

## Cool Vendors in IT Service Portfolio Management and IT Service Dependency Mapping, 2005

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As IT organizations adopt a business-oriented service management strategy, they seek greater efficiency in discovering, defining, documenting and reporting on IT services. A new "cool" set of vendors focuses on enabling organizations to become more IT service-centric.

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## ANALYSIS

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### Management Summary

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Internal customers within enterprises have been pressing their IT organizations to become better business partners, to improve service quality and to attain greater efficiency, all, of course, without increasing cost. In response, IT organizations are re-engineering their processes to deliver more business-oriented IT service management. A new set of "cool" vendors has come to light during 2004, offering innovative solutions aimed at assisting in this transformation through the emerging categories of IT service portfolio management and IT service dependency mapping technology. These new technology categories are "cool" because their solutions push beyond the boundaries of IT silos to affect the entire business management of IT.

This research does not include the "cool stuff" under development within big-name vendor product portfolios, such as BMC Patrol, Computer Associates' (CA's) Unicenter, HP OpenView and IBM Tivoli. Nor have we tried to cover small vendors that are no longer emerging independently, having already been acquired by larger companies (for example, iCAN-SP by Computer Associates and Appilog by Mercury). This research is just a sampling of independent companies that offer some unique capabilities that could help an IT organization that is making the transition to IT service management. Gartner analysts believe that these vendors are worth watching for their future developments, but by no means is Gartner endorsing these vendors and their products. Rather, we are urging you to look at their offerings to see whether they might be of use to you in addressing your business needs.

These are just two categories of management software where we see the pace of innovation accelerating, partly because venture capital money is starting to pick up again after a two-year slowdown. However, initial public offerings remain few and far apart. Most startups now work toward the goal of being acquired. Expect turmoil and consolidation as the big IT operations management software vendors — as well as vendors whose specialty lies outside of IT operations — snap up smaller vendors that have gained traction and demonstrate successful production deployments.

### 1.0 IT Service Portfolio Management

IT operations organizations are investigating emerging software product functionality that Gartner refers to as "IT service portfolio management" (ITSPM) to help manage their IT services, deliver better service experiences to customers and enable IT to be run more like a business. This market is "cool" because it helps IT document its service portfolio and develop more-standardized services to offer its customers, with standard process methodologies for service delivery. Through standardization, along with better understanding of customer requirements and delivery costs (such as capital and labor requirements), IT is in a position to continually seek methods to reduce delivery costs while meeting customer service and quality requirements. The IT service portfolio management products are intended to:

- Document the catalog of standardized IT services, along with their standard, supported architectures, and contracts with internal and external service providers

- Automate the process workflow for ordering and delivering IT services, including task definition and dissemination
- Report on service quality and costs

Depending on the services offered, integration would generally be required from the ITSPM product to other IT operations management software products such as service desk, desktop software distribution, server provisioning, user provisioning, usage monitoring and service-level performance monitoring.

### **Challenges Faced by ITSPM Cool Vendors**

**Limited Addressable Market:** The target market for ITSPM vendors is the 10 percent to 20 percent of enterprises that have attained the service management level of maturity. Many IT organizations document their service catalog in a spreadsheet, Microsoft Word document or homegrown database and see no need for this kind of tool. The few large enterprises that are testing or implementing these tools are visionary, "marquee" accounts. In fact, many of the software providers have been in business for four to five years and have only a handful of customers. Most will not have the cash or investor patience to survive the length of time it will take to expand the size of the addressable market.

**Broad Range of Expected Capabilities:** ITSPM projects are likely to suffer from "feature creep" in the form of unexpected demands and undocumented "assumed" functional requirements. Some customers mistakenly think that the ITSPM tools will include the ability to define business processes (rather than IT services). Others believe that ITSPM tools automate the discovery and dependency mapping of IT service components. Currently, a separate category of tools is needed to handle the latter functions.

**Conflicting Expectations of What Constitutes a Service:** With the varying levels of service management maturity exhibited by IT organizations, there are many different definitions of what might be considered to be an IT service, and thus expected to be covered by the ITSPM product. ITSPM vendors can be categorized into subgroups based on what IT services they focus on, such as:

- End-user IT services of the "move-add-change" variety
- IT services that enable strategic business processes such as hosting critical applications and assuring their service quality
- Service contracts with outsourcers and external service providers (ESPs)

Although still nascent, the ITSPM technology area already has experienced turbulent changes in executive management and strategy. Each vendor has very few production customers; thus, requirements set by their last large customer can dramatically influence their product strategy/road maps. Successful customers praise the benefits of financial and architectural control, while they complain about high cost, the need for custom services, and requirements to manually populate and update the service catalog.

## **1.1 Centrata**

**Centrata**, Redwood City, California ([www.centrata.com](http://www.centrata.com)) — Centrata was founded in 2001 and has 80 employees and four customers in production. Although this figure is only based on four deals, Centrata reports its average sales price to be approximately \$250,000 to \$500,000. Centrata named a new CEO, Dave Peranich, in June 2004, one of many executive management changes that we have observed in this technology category. The goal of Centrata's Service Catalog and Service Delivery Management solution is to help IT operations organizations

proactively manage their service portfolios and deliver IT services in a predictable, repeatable way. Centrata Service Catalog includes a set of pre-defined core IT services that can be used as an example for companies in an attempt to jump-start their service catalog initiatives. The Service Delivery Management suite tracks information about each IT service, such as price, service-level options, bill of labor, bill of materials and workflows associated with fulfilling requests. When workflows and best practices are documented in software, the service delivery process can be automated and operational efficiencies improved.

Centrata will be challenged by the requirement to stabilize its long-term vision and road map, which has been swayed by the needs of the "last big customer." At least one out of four Centrata customers seems to be using the product to document its reference architecture and costs, rather than using the product's service catalog and workflow functions. This is very helpful for collaboration between application development and production operations: When an exception is requested to deviate from the reference architecture, the reasons behind it and the increase in cost are well documented. However, because this was not intended to be the core functionality of the Centrata product, this "feature creep" is likely consuming precious R&D resources.

*Analysis by Kris Brittain and Debra Curtis*

## 1.2 Digital Fuel

**Digital Fuel**, San Mateo, California ([www.digitalfuel.com](http://www.digitalfuel.com)) — Digital Fuel was founded in 2000 and has 100 employees and 20 customers in production. Prices start at \$250,000. Digital Fuel places its product emphasis on multisourced IT service delivery management. Its ServiceFlow product helps enterprises and service providers better track outsourced and in-house IT services. Fundamental to its offering is the ability to define and make updates and adjustments to each IT service, which includes service configuration, cost, service-level agreements (SLAs) and associated processes. The service catalog can be externally published to provide access to internal or external customers using role-based authorization. For SLA tracking and reporting, ServiceFlow leverages data collected by performance monitoring and system management tools, as well as information stored in customer relationship management, billing and financial systems. The product can display performance by site and can forewarn of pending SLA breaches. Digital Fuel has announced that ServiceFlow will be used as the "system of record" for managing the business process outsourcing and IT outsourcing SLAs for Procter & Gamble's outsourcing contracts with HP, IBM and Jones Lang LaSalle.

Recent wins in the outsourcing segment of ITSPM have caused Digital Fuel to fine-tune its strategy and marketing message to focus more on "outsourcing governance." Although it is not abandoning multisourced IT service delivery management, Gartner believes that more R&D resources will likely be dedicated to managing the delivery of outsourced, rather than in-house, IT services. Thus, the vendor will be challenged to maintain domain knowledge of internally sourced IT services.

*Analysis by Kris Brittain and Debra Curtis*

## 1.3 Euclid

**Euclid**, San Jose, California ([www.euclid.com](http://www.euclid.com)) — Euclid was founded in 2000 and has 70 employees and five software product customers in production. Although this figure is only based on five deals, Euclid reports that its average sales price ranges from \$150,000 to \$500,000. Euclid is focusing more on the IT service catalog and visualization of IT service-level results, rather than on the service workflow process portion of ITSPM functionality. In April 2002, what was first offered as a managed service began to be marketed as a software product. Euclid software consists of modules that enable IT service definition and modeling, service catalog (allowing users to browse the catalog and read descriptions, though not to order services), and

SLA management (including development and operations domains). Euclid offers adapters for help desk, system management, project management and financial applications, and taps these data sources to provide a consolidated view of current and historical service health as measured by availability, performance, quality and cost. Because manual creation of service mapping and linkage to service-level monitoring data inhibits ITSPM product deployment, Euclid recently introduced blueprinting, storyboarding and management automation consulting offerings to help guide customers through the process.

Euclid has been suffering from more than the usual amount of "churn" in its executive management team, making it challenging to keep a consistent vision and road map. Sateesh Andra, one of Euclid's founders, is the new president and CEO as of November 2004, replacing Patty Azarello, who was hired for that role in January 2004. In the area of product challenges, Euclid's product offering lacks "out-of-the-box" process workflow to automate the ordering and delivery of IT services.

*Analysis by Kris Brittain and Debra Curtis*

## 1.4 newScale

**newScale**, Foster City, California ([www.newscafe.com](http://www.newscafe.com)) — newScale was founded in 1999 and has 101 employees and 20 customers in production. Its average sales price is \$250,000 to \$400,000. Although it is one of the early entrants to the ITSPM market, newScale, unlike some others in this category, has maintained a stable management team. Its RequestCenter 2004 product includes tools to catalog and automate service ordering, manage service fulfillment and report on service delivery. The vendor focuses on reducing the direct labor costs and improving the quality of IT, facilities or workplace services for internal customers. RequestCenter includes pre-defined templates for more than 800 common IT desktop, application, and infrastructure services or service subcomponents — such as new computer setup, network access, new server deployments and application maintenance. Many of these pre-defined templates are targeted at mature, repetitive, move-add-change type services. The vendor is beginning to expand its template base to support more-complex, business-oriented IT services and service contracts with outsourcers. There is a larger addressable market of IT organizations capable of automating repetitive, move-add-change type services for newScale to target. However, for future growth, the vendor will need to demonstrate its ability to support more-strategic, business-oriented IT services.

newScale will be challenged by the need to distinguish itself from IT service desk software vendors that also provide some semblance of a service catalog for end-user-oriented services and automated process workflow for move-add-change service requests. If the service desk vendors invest in strengthening their ITSPM-style capabilities, they will overwhelm the startups in this market with their global presence, direct sales force and variety of marketing.

*Analysis by Kris Brittain and Debra Curtis*

## 1.5 Oblicore

**Oblicore**, Columbia, Maryland ([www.oblicore.com](http://www.oblicore.com)) — Oblicore was founded in 2000 and has 80 employees and 23 customers in production. The average sales price of its product is \$550,000. Oblicore manages and reports on the performance of outsourced and insourced IT services for service providers and enterprises. The vendor's product, Oblicore Guarantee, starts with the ability to define, document and manage an IT service catalog. It captures service-level agreements and outsourcing contracts in terms of the services to be delivered to multiple customers, during specific time periods, using different infrastructure resources. Oblicore's Guarantee allows business rules (such as "eight minutes of downtime during peak hours is a violation") to be documented for determining compliance with service targets and their financial

impact (for example, performance penalties). It can gather data from many IT systems, such as help desks and network-, system- and application-monitoring tools. Manual effort or customization is required to define the logical links between component data and IT services, but then the data can be viewed and reported via real-time service-level dashboards. If the IT organization is deciding what service levels it can deliver, Oblicore can use historical data to establish service-level baselines.

Oblicore's challenges include the level of knowledge required by its customers. To be ready to use Oblicore Guarantee for insourced IT services (compared with offerings from ESPs), customers must already have an understanding of the dependency mapping from IT service to IT infrastructure components, and have access to data from service-level monitoring tools. Oblicore's product offering lacks process workflow to automate the ordering and delivery of IT services.

*Analysis by Kris Brittain and Debra Curtis*

## 1.6 Real Clear Technologies

**Real Clear Technologies** (formerly ManageStar), Emeryville, California ([www.realcleartechnologies.com](http://www.realcleartechnologies.com)) — Real Clear was founded in 1999 and has 50 employees and eight customers in production. Its average sales price is \$200,000. Real Clear started with a facilities management application service provider model focused on IT service support needs, but it has changed its strategy and now markets a suite of software products under the service delivery management umbrella, composed of the modules Real Clear Service Desk, Workbench service configuration tool and Service Catalogs. Real Clear includes more than 100 pre-built IT services (such as employee move-add-change, desktop IT and application access) that can help an IT organization move to a standardized, employee self-service delivery model. In addition to defining, configuring and maintaining services, their associated costs, service levels, and user entitlement, the product also integrates with help desk and asset repository systems and provides capabilities to report on service demand. The service catalog can be published and used to manage in-house and external services, including service packages based on specific business needs (for example, executive support).

Real Clear's recent focus on pre-built IT services places the vendor in direct competition with newScale, which has spent four years building a library of documented services. Real Clear will be challenged by the need to expand beyond the move-add-change type of IT services for internal employees before the IT service desk vendors enter this portion of the market. Many IT service desk vendors originally viewed the startup ITSPM vendors as acquisition candidates or potential partners. Now, however, IT service desk vendors see the ITSPM startups as rivals and have been shoring up their own capabilities so that they may compete more-effectively.

*Analysis by Kris Brittain and Debra Curtis*

## 2.0 IT Service Dependency Mapping

The IT service dependency mapping market remains as active as it was in 2004. Vendors in this market have enhanced and refined their solutions with more application blueprints and broader discovery. They are now targeting specific "pain points" in an IT infrastructure by providing information about applications and systems changes, real-time problem determination, and audit and compliance within an infrastructure.

Previously, we broadly defined this market as IT service configuration management. This includes solutions that enable IT organizations to discover, document and track relationships by mapping dependencies among the components that constitute an IT service (including desktops, servers, networks, storage, applications and data). Other functions could include risk and impact analysis

and additionally some basic configuration change control. However, since our last report, the IT service configuration market has become multisegmented and includes solutions that focus on a variety of requirements, including (see "Organizations Are Paying More Attention to Configuration Management," G00126227):

- Data center audit and compliance for hierarchy, desired state and dependencies across applications
- Infrastructure documentation to assist in aligning processes such as configuration, change and problem management
- Configuration consistency for application deployment of changes that can affect shared server resources

Dependency mapping is a subset of IT service configuration management. Thus, some vendors discussed in our 2004 report (see "Cool Vendors in Configuration Management," R-22-2613) would no longer be included in this segment of the market because they have redefined their focus and direction (for example, Troux is focusing on IT governance; mValent is focusing on application development).

### **Dependency Mapping and Configuration Management Databases**

Dependency-mapping solutions offer a visualization of the application infrastructure and associated components, such as servers, network and storage devices. This enables the IT organization to monitor the interrelationships between these components in a hierarchical and a peer-to-peer format across an infrastructure. This automatically discovered view of the infrastructure can then be correlated back to specific business services/processes. Dependency mapping is integral to achieving success with other service management functions (including service level, change, problem, asset, availability, performance and portfolio management).

The ability to discover and visually depict the application infrastructure and the associated configuration items in a "semi-real-time" mode is one of the conditions necessary for building a configuration management database (CMDB; see "Defining a Configuration Management Database," G00123937). CMDBs are being built by vendors with a suite of products focused on IT service management (such as CA, BMC Software/Remedy and HP). The goal is to integrate the dependency-mapping tools, which provide a view of the interrelationships into a CMDB to validate process adherence and analyze the business impact of impending changes on infrastructure components.

### **Factors Contributing to the Market's Growth**

Most IT organizations have relied on manual processes, scripts and homegrown tools to maintain configuration item information in many different repositories. The move toward automation has been driven by the need for a consistent view to audit and monitor changes across applications and infrastructure components, as well as providing improved root cause analysis and better change planning. This focus on a corporatwide configuration management strategy has been increased by external factors, such as the IT Infrastructure Library guidelines and compliance with the U.S. Public Company Accounting Reform and Investor Protection (Sarbanes-Oxley) Act of 2002, as well as internal factors, such as maturing IT service management initiatives.

In 2004, few solutions were available to support a broad set of blueprints or templates for applications, such as SAP, PeopleSoft or WebSphere. As a result, IT organizations had the time-consuming task of using homegrown tools to document the application and infrastructure components themselves, with little ability to document the intricate interdependencies or keep them up to date. No one tool provides complete IT service configuration management or a complete infrastructure view. Each tool takes a variety of approaches to discovery, visualization

and automation (focused on applications and servers), as well as offering a limited degree of integration with established management tools (such as CA, IBM Tivoli, BMC and HP) for a broader infrastructure view. The task required (such as system audit, security audit, configuration compliance) determines which component relationships are tracked and how the information is used.

During 2004, dependency mapping became a viable market, in part because manual efforts failed to provide a real-time or even near-real-time view. In addition, the large number and wide-ranging types of IT components that companies find themselves managing, and the breadth and number of application definitions (or blueprints), made it impossible to have one source of discovery that could visualize all of the components consistently. (In other words, management tools for storage and network and servers were able to discover their respective technologies, but no one tool could tie them all together visually, showing their interrelationships.) Some mapping vendors have been adding more out-of-the-box application blueprint discovery, and software development kits (SDKs) for building blueprints for custom or homegrown applications. Today, each dependency-mapping vendor's approach to discovery and visualization is proprietary. Because this is an emerging market, there is a lack of standards that address how discovery methods should present the visualization. Such a lack of standards is not unusual in a nascent marketplace, but it does present a risk to companies that are leading-edge, early adopters of new technologies.

### **Dependency-Mapping Cool Vendors**

Although these vendors still don't have a large number of clients, in just 12 months they have succeeded in identifying a set of needs that their solutions can address. In addition to the vendors we discussed in 2004 — Cendura, Collation, Relicore and Tideway — two new vendors should be considered as cool dependency-mapping vendors. All of these vendors are new to this market, with focused engineering teams that are able to quickly respond to new functionality requests. Their solutions are maturing quickly to offer enhanced functionality, including improved visualization of interrelationships, additional blueprints, impact analysis and, in some solutions, rollback or withdraw capability to take faster corrective action.

Dependency-mapping vendors are ideal acquisition candidates because they are relatively small, with only a handful of paying customers. In addition, they may have some feature that every large enterprise management vendor needs or is working on to enter this market or an adjacent market, such as CMDB. They are mainly attractive to larger vendors that want to quickly bring a complete solution to market. In addition, they may also be desirable to vendors in ancillary markets that wish to move into dependency mapping. The first acquisition in this market was Mercury's purchase of Appilog. The product resulting from this acquisition, Mercury Application Mapping, discovers and maps topologies of applications and the underlying infrastructure. The product stores all application information within a data store that can be used as a CMDB, which other Mercury management applications can access. For example, the Business Impact Analysis application can use updated application topology maps to assess the impact of planned and unplanned configuration changes to the IT environment.

As usual, when considering adopting a new technology, you should weigh the benefits that can be achieved with IT service dependency-mapping tools against the risks of investing in a solution that originates in a market that remains in flux, with new vendors appearing annually.

## **2.1 Motive**

**Motive**, Austin, Texas ([www.motive.com](http://www.motive.com)) — Motive was founded in 1997 and has 351 employees and one corporate customer in production (for this suite of products). With only one deal having closed so far, average sales price will change as the product matures and becomes more competitive. Motive is a public company that offers solutions that are predominantly for support automation for the broadband market (approximately 80 percent of its customers are

vendors, although its initial foray was into the IT service business and was not successful). The September 2004 release of the Motive Profile product makes Motive the most-recent addition to the dependency-mapping market. This is a suite of products for dependency mapping of Web-based applications that also includes Motive Triage — application support for Java 2 Platform, Enterprise Edition (J2EE) — Motive Resolution (problem resolution tool for J2EE) and Motive Model Builder, and Motive Remote Service manager. This suite of solutions does not use agents, contains model-based discovery, visualization, and snapshot-based comparative audit reporting for application compliance, as well as an SDK tool to build custom application blueprints (Model Builder). In February 2005, Motive announced a partnership with IBM Global Services to be one of the tools used with autonomies projects. BEA Systems, Siebel Systems and PeopleSoft are also users of Motive's Profile technology.

Although Motive offers visualization, its strategy is to add capability for change automation and its product is likely to be integrated as a feed to a CMDB, rather than itself serving as a CMDB. Profile is sold directly to users, which are using it to speed up service and support by improving visibility into their internal users; however, Profile has been quickly adopted by software vendors, which are primarily using it as a communication pipe and development tool to add their own content and knowledge. Motive's installed base of vendors is much larger than its number of end users (it has only one user). Gartner believes Motive will be challenged to sell its product directly to users of the technology, rather than to other vendors. The vendor must refine the sales approach and ensure that it targets the right buying centers within organizations. Maintaining a bifurcated approach to selling to vendors and users will also present a challenge in segmenting and training its sales organization.

*Analysis by Patricia Adams and Ronni Colville*

## 2.2 nLayers

**nLayers**, San Jose, California ([www.nlayers.com](http://www.nlayers.com)) — nLayers was founded in 2002 (first product shipped in 2Q03) and has 30 employees (17 in Israel, 13 in the United States) and six customers in production. Perpetual licensing begins at \$100,000. Its subscription model is \$75,000 for three years. A private company, nLayers has sold its product, InSight, as an appliance. InSight provides agentless discovery and dependency mapping, and can detect usage trends of applications and resources with a passive packet-inspection-like capability that plugs into a spanning port on a network switch. Its analytical capabilities can be used to create projections of application demand and resource use based on network traffic. Using customized policies and thresholds set by the user, it can identify when an application is no longer in desired performance state. InSight discovers shrink-wrapped and custom applications.

nLayers offers a license-based approach and a managed-service offering. The vendor has an original equipment manufacturer relationship with Managed Objects. nLayers also participates in Mercury's Technology Alliance program and IBM's Autonomic Computing Group. nLayers is also building integrations to other vendors' products, such as BMC's Patrol and Remedy help desk. An integration to HP's OpenView Network Node Manager is already available. The vendor expects to announce additional partnerships and integrations in the near future.

As with other vendors in this market, nLayers faces the challenge of adding value on top of the topology in one or many of the IT processes that depend on configuration information. Startups traditionally have found it difficult to staff and fund two different approaches to selling, as nLayers must do if it continues to balance its dual role of providing services and selling directly to customers.

*Analysis by Patricia Adams and Ronni Colville*

### 3.0 Conclusions

IT operations is undergoing a wide-reaching transformation as it becomes a business-oriented service provider. New vendors are springing up to meet the requirements for this new role, with solutions that focus on IT service dependency mapping and IT service portfolio management functions. Committing to a small, innovative startup vendor that specializes in these functions poses the usual risk that your vendor is more likely to be acquired or go out of business. Ask for financial results as well as customer references. Weigh the risk against the benefits of achieving advanced functionality earlier than you likely would if you built the solution yourself or waited for a larger, more established vendor to bring a solution to market. Because the IT service dependency mapping and IT service portfolio management markets are nascent, Gartner recommends that you first run a pilot project with these solutions. The project should focus on achieving measurable results in the enhancement of your configuration knowledge or the attainment of greater IT service management process maturity. You can successfully gain these results even while planning for the possibility that the particular software product you use might be discarded or the vendor that provided it might fail.

#### Appendix A. Acronym Key

<b>CA</b>	Computer Associates
<b>CMDB</b>	configuration management database
<b>ESP</b>	external service provider
<b>ITSPM</b>	IT service portfolio management
<b>J2EE</b>	Java 2 Platform, Enterprise Edition
<b>SDK</b>	software development kit
<b>SLA</b>	service-level agreement

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