



Aruba Networks (HPE) Recognized for

2021

Competitive Strategy Leadership

Global SD-WAN Vendor Industry

Excellence in Best Practices

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Aruba excels in many of the criteria in the global SD-WAN vendor market.

AWARD CRITERIA	
<i>Strategy Innovation</i>	<i>Customer Impact</i>
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Strategy Effectiveness

Silver Peak became part of Aruba, a Hewlett Packard Enterprise Company, via acquisition in September 2020. The Aruba EdgeConnect SD-WAN Edge Platform, acquired via Silver Peak, unifies SD-WAN, firewall, segmentation, routing, WAN optimization, and application visibility and control in a single, centrally-managed system.

Prior to its acquisition, Silver Peak was among a few vendors who managed to remain independent, yet deliver impressive growth rates organically. With the acquisition, Silver Peak is able to tap into the global sales and marketing strengths of Aruba to continue with the growth momentum the company had garnered in the last 3 years. The company has more than 3,000 customers, owing largely to its extensive channel partnerships.

Competitive Differentiation

Aruba’s SD-Branch solution was built with a deep focus on both LAN and WAN networking, with a security wrapper around it. Aruba Edge Services Platform (ESP) is the companies AI-powered, cloud-native platform. The cloud-native control plane allows users (enterprises and service providers) to achieve true multi-tenancy and run SD-WAN across thousands of sites with fully orchestrated tunnels and routes. At the heart of ESP is Aruba Central, a single-pane-of-glass console that helps enable a unified infrastructure. A key differentiation of Aruba’s SD-Branch solution is that it allows the

administrator to define user-centric policies. The Aruba ClearPass Policy Manager authenticates access to users (or devices/things) based on the user roles (employee, camera, guest, etc.). User-roles enable the administrator to define simple user-centric policies including micro-segmentation in near plain English

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- Roopa Honnachari, VP of Research

language (for example, “Security” role can talk to “Camera” role to allow the physical security team to monitor cameras, but not allow camera malware to access any other part of the network). This dramatically simplifies policy administration for network administrators. Aruba ESP includes edge-to-cloud advanced security solutions, applying a Zero Trust and Secure Access Service Edge (SASE) approach.

Silver Peak’s EdgeConnect solution combines SD-WAN, routing, WAN optimization and security

functions into a single composite software image that can be deployed on a physical or a virtual appliance. Cloud connectivity is one of the key reasons enterprises are evaluating SD-WAN services. As businesses increasingly embrace Software as a Service (SaaS), the solution enables the SaaS apps to be delivered via internet links while providing the required Quality of Service (QoS). Leading SD-WAN solutions can recognize thousands of enterprise applications, enabling the edge device to steer trusted applications to cloud and others to a firewall for further investigation. Silver Peak’s EdgeConnect solution comes with the unique First-packet iQ feature, which intelligently identifies applications on first packet (versus deep packet inspection that could take up to 4 to 10 packets before recognizing the application), and dynamically steers traffic to its destination (IaaS, SaaS, data center, etc) on an app-by-app basis for granular security policy enforcement and optimized cloud connectivity.

As businesses embrace software-defined branch (SD-Branch) solutions, the combination of Aruba’s SD-Branch and EdgeConnect SD-WAN solutions address branch transformation needs in a holistic manner encompassing wired, wireless LAN, and WAN solutions across campus, branch, data center, remote worker environments, and the cloud.

Customer Purchase Experience

The completeness of Aruba’s SD-WAN solution ensures that customers have a positive purchase

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experience, as it delivers the SD-WAN solution in a more holistic manner than competitive offerings. While most SD-WAN vendors have focused on the WAN space to a great extent, they are quickly realizing the need for tightly integrating the LAN components (LAN switches, Wi-Fi access points) to truly achieve a software-defined branch. Aruba’s solution addresses the needs of campus networks,

LAN and WAN, and allows unified, cloud-based management of the networks end-to-end. As Internet of

Things (IoT) endpoints continue to grow, and 5G and Wi-Fi 6 hold the potential to become an integral part of campus networks and LANs, the vendor's ability to deliver software-defined LAN solutions alongside SD-WAN is critical. Aruba's ESP platform is designed to deliver exactly that.

Another key trend in the market is the convergence of networking and security. Secure Access Service Edge or SASE has become somewhat of an industry buzzword, with vendors and service providers rushing to brand their SD-WAN and security offerings as SASE. Leading security vendors and some SD-WAN vendors have platforms that offer tightly integrated security functions with SD-WAN. While the integrated approach offers several benefits, there are customers who prefer to have a choice of vendors while choosing their security solutions. Aruba's strategy is to partner with leading security vendors to deliver automated integration with best-of-breed security functions, which provides businesses choice when deploying SASE solutions.

Furthermore, the proliferation of IoT devices is adding to the complexity of security architectures among businesses. Aruba edge-to-cloud segmentation capabilities enable network administrators to centrally segment users, devices, applications, and WAN services into secure zones and automate application traffic steering across the remote office, branch locations, cloud, data center and campus locations, in compliance with predefined security policies, regulatory mandates, and business intent.

Brand Equity

Aruba Networks and Silver Peak both have built strong brand equity independently before the acquisition. The combined company, Aruba Networks, under the leadership of parent company, HPE, is in an enviable competitive position to be able to upsell and cross-sell to their existing and potential customer base. Both companies have strong partnerships in place with network and managed service providers, and value added resellers, which will further help deploy sites faster. In the 2021 Frost & Sullivan WAN virtualization trends survey, over 50% of the global respondents indicated their preference to buy SD-WAN from a managed service provider. SD-WAN is simply a mechanism to simplify hybrid WAN deployments, making the underlay or physical network infrastructure highly critical in SD-WAN deployments. Partnerships with service providers that can utilize vendor SD-WAN solutions to offer managed SD-WAN services along with network services and other enterprise solutions increases stickiness of SD-WAN solutions.

Conclusion

Aruba, with its rich background in LAN networking, combined with Silver Peak's strengths in WAN solutions, has emerged a strong competitor in the SD-WAN market. As the SD-WAN technology market rebounds from the impact of COVID-19, Aruba Networks is strategically positioned in the competitive landscape to tap into the market opportunities arising as businesses transition to a software-defined branch. In recognition of the company's efforts, Frost & Sullivan bestows Aruba Networks with the 2021 Global Competitive Strategy Leadership Award in the SD-WAN vendor market.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes Best Practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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- **ROI & Margin:** Implementation Excellence
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- **Business Model (BM)**
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- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

