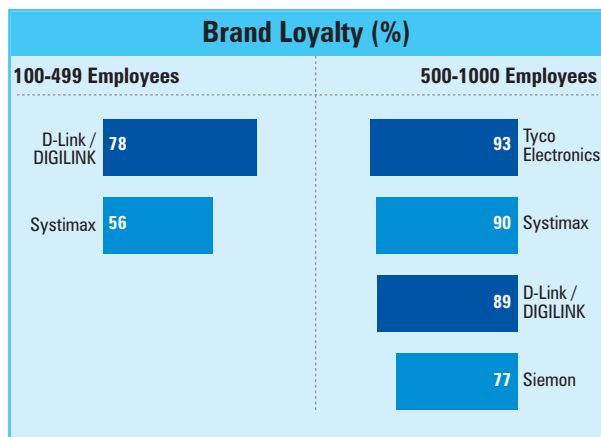
D-Link/DIGILINK sweeps the segment across all parameters, be it top of mind recall, current ownership, or future preference. Interestingly though, we didn't see 100% brand loyalty in this segment, as one would expect in this segment, since structured cabling is something that lasts many years. Even the winner D-Link/DIGILINK had 78% percent current users who were unlikely to shift in the 100-499 employee segment. Of the remaining 22%, 9% were likely to shift to other brands, while the remaining 13% weren't sure which brand they would shift to. In 500-1000 employee category as well, the winning brand had 89% brand loyalty.

Systemax had much lower brand loyalty in the 100-499 employees segment, with only 56% of its existing customers saying they'll stay with the brand. Others either didn't know which brand to shift to, or said that they were likely to move to D-Link/DIGILINK. In the 500-1000 employees category, Tyco enjoys the highest brand loyalty followed by Systemax. Interestingly, the users who were likely to shift out of both Tyco and Systemax said they would move to D-Link/DIGILINK.

In the 100-500 employee enterprises, existing users of D-Link/DIGILINK gave product reliability as the key reason for using the brand, and 76% of users that were likely to shift to it also gave the same reason for their shift. In 500-1000 employee enterprises also, a majority of D-Link/DIGILINK's users gave reliability as the key reason, while for Systemax, the key reason was brand value. This is not surprising because Systemax is a very old and established brand.



D-Link/DIGILINK is the brand of choice, completely overshadowing the other brands by a wide margin.



Most respondents who are likely to move out of other brands said that they would move to D-Link/DIGILINK.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	D-Link / DIGILINK	67	77	38	23	71	76	26	18
	Systemax	78	67	22	0	100	80	20	0
500-1000	D-Link / DIGILINK	70	80	41	32	65	66	34	31
	Systemax	90	80	60	10	91	64	9	9

While D-Link/DIGILINK is used for its reliability by its current and prospective future customers, it is brand value that the runner-up brand Systemax is more well-known for.

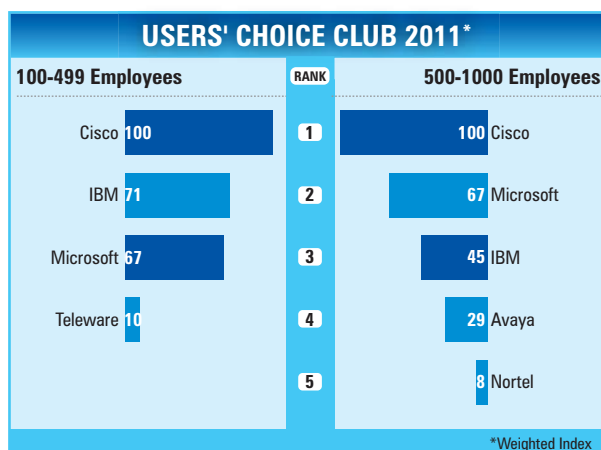
Unified Communication

Cisco reigns supreme across both employee categories, while Microsoft and IBM fight for the second and third spot

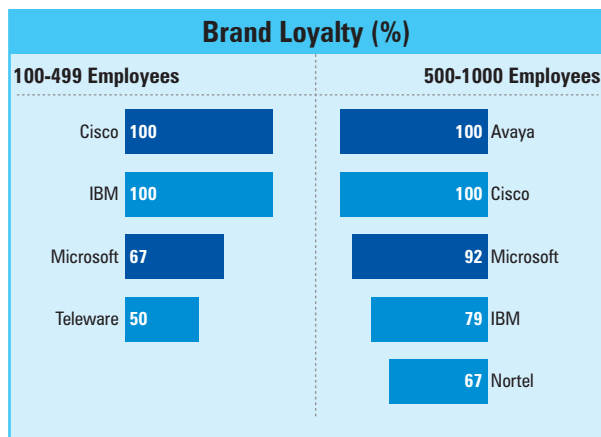
Unified Communication isn't something for the big boys only, even small and mid-sized enterprises in India use it or are actively considering to use it. This result came across very clearly from our survey's findings. In fact, Cisco enjoys the top spot in this space with a significant lead over others, followed by IBM in the 100-499 employees segment and Microsoft in the 500-1000 employees segments. Other key players in this segment that managed to make it to the Users' Choice club include Teleware, Avaya and Nortel.

Both Cisco and IBM enjoy 100% brand loyalty from its existing users in the 100-499 employee segment. Microsoft's brand loyalty in this segment is a concern at only 67%, with 17% respondents likely to shift to IBM, and another 17% not sure where to shift to. Teleware enjoys 50% brand loyalty, and the remaining 50% of its customers are likely to switch to Microsoft. In 500-1000 employee segment, Avaya and Cisco enjoy 100% brand loyalty, followed closely by Microsoft at 92%. IBM's brand loyalty is at 79% with 7% of its existing users likely to switch to Cisco, and the remaining were not sure which brand to switch to.

86% of users who are currently using Cisco's UC solutions in the 100-499 employees space gave brand value as the primary reason for the choice. 80% of those who're likely to choose Cisco in the future also gave the same reason for their choice. In case of IBM, things are a little more interesting. 75% of the respondents currently using IBM's UC gave all three—brand value, product reliability, and after sales service/support as the key reasons. Nobody gave initial price as the key reason for choosing IBM. For the future, users said they're likely to use IBM primarily for its reliability, followed by brand value. In the 500-1000 employees space as well, brand value and product reliability are the two key reasons that emerged for using/choosing Cisco and Microsoft.



Cisco enjoys a significant lead over others, while Microsoft and IBM swap the second and third spot across the two employee segments.



Cisco is the only brand in this segment to enjoy 100% brand loyalty amongst its existing users across both employee segments.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Cisco	86	43	43	43	80	50	30	60
	IBM	75	75	0	75	86	100	14	29
500-1000	Cisco	63	81	31	25	53	68	21	37
	Microsoft	67	67	17	42	79	64	29	14

Product reliability and brand value are the key reasons for current usage/future likelihood of purchase for all the top brands in this segment.

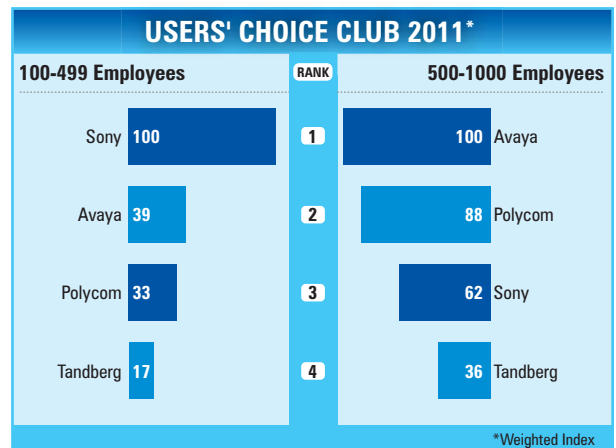
Video Conferencing

Sony leads in the 100-499 employee segment by a wide margin, while Avaya is the winner in organizations having 500-1000 employees, with Polycom close on its heels

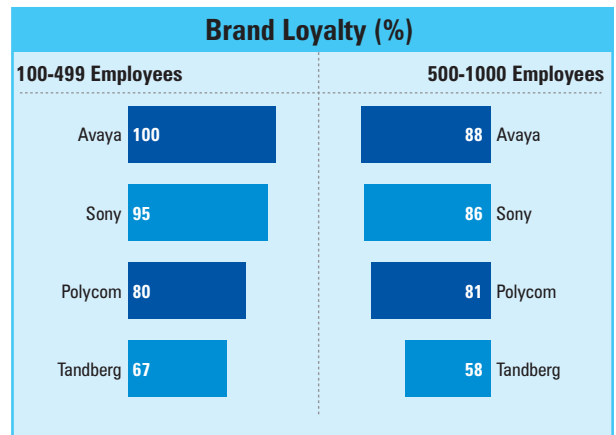
We have different winners in each of the two employee segments in this category. While Sony dominates the prestigious Users' Choice club in the 100-499 employees segment, it's Avaya that reigns supreme amongst enterprises with 500-1000 employees. Avaya is also a runner-up in the smaller organizations segment, while in the larger organizations, Polycom takes the runners-up position. The fourth brand that made it to the club is Tandberg, which trails at the fourth spot in both segments.

Amongst 100-499 employees enterprises, both Avaya and Tandberg enjoy 100% brand loyalty amongst their existing users, with Sony close behind at 95% brand loyalty and Polycom at 80%. In the 500-1000 employees organizations, Avaya enjoys 88% brand loyalty, and the remaining 12% of this brand's users not sure which brand to switch to. Sony enjoys 86% brand loyalty in this space, with 10% of its existing users likely to switch to either Avaya or Lifesize. Polycom is at 81% brand loyalty and faces a bit of competition from Avaya and Tandberg, as some of its users said that they were likely to switch to these two brands. Lastly, Tandberg had 58% brand loyalty, with the maximum shift likely to happen to LifeSize.

Coming to reasons for choosing the top three brands, Sony, Avaya, and Polycom, we found that all users who were currently using Avaya in 100-499 employee organizations said they were using it for its brand value and product reliability. 100% of the users who were likely to choose Avaya in the future said they would for its brand value, and surprisingly, another 100% votes also went for its after sales service and support. In the 500-1000 employee segment, 83% of existing Avaya users voted for its brand value, while 93% who were likely to go with Avaya in the future gave product reliability as the key reason. Those who prefer Polycom use it or are likely to buy it for its reliability.



Sony dominates the 100-499 employee segment, while Avaya and Polycom fight a tough battle in the 500-1000 employee space.



All brands except Tandberg enjoy high brand loyalty, with a majority of their existing users unlikely to switch to other brands.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Sony	79	37	37	26	83	57	30	22
	Avaya	100	100	0	50	100	33	33	100
500-1000	Avaya	83	79	33	29	72	93	31	38
	Polycom	85	89	30	22	72	79	24	24

All of Avaya's existing users amongst organizations with 100-499 employees said they were using it for its brand value and product reliability. For the future, all of them gave after sales service and support as the key reason, followed by product reliability.

DR and BCP

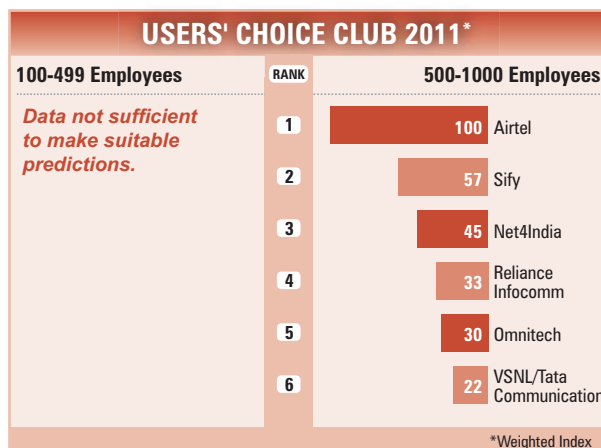
Airtel scores by a fair distance over its rivals to top the Users' Choice Club. Brand loyalties run very high across the board, possibly due to intense competition

There's no winner in the 100-499 employee segment in this category as there weren't enough responses. In the 500-1000 employees category, Airtel leads by a fair margin, followed by Sify, Net4India, Reliance Infocomm, Omnitech, and VSNL in that order. The top two brands in the User's Choice club enjoy similar ToM recall percentages, 28% for Airtel and 25% for Sify.

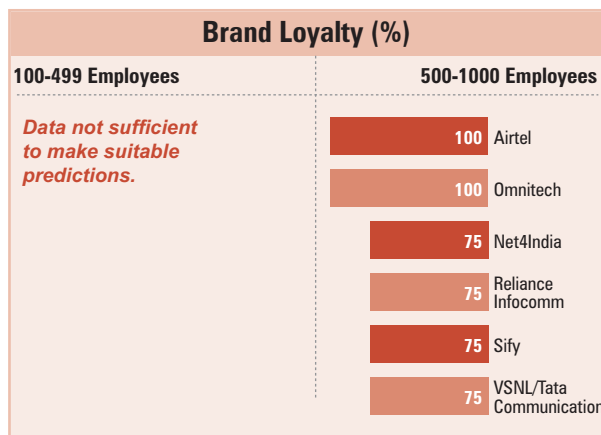
Brand loyalties in this segment are very high across the board, with 100% of respondents who currently use Airtel and Omnitech's services saying they're likely to stay with them in the future also. Remaining brands enjoyed 75% loyalty.

A further break up of the results reveals that the respondents who currently own Airtel quote brand value, reliability, and good after sales/service as the key reasons. Those who currently own Sify quoted brand value and reliability as the key reasons. 64% the respondents who're likely to use Airtel in the future quoted brand value as the key reason, while another 55% gave reliability as the key reason. Sify was slightly better off here, with 78% who were likely to shift quoting brand value as the reason, and another 78% quoting reliability.

Interestingly, price is not a key criteria while going for a DR and BCP solution, because very few respondents gave initial price as their reason for shifting (for Airtel and Sify). This is logical because you require a good brand name and reliability in a DR and BCP solution.



Airtel wins hands down but the race for the second spot is pretty tight.



Brand loyalties run very high, possibly due to vendors taking good care of their customers.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499		<i>Data not sufficient to make suitable predictions.</i>							
500-1000	Airtel	80	80	40	80	64	55	18	45
	Sify	88	88	25	50	78	78	0	56

Brand value and product reliability are seen as the key reasons for both Airtel and Sify's current customers. However, Airtel gets better ratings for its after sales support. Against future brand preference, Sify is getting better response in terms of brand value and reliability of its products and also its after sales support.

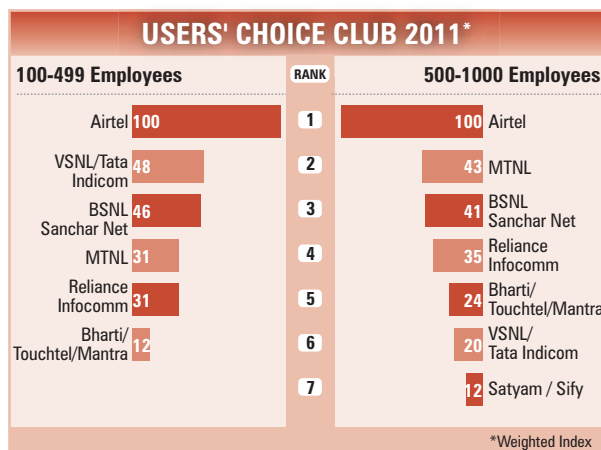
Internet and WAN Connectivity

Not surprisingly, Airtel dominates both segments and by a fair distance. The category has many competitors though with some interesting trends being forecast

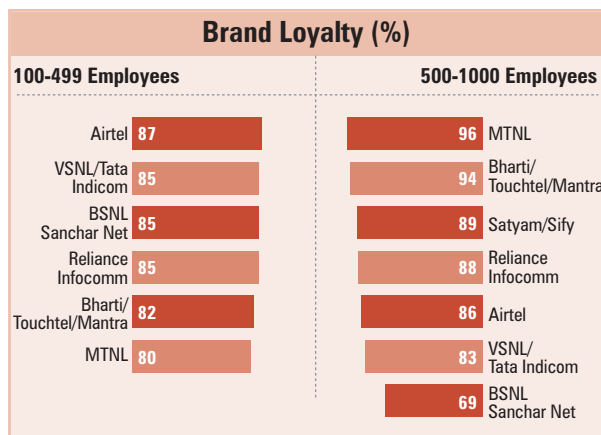
An Airtel story across both segments—100-499 and 500-1000 employee-organizations—and it duly tops the Users' Choice Club for this category. The second spot in the 100-499 segment is taken up by VSNL/Tata Indicom but it has a lot of catching up to do with the leader. Moreover, it faces stiff competition from BSNL. Reliance Infocomm and MTNL make up the rest of the pack. In the larger segment, the race for the second spot is a little more tight with MTNL topping BSNL and Reliance Infocomm. The brand loyalties are very high across both segments, possibly due to intense competition.

Further, within the 100-499 segment, Airtel enjoys the the highest ToM (top of mind) recall of 37% amongst all users. What's even more heartening for the brand is that 53% of users of other brands are likely to shift to it in the near future. The combined ToM recall for BSNL and MTNL is also a healthy 31%. But they share a concern with just 6% of other users likely to move to their services in future. Reliance fares better here as with a ToM recall of just 9% it can still expect 18% new customers in the near future. The scenario remains the same for all brands in the 500-1000 segment and Airtel even betters its performance with 64% likely to shift to it.

Dwelling on the reasons for current brand ownership within the 100-499 segment, Airtel's gets more votes for its brand value as compared to VSNL/Tata Indicom. However, the latter scores more for its after sales support. The scenario in the 500-1000 segment shows Airtel getting more votes in brand value over MTNL and also better ratings for its after sales support. Now looking at future preferences, users in the 100-499 employee segment are likely to prefer Airtel again for its brand value and better initial pricing. However, those likely to choose VSNL/Tata Indicom shall do so for better reliability of its products.



Airtel is the leader of the Users' Choice Club in both segments, and by a fair distance.



Brand loyalties run very high; looks like the competition is keeping vendors on their toes!

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Airtel	85	79	35	44	72	67	33	30
	VSNL/ Tata Indicom	55	85	48	61	52	81	16	52
500-1000	Airtel	72	83	47	61	51	76	38	38
	MTNL	92	85	19	19	63	74	22	37

The reason for choosing Airtel, currently as well as for future, in both segments, is predominantly its brand value. Interestingly, VSNL/ Tata Indicom and MTNL are quoted more for reliability of their products.

Application

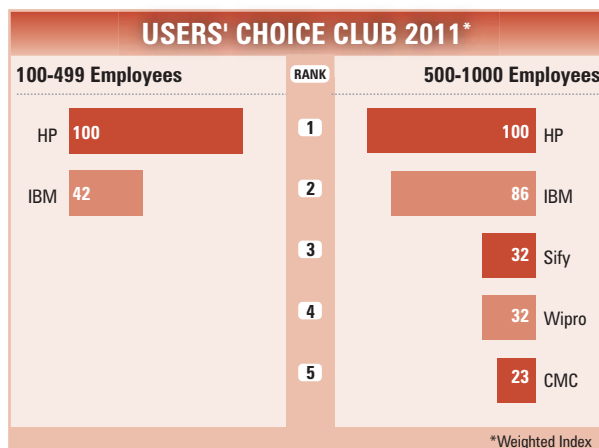
HP dominates both the 100-499 and 500-1000 employees segments. And though there is only IBM for company in the smaller segment, the larger segment is more fragmented

In both the SME and mid-to-large organizations, HP rules the roost here followed by IBM. The other key players, in the mid-to-large segment are Sify, Wipro and CMC, in that order. However, there's a big scope for others to gain a foothold in the SME space, as HP and IBM are the only two competitors right now.

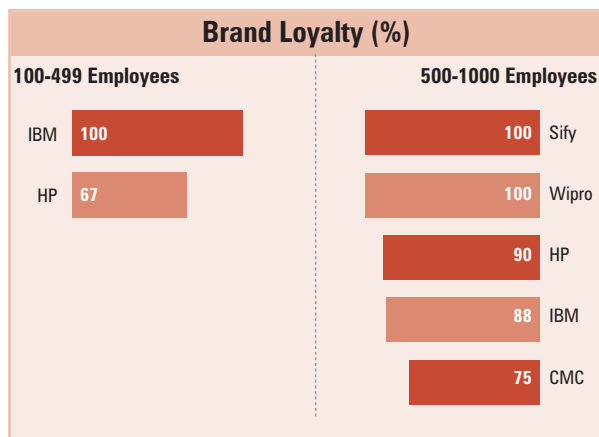
HP enjoys 100% brand loyalty in the SME space, meaning all respondents currently using HP's services are likely to remain with it in the near future also. IBM's brand loyalty stood at 67%. In the mid-to-large segment, that advantage is enjoyed by Sify and Wipro, followed closely by HP and IBM at 90% and 88% respectively.

When we drilled into the reasons for current ownership, 83% of HP's customers in the SME segment chose it for brand value that it carries, while the figure dropped to 50% for IBM. But the tables turned when reliability of product was discussed. Here, HP got only 67% vote as compared to 100% for IBM. In after sales support also, IBM scored more over HP with the former getting 50% approvals over latter's 33%. While choosing their future products, 85% of those likely to purchase HP are going to do so because of its brand appeal, while the figure drops to 33% for IBM's possible customers. However, 67% of respondent's likely to choose IBM quoted reliability as the key reason, as opposed to 54% for HP. The scenario in mid-to-large segment is somewhat similar. Here, the respective percentages for HP and IBM for current ownership because of the brand's value are 90 and 75 respectively, while reliability of product comes at 50% and 63% respectively.

However, initial price of the solution is an important consideration for this segment as 40% of HP's and 50% of IBM's customers chose the two for this reason. Nothing much to separate them in after sales support though.



HP tops the club by a wide margin in the 100-499 segment. However, there is more competition to its No. 1 spot in the larger segment.



Brand loyalties run pretty high in the 500-1000 employees segment, despite stiff competition, which shows the stronghold vendors have over their customers.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	83	67	17	33	85	54	15	15
	IBM	50	100	0	50	33	67	0	33
500-1000	HP	90	50	40	60	87	67	13	53
	IBM	75	63	50	50	79	86	21	71

In 100-499 employee enterprises, while HP plays on brand value, IBM leads in product reliability as the key reasons why users are likely to opt for these two brands. The customers likely to choose HP or IBM in future also quote the same reasons for their choice, although HP scores better on after sales support.

Data Center

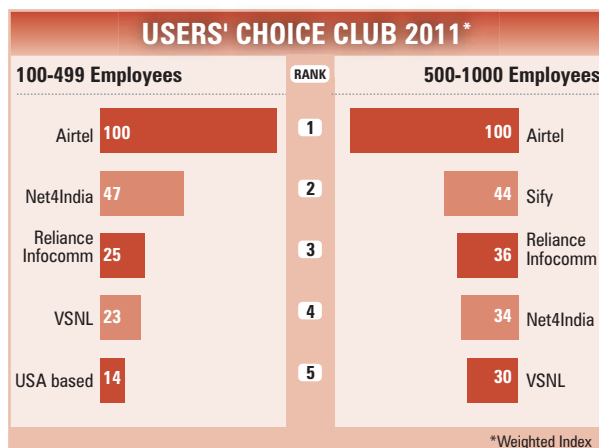
This is one category where more traction is expected in the 500-1000 employees space as these organizations are more likely to outsource their data center requirements

While Airtel tops the Users' Choice Club for both 100-499 and 500-1000 employee segments, there is a tussle between Net4India and Sify for the 2nd spot. The former seems strong in 100-499 segment while the latter follows the leader in the other segment. This is one category where more traction is expected in the 500-1000 space as these organizations are more likely to outsource their data center requirements. This might partially explain Sify's absence from the Users' Choice Club in the 100-499 segment. Reliance Infocomm is a consistent 3rd across both segments while VSNL and Net4India slip positions in the 500-1000 segment.

An interesting trend emerges in terms of brand loyalty in the 100-499 segment, where the top three—Airtel, Net4India and Reliance Infocomm enjoy 100% loyalty from their customers. This means all respondents who were using their services said they're likely to stay with them in the near future. However, the picture is not that rosy in the 500-1000 segment as only Airtel is expected to have that luxury in the near future. The other two, Reliance Infocomm and Net4India are likely to enjoy 75% brand loyalty.

When quizzed further on their current and future brand preferences, those currently using Airtel in the 100-499 segment vouched for it comprehensively for its brand appeal, reliability and after sales support. The approvals for future preference for Airtel are similar except that it got just 26% for after sales support. So Airtel needs to change its impression on after sales support.

Amongst current users in the 500-1000 segment, Airtel scores 88% for brand value as compared to 63% for Sify. Both score at par for reliability but after sales support is one area where Sify gets near perfect approvals from its current users. Some concern for Airtel here!



Airtel leads by a wide margin with the second spot being tightly contested by others in both segments.



Exceptionally high brand loyalties in this space for so many players is possibly a result of a highly competitive landscape.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	Airtel	75	88	25	63	79	68	32	26
	Net4India	43	100	43	29	67	67	44	11
500-1000	Airtel	88	75	25	25	79	71	21	14
	Sify	63	75	25	88	64	55	18	64

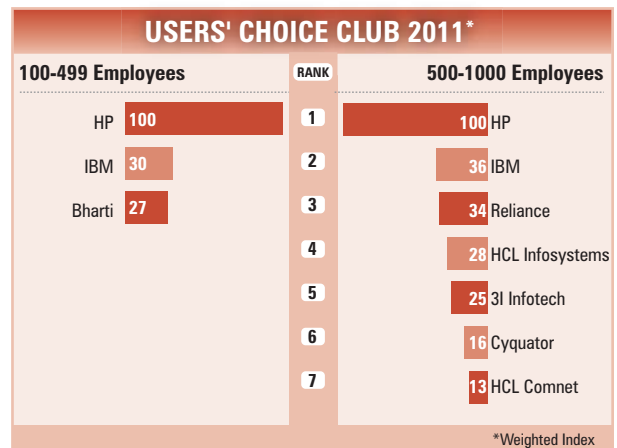
Airtel gets good number of votes for its brand value and reliability of its products across both segments. Sify gets better ratings for its after sales support.

Networks

A highly competitive segment overall with a plethora of players, which is currently ruled by HP, with others trailing far behind

HP rules the roost in this segment across both sizes of organizations we surveyed, leaving IBM and others far behind by a wide margin. In the 100-499 employee segment, Bharti is the only third brand to have gathered sufficient votes to even enter the Users' Choice club. The 500-1000 employee enterprise segment has small brand presence of numerous other brands, including Reliance, HCL Infosystems, 3I Infotech, Cyquator, and HCL Comnet. In fact, this is one of the few spaces, that has a large number of players. We recorded 24 unique brands and a significant presence of other local players in our survey. In fact, the combined index score of the local players alone is so high that it easily makes them a runner-up in the 100-499 employee segment, and puts them on the third spot in the 500-1000 employee enterprises.

Interestingly, brand loyalties are exceptionally high amongst 100-499 employee enterprises. All three players, viz. Bharti, HP, and IBM enjoy 100% brand loyalty, meaning none of their existing users are likely to switch to any other brand in the near future. In the 500-1000 employee enterprises, only Cyquator and IBM enjoy that honor. HP is at 90% brand loyalty (with remaining 10% saying that they are likely to switch to Bharti), followed by others. Maybe such high brand loyalties exist because the players risk loosing their accounts to competition due to such a highly competitive landscape in this category. Amongst 100-499 employee enterprises, brand value is the key reason why 83% users are currently using HP's network management services, and another 80% are likely to opt for it in the near future for the same reason. IBM's picture is even better, with 100% of its users giving reliability as the primary reason, followed by 50% for brand value and initial price each. The same pattern is visible for those likely to choose IBM in the future.



HP leads by a wide margin in this highly fragmented segment with quite a few players.



Exceptionally high brand loyalties despite a highly competitive landscape is interesting to see in this segment.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	83	50	33	33	80	53	33	27
	IBM	50	100	50	25	50	100	50	25
500-1000	HP	80	60	50	80	55	50	18	50

In 100-499 employee enterprises, while HP plays on brand value, IBM leads in product reliability as the key reasons why users are likely to opt for these two brands. IBM has slightly higher votes than HP in the initial price as well.

Security

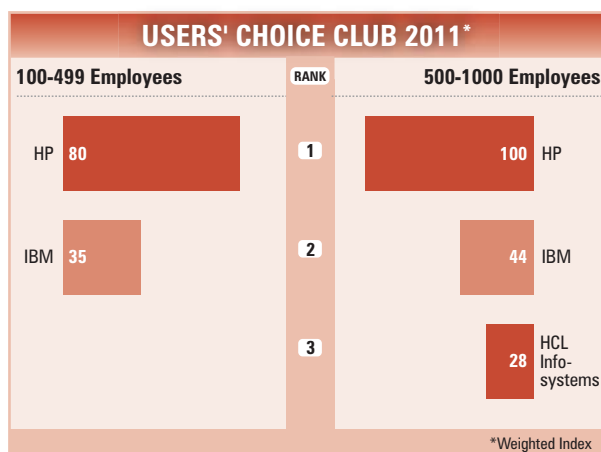
Another highly fragmented space with lots of players and yet poor top of mind recall; HP and IBM continue to hold the top two slots with the former leading by a wide margin

There's a plethora of players in this space as well, similar to managed network services. HP tops this segment as well, with IBM trailing by a wide margin, and only one more player making it to the users' choice club this year—HCL Infosystems at the third spot in the 500-1000 employees category.

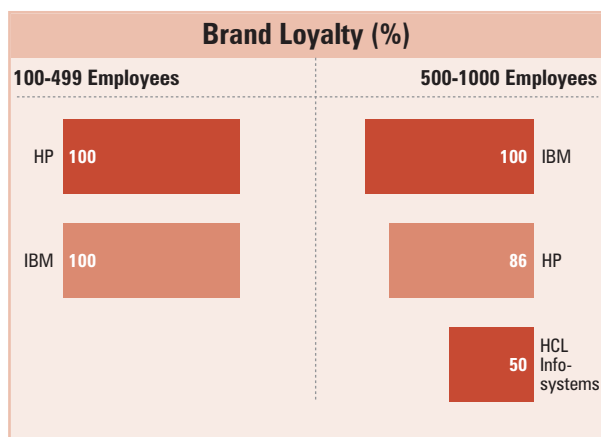
In terms of brand loyalty both HP and IBM enjoy dedicated customers in the 100-499 segment with both scoring 100%. The 500-1000 employee enterprise segment throws up a little more challenge for HP than IBM with its loyalty rating dipping to 86%. HCL Infosystems has more worries though with loyalty ratings of just 50%. The good thing for HCL is that the remaining 50% are not sure which brand to switch to. Top of Mind (ToM) recall is dismally low in this segment, remaining less than 30%, despite having so many players. In the 100-499 segment, only 27% of the respondents could recall HP in ToM recall, followed by IBM at 14%. Similarly, in the 500-1000 employee segment, 22% of the respondents could recall HP as a managed security services provider, followed by IBM at 12%.

Dwelling on the reasons for current brand ownership, 71% of those owning HP in the 100-499 segment cited brand value and reliability as the key reasons. In case of IBM, 100% cited reliability, and 60% gave initial price as the key reason. The 500-1000 segment reverses the scenario completely with HP tipping IBM over in brand value, reliability and after sales support ratings.

The future brand preferences for the 100-499 segment show 63% of HP's likely customers vouching it for brand value while IBM scores just 38% here. Likewise HP scores significantly higher in after sales support at 44% to IBM's 13%. Both score equally as far as reliability of their products is concerned.



There were lots of players whose names came up in this space, and yet only 3 managed to make it to the club.



IBM enjoys 100% brand loyalty amongst its users in both segments, while HP enjoys a similar honor in only one segment.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	71	71	29	57	63	63	13	44
	IBM	20	100	60	40	38	63	25	13
500-1000	HP	86	43	29	57	67	53	47	27
	IBM	100	50	0	75	83	50	0	50

All users who currently use IBM's services cite reliability as the key reason in the 100-499 employee enterprises. 71% of HP's users in the same employee segment cite both brand value and reliability as the key reasons. IBM's pricing seems to be better than HP's in this segment.

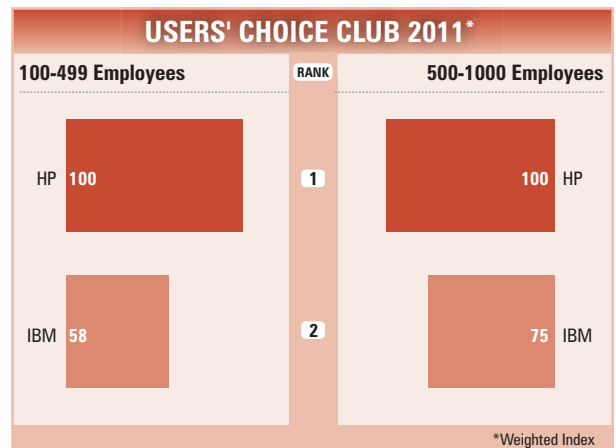
Server

Both HP and IBM enjoy strong brand loyalty in the 100-499 employees segment, however, the larger segment shows HP gaining over IBM

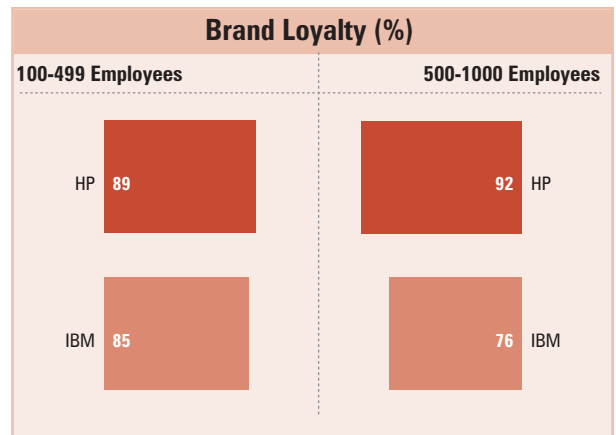
A category, completely dominated by HP and IBM in both the 100-499 and the 500-1000 employee segments. However, HP tops the Users' Choice Club by some distance. While both enjoy similar brand loyalty in the 100-499 segment, its the 500-1000 employees segment where HP gains traction over IBM with ratings of 92% as compared to latter's 76%.

The top of mind recall for HP is also significantly higher at 59% as compared to IBM's 34% in the larger segment. The corresponding figures for the smaller segment are 41% and 24% respectively. So complete is the domination of the two that other vendors don't even touch 10% for this particular parameter. HP has strong mindshare across all four zones—North, East, South and West and all verticals barring one—IT/ITES—in the 100-499 segment. But the competition is more intense in the 500-1000 segment with IBM toppling it in North and South and in IT/ITES, Healthcare and Education verticals.

Coming to reasons for using a brand in the 100-499 segment, HP scores more approval points for brand value at 89% as compared to IBM's 60%. However, product reliability is considered a key reason by 95% of those who said they were currently using IBM's services in this segment. HP stood at 78% for reliability. The scenario remains the same for the 500-1000 segment, except in after sales service/support parameter. Here, approvals for IBM run at 76% as compared to 46% for HP. This is in sharp contrast to the near equal ratings enjoyed by the two for this parameter in the 100-499 segment. Scrutinizing the likely choice of HP or IBM amongst future users, we find contrasting situations for both HP and IBM. In 100-499, HP outscores IBM 81% to 53%, while the scenario reverses in the larger segment, with IBM getting 62% approvals to HP's 47%.



Both HP and IBM dominate in both segments, but HP's lead widens in the smaller segment.



Very high brand loyalties for both, noticeably due to the absence any strong competition.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	89	78	11	56	81	58	15	35
	IBM	60	95	35	55	53	76	29	29
500-1000	HP	77	69	31	46	47	77	23	50
	IBM	71	90	48	76	62	76	29	52

HP gets more votes for its brand value as compared to IBM, but the latter scores more for the reliability of its products. IBM also scores more for its after sales support.

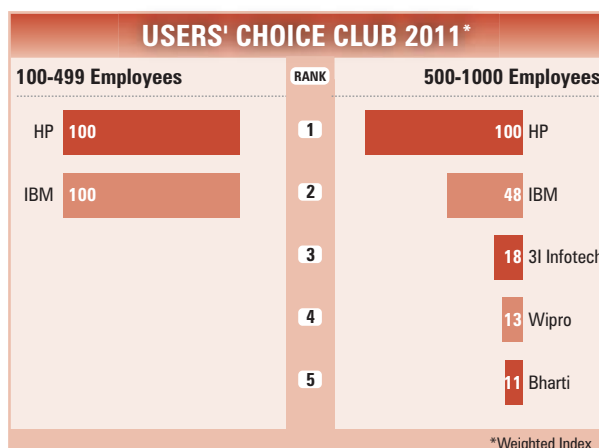
Storage

HP and IBM share the top spot in the 100-499 employees segment, while the former takes away the cake in the 500-1000 employees segment

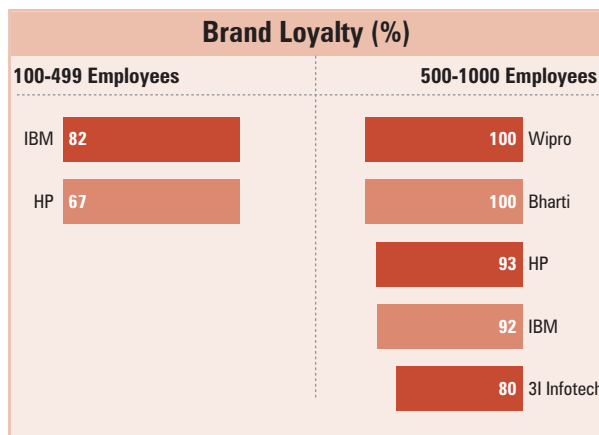
Here's another segment with lots of players, but dominance by only a handful. Five brands managed to make it to the Users' Choice club in this segment this year, with HP and IBM sharing the top spot amongst 100-499 employee enterprises, and HP leading by a wide margin in the 500-1000 employee enterprises. The remaining three brands, viz. 3I Infotech, Wipro, and Bharti trail far behind, and didn't get enough votes to make it to the 100-499 category.

Unfortunately for HP and IBM, brand loyalties aren't as high for them in this category, as they were in some of the others in managed services domain. While 82% of respondents who were using IBM's managed storage services in 100-499 employee enterprises said they're likely to remain with IBM in the future as well, the remaining 18% weren't sure which brand to switch to. A similar situation exists with HP, at 67% brand loyalty and another 33% users who weren't sure which vendor to switch to. In the 500-1000 employee enterprises, Wipro and Bharti enjoy 100% brand loyalty amongst respondents that were using their services.

So why should you choose managed storage services from HP and IBM, the top two vendors in this space? In HP's case, all users using its services in the 100-499 employees space cited brand value as the key reason. 50% of them cited product reliability and after sales support/services each. Among those likely to opt for HP services in the future, 75% cited brand value as the key reason followed by reliability at 50%. In IBM's case, 91% of existing users quoted reliability as the main reason, followed by brand value. For future purchase, its situation was similar to HP's in brand value, but in initial price and after sales service/support, it garnered fewer votes. In 500-1000 employees category, reasons for current usage by a majority of both IBM and HP's users is brand value.



5 players made it to the club this year, out of some 19 brand names that came up in this space.



Brand loyalties aren't as high for the top two contenders, HP and IBM, in this category as compared to others.

		Reasons for Choice (%)							
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	100	50	17	50	75	50	38	38
	IBM	73	91	18	27	75	42	17	17
500-1000	HP	80	67	27	40	83	78	17	33
	IBM	75	83	50	8	57	86	21	36

Brand value seems to be the key criteria for respondents likely to go for IBM and HP's managed storage services in the near future in the 100-499 employees organizations. In 500-1000 employees space, IBM is being chosen for its reliability, while HP is likely to be chosen for its brand value.

Systems

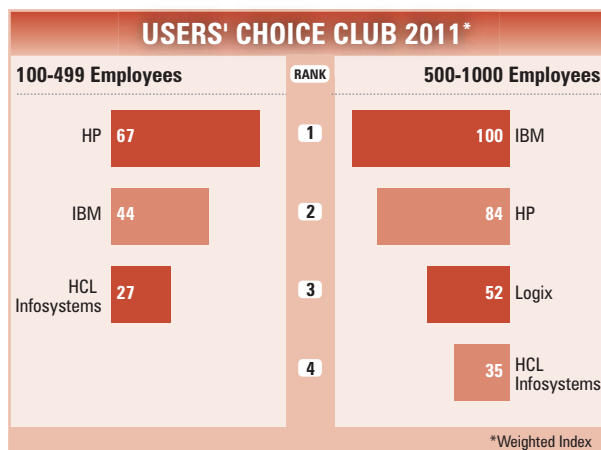
A category dominated by HP and IBM across both segments. The 500-1000 employee segment shall witness more intense competition from rivals but the 100-499 segment shall remain their forte in the near future

The Users' Choice Club is topped by HP across both segments—100-499 employees and 500-1000 employees. IBM follows as a runners-up but has a fair distance to cover. A third contender, Bharti follows IBM in the smaller segment but there's precious little to report about others. The large enterprise segment though witnesses Reliance and HCL Infosystems giving close competition to IBM. The loyalty index for all—Bharti, HP and IBM is a perfect 100% in the SME segment, which means they can rest comfortable as their current customers are likely to stick with them in the near future as well. Even the larger 500-1000 employees segment throws up a cent percent rating for IBM and a marginally lower 90% for HP. So, overall the loyalty run pretty high within this category.

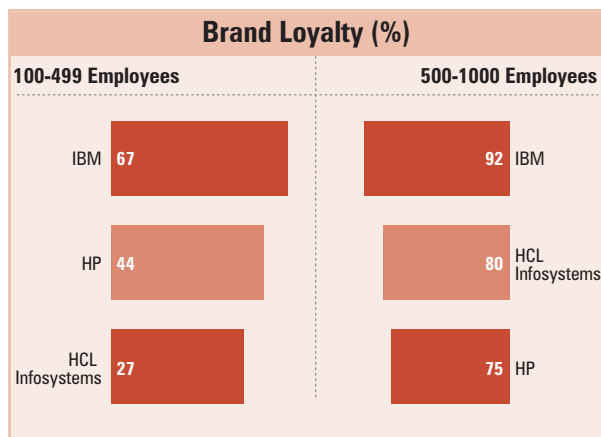
While searching for the key reasons for currently owning a particular brand among the 100-499 segment, we found that 83% of HP owners own it because of its brand value while 50% of IBM's customers do the like. But reliability of product is where IBM gets cent percent approvals with HP getting just 50% from its current owners.

When asked to comment on the initial price of products offered by the two, 50% of IBM users quoted it as one of the reasons for currently owning the company's products while the corresponding figure for HP was 33%. The two companies nearly square-up when compared on their after sales support. The 500-1000 segment shows similar ratings for HP except that it gets a far greater approval rating of 80% in after sales support.

Future brand preferences within the 100-499 segment throw up similar patterns with 80% likely to choose HP for its brand value and 50% likely to go with IBM for this. The after sales support figures for both companies also square up again. In the 500-1000 segment, HP again gets similar ratings as it did from its current owners, except that its after sales support approvals this time are at 50%.



HP and IBM dominate the 100-499 and 500-1000 employee segments respectively. Other providers need to do more catching up.



Brand loyalties are very scattered as the category witnesses a fair amount of local competition.

Reasons for Choice (%)									
Employees	Brand Name	Currently Owned				Future Preference			
		Brand Value	Reliability of Product	Initial Price	After Sales Support/Service	Brand Value	Reliability of Product	Initial Price	After Sales Support/Service
100-499	HP	86	57	29	43	70	50	20	20
	IBM	40	100	20	80	57	86	0	43
500-1000	IBM	92	92	25	42	68	79	16	21
	HP	75	63	25	50	75	88	19	31

The prime reasons for currently owning HP as cited by its users are brand value, while IBM is cited more for its reliability and after sales support. No clear reasons emerge for future preference, which is expected due to the presence of local competition.