

March 28, 2007

The Forrester Wave™: Business Service Management, Q1 2007

by Peter O'Neill and Evelyn Hubbert

TECH CHOICES

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BMC Software And Managed Objects Lead, But With Many Other Vendors Hot On Their Heels

by Peter O'Neill and Evelyn Hubbert

with Jean-Pierre Garbani and Reedwan Iqbal

EXECUTIVE SUMMARY

Forrester evaluated leading business service management (BSM) vendors across 26 criteria and found that BMC Software and Managed Objects have established early leadership, thanks to their strong product portfolios. HP, Digital Fuel Technologies, IBM, Oblicore, and Proxima Technology are leaders as well, while OpTier, Indicative Software, CA, and ProactiveNet are strong performers. While all the products performed well in this evaluation, Forrester favored those that truly make the connection between infrastructure and business services and conduct business impact analysis. The current order will almost certainly change considerably over the next 12 to 18 months as new ideas and functionality are added to these and other tools. Forrester will continue to analyze acquisitions and product updates in this dynamic market on an ongoing basis.

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NOTES & RESOURCES

Forrester conducted evaluations in January 2007 and interviewed 11 vendor companies: BMC Software, CA, Digital Fuel Technologies, HP, IBM, Indicative Software, Managed Objects, Oblicore, OpTier, ProactiveNet, and Proxima Technology.

Related Research Documents

["The Forrester Wave™: Application Mapping For The CMDB, Q1 2006"](#)

February 27, 2006, Tech Choices

["IT Asset Management, ITIL, And The CMDB: Paving The Way For BSM."](#)

October 25, 2005, Trends

TARGET AUDIENCE

IT infrastructure and operations professional

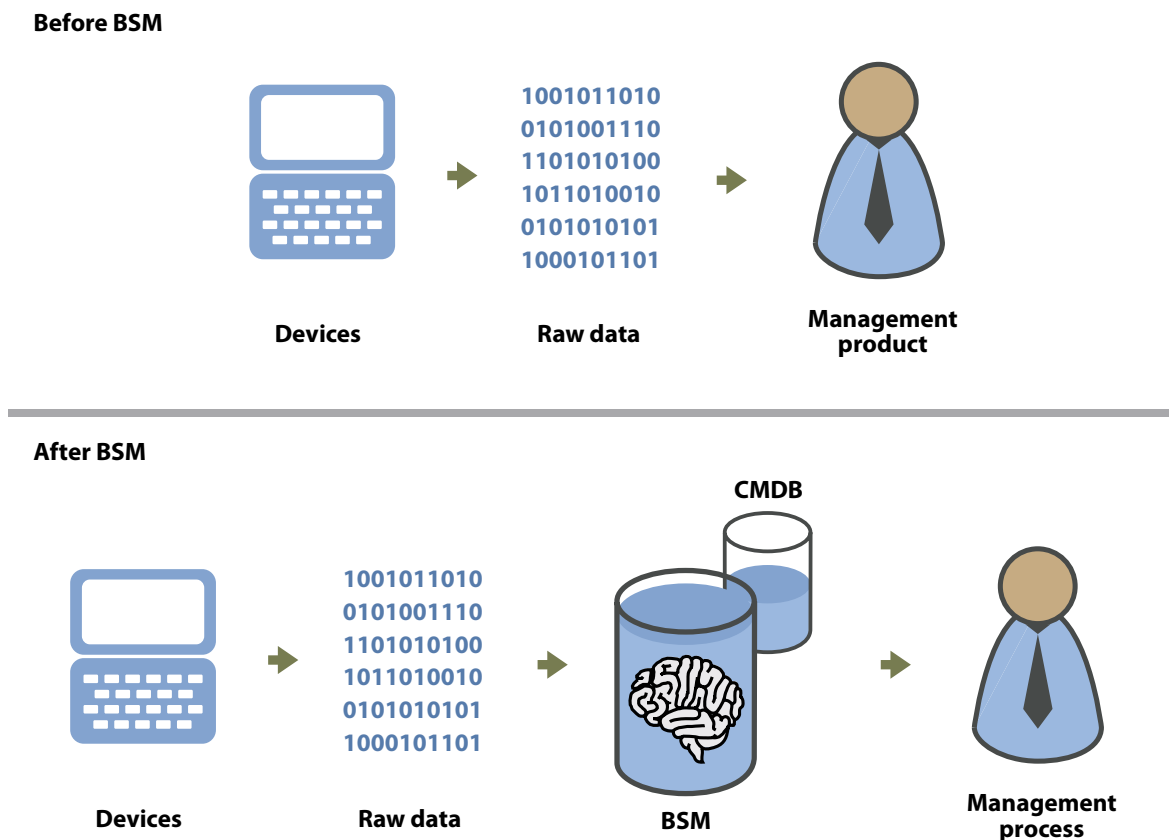
BUSINESS SERVICE MANAGEMENT: A HIGHER CALLING FOR IT

Business service management (BSM) is changing the way vendors build management software products and how IT uses IT management software solutions. Forrester defines BSM as:¹

Software that dynamically links business-focused IT services to the underlying IT infrastructure. A business-focused IT service may be a specific IT service or part of a business process, but it must support a significant, visible business metric for a business owner.

With BSM, IT can provide and improve service quality consistency and the related performance indicator, incident closure time. Additionally, it provides cost savings and indirectly increases the respect for IT from other executives inside the organization. With BSM, the IT organization has a system for prioritizing the most critical business services and measuring the effectiveness of service delivery to the organization. As a result, effective use of BSM can: help improve any number of IT processes, such as business impact and cost analysis; allow for the proactive planning of IT infrastructure needs; and demonstrate the value of IT operations as a key element in business and technology alignment.

The Forrester Wave methodology is an objective evaluation of the vendors in the BSM market and analyzes the strengths and weaknesses of the respective vendor products and their potential to become or remain a long-term solution in your organization (see Figure 1). Making the wrong decision could haunt your firm for years to come, as switching from one solution to another is a costly and time-consuming project that no firm should undertake lightly. BSM provides a new — almost revolutionary — way for IT organizations to effectively measure the performance and efficiency of the infrastructure they own. However, while many vendors claim to provide BSM tools, the technology is still a work in progress, and no vendor can credibly claim to have a complete solution today.

Figure 1 Where BSM Fits In The Overall Systems Management Environment

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Source: Forrester Research, Inc.

What Criteria Should You Use To Select A BSM Solution?

The most important criteria to look at when selecting a BSM solution is the product's ability to collect and leverage raw data from existing systems and data sources, but it is also critical for potential buyers to understand the origin of the BSM project itself within the organization. Is it initiated by service management or by operations, or is it a strategic initiative for the whole IT organization? To answer this, Forrester has identified three families of BSM software solution vendors:

- **IT service management (ITSM) vendors.** ITSM vendors provide BSM solutions to their installed base by leveraging the information contained in their service catalog or in the service-level management system. These vendors include Digital Fuel Technologies, Oblicore, and the "big four" — BMC Software, CA, HP, IBM — for certain use cases and with specific configurations or solution bundles of their extensive product portfolios.

- **Performance and transaction management vendors.** These vendors —including Indicative Software, OpTier, ProactiveNet, and Proxima Technology in addition to the “big four” — have enhanced their performance and transaction monitoring products to better use metric data.
- **BSM strategy vendors.** There are also a group of BSM-focused offerings that leverage existing customer systems and add value by managing a configuration management database (CMDB). They provide BSM reporting using a top-down and business-oriented approach — as opposed to a bottom-up and technology-oriented solution. Vendors in this category include Managed Objects and BMC Software, while offerings from HP and IBM also fall into this category in some customer scenarios.

BSM tools do not replace the existing monitoring and management tools that IT uses; these monitoring tools are simply data collectors and produce raw data. The raw data produced by the data silos within IT must be correlated around a business service model to provide true information on the state and health of a business process. The monitoring tools must stay in place to still monitor and manage the different “silos” in the infrastructure to provide the raw data, but it is BSM tools that fundamentally improve IT management processes.

There Are Necessary Prerequisites Before Implementing BSM

Before considering implementing BSM, there are several critical technical foundations that need to exist in IT for BSM to work. As a baseline, you need to have the ability to model infrastructure component relationships to IT services — which can be defined manually through an embedded discovery mechanism or retrieved from a CMDB — and a CMDB, which includes application dependency mapping to automatically populate the service models and enable the BSM solution. Based on conversations with clients and numerous assessments of actual BSM implementations, Forrester believes that the following improvement projects are essential stepping stones toward BSM:²

- **IT asset management.** IT asset management is necessary to gain a basic understanding of infrastructure components like servers, routers, and clients that operate in the IT environment.³
- **The IT Infrastructure Library (ITIL).** ITIL is needed to establish more rigorous processes for internal IT service delivery.⁴
- **Service-level management (SLM).** SLM includes end user response time measurement, which allows internal IT shops to determine whether the services they offer comply with their service-level agreements (SLAs).⁵
- **Business service mapping.** Business service mapping is essential for a fully fledged BSM implementation because it defines, in business terms, the key quality metrics needed to measure the performance of a BSM system.

Enterprises that have implemented these process improvement projects are better equipped to leverage full value from their BSM projects.

However, it is not always possible to go through process improvement projects in sequence. Forrester has seen many clients adopt a more pragmatic BSM approach, where they add business process mapping to transaction management or to service-level management projects to produce similar results without having the underlying information architecture, such as a CMDB. The technologies supporting this approach discover and collate their own service model information at runtime to provide immediate decision support on performance or transaction management. Forrester has therefore included those vendors that do not offer a CMDB in the evaluation, but the scoring methodology favors products that provide, or at least integrate to, an enterprise CMDB. An enterprise CMDB is one that can support all of the service management processes in IT — due to the complexity involved, it is likely to be federated, taking feeds from existing data repositories.⁶

BSM SOLUTIONS EVALUATION OVERVIEW

To assess the state of the BSM solutions market, Forrester evaluated the strengths and weaknesses of top BSM solutions vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 2). We evaluated vendors against 26 criteria, which we grouped into three high-level categories:

- **Current offering.** As a framework for the evaluation, we looked at several areas of functionality — data collection, service catalog management, infrastructure mapping, business service mapping, dynamic linking of services, end-to-end monitoring, and integration of a CMDB — as well as support for standards. We also considered product architecture, usability — including language localization — and the ability to integrate with other service management and monitoring systems. We evaluated vendor solutions based on products, features, and capabilities that were generally available to enterprise buyers during the evaluation period.
- **Strategy.** We reviewed each vendor's strategies, target markets, and approach — including planned and future releases, sales and implementation strategies, technology and channel partnerships, geographic presence, and cost. Forrester believes that the acquisition of BSM is a technology decision that firms will need to live with and build upon for years to come.
- **Market presence.** We assessed each vendor's financials, installed base, and staff size and structure. Financial viability and experience in selling and implementing BSM solutions for enterprise customers is always a key evaluation criterion for investments of this size and scale.

Figure 2 Evaluation Criteria

CURRENT OFFERING	
Architecture	Is the product designed to ensure stability, performance, integration, and scalability?
Data collection	Is the solution able to collect relevant and timely data for BSM reporting?
Service catalog management	How does the BSM solution support or integrate service catalogs, SLAs, and OLAs in business metrics?
IT infrastructure mapping	What are the solution's capabilities in discovering and accounting for configuration items (CIs)?
Business service mapping	How does the solution support business service mapping? Can they be diagrammed? Can metrics be maintained?
Dynamic linking of service to infrastructure	How does the solution map business services to CIs? Is this dynamic?
End-to-end monitoring	How mature are the solution's monitoring capabilities?
CMDB	What are the features of the CMDB? What functionalities does it support?
Standards and interoperability	What vendor-neutral and third-party standards does the product support?
STRATEGY	
Product vision	What is the company's product road map for BSM? What is the degree of focus within the company for IT service management?
Sales and implementation strategy	What is the sales strategy? Is this strategy credible and successful?
Geographic presence	How does the company promote and sell its solutions around the world?
Cost	How is the product priced?
MARKET PRESENCE	
Installed base	How large is the installed base of customers for BSM?
Employee base	How many people does the organization dedicate to this solution?
Financials	What is the company's cash position?

Source: Forrester Research, Inc.

Evaluated Vendors Are Well-Known and Active In This Area

Forrester included 11 vendors in the assessment: BMC Software, CA, Digital Fuel Technologies, HP, IBM, Indicative Software, Managed Objects, Oblicore, OpTier, ProactiveNet, and Proxima Technology. Each of these vendors is:

- **In the mind of Forrester clients.** All of the vendors included in the assessment were the subject of client inquiries, product assessments, or consulting engagements. Our clients told us who we needed to evaluate.
- **Actively marketing BSM solutions.** While there are dozens of vendors that use the BSM term in their marketing, Forrester has focused on a manageable shortlist of vendors that we consider provide true BSM value to our clients.

EVALUATION ANALYSIS

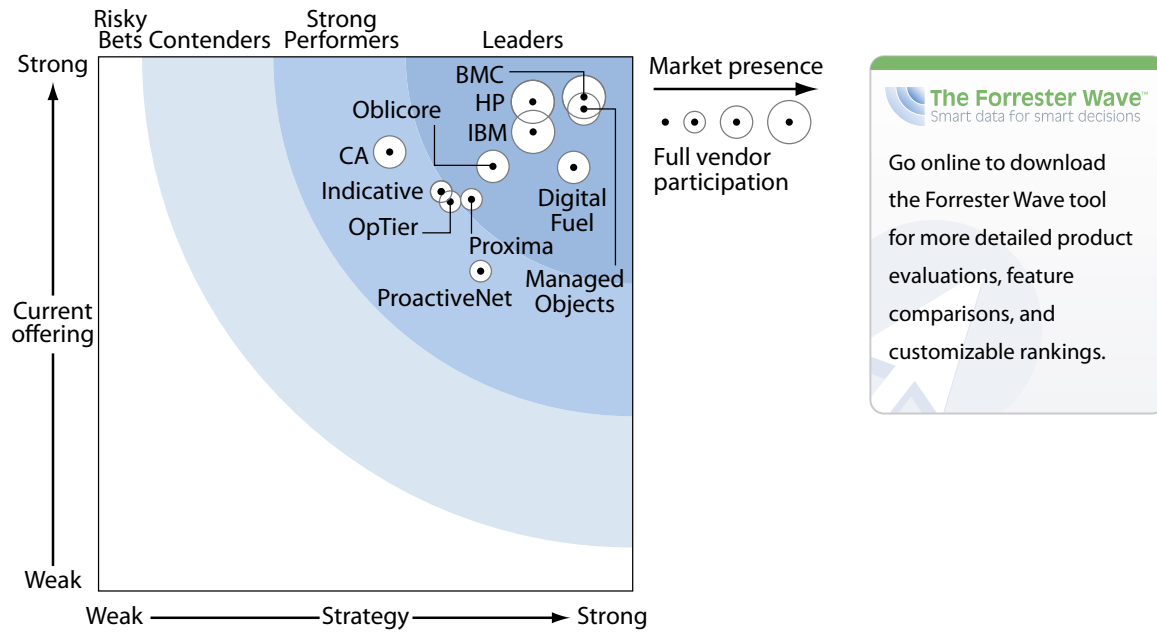
Forrester favored those vendors that truly make the connection between infrastructure and business services and conduct business impact analysis. The tools that are able to understand the metrics their business users employ to decide if IT is providing value and that link these metrics and associated business services to IT infrastructure components also received high scores.

Our evaluation of leading BSM solutions uncovered a tightly grouped market (see Figure 3).

- **BMC Software and Managed Objects are leaders.** Strong product portfolios put BMC Software and Managed Objects at the head of the pack. HP, Digital Fuel Technologies, IBM, Oblicore, and Proxima Technology also fall into this category.
- **OpTier, Indicative Software, CA, and ProactiveNet offer competitive options.**

This evaluation of the BSM market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 3 Forrester Wave™: Business Service Management, Q1 2007



Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: Business Service Management, Q1 2007 (Cont.)

	Forrester's Weighting	BMC Software	CA	Digital Fuel Technologies	HP	IBM	Indicative Software	Managed Objects	Oblicore	OpTier	ProactiveNet	Proxima Technology
CURRENT OFFERING	50%	4.71	4.18	4.04	4.66	4.39	3.81	4.60	4.06	3.72	3.03	3.74
Architecture	20%	4.80	4.70	4.05	4.50	4.05	3.75	5.00	4.40	3.95	4.00	4.25
Data collection	10%	4.25	3.75	4.25	4.25	3.75	3.50	4.50	4.25	4.00	4.75	4.00
Service catalog management	10%	4.00	4.00	5.00	5.00	5.00	4.00	4.00	5.00	3.00	1.00	4.00
IT infrastructure mapping	10%	5.00	5.00	3.00	5.00	5.00	5.00	5.00	4.00	5.00	2.00	3.00
Business service mapping	15%	5.00	4.00	4.00	5.00	4.00	4.00	4.00	4.00	4.00	1.00	3.00
Linking service to infrastructure	10%	5.00	3.00	5.00	4.00	4.00	3.00	5.00	3.00	3.00	4.00	4.00
End-to-end monitoring	10%	4.75	3.65	4.55	4.80	5.00	4.10	4.50	5.00	4.30	4.05	4.35
CMDB	10%	5.00	5.00	3.00	5.00	5.00	3.00	5.00	3.00	2.00	3.00	3.00
Standards & interoperability	5%	4.00	4.00	3.00	4.00	4.00	4.00	4.00	3.00	4.00	4.00	4.00
STRATEGY	50%	4.60	2.70	4.50	4.10	4.10	3.20	4.60	3.70	3.30	3.60	3.50
Product vision	50%	5.00	2.00	5.00	4.00	4.00	3.00	5.00	3.00	3.00	3.00	3.00
Sales and implementation	30%	4.00	3.00	4.00	4.00	4.00	3.00	4.00	4.00	3.00	4.00	4.00
Geographic presence	10%	5.00	5.00	4.00	5.00	5.00	4.00	5.00	5.00	4.00	5.00	3.00
Cost	10%	4.00	3.00	4.00	4.00	4.00	4.00	4.00	5.00	5.00	4.00	5.00
MARKET PRESENCE	0%	4.65	3.95	3.30	4.65	4.65	2.95	3.65	3.30	2.60	3.00	3.00
Installed base	35%	4.00	2.00	4.00	4.00	4.00	3.00	4.00	3.00	2.00	4.00	4.00
Employee base	35%	5.00	5.00	2.00	5.00	5.00	2.00	3.00	3.00	2.00	2.00	2.00
Financials	30%	5.00	5.00	4.00	5.00	5.00	4.00	4.00	4.00	4.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **BMC Software.** BMC Software has offered its product portfolio under the BSM banner for several years now, but it is its product portfolio and experience that makes it an industry leader in BSM. All of its service management products and the Atrium CMDB are based on the BSM concept. In addition, BMC Software has a strong customer base and a sales staff that is capable of discussing BSM challenges with clients.⁷
- **Managed Objects.** Managed Objects focuses wholly on providing a business orientation to IT service management. It has a strong product portfolio for BSM projects and integrates well to

most of the industry's monitoring tools. It provides a standalone CMDB, offering an interesting alternative for enterprises that use products from two or more of the "big four" vendors and would thus prefer a "neutral" CMDB.⁸

- **HP.** The acquisition of Mercury Interactive provides HP with a strong BSM solution with a new and improved CMDB strategy. HP's BSM solution is a natural fit for organizations with a commitment to HP's enterprise management tools. The former Mercury tools also provide good integration to nonHP environments, giving HP an opportunity to expand its software market reach to nonHP customers.⁹
- **Digital Fuel Technologies.** Digital Fuel Technologies is a rapidly growing player in the service catalog management market, offering a business service-oriented solution to service providers and enterprises. Digital Fuel Technologies has a very strong solution for managing the service levels established between the enterprise and the service provider. Its DigitalFlow product can manage the entire life cycle of an SLA. For both the service provider and service consumer, this technology provides a common, transparent, and verifiable process for SLA performance and compliance.¹⁰
- **IBM.** IBM has provided Tivoli Business Systems Management (TBSM) to its mainframe customers for several years. Recently, it renamed TBSM as Business Service Management and enhanced the technology to include distributed systems beyond the mainframe. Integrated with IBM's new C-CMDB, IBM Tivoli offers a compelling solution for enterprises committed to Tivoli solutions in particular and IBM products in general.¹¹
- **Oblicore.** Oblicore is a privately held company that is carving out a place among big vendors like BMC Software, CA and HP and is competing with smaller vendors in the BSM space. Its solution is designed to minimize the costs in IT that come from structuring service catalogs and continuously monitoring, managing, and reporting SLAs. The company markets its solution to service providers, telcos, and IT enterprises.¹²
- **Proxima Technology.** Compuware recently acquired Proxima and will integrate the Proxima Technology solution into Compuware's Vantage solutions portfolio. In the past few years, Proxima Technology has built up a solid reputation as a BSM solutions provider around its transaction management technology.¹³

Strong Performers

- **OpTier.** OpTier is a smaller vendor with a clear focus on business transaction management software, achieving success primarily in the financial services sector. OpTier's solution, CoreFirst, traces end user transactions throughout all system tiers and logs the relevant information in a database for reporting and analysis. OpTier dynamically links business services to underlying IT infrastructure and monitors and alerts on performance issues. Its core ability

lies with mapping business services, prioritizing critical business processes supporting the services, analyzing the performance of the underlying infrastructure, and taking corrective actions.¹⁴

- **Indicative Software.** Indicative Software gained its pedigree of expertise in network, systems and service management from HP and then from Agilent Technologies. Founded in 2003 as a separate company, Indicative Software has rapidly built up an impressive client list that does context, visualization, and performance monitoring of the entire business service value chain.¹⁵
- **CA.** CA is one of the “big four” IT management software vendors, with a large and disparate installed base for its existing monitoring and service management solutions. CA’s strategy of enterprise IT management (EITM) reflects a strong technological potential to cover BSM; however, the solution is closer to enterprise or IT service management than to BSM. Its service-level management product and the CMDB provide a good start. CA’s solution approach to BSM — which means that firms need to combine many different products to gain the fully functioning BSM solution — is great for CA’s installed base, but makes it difficult for other customers to get started.¹⁶
- **ProactiveNet.** ProactiveNet is unique as it provides BSM via an analytics engine that correlates massive volumes of performance data from across the entire infrastructure, narrowing the many potential causes of a service problem to a manageable few to speed problem resolution efforts. Its ability to analyze giant performance data sets quickly in combination with an intelligent threshold setting makes this solution a great option for eCommerce clients. Its self-learning capabilities virtually eliminate the ongoing costs of threshold setting and script maintenance.¹⁷

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with some of the vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Forrester anticipates that the number of enterprises implementing business service management (BSM) will nearly triple by the end of 2008 to 25% of enterprises with more than \$1 billion in revenues — about 800 companies worldwide. According to our research, 9% of enterprises already have a BSM project in progress. See the February 6, 2007, Market Overview “[Business Service Management: Early Birds Are Catching The Worm, But IT Still Doesn't Get It.](#)”
- ² Over the past 12 months, Forrester has interviewed more than 50 companies that have either already completed BSM projects or are currently implementing them. Forrester also surveyed 10 companies in 2006 as best-practice examples of BSM projects after leading BSM software vendors identified these companies as pioneers in this respect. See the February 6, 2007, Best Practices “[Business Service Management: Early Birds Are Catching The Worm, But IT Still Doesn't Get It.](#)”
- ³ IT asset management is the portfolio approach to measuring the technical, financial, and service condition of an organization's IT infrastructure. IT asset management leverages the physical attributes of an asset with services and financial data that support the management of the asset.
- ⁴ The Information Technology Infrastructure Library (ITIL) is a set of standard IT terminologies — such as a high-level definition of a change request — that the United Kingdom Central Computer and Telecommunication Agency developed in the late 1980s and early 1990s to address the IT service support and delivery issues faced by IT infrastructure organizations. ITIL standards were designed to establish guidelines and a common language for operational processes, such as change management, problem resolution, service delivery, and resolution of customer inquiries. ITIL is a registered trademark and a registered community trademark of the UK Office of Government Commerce and is registered in the US Patent and Trademark Office. In 2001, the United Kingdom Central Computer and Telecommunication Agency was absorbed into the Office of Government Commerce, which now owns ITIL. See www.ogc.gov.uk/index.asp?id=2261 for more information.
- ⁵ A service is defined as a discrete offering from an IT department or external service provider. A service-level agreement is a contract between a business and an IT service provider, internal or external. Service-level management is the process of measuring service quality, reporting results, and taking action to ensure that quality stays within agreed parameters. See the October 24, 2005, Trends “[IT Asset Management, ITIL, And The CMDB: Paving The Way For BSM.](#)”
- ⁶ The convergence of more structured management processes, such as ITIL, and technical innovations like application dependency discovery has brought configuration management and the concept of the configuration management database (CMDB) to the attention of many enterprises. See the April 12, 2006, Best Practices “[The 'Just Enough' CMDB.](#)”
- ⁷ View the vendor summary for more detailed analysis on how BMC Software fared in this evaluation. See the March 28, 2007, Tech Choices “[BMC Software Aligns IT With The Business To Lead In BSM.](#)”
- ⁸ View the vendor summary for more detailed analysis on how Managed Objects fared in this evaluation. See the March 28, 2007, Tech Choices “[Managed Objects Is One Of The Pioneers In Business Service Management.](#)”

- ⁹ View the vendor summary for more detailed analysis on how HP fared in this evaluation. See the March 28, 2007, Tech Choices “[The Mercury Acquisition Bolsters HP’s Leading BSM Capabilities.](#)”
- ¹⁰ View the vendor summary for more detailed analysis on how Digital Fuel Technologies fared in this evaluation. See the March 28, 2007, Tech Choices “[Digital Fuel Technologies Provides Service-Level Management At Its Finest In BSM.](#)”
- ¹¹ View the vendor summary for more detailed analysis on how IBM fared in this evaluation. See the March 28, 2007, Tech Choices “[IBM Visualizes The Health Of Critical Business Services To Become A BSM Leader.](#)”
- ¹² View the vendor summary for more detailed analysis on how Oblicore fared in this evaluation. See the March 28, 2007, Tech Choices “[Oblicore Shows Firms The Price Of Poor IT Performance With Its Leading BSM Solution.](#)”
- ¹³ View the vendor summary for more detailed analysis on how Proxima Technology fared in this evaluation. See the March 28, 2007, Tech Choices “[Proxima/Compuware Allows Service Providers To Contain Costs And Reduce Risk Via BSM.](#)”
- ¹⁴ View the vendor summary for more detailed analysis on how OpTier fared in this evaluation. See the March 28, 2007, Tech Choices “[Strong Performer OpTier Brings Transaction Management To BSM.](#)”
- ¹⁵ View the vendor summary for more detailed analysis on how Indicative Software fared in this evaluation. See the March 28, 2007, Tech Choices “[Indicative Software Provides A Strong-Performing All-In-One Product For BSM.](#)”
- ¹⁶ View the vendor summary for more detailed analysis on how CA fared in this evaluation. See the March 28, 2007, Tech Choices “[Strong Performer CA Is Building Its BSM Solution By Acquisition.](#)”
- ¹⁷ View the vendor summary for more detailed analysis on how ProactiveNet fared in this evaluation. See the March 28, 2007, Tech Choices “[ProactiveNet Uses Superior Analytics To Improve Business Service Management.](#)”

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