



Who, What, and How:

A Directory of Service Offerings, Partners, and Supported Technologies

Overview: This is a summary of the 80-page directory report covering the depth and breath of Internet infrastructure services provided by firms offering colocation, custom and complex hosting, and managed and professional services. The report is accompanied by a searchable, online database tool of the results, which is available to subscribers at www.tier1research.com and will be continually updated. The data presented is primarily based on results from the 40 providers who completed one or both of Tier 1 Research's surveys and also includes estimates for a handful of companies. The goal is to show a snapshot of this rapidly evolving sector through a competitive comparison across companies, looking at: 1) what services are currently offered?; 2) what partners are used to help deliver each service?; and 3) what technologies are supported – and what does support mean anyway? Here are some of the key highlights and findings:

- **40 Participating firms: 32 completed surveys, Tier 1 estimates for 8 others**
 - Surveys completed by: AT&T, Attenda, BT Ignite, Center 7, Cervalis, Conxion, Coradiant, Digex, DigiPLEX, divine, Ejasent, Equinix, eXchange Colocation, Exodus, Genuity, IBM Global Services, Inflow, Interliant, Level 3, Loudcloud, MFN, NOCPulse, Optiglobe, Pihana Pacific, Q9 Networks, Rackspace, SiteLite, Stormwatch, Terremark, Totality, XO Comm., and XOR.
 - Estimates for: Avasta, Berbee, EDS, Intel Online, InteQ, Sevenspace/Nuclio, Sprint, and Verio/NTT.
- **Of the 31 companies participating in the Services Portfolio Survey:**
 - **Technology Procurement:** Find out what portion of the 61% of companies offering Technology Procurement services will be offering procurement services a year from now.
 - **Multiple NSPs:** Over 90% of the providers offer services in IDCs where multiple networks are connected. Inside, find out what % plans to operate in more/less connected environments next year.
 - **Infrastructure Audit Service:** 77% of firms offer the service, inside find out who charges for this.
 - **Wireless Support:** While wireless may be the future of the Internet, the technologies remain immature or non-existent. Find out how many firms have an early lead.
- **Of the 23 companies participating in the Supported Technology Survey:**
 - **OS Support:** Sun Solaris is the most widely supported OS, edging out Microsoft NT/2000 and Linux flavors. Find out the percentage of firms supporting these and other less popular OS'.
 - **Web Server Support:** Find out whether Microsoft IIS or Apache is the most highly supported Web Server for managed hosting on a full support, monitoring only, and on a custom basis.
 - **App Server Support:** BEA WebLogic and Sun/Netscape's iPlanet are the most widely supported Application Servers. Find out how close IBM is coming to these with its Websphere solution.
 - **Database Server Support:** Find out the percentage of firms supporting the popular Oracle and Microsoft SQL database servers and how quickly IBM's DB2 and MySQL are gaining traction.
 - **ISV App Support:** While support for ISV apps is not huge, the most widely supported ISV apps are Siebel, SAP, Ariba, and Oracle ERP. Inside find out what percentage of firms supports each.
 - **ESM Tools:** HP Openview was the most frequently seen tool among the participating companies. Inside see where Concord, BMC Patrol, KeyNote, Mercury Interactive, Micromuse Netcool, and NetIQ rank and who is used more often as a primary and secondary tool..

Tier 1 Research
Andrew Schroepfer (763) 694-9992 & Joshua Beil
Andy@Tier1Research.com - April 2002 – www.Tier1Research.com

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PARTICIPANTS & METHODOLOGY

Tier 1 Research designed and distributed two comprehensive online surveys, one for Services Portfolio and the other for Supported Technologies. These online capabilities were acquired through the use of a third-party ASP company. Companies could choose to participate in one or both surveys.

Exhibit 5: Companies included in this report

<i>Company</i>	<i>Public/Private</i>	<i>Services Portfolio</i>	<i>Supported Technologies</i>
AT&T	NYSE: T	Y	Y
Attenda	Private	Y	Y
Avasta*	Private	-	-
Berbee*	Private	-	-
BT Ignite	NYSE: BTY	Y	Y
Center 7	Private	Y	Y
Cervalis	Private	Y	-
Conxion	Private	Y	Y
Coradiant	Private	Y	Y
Digex	NASDAQ: DIGX	Y	Y
DigiPlex	Private	Y	-
divine	NASDAQ: DVIN	Y	Y
EDS*	NYSE: EDS	-	-
Ejasent	Private	Y	Y
Equinix	NASDAQ: EQIX	Y	-
eXchange Colocation	Private	Y	-
Exodus, a C&W service	NYSE: CWP	Y	Y
Genuity	NASDAQ: GENU	Y	Y
IBM Global Services	NYSE: IBM	Y	Y
Inflow	Private	Y	Y
Intel Online Services*	NASDAQ: INTC	-	-
InteQ*	Private	-	-
Interliant	NASDAQ: INIT	Y	-
Level 3	NASDAQ: LVL	Y	-
Loudcloud	NASDAQ: LDCL	Y	Y
Metromedia Fiber Network	NASDAQ: MFNX	Y	Y
NOCpulse	Private	-	Y
OptiGlobe	Private	Y	Y
Pihana Pacific	Private	Y	Y
Q9 Networks	Private	Y	-
Rackspace	Private	Y	Y
Sevenspace/Nuclio*	Private	-	-
SiteLite	Private	Y	Y
Stormwatch	Private	Y	-
Sprint*	NYSE: FON	-	-
Terremark	Private	Y	Y
Totality	Private	Y	Y
Verio (NTT)*	NYSE: NTT	-	-
XO Communications	NASDAQ: XOXO	Y	Y
XOR	Private	Y	Y

Note: A “Y” indicates that the company completed our survey. Companies with a (*) did not participate in the surveys, and all information presented is from publicly available sources.

Service Portfolio Survey Overview

Service Category	Question to Provider
COLO/Facilities	
Colocation Space	Do you operate your own IDCs?
Points of Presence	How many IDCs do you operate within (regardless of ownership)?
Private Suites	If you operate your own IDCs, do you offer to build private suites for larger clients?
Remote Hands	Are technical personnel employed by your company at each IDC?
Ability to serve CPE	Do you provide managed services outside your IDC?
Technology Procurement	Do you purchase and resell hardware for your customers?
Staging & Testing - Facilities	Do you have separate rooms for customers to test their applications?
Staging & Testing - Equipment	Do you provide the hardware/software for customers to use?
Business Continuity - Space	Can customers purchase space in your IDC in the event of a disaster?
Connectivity	
Transport VPN	VPN services connecting a client's hosted infrastructure to their offices?
Remote Access VPN	VPN services connecting one or more users, each on a different connection, to the customer's hosted infrastructure?
V-LAN	Do you offer a service to connect client servers/racks that are not in a contiguous location/rack?
Access to multiple NSPs	Are there multiple fiber providers offered?
Multi-Homing Solution	Do you offer a solution where bandwidth moves over multiple networks?
Content Delivery	Do you maintain your own CDN network and offer your own CDN services?
Streaming Distribution Services	Do you offer streaming services that are your own?
ProServ	
Web/Application Design	Do you offer web application design services?
Storage Network Design	Does your staff offer consulting for the design of a storage infrastructure?
Security Infrastructure Design	Do have a staff of certified security personnel?
Hosting Infrastructure Audit	Does your firm provide an audit to potential/existing clients regarding their existing hosting infrastructure?
Security/Vulnerability Assessments	Does your staff perform security assessments?
Dedicated NOC Staff (option)	Can your clients pay you to have a dedicated NOC staff (of any size) or can they purchase desk space at your NOC for their own personnel?
Call Center Support Level	Is you inbound call center staffed 24x7 fot Level 1, Level 2, or Level 3 support?
Wireless Infrastructure Design	Does your staff offer consulting for the design of a wireless infrastructure (includes voice)?

Managed Services - Monitoring	
Managed Web/App Servers	Do you offer managed server services?
DBA - Managed Service	Do you provide database administration services?
Load Balancing - Geographic	Do you provide load balancing for clients deploying infrastructure in multiple IDCs?
Load Balancing - Server Level	Do you provide load balancing services for server clusters?
Dynamic Failover - Hot Site Backup	Do you provide the service option for clients to have a redundant infrastructure?
Intrusion Detection	Do you offer intrusion detection monitoring services?
Managed Firewall	Do you offer managed firewall services?
Disaster Recovery - Rollback	Do you offer disaster recovery services?
Disk-on-Demand	Do you offer customers primary data storage services or disk-on-demand?
Back-up	Do you offer tape or disk data storage backup services?
Wireless Service	Do you offer content conversion or other wireless infrastructure services?
Site Traffic Analytics	Do you offer your customers your own traffic analysis service?
DNS Administration	Do you handle DNS administration for your clients?
Quality of Service	Do you offer clients a QoS tool to manage traffic?
CPU-on-Demand	Do you offer customers CPU or application processing on-demand in the event of heavy traffic?
Service Level Management	Do you offer clients a real-time (or near real-time) web-based means to manage service level agreements, track and review performance?
Testing Services	
User/Transaction Simulation	Do you offer user simulation testing services?
Stress/Load Testing	Do you offer stress testing services?
Custom Testing	Do you offer infrastructure testing services on a custom basis for clients?

Service Portfolio Survey Overview

The goal of this survey was to understand what types of technologies and vendors are supported by service providers. There were nine categories in the Supported Technology survey, with the ISV category split into B2B apps, CRM apps, and ERP apps. The categories and the leading technologies in each category are presented in Exhibit 7. Before we get to this, however, it is important to discuss the four approaches that were used to get at what is meant by “support,” since this word can and does mean so many different things to different people.

First, for each technology, the survey included a six-point rating scale, and participants were asked to choose one of the following:

1	Full support (monitor & manage); tied into SLA
2	Monitoring only, tied into SLA
3	Previous experience, but not formally supported
4	Custom support (monitor & manage) on request
5	No support - Expect to add in next 12 months
6	No support - Do not expect to support

Second, we looked at in-house capabilities. The survey asked for the number of engineering/operations employees capable of working on each layer of technology as well any relevant certifications/credentials held by these employees.

Third, the survey asked for the participants to indicate the type of monitoring or management tools, OSS or otherwise, used for each technology. The specific suites we inquired into included:

HP Openview	IBM Tivoli
Micromuse Netcool	BMC Patrol
CA Unicenter	Mercury Interactive
Concord	Keynote

Fourth and finally, we asked for any relevant partners used to help support each technology layer. We feel that the combination of these four elements is a relatively innovative and sensible attempt to break down the semantic debate surrounding “support.”

Target Audience

We believe the data gathered and presented in this report has multiple audiences. The following table highlights the key audiences and the report’s relative usefulness.

<i>Audience</i>	<i>Potential Uses of the Data Presented</i>
Service Providers	<ul style="list-style-type: none"> • Assist in evaluating their own offerings and technical capabilities relative to their peers. • Assist in determining potential partnerships, mergers, and acquisitions.
Enterprises	<ul style="list-style-type: none"> • Assist with evaluating an outsourcing partner, particularly if there is an existing investment in any number of technologies.
Technology Providers	<ul style="list-style-type: none"> • Assist in qualifying service provider leads.



The screenshot shows the Tier 1 Research website interface. At the top, there is a navigation bar with links for 'Home', 'Partners', 'FAQs', 'Services', and 'Samples'. Below this, a 'Client Log In' section contains fields for 'Username' and 'Password' with a 'Log In' button. The main content area features a 'Sector Information Exchange' section with a 'LEARN MORE' link, and a 'Platinum Level Service' section with a 'LEARN MORE' link. A 'Gold Level Service' section is also visible. Below the main content, there is a 'What We Provide' section with a list of services: 'Hosting', 'CDN', and 'Storage'. The website has a green and white color scheme.

VISIT US AT WWW.TIER1RESEARCH.COM
PLYMOUTH, MN
(763) 694-9992

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