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The Forrester Wave™: Message Archiving Software, Q1 2011

by Brian W. Hill

for Content & Collaboration Professionals



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Autonomy, IBM, And Symantec Lead A Crowded Field

by **Brian W. Hill**

with Stephen Powers, Joseph Dang

EXECUTIVE SUMMARY

In Forrester's 90-criteria evaluation of message archiving software vendors, we found that Autonomy, IBM, and Symantec lead with mature products, strong eDiscovery capabilities, and an integrated portfolio of supporting offerings. Strong Performers EMC, OpenText, and ZL Technologies also have solid products, but lack comparable offering depth and breadth. Contender Hewlett-Packard (HP) offers an integrated appliance with core message archiving capabilities but has shortcomings with content types supported, eDiscovery, and supervision. With Exchange 2010, Contender Microsoft has basic archiving functionality built into its broadly adopted messaging platform but trails other message archiving providers in capabilities.

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Forrester evaluated nine products and interviewed 18 user companies.

Related Research Documents

["Q&A: eDiscovery Fundamentals For Content & Collaboration Professionals"](#)

December 15, 2010

["Q&A: Message Archiving Fundamentals For Content & Collaboration Pros"](#)

September 7, 2010

["Regulatory And eDiscovery Demands Drive A Growing Message Archiving Market"](#)

March 17, 2010

["The Impact Of Convergence On Content Management, Archiving, And Retention Policies"](#)

October 15, 2008

COMPLIANCE, EDISCOVERY, AND IT OBJECTIVES DRIVE MESSAGE ARCHIVING

Over the past decade, requirements to comply with regulations, mitigate legal risk, and improve operational efficiency have driven tens of thousands of organizations to deploy archiving solutions for Microsoft Exchange, IBM Lotus Domino, and other messaging systems. Although this is a mature market supported by a broad array of vendors, solution satisfaction rates lag, and enterprises report significant frustration with policy development, integrating with eDiscovery processes, and system shortcomings.

Buyers Must Focus On Five Key Trends In Evaluating Message Archiving Options

The rapid growth in messaging volume combined with increasingly complex compliance and eDiscovery requirements challenges message archiving initiatives.¹ These factors along with key vendor and technology shifts drive significant change in the well-established message archiving market. These major market shifts include:

- **Microsoft's entrance in the message archiving market.** As the messaging market share leader due to its Exchange installed base, Microsoft's perspective and direction on message archiving have significant impact.² In November 2009, Microsoft released Exchange Server 2010 and included basic archiving and eDiscovery functionality as a feature to that offering. Exchange 2010 can reduce the proliferation of .pst files and provides basic retention management, auditing, and legal hold functionality. Exchange 2010 has shortcomings compared with other suppliers, but the vendor's foray into this area signifies the importance of this market. It also adds complexity as Microsoft continues to partner with other message archiving providers and now also competes with them.
- **The increasing importance of archiving across multiple content types and applications.** Surging enterprise content growth adds to greater exposure to legal risk, compliance challenges, high storage costs, and IT operational headaches. Rapid rises in email and attachment message size and volume account for a significant part of this growth, but growth in file shares, instant messages, voicemail, social media, SharePoint, and a variety of other unstructured content as well as structured data create further complications.³ For several years, enterprises have aimed to transition from disjointed product responses to more holistic archiving approaches across broader array of content and application types. While structured data archiving remains largely a separate and distinct market, this trend toward a unified approach for archiving messaging and unstructured information is accelerating as organizations seek to rationalize infrastructure and pursue broader information governance objectives.⁴
- **Significant and expanding focus on the intersection of eDiscovery and message archiving.** Message archiving systems typically provide compression, single-instance storage, and tiered storage support that enable significant storage savings and other IT operational benefits such as improved backup and recovery. These objectives remain important, but with increased

enterprise focus on eDiscovery and compliance, legal risk mitigation needs now drives message archiving adoption. Effective archiving initiatives reduce the volume of content that organizations need to sift through in the face of litigation or regulatory inquiries, translating to lower costs and improved response times. Considering the challenges that enterprises typically face with disconnected applications during the eDiscovery process, vendor eDiscovery capabilities have a major impact on message archiving system selection.

- **Accelerating adoption of cloud-based message archiving.** Organizations are increasingly adopting cloud-based solutions for message archiving due to perceptions of lower total cost of ownership, more rapid deployment capabilities, and other drivers. Software-as-a-service (SaaS)-based and hosted message archiving solution adoption has historic roots in small and midsized organizations, particularly in the financial services market. Security, operational, legal, and other adoption barriers persist, but vendors are seeing greater success in larger enterprise customers across a variety of vertical markets as they address these concerns. Vendors in this evaluation sell on-premises offerings, but nearly all support or plan to support cloud-based archiving through either native capabilities or partnerships. Some vendors may simply support the cloud as an optional storage target or focus on dedicated hosting partnerships, but others will support hybrid infrastructures across SaaS and on-premises deployments.
- **Growing frustration with shortcomings in current solutions.** Only about half of message archiving stakeholders report satisfaction with their current message archiving solutions.⁵ Many stakeholders are investigating alternative suppliers as they look to replace legacy archiving systems or upgrade existing messaging platforms. The most pressing problems aren't expense or technology concerns like insufficient feature sets. Instead, pain points include retention and legal hold policy creation, stakeholder alignment, and synchronizing eDiscovery, records management, and archiving efforts. Technology alone does not provide a satisfactory "quick fix" for message archiving. Stakeholders report significant challenges in aligning with diverse functional groups (e.g., legal, IT, compliance, records management, and lines of business) for policy development and application integration to mitigate legal risk. Most vendors in this evaluation provide at least some services in this area, but challenges remain.

A Broad Range Of Vendors Offer Message Archiving

While more than two dozen vendors compete in the market, this analysis evaluates top on-premises message archiving products. Other vendors also provide on-premises offerings, and a largely separate set of other suppliers market cloud-based solutions. With limited overlap, the relevant players in the market fall into two primary categories (see Figure 1):

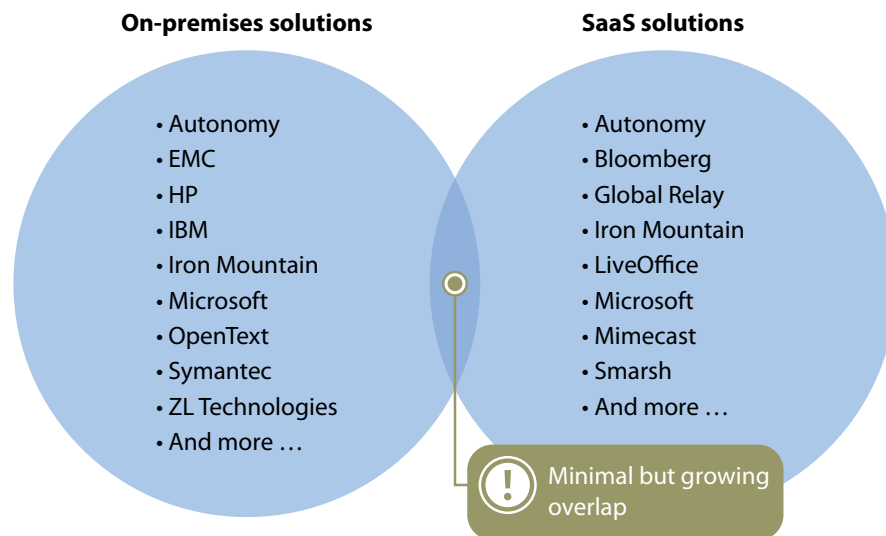
- **On-premises vendors.** This evaluation compares Autonomy, EMC, HP, IBM, Iron Mountain, Microsoft, OpenText, Symantec, and ZL Technologies. Beyond these nine vendors, other providers in this category offer traditional software and appliance delivery models, but did not meet the evaluation inclusion criteria. These include: Atempo, Barracuda Networks,

CommVault, C2C Systems, Computer Generated Solutions, GWAVA, Messaging Architects, MessageSolution, Metalogix Software, Mirapoint Software, Quest Software, Sherpa Software, Unify, and ZyLab.

- **Cloud-based suppliers.** A limited number of vendors (e.g., Autonomy, Iron Mountain, Microsoft, and others) currently offer cloud-based message archiving approaches in addition to their on-premises products. But these markets are mainly separate and distinct and integration across SaaS and on-premises offerings is immature. Over the next 12 months, Forrester expects several more on-premises vendors to add cloud functionality, ultimately supporting hybrid on-premises/cloud scenarios. Additional suppliers currently providing SaaS-based message archiving include: Bloomberg, Dell, Global Relay Communications, LiveOffice, Mimecast, Sonian, and Smarsh.

Consolidation continues at a steady pace in the message archiving market. For example, in early 2010 Iron Mountain acquired Mimosa Systems and in mid-2010 Autonomy purchased the information governance assets of CA Technologies.⁶ Forrester expects the acquisitions to continue over the next 18 months as vendors seek to accelerate cloud computing initiatives, expand capabilities for archiving additional content types, and round out broader information governance portfolios.

Figure 1 Provider Capabilities Across On-Premises And SaaS Are Largely Separate But Will Overlap



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Source: Forrester Research, Inc.

MESSAGE ARCHIVING SOFTWARE EVALUATION OVERVIEW

To assess the state of the message archiving software market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top message archiving software vendors.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

We evaluated vendors against 90 criteria, which we grouped into three high-level categories:

- **Current offering.** We focused on system breadth and extended capabilities for message capture, retention management, eDiscovery, storage management, supervision, security, and proven scalability as well as support for an array of application and content types and flexible deployment models.
- **Strategy.** Message archiving vendors need robust strategies that support eDiscovery and broader enterprise information governance initiatives and well-rounded portfolios of related offerings and rich partner ecosystems. We investigated vendors' product road maps, corporate strategy, and ability to execute on their plans.
- **Market presence.** We evaluated vendors' current installed bases, overall revenue and geographic presence, and services capabilities.

Vendors Evaluated For Message Archiving Solutions Offer Breadth And Market Traction

Forrester included nine vendors in the assessment: Autonomy, EMC, HP, IBM, Iron Mountain, Microsoft, OpenText, Symantec, and ZL Technologies. Each of these vendors has (see Figure 2):

- **At least 200 enterprise customers in a variety of vertical markets.** All of the vendors we evaluated have established message archiving offerings with more than 200 enterprise customers in a diverse set of markets.
- **Strong and ongoing interest from enterprise customers.** We selected products that receive frequent mentions by enterprise clients in Forrester’s inquiry and consulting services.

Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Autonomy	Autonomy Consolidated Archive		2010
EMC	EMC SourceOne Email Management	6.5	January 2010
HP	HP Integrated Archive Platform	2.0	February 2010
IBM	IBM Content Collector	2.1.1.1	October 2009
Iron Mountain	Iron Mountain Mimosa NearPoint		February 2010
Microsoft	Microsoft Exchange 2010		April 2010
OpenText	OpenText Email Archiving and Email Management	10	October 2009
Symantec	Symantec Enterprise Vault	8.0	January 2009
ZL Technologies	ZL Technologies Unified Archive	7.0	January 2010

Vendor selection criteria

- The vendor has at least 200 enterprise customers in a variety of vertical markets.
- The vendor has strong and ongoing interest from enterprise customers.
- The vendor has products that receive frequent mentions by enterprise clients in Forrester’s inquiry and consulting services.

Source: Forrester Research, Inc.

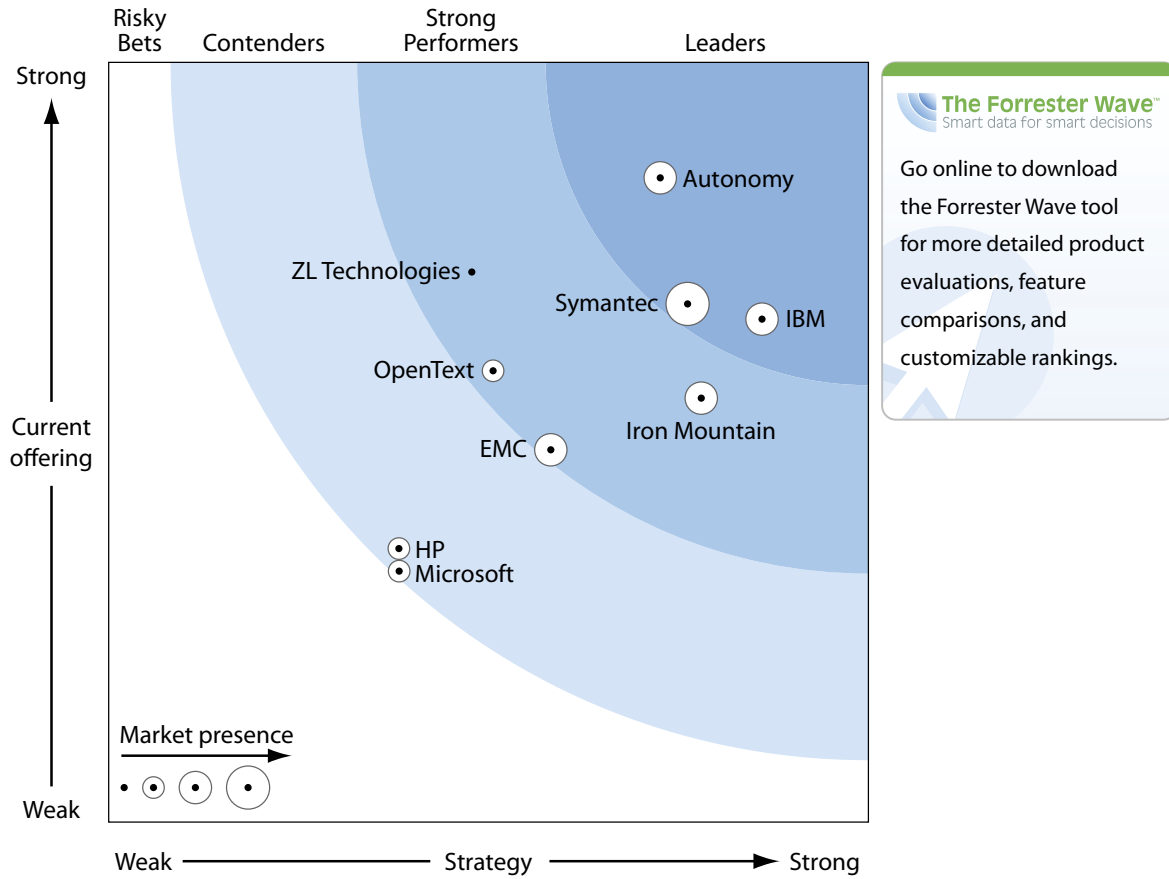
EDISCOVERY SUPPORT AND INTEGRATED OFFERINGS DRIVE SUPPLIER DIFFERENTIATION

The evaluation uncovered a market in which (see Figure 3):

- **Autonomy, IBM, and Symantec have the edge.** Autonomy, IBM, and Symantec have mature message archiving offerings but each vendor approaches the market with a different technology heritage. Historically, Autonomy has emphasized its strong enterprise search functionality; IBM has highlighted its leading content management capabilities; and Symantec has called out its deep storage management abilities. These different backgrounds continue to influence each vendor's current offering and its go-to-market strategy. These vendors each address a broad spectrum of legal, compliance, IT, and other needs with their respective message archiving products, and each has invested in integrating eDiscovery functionality.
- **EMC, Iron Mountain, OpenText, and ZL Technologies offer competitive options.** In comparison with the Leaders for this category, these four Strong Performers have solid offerings in core message archiving capabilities, but lack comparable depth and breadth in their offerings or face challenges in their ability to execute. For example, eDiscovery shortcomings (factoring in both capabilities and integration) are an issue for EMC and OpenText, and portfolio rationalization and corporate resources present concerns for Iron Mountain and ZL Technologies, respectively. Each of these four Strong Performers, however, merit consideration on enterprise short lists and score well with their current offering and overall strategy.
- **HP and Microsoft's offerings take a different approach but merit examination.** HP has a different approach with its appliance offering, Integrated Archive Platform (IAP). IAP, despite ongoing investments in scalability, lacks functionality depth in comparison with its peers and customer adoption hasn't kept pace. Microsoft also differs from the other systems evaluated, given that it includes basic archiving and eDiscovery functionality as a feature of Exchange 2010. While Exchange 2010's archiving functionality trails in comparison with other systems, the vendor's messaging market share leadership and cloud computing capabilities, along with enterprise frustrations with legacy systems, present message archiving opportunities for Microsoft.

This evaluation of the message archiving market is intended to be a starting point only. We encourage readers 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™: Message Archiving Software, Q1 '11



Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: Message Archiving Software, Q1 '11 (Cont.)

	Forrester's Weighting	Autonomy	EMC	HP	IBM	Iron Mountain	Microsoft	OpenText	Symantec	ZL Technologies
CURRENT OFFERING	50%	4.24	2.45	1.80	3.31	2.79	1.65	2.97	3.41	3.62
Message capture	10%	4.40	3.49	3.59	3.97	2.28	1.88	4.18	4.31	4.22
Range of content types supported	15%	3.55	1.45	1.35	3.10	2.65	1.35	3.05	2.75	2.80
Message management	30%	4.78	2.85	2.12	4.28	3.05	1.47	3.66	3.78	4.13
Supervision	5%	4.30	2.70	0.00	0.00	3.20	1.90	2.10	4.40	4.20
Scalability	15%	4.55	2.60	3.10	3.65	1.75	1.15	3.10	3.75	3.95
Security	5%	4.25	3.25	2.50	3.25	3.50	3.75	2.50	4.25	3.75
Deployment flexibility	20%	3.60	1.70	0.05	2.25	3.25	1.80	1.50	2.20	2.75
STRATEGY	50%	3.63	2.91	1.91	4.30	3.90	1.91	2.53	3.81	2.39
Vision and product strategy	70%	4.75	3.30	2.30	4.00	3.85	1.65	2.75	3.30	2.55
Technology partnerships	15%	1.00	1.00	1.00	5.00	3.00	0.00	3.00	5.00	3.00
Reseller partnerships	15%	1.00	3.00	1.00	5.00	5.00	5.00	1.00	5.00	1.00
Cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	3.36	3.24	2.40	3.37	3.14	2.99	2.61	4.10	1.68
Installed base	55%	2.95	3.10	1.80	3.05	2.45	2.25	2.40	4.70	1.80
Revenue and profitability	15%	3.50	5.00	5.00	5.00	4.00	5.00	3.50	4.50	2.50
Total employees	5%	3.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00	1.00
Services	25%	4.25	2.15	1.65	2.75	3.75	3.00	2.45	2.35	1.05

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **Autonomy.** Autonomy Consolidated Archive offers the most complete product evaluated and it receives top marks for message capture, range of content types supported, message management, and supervision functionality. The vendor's rich set of deployment models and depth of integrated eDiscovery functionality contribute to Autonomy's leadership position. In addition to message archiving functionality acquired from its 2007 Zantaz purchase, the vendor also leverages technology from a distinct product, Message Manager, which it acquired from CA Technologies in mid-2010. While integration efforts remain across its acquired products, the vendor's strong set of flexible message archiving offerings and first-class legal risk mitigation support contribute to its leadership position.

- **IBM.** IBM Content Collector provides strong message archiving functionality and is an integrated element of the vendor's leading ECM and records management applications and its Smart Archive strategy. The product supports a broad range of content types, runs on multiple operating systems, and includes a good set of integrated eDiscovery functionality. Although the product does not include supervision functionality, IBM has partnerships (e.g., CA) for regulated customers with these needs.. Apart from this shortcoming, IBM's rich set of archiving functionality combined with deep integration with its broader Information Lifecycle Governance portfolio, ongoing investments in eDiscovery, and flexible deployment models put the vendor in the Leader category.
- **Symantec.** With a mature message archiving product line, Symantec holds the dominant market share for on-premises deployments. Enterprise Vault provides strong message capture support, archives instant messages and a broad range of other content types and applications, and via product add-ons includes robust supervision and eDiscovery capabilities. After the evaluation cut-off period, Symantec shipped an updated version of Enterprise Vault that included a number of archiving and eDiscovery enhancements. To advance further in the Leader category, Symantec will need to resolve legacy search engine issues and make more headway in delivering cloud-based solutions and supporting hybrid deployment models.

Strong Performers

- **Iron Mountain.** Iron Mountain added on-premises software message archiving options to its cloud-based archiving portfolio via its Q1 2010 acquisition of Mimosa Systems. The acquired product, NearPoint, does not support Lotus Domino but provides strong functionality for archiving Exchange, SharePoint, file shares, and some support for other content types and applications. The product includes robust storage management capabilities, but has some eDiscovery shortcomings. With its on-premises software and separate cloud-based archiving services, records management applications, and eDiscovery offerings, the vendor offers an extensive archiving and legal risk mitigation portfolio, but significant integration work remains.
- **ZL Technologies.** Although considerably smaller than the other suppliers in this evaluation, ZL Technologies delivers rich archiving functionality. Large enterprises use the vendor's Unified Archive product to archive email, files, SharePoint, and other content types and applications. Beyond basic archiving, the product includes strong search, supervision, and eDiscovery capabilities and the vendor continues to make advances on these fronts. ZL Technologies has an extensive, integrated set of offerings to support message archiving, but in comparison with other vendors in this evaluation the vendor's go-to-market resources are limited and it has acquired far fewer total customers.

- **OpenText.** OpenText's message archiving product is an element of the vendor's ECM portfolio and integrates with the vendor's ECM and records management applications. The product includes good message capture capabilities, basic supervision functionality, and supports archiving file shares, SharePoint, SAP, and other content types and applications. The vendor's message archiving product includes some eDiscovery support, but for review, advanced legal hold, and richer eDiscovery functionality, OpenText relies on partners. This offering may be a good fit particularly for enterprises seeking to leverage existing OpenText ECM investments, or those considering message archiving as an integral part of a broader ECM initiative, but the offering has eDiscovery shortcomings, limited deployment model options, and modest customer adoption to date.
- **EMC.** EMC's SourceOne offering includes good message capture capabilities, strong storage management support, and — via-add on modules — offers some supervision and eDiscovery functionality. Subsequent to the evaluation cutoff period the vendor added modules for file system and SharePoint archiving. While EMC also offers content management and records management applications, these are not deeply integrated with the product supporting high volume scenarios. Leveraging its 2009 acquisition of Kazeon, EMC has made initial Kazeon-SourceOne integrations and plans to build on these to bolster its eDiscovery support.

Contenders

- **HP.** Building on its 2003 acquisition of Persist Technologies, HP's Integrated ArchivePlatform (IAP) provides message archiving as a factory-integrated on-premise appliance. HP has invested to improve IAP's scalability, but the product supports a narrow range of content types and applications, includes only basic eDiscovery support, and does not offer supervision functionality. HP has struggled in expanding its IAP customer base and while the product can be deployed rapidly it is best suited for organizations with low legal risk profiles.
- **Microsoft.** Microsoft introduced basic message archiving and compliance capabilities in Exchange 2010. The functionality, built into the messaging platform, includes the ability to create a personal archive (designed to reduce the spread of .pst files) along with basic retention management, auditing, and legal hold functionality. After the cut-off period for this evaluation, Microsoft released Exchange 2010 SP1, which introduced storage flexibility for a user's personal archive, and improved .pst ingestion. Even with these and other archiving advances, the offering lacks single-instance storage, legal hold for individual items in mailboxes, legal review, or support for non-Microsoft messaging and other applications like SharePoint. This archiving offering is best suited for organizations with limited legal risk mitigation needs. Microsoft continues to partner with a broad set of suppliers for more advanced archiving and eDiscovery needs. As Office 365 gains market traction, Microsoft is well positioned to provide hybrid message archiving options and consistent policies across Exchange Online and Exchange Server.

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 three 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.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each 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 we encourage readers 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 eDiscovery challenges abound and enterprises report low confidence in their eDiscovery capabilities. For further details and a review of eDiscovery basics, see the December 15, 2010, "[Q&A: eDiscovery Fundamentals For Content & Collaboration Professionals](#)" report.
- ² Globally, over two-thirds of organizations use Microsoft Exchange as their email server of choice. Source: Forrsights Software Survey, Q4 2010.
- ³ According to Forrester's Forrsights Hardware Survey, Q3 2010, 58% of hardware decision-makers expect their companywide storage to grow 11% to 50%; an additional 9% expect it to grow by more than 50% in the next 12 months. For additional insights on this growth from a records management perspective, see the October 22, 2010, "[Records Management And Storage: Current Trends And Expected 2011 Growth](#)" report.
- ⁴ For example, while instant message archiving is a mature market largely driven by regulatory requirements, enterprises are increasingly looking at how they might support archiving social media in the context of broader approaches to archiving email and other unstructured content. Vendors such as Actiance and Socialware offer social media archiving functionality, but this is currently an early stage market. FINRA's Q1 2010 guidance in Regulatory Notice 10-06 clarifies supervision, recordkeeping, and responsibilities of firms and, as vendor capabilities, regulator perspectives, and enterprise awareness mature, this guidance will have significant impact in financial services and ultimately in other markets.
- ⁵ Forrester captured findings on decision-maker challenges, adoption drivers, and a variety of other message archiving topics in the Q1 2010 Global Message Archiving Online Survey. For an overview of selected survey responses see the March 17, 2010, "[Regulatory And eDiscovery Demands Drive A Growing Message Archiving Market](#)" report.
- ⁶ For commentary on these acquisitions and other M&A activity, see the July 9, 2010, "[eDiscovery Market Consolidation Continues Its Steady March](#)" report and also read Brian Hill, "Iron Mountain Buys Archiving Vendor Mimosa Systems," *Forrester Blog For Content & Collaboration Professionals*, February 22, 2010 (http://blogs.forrester.com/brian_hill/10-02-22-iron_mountain_buys_archiving_vendor_mimosa_systems).

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