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The Forrester Wave™: Collaboration Platforms, Q2 2006

by Erica Driver

TECH CHOICES



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IBM And Microsoft Lead In Our Product Evaluation

by Erica Driver

with Connie Moore and Lucy Fossner

EXECUTIVE SUMMARY

Forrester evaluated five leading collaboration platform vendors across 98 criteria and found that IBM and Microsoft are still the Leaders in this market. Both vendors are well suited for customers that need a full collaboration platform (but don't mind lack of unification among the modules), value vendor viability and collaboration market share, and plan to develop Information Workplace strategies. IBM is an especially good fit for Java and Linux environments; Microsoft is better suited for Microsoft shops. Oracle and Sun are Strong Performers but lack market share and are missing key features. Oracle is an especially good fit for Oracle shops that have a Java orientation and want a unified collaboration platform, and Sun is an especially good choice for Java shops that have open source leanings. Novell is also a Contender; however, its product is missing many collaboration features and Novell's strategy and road map are weaker than those of its competitors.

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Forrester conducted evaluations in Q4 2005 and Q1 2006 and interviewed five vendors (IBM, Microsoft, Novell, Oracle, and Sun Microsystems). We also interviewed reference customers for all vendors but Sun.

Related Research Documents

["Context Is King In The New World Of Work"](#)
March 8, 2006, Trends

["A 10-Step Collaboration Strategy Work Plan"](#)
June 29, 2005, Best Practices

["The Information Workplace Will Redefine The World Of Work At Last"](#)
June 1, 2005, Forrester Big Idea

TARGET AUDIENCE

Enterprise architecture executive, chief information officer, strategic planning executive

THE MARKET IS EVOLVING TOWARD UNIFIED COLLABORATION PLATFORMS

In 2005, Forrester clients submitted more than 250 inquiries on messaging and collaboration, with questions that fell into two camps: collaboration strategy and collaboration technology (see Figure 1). Based on these inquiries and many other discussions with companies and government agencies, we see a clear trend that organizations are now beginning to develop collaboration strategies for the entire enterprise. This trend is taking place whether the organizations are currently only experimenting with collaboration tools (in Phase 2 of collaboration readiness and adoption) or experiencing a painful proliferation of disparate, non-interoperable tools throughout the enterprise (in Phase 3).¹

Disparate Tools — Lacking Context — Aren’t Good Enough Anymore

Enterprise collaboration strategy development efforts are driven by organizations’ efforts to simplify and reduce the cost of their IT environments, solve a broader range of business problems using a single set of collaboration tools, reduce the pain associated with a proliferation of disparate tools, and provide users with contextual collaboration. In fact, in a September 2005 survey of 117 professionals, nearly all of the respondents (91%) said that delivering collaboration tools to users within the context of the business process is somewhat or extremely important.²

Figure 1 Common Forrester Client Inquiries About Messaging And Collaboration

Common collaboration strategy questions	Common collaboration technology questions
<ul style="list-style-type: none"> • We have a proliferation of collaboration tools and want to standardize. Where should we start? And how? • How can we combat the inertia and political issues that are coming up as we try to develop a collaboration strategy? • For team collaboration, which should we use: products from infrastructure vendors (e.g., IBM, Microsoft, and Oracle) or our enterprise content management (ECM) vendor(s)? • We standardized on Microsoft Office 2003, Lotus Notes/Domino for email, and Oracle application infrastructure for new apps. Which vendor should we choose for our enterprise collaboration platform? • What are the costs and benefits of switching to the Microsoft collaboration platform? 	<ul style="list-style-type: none"> • Are there any viable open source alternatives to the leading commercial collaboration software packages? • How does IBM Workplace Collaboration Services compare to the IBM Lotus Notes/Domino platform? • If we move off Lotus Notes/Domino for messaging, what should we do about our Domino apps? • Is Oracle committed to the messaging and collaboration market? Do you recommend Oracle Collaboration Suite? • We have a non-EMC content strategy. Should we keep eRoom? • What new collaboration functionality will Microsoft release in Office 2007 and Exchange 2007?

Information workers both want and need to locate and communicate with others — in other words, collaborate — directly within the context of the activity or business process in which they are involved. They don't want to be required to create context manually by launching discrete tools to look up and chat with colleagues, participate in discussion threads, or check on or communicate the status of team projects, using "Alt + Tab" to flip back and forth among the tools. The leading collaboration vendors understand this need and are laying the groundwork for contextual collaboration by moving collaboration functionality lower and lower into the application infrastructure stack. And their previously disparate collaboration tools have morphed into collaboration platforms, defined as:

Unified electronic platforms that support synchronous and asynchronous communication through a variety of devices and channels. Collaboration platforms offer a set of software components and software services that enable individuals to find each other and the information they need and to be able to communicate and work together to achieve common business goals. The core elements of a collaboration platform today are messaging (email, calendaring, and contacts), team collaboration, and real-time collaboration (e.g., instant messaging and Web conferencing). Additional features will become standard in collaboration platforms during the next 12 to 18 months, like blog and wiki tools.

For example, IBM offers a J2EE-based platform of collaboration components called Workplace Collaboration Services, which can be exposed to users through WebSphere Portal or Workplace Services Express. Microsoft has moved Windows SharePoint Services down into the Windows Server operating system. And Oracle plans to move support for Session Initiation Protocol (SIP) and call control features into Oracle Application Server.

Point Solutions Are Disappearing Into Collaboration And Information Workplace Platforms

The collaboration platform decision is increasingly becoming a stack decision — taking into account not just messaging, real-time collaboration, and team collaboration platforms, but also the organization's internal standards for office productivity, portal software, enterprise content management, enterprise directories, application servers, databases, and operating systems. As a result, the market for point collaboration products (e.g., team collaboration, enterprise instant messaging) is shrinking as collaboration features get absorbed into the software infrastructure. In 2006, organizations will continue to swap out collaboration point products for enterprise collaboration platforms, and the market will continue to consolidate.

- **Consolidation started three years ago and will continue unabated.** The collaboration market has undergone significant consolidation in the past three years as customers drive demand for integrated or unified platforms rather than point products. Microsoft, for example, acquired PlaceWare in 2003 and Groove Networks in 2005.³ In 2003, EMC acquired Documentum (which had earlier acquired eRoom), Interwoven merged with iManage, and Vignette acquired Intraspect.⁴ In 2004, collaboration specialist SiteScape acquired Imidio, and in 2005, WebEx acquired Intranets.com. This consolidation will continue for the next two years as software infrastructure vendors continue to expand and unify their collaboration platforms and application vendors in areas like ECM and product life-cycle management continue to flesh out their suites.

- **Collaboration platforms are not the end game — Information Workplaces are now emerging.** Moving forward, collaboration features will be delivered by Information Workplace platforms, which will deliver unified content, collaboration, portal, and office productivity tools.⁵ Information Workplace platforms are emerging to support all types of information workers (e.g., traditional office workers, people who work with people, and people who work with the physical world) with a digital workplace that is seamless, visual, contextual, guided, role-based, multimodal, and aware of the physical world. Users will access myriad forms of enterprise information via Information Workplaces that run on various devices and platforms.

COLLABORATION PLATFORMS EVALUATION OVERVIEW

Because Information Workplaces have not fully emerged in the market, this Forrester Wave evaluation examines today's collaboration platforms with an eye toward the road maps that will get vendors to Information Workplaces. To assess the state of the collaboration platforms market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the leading technology providers.

Evaluation Criteria Emphasize Unification Of Collaboration Platform Modules

After examining past research, user need assessments, and vendor and user interviews, we developed a comprehensive set of evaluation criteria (see Figure 2). Forrester evaluated vendors against approximately 98 criteria, which we grouped into three high-level buckets:

- **Current offering.** The products were evaluated on the three core elements of a collaboration platform: messaging, real-time collaboration, and team collaboration. We also evaluated them on architecture and administration, security, platform support, and Information Workplace readiness — paying special attention to unification across the platform's modules.
- **Strategy.** We assessed the vendors' executive vision and strategy (paying special attention to execution on collaboration strategy, and having an Information Workplace strategy) and product road map. When evaluating each vendor's product road map, we looked for differentiation as well as innovation.
- **Market presence.** We examined the vendors' installed base in messaging, real-time collaboration, and team collaboration, as well as total revenue, revenue growth, and number of employees.

Evaluated Vendors Have A Messaging Server And More

Forrester included five vendors in this assessment: IBM, Microsoft, Novell, Oracle, and Sun Microsystems. Our selection criteria are driven by the fact that, very often, enterprise collaboration strategies stem from messaging server upgrades or migrations. Most organizations now realize that collaboration isn't just about email any more. Each of the vendors that participated in this Forrester Wave has:

Figure 2 Collaboration Platform Evaluation Criteria

CURRENT OFFERING	
Messaging platform	What messaging clients does the messaging platform support — both Web-based and rich client? What email, unified messaging, calendaring, scheduling, and task management services does the messaging platform provide? What enterprise directories does the messaging server support? How scalable has the messaging server been proven to be in production customer environments? In how many languages are the messaging platform system administration UI, end user UI, and documentation available? How strong is the messaging server's third-party software integration?
Real-time collaboration platform	What Web conferencing, enterprise instant messaging, presence awareness, whiteboarding, application/desktop sharing, and voice and video conferencing features does the real-time collaboration platform provide? What standards does it support? How scalable has it been proven to be in production customer environments? How strong is its language localization?
Team collaboration platform	What document repository and library services does the platform provide? How about voting and survey tools, and blog and wiki tools? Does the system provide offline access to team sites? How many application templates does the vendor provide for team collaboration, and what skills are required to work with them? How strong is its language localization?
Architecture and administration	Does the vendor offer clustering? Does the platform provide a single, Web-based administration UI? How strong is the platform's administration organization?
Security	How strong are the collaboration platform's access control, authentication, encryption, and enterprise rights management capabilities?
Cross-platform support	How many different operating systems, mobile devices, application servers, and databases does the collaboration platform support?
Information Workplace readiness	How strong is the vendor's integration with portal software, office productivity suites, and ECM systems? What APIs does the vendor provide for its collaboration platform?
STRATEGY	
Executive vision and strategy	How well is the vendor executing on its collaboration strategy? Does it have an Information Workplace strategy?
Product road map	What enhancements is the vendor planning for its collaboration platform for the next 12 to 18 months?
MARKET PRESENCE	
Installed base	How many seats has the vendor sold to date of its messaging server, enterprise instant messaging server, and team collaboration platform?
Employees	How many employees does the vendor have, in total?
Total revenue and growth	What were the vendor's total revenues in fiscal year 2005, as well as its revenue growth and profitability in that year?

37144

Source: Forrester Research, Inc.

- **A full messaging platform.** The cornerstone of a collaboration platform is the messaging platform (email, calendaring, and contacts), so we only included vendors that offer this core capability. We did not include, for example, vendors like EMC or SiteScape, which offer team collaboration and real-time collaboration platforms but not a messaging platform.
- **Sold 5 million seats or more of the messaging platform.** We included only market leaders, as defined by having sold 5 million or more seats (end user licenses) of its messaging platform. We did not limit participation based on the number of real-time collaboration or team collaboration seats the vendors sold.
- **Functionality in each of the three main collaboration platform areas.** In addition to a messaging platform, each participating vendor has at least some functionality in both of the other two main collaboration platform areas: team collaboration and real-time collaboration.

COLLABORATION PLATFORMS EVALUATION ANALYSIS

Forrester's evaluation of the collaboration platforms market uncovered a market in which (see Figure 3):

- **IBM and Microsoft lead the pack.** IBM and Microsoft both offer full, rich collaboration platforms and strong Information Workplace strategies, and together they make up the lion's share of the enterprise messaging platform market.

The current version of IBM's messaging platform is Lotus Notes/Domino 7. IBM offers two real-time collaboration platforms: Lotus Sametime 7.0 and IBM Workplace Collaboration Services (WCS) 2.6.⁶ IBM also offers two team collaboration products: Lotus QuickPlace 7.0 and IBM WCS.⁷

The current release of Microsoft's messaging server is Exchange Server 2003 Service Pack 2. Microsoft offers a real-time collaboration server, called Microsoft Office Live Communications Server 2005 (LCS) and a hosted Web conferencing service called Microsoft Office Live Meeting 2005. Microsoft offers two team collaboration products: Windows SharePoint Services and Groove Virtual Office V3.1.

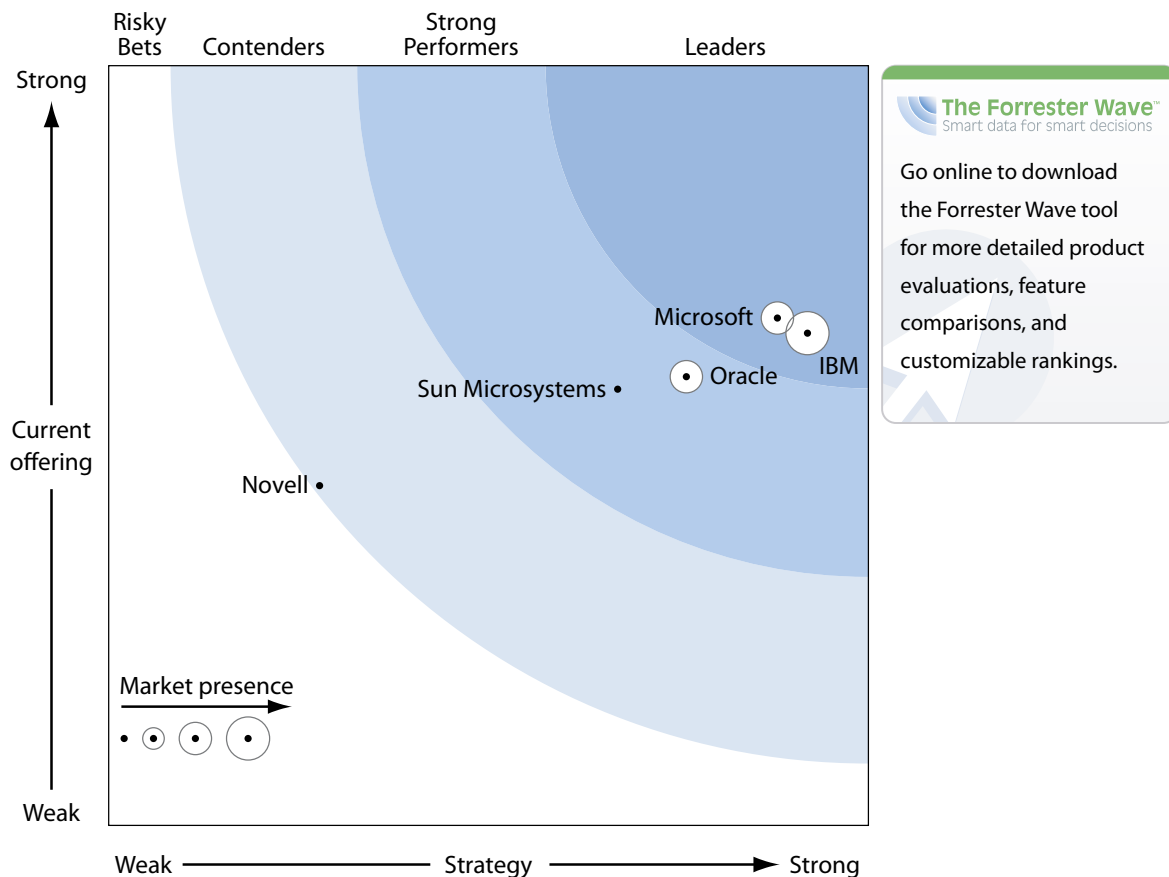
- **Oracle and Sun offer competitive options.** Oracle and Sun are Strong Performers, though they lack market share and are missing features that the Leaders offer.

Oracle offers a messaging platform called Oracle Collaboration Suite (OCS) 10.1, a real-time collaboration platform called Oracle Real Time Collaboration (RTC) 10.1.2.1 (which includes Oracle Web Conferencing and Oracle Messenger for enterprise IM), and a team collaboration platform called Oracle Workspaces 10.1.2.1.

Sun's collaboration platform is called Sun Java Enterprise System. Sun offers a messaging platform called Sun Java System Messaging Server and an enterprise IM server called Sun Java System Instant Messaging. Sun has two team collaboration offerings: basic features in Sun Java System Portal Server 7, which is part of the Sun Java Enterprise System, and richer features in the third-party FatWire Spark product, which is free to all Sun Java Enterprise System customers.

- **Novell has strong messaging but lacks full team and real-time collaboration.** The current release of Novell's messaging server is GroupWise 7. Novell does not offer a full real-time collaboration platform, just an enterprise IM server called GroupWise Instant Messenger 2.0. It is missing Web conferencing. For team collaboration, Novell provides a document repository and library services (discussion threads, check-in/checkout, version control) but does not provide a fully fledged product.

Figure 3 Forrester Wave™: Collaboration Platforms, Q2 '06



Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: Collaboration Platforms, Q2 '06 (Cont.)

	Forrester's Weighting	IBM	Microsoft	Novell	Oracle	Sun Microsystems
CURRENT OFFERING						
Messaging platform	20%	3.66	3.39	3.13	2.59	2.65
Real-time collaboration platform	20%	3.28	3.66	1.09	2.50	2.27
Team collaboration platform	20%	3.32	2.71	0.75	2.55	1.93
Architecture and administration	10%	2.84	3.75	2.44	3.41	4.10
Security	10%	3.80	4.30	3.25	3.45	3.25
Cross-platform support	10%	1.50	1.80	3.60	4.00	4.00
Information Workplace readiness	10%	3.75	4.00	2.88	3.38	3.63
STRATEGY						
Executive vision and strategy	50%	4.20	3.80	1.70	4.60	3.70
Product road map	50%	5.00	5.00	1.00	3.00	3.00
MARKET PRESENCE						
Installed base	50%	4.01	4.01	1.01	1.00	2.65
Employees	15%	5.00	3.00	1.00	3.00	2.00
Total revenue and growth	35%	3.60	3.70	2.75	4.10	0.95

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

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Source: Forrester Research, Inc.

This evaluation of the collaboration platforms 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.

VENDOR PROFILES

Leaders

- **IBM.** IBM excels in messaging, team collaboration, product road map, and overall market presence. IBM also has core strengths in real-time collaboration, security, Information Workplace readiness, and executive vision and strategy.⁸ IBM's strengths and characteristics make it a good fit for organizations that have a strategic orientation toward Java and other open standards; have an Information Workplace strategy; need a full collaboration platform and don't mind a lack of unification among collaboration modules; place a premium on vendor viability and market presence in collaboration; and have open source leanings — especially toward Linux.

- **Microsoft.** Microsoft has deep strengths in real-time collaboration, security, Information Workplace readiness, and product road map. Microsoft also got high marks in messaging, team collaboration, architecture and administration, and market presence.⁹ Microsoft's strengths and characteristics make it a good fit for Microsoft shops (especially organizations that use Office 2003, Windows, and Active Directory and have standardized on the .Net framework for at least some application development) that need a full collaboration platform and don't mind lack of unification among the components. Microsoft is a good fit for organizations that have an Information Workplace strategy and need a budding Information Workplace platform, and place a premium on vendor viability and market presence in collaboration.

Strong Performers

- **Oracle.** Oracle is a Strong Performer in the enterprise collaboration platforms market, with Oracle Collaboration Suite. Oracle's offerings in the three main areas of collaboration (messaging, real-time, and team) are basic, but Oracle has an excellent executive vision and strategy as well as strengths in total revenue and revenue growth, cross-platform support, and product road map.¹⁰ Oracle's strengths and characteristics make it a good fit for Oracle shops (Oracle Database, Oracle Application Server, and Oracle Portal) that have heterogeneous computing environments; have a Java orientation toward application development; want a full, unified collaboration platform, however basic; have an Information Workplace strategy and want an emerging Information Workplace platform; value vendor viability; and don't mind limited collaboration market share.
- **Sun Microsystems.** With the Sun Java Enterprise System, Sun Microsystems is a Strong Performer in the enterprise collaboration platforms market. Sun excels in architecture and administration and has strong cross-platform support. The vendor follows the two Leaders in overall installed base.¹¹ Sun's strengths and characteristics make it a good fit for Java shops that have service-oriented architecture strategies and open source leanings; need a basic collaboration platform; want to buy a collaboration platform from a large company; and are not too concerned about limited collaboration platform market share.

Contenders

- **Novell.** Novell is a Contender in the collaboration platforms market with GroupWise. Novell is not the high scorer in any areas we evaluated, though it is strong in cross-platform support.¹² Novell's characteristics make it a fit for organizations that have heterogeneous computing environments — especially those that are interested in open source technologies like Linux and OpenOffice.org — that use Novell eDirectory, NetWare, SUSE Linux, and/or Open Enterprise Server (which is the new name for the next version of NetWare); need a solid messaging platform but not Web conferencing or team collaboration; and are not overly concerned about vendor viability or share in the broader collaboration platforms market.

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 four 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 to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct Web-based demonstrations of their products' 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 one or two of each vendor's current customers, except Sun — we were not able to speak with a Sun Java Enterprise System enterprise customer.
- **Existing Forrester research and knowledge.** Forrester has covered the collaboration market for many years, so we were able to shore up our Wave research with an existing knowledge and research base (e.g., vendor presentations and analyst meeting notes) of the collaboration market.

The Forrester Wave

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 sees firms go through five phases of collaboration readiness and adoption. Phase 1 is traditional collaboration; Phase 2 is experimentation; Phase 3 is proliferation; Phase 4 is standardization; and Phase 5 is the Information Workplace. See the June 29, 2005, Best Practices [“A 10-Step Collaboration Strategy Work Plan.”](#)
- ² As enterprises better understand the relationship between roles, content, collaboration, and business processes, the need to provide information and tools within the context of an information worker’s daily activities will drive the implementation of Information Workplaces. See the March 8, 2006, Trends [“Context Is King In The New World Of Work.”](#)
- ³ Microsoft’s acquisition of Groove Networks is increasing the velocity of Microsoft’s propulsion into collaboration platforms and the newly emerging Information Workplace platforms market. Microsoft not only acquired critical collaboration technology from Groove Networks that fills gaps in its product line, but it got a brilliant thinker and innovator with the addition of Ray Ozzie to Microsoft’s team. See the March 15, 2005, Quick Take [“‘We’re Engaged!’ Microsoft To Acquire Groove,”](#) and see the June 25, 2003, IdeaByte [“Making A Web Conferencing Vendor Decision.”](#)
- ⁴ 2003 saw a flurry of mergers and acquisitions in the collaboration technology market. See the October 15, 2003, IdeaByte [“EMC Acquires Documentum, Ushers In New Era In Enterprise Content Management,”](#) see the August 14, 2003, IdeaByte [“Interwoven and iManage Merge To Create An Enterprise Content Management Powerhouse,”](#) and see the August 13, 2003, Brief [“Interwoven/iManage Merger Cracks The ECM Ranks.”](#)
- ⁵ The Information Workplace will be much simpler, yet richer, than today’s tools by incorporating contextual, role-based information from business systems, applications, and processes; delivering voice, documents, rich media, process models, business intelligence, and real-time analytics; integrating just-in-time eLearning; and fostering collaboration. Using a service-oriented architecture, the Information Workplace will be rich with presence awareness, information rights, and personalization, and it will provide offline and online support to a plethora of devices. As this unfolds, information work will expand beyond traditional knowledge workers. See the June 1, 2005, Forrester Big Idea [“The Information Workplace Will Redefine The World Of Work At Last.”](#)
- ⁶ Per IBM’s request, in this Wave evaluation, Forrester evaluated only Sametime, not the real-time collaboration features of Workplace Collaboration Services.
- ⁷ Lotus QuickPlace is based on the Domino platform and WCS is based on DB2, Eclipse, J2EE, and WebSphere technologies.

- ⁸ View the vendor summary for more detailed analysis on how IBM fared in this evaluation. See the May 24, 2006, Tech Choices “[IBM Is A Leader In The Collaboration Platforms Market.](#)”
- ⁹ View the vendor summary for more detailed analysis on how Microsoft fared in this evaluation. See the May 24, 2006, Tech Choices “[Microsoft Is A Leader In The Collaboration Platforms Market.](#)”
- ¹⁰ View the vendor summary for more detailed analysis on how Oracle fared in this evaluation. See the May 24, 2006, Tech Choices “[Oracle Is A Strong Performer In The Collaboration Platforms Market.](#)”
- ¹¹ View the vendor summary for more detailed analysis on how Sun fared in this evaluation. See the May 24, 2006, Tech Choices “[Sun Is A Strong Performer In The Collaboration Platforms Market.](#)”
- ¹² View the vendor summary for more detailed analysis on how Novell fared in this evaluation. See the May 24, 2006, Tech Choices “[Novell Is A Contender In The Collaboration Platforms Market.](#)”

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