

F R O S T & S U L L I V A N

2024

MARKET  
LEADER

*IN THE GLOBAL  
NETWORK PACKET  
BROKERS INDUSTRY*

F R O S T & S U L L I V A N

2024 BEST  
PRACTICES  
AWARD

**Gigamon**<sup>®</sup>

## 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. Gigamon excels in many of the criteria in the network packet broker (NPB) space.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

### *The Evolving Network Packet Broker Market*

Several drivers propel continuing growth in the NPB market. The need for simplified data center management and automation, the high demand for cloud services and the requirement for pervasive visibility that can expand as organizations move from on prem to hybrid and multi-cloud infrastructure, security and compliance requirements, OT environments, and web applications drive sustained NPB adoption. Enterprises (as major end-users) require high-performance connectivity, high availability, high throughput, and reliability to manage vast amounts of data. Adopting NPBs is necessary to meet these demanding requirements, especially as digitization revolutionizes healthcare, e-commerce, banking, and education, among other industries.

Many organizations have long relied on NPB solutions to monitor and manage their data center infrastructure. However, as businesses increasingly adopt hybrid multi-cloud environments, their needs are evolving beyond traditional NPB capabilities. This shift is driving demand for deep observability solutions, which extend visibility into virtual, container, and cloud applications.

While network visibility and context remain essential, some organizations are hesitant to expand their NPBs beyond the data center, especially when faced with concerns about compatibility and the complexity of integrating with modern architectures. Additionally, price pressures at the lower end of the market

contribute to this hesitation, as customers seek cost-effective solutions without sacrificing performance.

*“Within this complex landscape, Gigamon, a leader in deep observability solutions, strategically emphasizes the critical value of its advanced offerings. By delivering unmatched visibility and traffic management capabilities, the company enables enterprises, government and service providers to meet the stringent demands of modern data centers.”*

**- Manuel Albornoz**  
**Best Practices Research Analyst**

This hesitation arises from concerns about the need for more advanced setups, compatibility challenges, and the complexity of integrating new NPBs into existing data center infrastructures. However, NPBs present a strong return on investment (ROI), especially during economically challenging periods. While price sensitivity may grow, NPBs are counter-cyclical, offering significant cost savings through network optimization and reducing reliance on additional tools. By implementing NPBs, organizations can notably reduce tooling expenses, making these solutions essential, even in environments with limited resources.

Within this complex landscape, Gigamon, a leader in deep observability solutions, strategically emphasizes the critical

value of its advanced offerings. By delivering unmatched visibility and traffic management capabilities, the company enables enterprises, government and service providers to meet the stringent demands of modern data centers. Its long-standing partnerships with key government agencies, including the United States Department of Defense and the intelligence community, provide Gigamon with stability and help mitigate competitive pricing pressures. These agencies’ emphasis on high-quality, secure solutions allows Gigamon to maintain its premium positioning. Moreover, by targeting sectors prioritizing sophisticated security and traffic management, the company reinforces its leadership while expanding its market presence.

### **Gigamon: An Industry Leader**

Founded in 2004 and headquartered in California, United States, Gigamon excels with its deep observability solutions. The company has developed an extensive deep observability pipeline that efficiently delivers network-derived intelligence and insights directly to cloud, security, and observability tools. This approach enables organizations to eliminate security blind spots, enhance network traffic efficiency, and lower operational costs. The Gigamon offerings extend beyond conventional observability methods by harnessing real-time intelligence from network traffic, including lateral and encrypted flows. With over 20 years of industry experience, more than 150 patents, and a dedicated focus on customer success, Gigamon stands out as a leader in the sector.<sup>1</sup>

### **Setting the Standard for Deep Observability**

Gigamon sets the standard in the market by providing unmatched visibility into complex hybrid cloud environments. Unlike traditional tools that rely solely on metrics, events, logs, and traces, the company’s deep observability pipeline mines essential intelligence directly from network traffic. This capability enables customers to identify previously hidden threats, enhance their security postures, and manage their infrastructures with increased precision and confidence.

<sup>1</sup> “Our Value Proposition” (Gigamon website: <https://www.gigamon.com/company/company-information.html>)

*“The Gigamon Deep Observability Pipeline integrates network-derived intelligence with existing cloud, security, and observability tools. It eliminates security and performance blind spots, which are crucial in hybrid and multi-cloud environments, particularly in lateral and encrypted data flows. Gigamon equips organizations to proactively address risks by delivering real-time insights into network traffic, ensuring their hybrid cloud infrastructure remains secure, efficient, and resilient.”*

**- Sujan Sami**  
**Research Director**

The Gigamon **Deep Observability Pipeline** integrates network-derived intelligence with existing cloud, security, and observability tools. It eliminates security and performance blind spots, which are crucial in hybrid and multi-cloud environments, particularly in lateral and encrypted data flows. Gigamon equips organizations to proactively address risks by delivering real-time insights into network traffic, ensuring their hybrid cloud infrastructure remains secure, efficient, and resilient. The components of the pipeline **include the GigaVUE HC/TA physical appliances, G-TAPs, GigaSMART® applications, GigaVUE-FM Fabric Manager and GigaVUE Cloud Suite™** that extends the capabilities of the Gigamon Deep Observability Pipeline to public and private cloud.

The core GigaVUE HC/TA physical appliances, G-TAPs, GigaSMART® applications, and GigaVUE-FM Fabric Manager solutions ensure efficient traffic acquisition, processing and forwarding of traffic to security and performance monitoring tools. These solutions are scalable from 1 to 400 gigabytes per second, enabling consistent monitoring and management and delivering stringent security and operational efficiency across even the most complex networks.<sup>2</sup>

**GigaSMART** applications, include sophisticated features and capabilities like secure sockets layer and transport layer security decryption, de-duplication, and application metadata intelligence. These advanced features significantly boost the effectiveness of security tools, enabling organizations to strengthen their security posture and reduce operational cost and complexity. GigaSMART applications enhance processing capabilities, allowing organizations to shift from a reactive to a proactive security posture. This capability is significantly boosted by the recently announced Gigamon Enriched Metadata feature that leverages API as a source. This enables sophisticated correlation of traffic intelligence to accelerate troubleshooting of applications and the underlying network to improve application performance and therefore customer experience.

The **GigaVUE-FM Fabric Manager** provides centralized orchestration and management for physical, hybrid and multi-cloud infrastructures, simplifying the complexities associated with managing these environments. It enables organizations to uniformly enforce security and compliance policies across all their infrastructure and equips organizations with the flexibility and agility to navigate evolving digital landscapes.

Finally, **GigaVUE Cloud Suite** significantly bolsters the company’s market leadership by offering extensive visibility across hybrid and public cloud environments. This suite acquires and analyzes traffic in all directions: east, west, north, south, and within virtual instances and containers, assuring comprehensive network monitoring. By supplying security and observability tools with detailed, context-rich network-

<sup>2</sup> Frost & Sullivan Interview with Gigamon (Frost & Sullivan, August 2024)

derived intelligence, Gigamon enhances threat detection, application performance, and accelerates troubleshooting.

A Gigamon standout feature is making its software user-friendly. Recognizing the skill shortages in networking and security, the company streamlined its software implementation and management processes, reducing entry barriers and accelerating the return on investment (ROI). The company strategically tackled industry standards and compliance challenges by developing “starter packs.” These packs, which amalgamate insights from numerous projects, include pre-configured dashboards that leverage open-source software like Elastic and tools like Splunk, enabling customers to visualize essential data. These ready-made solutions expedite security and compliance objectives, reducing costs and enhancing the appeal of Gigamon offerings to clients.

### ***The Gigamon Approach to Advancing Market Leadership through Innovation***

Gigamon implements its market strategy through long-term initiatives and tactical solutions, strengthening its market position and meeting evolving client needs. Central to its approach is the company’s enduring commitment to embracing modern technologies (e.g., advanced chipsets and data lakes) to enhance its offerings over the long haul. For instance, Gigamon is investigating artificial intelligence (AI)’s role in enhancing customer service capabilities, streamlining the software development lifecycle, and improving quality assurance processes. However, given the sensitive nature of its work with defense and intelligence agencies, the company remains cautious, ensuring that any AI technologies adopted are thoroughly vetted and reliable before deployment.

The company’s AI adoption strategy involves enhancing data quality to maintain market leadership. In collaboration with major providers such as Amazon Web Services (AWS) and Microsoft, Gigamon ensures that the data supplied to AI tools is context-rich and pre-filtered for relevance.<sup>3</sup> Consequently, AI applications can utilize their computing power to derive insights, thereby increasing their efficiency and accuracy. This method boosts the performance of AI applications and solidifies the company’s reputation as a leader in providing high-quality, actionable data. When it comes to performance, the company recognizes it as a key focus area. By integrating advanced chip sets and addressing network bottlenecks, Gigamon enhances overall system performance. Its solutions empower IT teams to troubleshoot issues efficiently, ensuring application service levels and delivering a superior user experience.

Moreover, Gigamon has developed Precryption™ technology to provide plaintext visibility into encrypted traffic, without the need for decryption, eliminating a significant blind spot for many organizations. The company has also broadened its offerings with tactical-level hardware like the GigaVUE-HCT, designed for defense agencies to use in the field, demonstrating its capability to tailor its technology for specialized applications.<sup>4</sup>

Gigamon Universal Cloud Tap is another innovation that streamlines and standardizes traffic acquisition across virtual and large cloud environments, including AWS, Google Cloud Platform, and Microsoft Azure.<sup>5</sup> Leveraging eBPF, it simplifies the acquisition and distribution of traffic to various tools by eliminating the

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<sup>3</sup> Frost & Sullivan Interview with Gigamon (Frost & Sullivan, August 2024)

<sup>4</sup> Ibid.

<sup>5</sup> “GigaVUE Universal Cloud Tap” (Gigamon website: <https://www.gigamon.com/content/dam/resource-library/english/feature-brief/fb-gigavue-universal-cloud-tap-at-a-glance.pdf>)

need for complex overlays like load balancers. The company complements this feature with its ability to reduce cloud traffic acquisition costs by a factor of five while providing real-time visibility into cloud expenses, helping customers avoid unexpected costs and efficiently manage their cloud resources.

In the short term, Gigamon tackles immediate challenges by improving customer interactions with its products. For example, the company has developed dashboards to aid the visualization of network activities, bridging the gap between the company's technical enhancements at the network level and practical, day-to-day concerns of business unit decision-makers. These dashboards allow for rapidly resolving critical issues (such as expired certificates or unauthorized server communications), empowering customers to proactively manage their network security.

### ***A Commitment to Customer Success and Expanding Market Reach***

Gigamon demonstrates its dedication to customer service and product alignment by delivering reliable solutions that require minimal post-deployment intervention. To this end, customers consistently praise the company's hardware and software for operating smoothly with minimal maintenance, a testament to the exceptional engineering and support the company provides.

From a customer standpoint, Gigamon excels as the ideal partner for navigating digital landscape complexities. The company delivers value by reducing irrelevant data traffic, enhancing the efficiency of existing tools, and reducing operational costs. For many years, Gigamon has implemented strategies that reduce traffic flow to tools by 50 to 60 percent, enabling its tools to process data more effectively and minimizing the need for additional instances.<sup>6</sup> This approach drives cost savings and empowers customers to retool and optimize their data centers.

Gigamon enhances customer acquisition through various key strategies. One approach involves introducing dashboard capabilities to demonstrate the impact of the company's solutions on business outcomes. These tools allow potential customers to visualize the benefits of Gigamon products, translating technical improvements into tangible business value. Plus, the company streamlines the process for potential customers to trial its software with "try and buy" capabilities. This frictionless experience enables users to access and test the software via AWS instances, allowing them to quickly download, implement, and create working prototypes of the company's solutions at minimal cost and within an hour. This low-risk trial experience boosts customer acquisition and accelerates the sales cycle.

### **Customer Success Examples**

**Corpay**, a global fintech company, faced significant challenges in managing and securing its vast, segmented multi-cloud network, particularly in monitoring potential threats that could arise from unseen vulnerabilities. By adopting Gigamon visibility and analytical fabric solutions, Corpay successfully optimized its network performance and enhanced its threat management capabilities. These solutions provided advanced visibility into both inbound and outbound traffic and lateral (east-west) movements within the network, allowing Corpay to address potential threats. As a result, the company now benefits from improved traffic management and security across its AWS and Azure environments, enabling it to maintain operational efficiency and safeguard against emerging risks.

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<sup>6</sup> Frost & Sullivan Interview with Gigamon (Frost & Sullivan, August 2024)

*“We built our hybrid cloud utilizing AWS and Azure, multi-cloud visibility is extremely important to us. It allows us to understand our traffic, understand our potential threat, and also give us the ability to be proactive with any threat intelligence we get.”*

**- Waddah Keirbeck**  
**Global Chief Technology Officer,**  
**Corpay<sup>7</sup>**

**Magenta Telekom**, the leading telecommunications provider in Austria, faced the challenge of handling the rapid increase in data traffic while ensuring the high quality and availability of its 4G and 5G networks. The existing hardware-based monitoring solution was no longer sufficient to manage the exponentially growing network traffic and needed an upgrade to manage modern mobile connections. To address these challenges, Magenta Telekom, in collaboration with Magellan Netzwerke, implemented the Gigamon Deep Observability Pipeline. This next-generation solution enabled real-time

performance analysis, seamless reporting, and efficient traffic management across the mobile coverage area, including 4G and 5G networks. As a result, Magenta Telekom now operates with an available monitoring solution that ensures maximum performance and security across its entire network infrastructure, meeting the demands of today’s data volumes and transmission rates.

### **Commanding the NPB and Deep Observability Markets**

*“We needed a reliable solution that monitors the relevant data traffic without loss or error to detect signs of disruption directly and provide immediate assistance to our customers.”*

**- Athanasios Avgeridis**  
**SVP Core, IP Networks and**  
**Operations, T-Mobile**  
**Magenta<sup>7</sup>**

Gigamon commands a remarkable 30.2 percent share of the NPB market, highlighting its leadership and innovation.<sup>7</sup> In 2024, the company solidified its dominance with an impressive 61 percent market share in the deep observability market, further establishing itself as the industry leader.<sup>8</sup> This substantial market presence reflects the trust and reliance placed on Gigamon by over 4,000 customers, including 83 Fortune 100 companies.<sup>9</sup> Supported by over 1,000 professionals, Gigamon continues to set the standard for excellence and innovation, making it the preferred partner for enterprises seeking comprehensive network visibility and security.<sup>10</sup>

The company increases market penetration through a strategic blend of industry collaborations and a customer-focused development approach. By partnering with key players like Splunk, Gigamon integrates advanced technologies into its offerings, enabling faster deployment and allowing customers to realize return on their investments.<sup>11</sup> The company invests heavily in brand building to further strengthen its market position, particularly around its deep observability pipeline solution for hybrid cloud environments. By enhancing its brand presence, Gigamon targets higher-level decision-makers, such as Chief Information Officers and Chief Information Security Officers, who are crucial in purchasing decisions. This dual focus on technology collaboration and strategic brand building ensures the company continues to expand its market share while delivering measurable ROI to its customers, supporting its long-term

<sup>7</sup> Frost & Sullivan Interview with Gigamon (Frost & Sullivan, July 2024)

<sup>8</sup> “Gigamon Maintains Leadership Position in Deep Observability Market with 61 Percent Market Share in 2024 According to New Frost & Sullivan Research” (Gigamon press release, June 2024)

<sup>9</sup> “Serving the World’s Most Demanding Enterprises” (Gigamon website: <https://www.gigamon.com/company/company-information.html>)

<sup>10</sup> Ibid.

<sup>11</sup> Frost & Sullivan Interview with Gigamon (Frost & Sullivan, August 2024)

growth objectives.

As a global company, Gigamon ensures its products and services consistently deliver value across all markets through a robust framework. The company grants regional autonomy, allowing each market to tailor its approach based on local opportunities and needs. This localized strategy aligns its global objectives with diverse market conditions worldwide. For instance, a key element of the company's global strategy is its alignment with international standards, particularly in the security sector. The company works closely with standards bodies, including those responsible for the National Institute of Standards and Technology models and zero trust strategies, which are increasingly adopted globally.<sup>12</sup> This alignment provides Gigamon with a consistent framework to deliver its solutions across various markets.

Gigamon supports its growth in emerging markets by investing in the expansion of its business in regions that show significant potential. The company is experiencing substantial growth in territories like Eastern Europe, the Middle East, and Africa, where it invests in local sales teams and distributor support. A notable example of this expansion is the opening of a 76,767-square-foot office in Chennai, India, which now serves as the company's second headquarters.<sup>13</sup> This state-of-the-art facility started as a small research and development center in 2015 and has evolved into a critical hub for engineering, sales, customer support, and HR functions. With modern, eco-friendly features, the new facility provides a world-class workspace for innovation. It strategically positions Gigamon to capitalize on growing market opportunities in India, the broader Asia-Pacific region, and beyond.

## Conclusion

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Companies require a steadfast commitment to developing and executing effective growth strategies to become market leaders. A market leader must earn and sustain customer trust while driving positive change across the industry. Gigamon exemplifies Frost & Sullivan's definition of a market leader by delivering unparalleled visibility into complex hybrid cloud environments through its deep observability pipeline, which seamlessly integrates critical network-derived intelligence with existing cloud, security, and observability tools. The company's dedication to adopting new technologies, such as advanced chipsets, eBPF, and data lakes, further elevates its offerings and drives customer acquisition through innovative approaches like dashboard capabilities and seamless "try and buy" experiences. This customer-centric strategy, combined with a commanding 30 percent share of the network packet brokers market and a dominant 61 percent share of the deep observability market, firmly establishes the company's leadership and innovation. Due to these reasons, Gigamon is respected, recognized, and remembered, elevating it to a market leader position.

With its strong overall performance, Gigamon earns Frost & Sullivan's 2024 Global Market Leadership Award in the network packet brokers industry.

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<sup>12</sup> Ibid.

<sup>13</sup> "Gigamon Opens 76,000-Square-Foot Office in Chennai, Establishes Second Headquarters to Address Growing Global Demand for its Deep Observability Solution" (Gigamon press release, July 2024)



## What You Need to Know about the Market Leadership Recognition

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Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

### Best Practices Award Analysis

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

**Growth Strategy Excellence:** Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

**Implementation Excellence:** Company processes support efficient and consistent implementation of tactics designed to support the strategy

**Brand Strength:** Company is respected, recognized, and remembered

**Product Quality:** Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

**Product Differentiation:** Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

**Technology Leverage:** Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

**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 are proud to 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 of high quality

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO’s growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

## The Growth Pipeline Engine™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

