

Magic Quadrant for MSSPs, North America, 1H07

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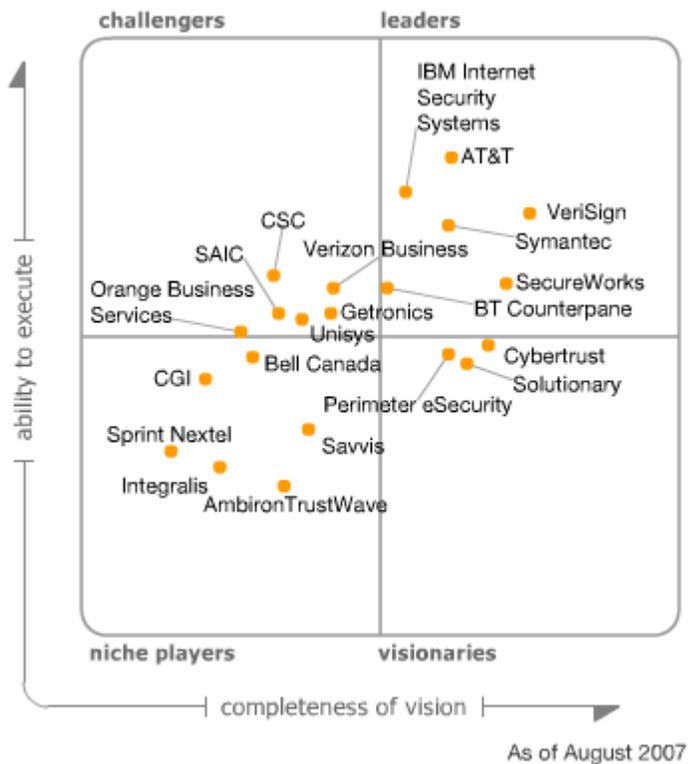
Growth and merger and acquisition activity continued in the maturing managed security service provider market. The expansion of service offerings to include security vulnerability and information management also had an impact on the ratings of several service providers.

WHAT YOU NEED TO KNOW

When evaluating managed security service providers (MSSPs), begin with a clear set of requirements for device monitoring and management, vulnerability assessments, scanning, and incident management and reporting. Compare your requirements with customer premises equipment (CPE) product-based services and in-the-cloud (ITC) services. Consider current or pending IT or network outsourcing arrangements, and evaluate MSSPs from all quadrants against your requirements.

MAGIC QUADRANT

Figure 1. Magic Quadrant for MSSPs, North America, 1H07



Source: Gartner (August 2007)

Market Overview

The managed security service (MSS) market in North America generated revenue of approximately \$500 million in 2006, and Gartner estimates that revenue will grow about 19% in 2007. Gartner estimates that, in 2006, 60% of Fortune 500 enterprises had engaged in some level of use of an MSSP, representing about 20% of enterprise firewalls under remote monitoring or management.

Growth in enterprise demand for MSSs in 2006 was primarily driven by four factors:

- **Expansion of MSSP contracts** — Many enterprises are adding firewalls to remote locations as they move away from centralized Internet connections. Deployment of network intrusion prevention devices and increased demand for remote security monitoring of servers has also led to increased device count and contract value when renewing contracts.
- **Staffing and budget growth limitations** — Gartner's research shows that IT spending will only grow 2.8% in 2007 (see "Gartner 2006-2007 IT Spending and Staffing Report: North America"), and many enterprises were under pressure to increase security levels without increasing staffing. Corporate pressure to outsource operational IT functions to reduce capital expenditures and staffing costs continued.
- **Compliance reporting requirements** — MSSs also provide a low-investment path to meet demands for increased reporting to demonstrate compliance with Payment Card Industry standards and government regulations.
- **Midsized businesses** — Smaller businesses in retail, energy, banking and other sectors entered into security outsourcing agreements to increase security levels and to meet regulatory demands.

Since the publication of the previous Magic Quadrant in this space, demand for MSS has continued to increase. At this stage of a maturing market, larger enterprises continue to emphasize vendor viability — bigger was definitely better. For many of the Type B and Type C customers (mainstream technology adopters and risk-averse companies, respectively) entering this market, security expertise, reputation and MSS innovation were of less importance than an established relationship with a trusted partner for other IT services — "good enough" security monitoring was sufficient. Pricing for premium service offerings has declined slightly (measured in cost per device per month for monitoring/management), but the addition of new services or devices under management has kept overall contract value fairly steady. For Type B and Type C customers, pricing is a strong factor in vendor selection, and low-cost/low-touch offerings are more common now than 18 months ago.

In addition to new types of buyers, we've seen changes in the service provider landscape. In the past 12 months, a number of acquisitions occurred as larger service providers added or improved MSS capabilities through acquisition, and smaller providers joined to gain scale.

- IBM acquired Internet Security Systems (ISS) in August 2006. The acquired group is in IBM Global Services and is referred to as IBM Internet Security Systems.
- British Telecom acquired Counterpane Internet Security, which is now known as BT Counterpane, and also acquired INS.
- SecureWorks and LURHQ merged and are now called SecureWorks.
- Solutionary and VigilantMinds merged and are called Solutionary.
- Perimeter Internetworking acquired MessageSecure and ANE Technologies and is now known as Perimeter eSecurity.
- AmbironTrustWave acquired SecurePipe.

Other acquisitions, not directly related to MSS, include Verizon's acquisition of MCI (now known as Verizon Business,) the merger of SBC and AT&T (now known as AT&T,) and KPN's announcement of an offer to acquire Getronics.

During the development of this Magic Quadrant report, Verizon Business announced its intention to acquire Cybertrust, and the deal closed in July 2007. In this Magic Quadrant, Verizon Business and Cybertrust are treated as separate entities. Verizon Business has a detailed road map to merge the Verizon Business and Cybertrust service offerings during the next 12 months. In the short term, MSS customers of each service will stay with that service, and new MSS customers will be brought on board with service based on the Cybertrust architecture.

Emerging Security Information Management Needs

Several MSSPs have developed offerings that target security information management. These include, in addition to the real-time monitoring and alerting for network devices, the collection of log data from servers, applications for non-real-time alerting and reporting, and the ability to store/archive these logs for later investigation and for data retention requirements. The functions provided by these services are typically the collection, filtering and storage of selected events from logs, and some correlation and reporting derived from those data. Log management services include, typically, on-premise storage of log data, reporting from that local store and the use of log management technology partners. These offerings are being driven by clients that need to meet compliance requirements and are seeking an alternative to buying and implementing a security information/event management product. We expect to see more demand for these offerings and increased functionality from service providers during the next six to 12 months.

ITC MSS offerings have expanded to include offerings for small or midsize business (SMB) customers. These include ITC-managed firewall services and on-demand distributed denial-of-service (DDOS) offerings. The SMB version of DDOS offered by AT&T, for example, is a lower-cost version of the DDOS detection and mitigation subscription services targeted to larger enterprise customers. The SMB version foregoes detection (the customer is the detection mechanism) and invokes mitigation on the customer's request. The daily charges for mitigation are capped at the cost of the subscription service.

Gartner is starting to see evidence in the marketplace that ITC security offerings are being evaluated in competitive MSS procurements. Gartner has feedback from customers indicating that the services are offered at price points that make them slightly less expensive than premise-based firewall service. However, the pricing and packaging are complex and, for some customers, make the comparison of different service options difficult.

The trend toward competition for MSS renewal deals continues, even among customers satisfied with their incumbent MSSP. The driver for re-competing for the deals is driving down costs or getting additional services without an overall increase in costs. Leading MSSPs will be able to maintain or increase profitability while meeting this type of Moore's Law effect on services.

Market Definition/Description

For the purposes of this research, Gartner defines "managed security services" as the remote management or monitoring of IT security information, assets and processes where the delivery of those services is via remote security operations centers, not through personnel on site. MSS does not, therefore, include any consulting or development and integration services that may be included in a security outsourcing engagement.

MSSs include:

- Monitored or managed firewall or intrusion prevention systems
- Monitoring or managed intrusion detection systems
- DDOS protection

- Managed e-mail antivirus/anti-spam service
- Managed gateway antivirus
- Security information management
- Security event management
- Managed vulnerability scanning of networks, servers or applications
- Security vulnerability or threat-notification services
- Managed log analysis
- Reporting associated with monitored/managed devices and incident response
- Above-listed services delivered via CPE or via Internet service provider central office equipment

This research evaluates vendors that offer monitored/managed firewall and intrusion detection/prevention functions, rather than those focused on a single element of the services listed above.

Inclusion and Exclusion Criteria

To be included in this Magic Quadrant, an MSSP must have:

- The ability to remotely monitor and/or manage firewalls and intrusion detection/prevention (IDP) devices via discrete service offerings
- More than 500 firewall/IDP devices under remote management or monitoring for external customers *or* at least 200 external customers with those devices under management or monitoring
- Reference accounts relevant to Gartner customers in North America

Vendors that have MSS offerings, such as DDOS protection (Prolexic Technologies) or vulnerability scanning (Qualys), but not device monitoring and management, are not included in this Magic Quadrant.

Added

We have added AmbironTrustWave, Bell Canada, CGI, Integralis and Savvis to the 1H07 Magic Quadrant.

Dropped

We have dropped EDS from the 1H07 Magic Quadrant because it does not offer MSS as a discrete, stand-alone service relevant to Gartner customers.

Evaluation Criteria

Ability to Execute

Ability to execute criteria are discussed in "Updated Criteria for Selecting an MSSP."

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	standard
Customer Experience	high
Operations	standard

Source: Gartner

Completeness of Vision

Criteria weights for completeness of vision are shown in Table 2.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	high
Geographic Strategy	low

Source: Gartner

Leaders

Each of the service providers in the Leaders quadrant has significant "mind share" among enterprises looking to buy an MSS from pure-play security vendors, and they generally receive positive reports on service and performance from Gartner clients. Vendors in the Leaders quadrant are typically appropriate options for enterprises requiring frequent interaction with the MSSP for analyst expertise and advice, portal-based correlation and workflow support, and flexible reporting options.

Challengers

Gartner customers are more likely to encounter an MSS offered by a service provider in the Challengers quadrant as a component of that vendor's other telecom, outsourcing or consulting services. Although an MSS is not a leading service offering for this type of vendor, it offers a "path of least resistance" to enterprises that need an MSS and use the vendor's main services. It also represents the largest portion of overall MSSP revenue.

Visionaries

Companies in the Visionaries quadrant have demonstrated the ability to turn a strong focus on managed security into high-quality service offerings for the MSS market. Vendors in the Visionaries quadrant are often strong contenders for enterprises requiring frequent interaction with MSS analysts, flexible service delivery options and strong customer service.

Niche Players

Niche players are characterized by service offerings that are available primarily in specific market segments or primarily as part of other service offerings.

Vendor Strengths and Cautions

AmbironTrustWave

Strengths

- AmbironTrustWave (ATW) was formed in 2005 through the merger of Chicago-based Amibiron and Maryland-based TrustWave. ATW has focused on the Payment Card Industry (PCI) Data Security Standard security assessment market and has captured the majority of key channel partners in online credit card payment processing. Through recent acquisitions (ReddShell, SecurePipe), it has acquired broader capabilities in addressing the security monitoring and management needs beyond PCI compliance. Consider ATW where the outsourcing of security monitoring and the management of online commerce systems can reduce the annual costs of maintaining PCI compliance.

Cautions

- ATW has done three acquisitions in the last 12 months, which for a relatively small company can be a major distraction. One of those acquisitions was of a small network intrusion prevention system (IPS) product provider (Lucid), which is an area with little synergy with the services business. ATW's MSSs portal capabilities lag behind the major competitors.

AT&T

Strengths

- AT&T has continued to invest in and focus on a broadening range of global security services. It has been aggressive in offering and pricing ITC services (in particular, DOS filtering) that give it a clear advantage over MSSPs that are not telecom providers. Of all the telecom providers, AT&T has been the most effective at leveraging the increasing threat visibility gained by managing large portions of the Internet backbone. AT&T MSSP customers did not report any disruption of service levels as the AT&T/SBC merger closed. Consider AT&T for MSSs where detailed security information and flexible protection capabilities are required.

Cautions

- AT&T falls into the middle of the pack when its services require CPE or "feet in the street" consulting support services. Its portal capabilities, although strong on threat information, have not advanced to provide more-sophisticated risk assessment or change impact analysis services. AT&T often suffers from "not invented here" syndrome

— it has not been aggressive in partnering with security product vendors to offer new capabilities until those capabilities are in use internally at AT&T.

Bell Canada

Strengths

- Bell Canada has flexible MSS deployment options that include comanagement capabilities that enable customers to share management and monitoring responsibilities with Bell Canada. Network service offerings beyond security provide a large base of customers to sell MSS to as add-on services, and Bell Canada customers should consider Bell when looking for MSS.

Cautions

- Bell Canada has limited visibility outside of the Canadian market. The features of Bell Canada's security portal lag behind those of the leading MSS providers.

BT Counterpane

Strengths

- BT's acquisition of Counterpane and INS (a security consultancy) provides it with instant credibility in the security services area. BT provides the strong European partner Counterpane needed to replace Getronics, while BT provides the financial stability and global reach that Counterpane lacked. BT has the usual telecommunications installed base and ITC provider advantages. Consider BT Counterpane where other BT network services are in use or high levels of security recommendations and advice are high priorities.

Cautions

- BT's plans for integrating its own security services offerings and those provided by Counterpane and INS are not well-defined. Telecommunications providers face many cultural challenges in managing and delivering security services, and BT has to demonstrate that it can maintain the strengths of Counterpane while evolving to a coherent set of security services. BT has limited visibility in North America and will have to invest in establishing its commitment to the North American market.

CGI

Strengths

- CGI's broad IT services portfolio and established Government of Canada relationships offer easy access to MSS for agencies that require monitoring and device management services. CGI's service customers can readily add MSS to their established outsourcing deals.

Cautions

- CGI does not have high visibility among enterprises looking for discrete MSS deals, and CGI's portal capabilities lag behind those of leading MSS providers.

CSC

Strengths

- CSC's MSS offerings provide a complement to its other outsourcing and IT management services, enabling customers to acquire MSS as part of a larger outsourcing contract. Consider CSC for MSS when looking to expand infrastructure outsourcing to include security management.

Cautions

- Opportunities for MSS growth are tied to CSC's ability to sell to the customers of its other outsourcing services.
- CSC does not appear on shortlists of customers seeking discrete MSS deals.

Cybertrust

Strengths

- Cybertrust has developed a solid set of MSSs and gotten high marks for customer support. It has a strong presence in Europe, the Middle East and Africa; the Australia/New Zealand area; and in the PCI security assessment market. Consider Cybertrust where security outsourcing requires local presence in those geographic locations. As of July 2007, Cybertrust was acquired by Verizon Business.

Cautions

- Cybertrust's acquisition by Verizon may result in a high level of "brain drain" as security specialists leave, rather than work for a telecom service provider.

Getronics

Strengths

- Getronics' MSS capabilities provide opportunities for IT infrastructure outsourcing customers to add security device management and monitoring into large outsourcing deals. Getronics recently added security expertise to its management team for services. Consider Getronics for MSS when looking to add security monitoring/management to your infrastructure outsourcing relationship.

Cautions

- Getronics is better known as an IT outsourcer than as an MSSP and has low visibility to enterprises looking for discrete MSS deals.

IBM Internet Security Systems

Strengths

- IBM has consolidated security managed services under ISS and has made major investments in sales and engineering. IBM's acquisition integration process provided rapid connection between IBM Global Services widespread sales operations and the ISS MSSP capability. This should greatly improve ISS's reach, especially where global sales and support are required. Gartner did not view the acquisition of ISS by IBM as a positive move for ISS's IPS products, but the converse is true for ISS's MSSs. The IBM

ISS managed services offerings should be able to move forward in capability and in channel strength through increased separation from ISS's product line and by taking advantage of IBM's global services presence. Consider IBM for MSSs where depth of support and detailed threat information are key requirements.

Cautions

- IBM is a large company with many moving parts and numerous bureaucracies, while ISS had maintained a small entrepreneurial culture for many years, even as it grew. The well-known expertise at ISS may find integrating with IBM difficult. IBM has not showcased the ISS brand in its security marketing, missing a chance to assure ISS customers that the ISS brand will still have meaning.

Integralis

Strengths

- Integralis has a larger and better-known presence in Europe. In the U.S., it has greater depth on the East Coast than elsewhere. Consider Integralis when looking at 24/7 monitoring where cost control is a significant factor.

Cautions

- Integralis has lagged other MSSPs in portal reporting capabilities. Integralis' distribution deal with Verizon Business is likely to be negatively affected by Verizon's own MSS capability and the recent acquisition of Cybertrust.

Orange Business Services

Strengths

- Orange Business Services offers global MSS coverage, extensive process documentation and a full set of services beyond managed security. Orange is better known in Europe than in North America, but customers give it good marks for solid service delivery. Orange telecommunications customers should consider Orange for MSSs.

Cautions

- Orange has no resellers/distributors in North America, so prospective customers will need to seek out Orange or be exposed to an Orange MSS as an adjunct to discussions about other Orange network services. Prospective customers should ensure that the portal capabilities match their requirements regarding the capture of asset data for compliance reporting and for managing vulnerability-scanning activities.

Perimeter eSecurity

Strengths

- Perimeter eSecurity has increased its reach through acquisition and channel partnerships, primarily focused on the midsize financial market. References consistently give Perimeter high marks for service. Perimeter also broadened its capabilities to work with network service providers and value-added resellers that can "white label" Perimeter's services, enabling it to compete with the larger telecom providers. Consider Perimeter where its vertical focus matches your industry and where maintaining a security level while reducing costs is a key requirement.

Cautions

- As one of the smaller pure-play MSSPs, Perimeter faces the same viability/acquisition uncertainty concerns as a supplier. Perimeter has been quite active in acquiring small companies, which can lead to integration issues and service quality disruption.

SAIC

Strengths

- SAIC has strong security expertise supporting its consulting activities, and a strong reputation as a government-focused IT consulting and integration firm. As a publicly traded company, prospective customers will be better able to assess whether SAIC meets their requirements for outsourcing partners. Consider SAIC MSSs as an extension of established service relationships with SAIC.

Cautions

- SAIC has little visibility to enterprises looking for a discrete MSS deal, and its service offerings are solidly "middle of the pack" among large system integrator vendors offering MSSs.

Savvis

Strengths

- Savvis offers a broad portfolio of Web-hosting, network and IT infrastructure services, with a focus on flexibly priced utility offerings. This enables Savvis to offer CPE-based, ITC and hosted security service offerings. Savvis has an opportunity to drive more-flexible pricing options into the MSSP market. Savvis's Arca Common Criteria Testing Laboratory provides depth in security expertise for Savvis that helps establish credibility against other network service providers. Consider Savvis services to augment any hosting or network services already being procured from Savvis.

Cautions

- Savvis' ability to invest in MSSs may be affected by the financial demands of its hosting and wholesale network business. Savvis will need to invest in channel reach and in increasing its levels of security, customer support and security portal capabilities.

SecureWorks

Strengths

- SecureWorks' acquisition of LURHQ brings it a strong capability to serve enterprise customers, in addition to its capability to meet the needs of smaller financial services customers. SecureWorks gets high marks for customer service and strong security expertise. Self-service security information management offerings differentiate SecureWorks' service portfolio.

Cautions

- As a privately held firm, SecureWorks must address concerns of large-enterprise prospects about its ability to deliver services in a market environment characterized by mergers and acquisitions. SecureWorks must also balance its service offerings to address the different expectations of its small financial services customers and those of

its large enterprise customers. Although the real business impact of large distribution partners is often muted in practice, the SBC/AT&T merger is likely to mean SecureWorks will need to look elsewhere for a telco distribution partner.

Solutionary

Strengths

- Solutionary has improved its ability to reach the market via deals with solution providers such as ACS, Fiserv and FishNet. The recent acquisition of Espiria (risk management services) and VigilantMinds (MSS) have beefed up Solutionary's capabilities with additional consulting resources, managed offerings and an operations center. Solutionary has augmented its perimeter device-monitoring capabilities with host-monitoring capabilities. Solutionary gets high marks for service delivery and customizing its offerings to accommodate client requirements.

Cautions

- Solutionary must move smartly to integrate operations and service delivery with VigilantMinds to take advantage of the greater scale the acquisition brings, and at the same time avoid losing focus on its core market for MSSs.

Sprint Nextel

Strengths

- Sprint, like other telephone company competitors, has an installed base of bandwidth customers that provides an advantage when competing with MSSP pure-plays. Sprint offers CPE-based services and ITC services. Consider Sprint security services when bundling them with other Sprint telecommunications services for procurement savings.

Cautions

- Sprint does not appear to be focusing on security services as a major business line. It is not adding more advanced services and portal offerings and is falling further behind the major competitors.

Symantec

Strengths

- Symantec shows up in the majority of competitive acquisitions for MSS among Gartner customers. Customers report no concerns about channel conflicts between product and service sales. We expect Symantec will focus on internal improvements to its service delivery capabilities in the near term. Consider Symantec when looking for a solid, experienced MSS provider.

Cautions

- Symantec must take care to keep service levels high as it focuses on improving internal processes to reduce the cost of delivering core MSS offerings and lays the groundwork for new offerings.

Unisys

Strengths

- Unisys has focused on U.S. government and midsize financial services for MSS business. It has had some success selling MSS outside of its customer base for other IT infrastructure services. Unisys should be considered when looking for solid, mainstream MSS capabilities.

Cautions

- Unisys portal capabilities lag slightly behind those of leading vendors. Unisys has experienced recent management turnover in the security services practice.

VeriSign

Strengths

- VeriSign has maintained the quality of the Guardent and iDefense capabilities, generally getting high marks for support from established customers. VeriSign's integration of Skybox Security change impact analysis capabilities provides a risk-based approach for assessing the potential exposures caused by network or security device configuration changes. Consider VeriSign where broad security management capabilities are required.

Cautions

- VeriSign's overall corporate directions continue to evolve, recently focusing on growing video and mobile content delivery businesses that may distract investments from continuing to improve and expand the MSS business.

Verizon Business

Strengths

- Through the acquisitions of NetSec and, in July 2007, of Cybertrust, Verizon Business now has a broad line of security managed and professional service offerings with a global coverage area. As a telecommunications provider, Verizon Business has a large installed base in which to sell ITC- and CPE-based security services at a competitive advantage. Consider Verizon Business security services when you are using other Verizon Business telecommunications services.

Cautions

- Verizon Business (then MCI) completed the financial aspects of its acquisition of NetSec in February 2005, but the overall integration of MSSs across Verizon Business has taken much longer. There have been several organizational changes and brain drain since the NetSec buy, and the acquisition of Cybertrust will require yet another service-line integration with the potential for delays or disruptions in service.

RECOMMENDED READING

"In the Cloud' Security Services Will Change Providers' Landscape"

"Magic Quadrant for MSSPs, North America, 2H05"

"Findings: Ensure Your MSSP Tunes Your Intrusion Prevention Systems"

"A Dozen Questions That Prospective Buyers of Managed Security Services Should Ask"

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

Acronym Key and Glossary Terms

CPE	customer premises equipment
DDOS	distributed denial-of-service
IDP	intrusion detection/prevention
IDS	intrusion detection system
IPS	intrusion prevention system
ISS	Internet Security Systems
ITC	in-the-cloud
MSS	managed security service
MSSP	managed security service provider
PCI	Payment Card Industry
SMB	small or midsize business

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, etc.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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