

# Magic Quadrant for Enterprise Search

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The enterprise search market is being reshaped by new consumer experiences and shifts in vendors' strategies, such as Microsoft's decision to tie search technology more closely to SharePoint. Gartner compares 15 vendors to help search managers and information architects make the right choice.

## Market Definition/Description

Enterprise search technology relates users' inquiries to all kinds of information in order to identify relevant information and perform light analysis. Consumer Web search tools, such as those at google.com, yahoo.com and bing.com, are not covered by this Magic Quadrant.

We continue to see wide variations in pricing models, delivery models and go-to-market strategies in the enterprise search sector. The Nexus of Forces — social, mobile, cloud and information — is affecting the information-centric search market substantially, as the ability to address mobile computing functions through apps, to address the cloud through both direct provision and connectors, and to offer meaningful social features go to the heart of the business of executing and innovating in this area of technology.

Some vendors offer only software to be installed on customers' premises; some offer hardware-based appliances; and others offer software as a service (SaaS) or installations on the infrastructure of cloud services providers, such as Amazon Web Services. Vendors must offer connectors to both traditional and unconventional data sources. Examples of traditional sources are file servers, content management systems and email archives. Unconventional sources include cloud file shares such as Dropbox and Google Drive.

Gartner puts the compound annual growth rate of the enterprise search market from 2007 to 2013 at 11.7%. We estimate that the market was worth \$1.69 billion in 2012 and that this figure will grow to \$1.89 billion in 2013 (see "Dataquest Insight: Business-Function-Aligned Solutions and Content Analytics Drive Enterprise Search Market Growth"; *this document has been archived; some of its content may not reflect current conditions*).

# Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Search



Source: Gartner (April 2013)

## Vendor Strengths and Cautions

### Attivio

Attivio focuses on addressing the combination of structured and unstructured data, and is well-regarded for its effectiveness in combining the two perspectives. It has rolled its enterprise search technology into its Unified Information Access Platform, which also includes a range of analytical capabilities.

### Strengths

- Attivio offers strong flexibility for the design of conversational search capabilities to reduce the ambiguity of results.
- Attivio has a comparatively transparent process for understanding why a particular set of results is returned to the user.

- Attivio offers a broad range of choices for using its system on a cloud platform. It has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.

### Cautions

- Attivio is still developing its strategy to achieve a high profile in the market.
- Attivio's federation capabilities lag behind those of more aggressive vendors.
- The administration capabilities offered by Attivio "out of the box" include limited monitoring.

### Autonomy

[Autonomy](#), an HP company, receives very mixed reviews from clients as both its challenges and strengths from previous years remain. Its strategy and continuity within the HP product portfolio needs to be maintained and consistently enforced in order to fulfill its potential.

### Strengths

- Autonomy is very good at searches driven by queries that include surmised or contextual information.
- Autonomy's exceptional sophistication and extensibility enable it to tackle the most demanding use cases.
- A very long list of data connector types enables almost any data source to be discovered and indexed. However, a few clients have expressed concerns about the SharePoint 2010 connector, to such a degree that we recommend undertaking a proof-of-concept exercise.

### Cautions

- Autonomy's future at HP remains unclear as HP is streamlining its offering to seize the highest-margin opportunities in the fields of compliance, e-discovery and information governance. This might mean it pays less attention to pure enterprise search customers in the future.
- Autonomy must continue to manage its external image after last year's executive turnover and uncertainty, to regain customers' trust.
- The pricing of Autonomy's Intelligent Data Operating Layer (IDOL) offering has never been transparent or predictable. Recent changes have been welcomed, but customers have yet to report major improvements in predictability.

### Coveo

[Coveo](#) recently received a new round of funding. This Canadian vendor pursues most business cases, but particularly targets Web customer service and customer interaction hubs for its software.

**Strengths**

- Coveo offers strong flexibility for the design of conversational search capabilities to reduce the ambiguity of results.
- Coveo's solid go-to-market strategy recognizes the importance of specialization in valuable categories.
- Coveo's software is easy to install and configure.

**Cautions**

- Coveo's process for understanding why a particular set of results is returned to the user is less transparent than those of some other vendors.
- Coveo's documentation of its deeper integration is less clear than that of other vendors.

**Dassault Systemes**

Since Dassault Systemes acquired Exalead in 2010, [Exalead's](#) profile in the market has grown. Dassault has invested in Exalead's search applications for manufacturing contexts, but also allowed its Exalead business to maintain strengths elsewhere.

**Strengths**

- Dassault Systemes gives its Exalead team substantial independence and lends it credibility in search applications that are valuable in manufacturing contexts.
- The Exalead product is particularly deft at providing a foundation for mobile applications.
- This vendor has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.

**Cautions**

- Feedback on support capabilities from customers is very mixed. Clients should ensure they have competent support available in their locale, whether directly or through the network of partners.
- The number of cloud content sources supported remains limited.

**Expert System**

[Expert System](#) has a strong offering in the field of analytical applications, and is less focused on conventional enterprise search offerings.

**Strengths**

- Expert System's clear pricing model makes costs predictable.

- Expert System's advanced natural-language processing makes it a strong choice for use cases that require questions to be answered in natural language.

### Cautions

- More effort is required to address mobile business cases than is the case with other vendors.
- Expert System's federation options lag behind those of vendors that have sought to develop this aspect of their products more completely.
- Expert System's administration interface is complex and driven by technical rather than business needs.

### Google

The [Google Search Appliance](#) continues to gain new features to increase its appeal to enterprises wanting to customize and manage installations. Google's profile in the enterprise search market has grown steadily during the past four years, despite stiff competition, mainly from Microsoft. Overall, however, the volume of inquiries about the Google Search Appliance that Gartner receives from clients has decreased.

### Strengths

- Google's appliance is very simple to install. Enterprises report only brief waits to bring projects into the pilot or production stages.
- Google's appliance is low-maintenance. It does not demand substantial investments in human resources.
- Google continues to invest in capabilities to expand its functionality and improve its service. In addition, a clear pricing model makes costs predictable.

### Cautions

- The process for understanding why a particular set of results is returned to the user is particularly difficult. Google considers its relevancy calculation models to be a precious competitive differentiator and that it is therefore appropriate to keep them opaque.
- Google's federation options are simple to use, but lag behind those of vendors that have sought to develop this aspect of their products more completely.
- Administration reporting capabilities are less strong than some customers might consider necessary.

### IBM

IBM's [Content Analytics with Enterprise Search](#) includes capabilities previously found in OmniFind and is founded on the open-source search technology Apache Lucene. IBM informs us that it has

more success with its analytical functionality and is not vigorously seeking new enterprise search installations. Users of Gartner's inquiry service do not indicate that they select IBM as a best-in-class choice to satisfy their enterprise search requirements. IBM's pricing uses the company's Processor Value Unit metric, which clients frequently indicate is opaque to them.

IBM has acquired search leader Vivisimo, but intends no longer to sell the associated product to address enterprise search requirements. Instead, IBM now sells this product as InfoSphere Data Explorer, and targets big data and analytics projects exclusively. Content Analytics with Enterprise Search and InfoSphere Data Explorer have areas of overlapping functionality but are positioned and targeted separately.

### Strengths

- The foundation in open-source software reassures clients who like the idea of an open-source strategy.
- Content Analytics with Enterprise Search has for years been used in various vertical markets, including healthcare and law enforcement.

### Cautions

- IBM's search products have shifted through various strategies and have never established a strong presence in the market.
- Reference customers and other clients that use Content Analytics with Enterprise Search say it is difficult to use.

### LucidWorks

[LucidWorks](#) is a product company that was formerly known as Lucid Imagination, when it focused on services for Apache Lucene and Apache Solr. This small vendor includes among its staff creators of the Lucene and Hadoop technologies. It is working to develop a tight, streamlined strategy with which to exploit the desire for open-source technology without relying on low-margin services.

### Strengths

- There is a broad range of choices for using the system on a cloud platform.
- The open-source model attracts many enterprises that want to try before buying.
- LucidWorks has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.

### Cautions

- LucidWorks provides no apps or widgets for mobile use.

- The process of understanding why a particular set of results is returned to the user is especially difficult.
- Federation options lag behind those of vendors that have sought to develop this aspect of their products more completely.

### MarkLogic

[MarkLogic](#) was early in developing what is now a mature XML-based technology for data storage, indexing and content management. Its initial targets were publishers, but it subsequently expanded to address the government sector. It has recently expanded further, and now seeks to exploit the rise of big data with an analytics- and query-driven product line.

#### Strengths

- MarkLogic's extremely flexible and extensible platform can help with various unusual use cases.
- MarkLogic's broad platform places unique emphasis on XML and XML-based successor standards.
- MarkLogic has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.

#### Cautions

- Federation options lag behind those of vendors that have sought to develop this aspect of their products more completely.
- Enterprises may feel that acquiring an XML content management system/XML database is a greater investment than they wish to make.
- There are no ready-made mobile apps.

### Microsoft

[Microsoft](#) continues to grow in strength with its Enterprise Search engine and has fared better than expected in competition with Google. Tight integration with Microsoft SharePoint should continue to lead to market share gains from client installations; it also clarifies what had long been a confusing product line featuring many different kinds of search capability for SharePoint.

#### Strengths

- Microsoft offers a comparatively transparent process for understanding why a particular set of results is returned to the user.
- Deep integration with SharePoint offers the promise that administrators of the collaboration platform will also be able to be search managers.

## Cautions

- Microsoft's decision to tie Fast search technology tightly to the SharePoint platform, and not sell it independently, has disappointed its most visionary customers and will drive away developers that sought to build exceptional applications on it.
- In the context of the cloud, Microsoft offers Fast and SharePoint only on the Windows Azure platform and in Office 365. It does not support other cloud platforms. (On-premises installations are common, and Microsoft also offers hybrid options.)
- Current users of stand-alone Fast installations should consider their options for the future if they are not also users of SharePoint.

## Mindbreeze

[Mindbreeze](#) is an Austrian company that is slowly expanding its reach beyond central Europe to a wider range of customers. It continues to increase its strength, especially in conjunction with Fabasoft's Folio Cloud and an on-premises enterprise content management system.

## Strengths

- Mindbreeze is particularly deft at providing a foundation for mobile apps.
- All connectors are self-developed and support many different content repositories, as well as several industry standards, including Content Management Interoperability Services (CMIS).
- Mindbreeze offers effective social search features, including the ability to move anonymized search results and profiles from one installation to another to improve search relevancy.

## Cautions

- Mindbreeze has struggled to secure a broader network of partners outside its core central European market, including in the Americas, and it has some way to go to develop a generalized and effective go-to-market strategy. To grow effectively, it needs to find larger partners with a wider footprint.
- Mindbreeze markets the cloud-based version of its enterprise search offering mostly by underlining its European data centers, despite also supporting other cloud infrastructures, such as those of Microsoft (Windows Azure) and Amazon. This could limit the appeal of its cloud-based product to organizations outside the EU, which might prefer other cloud providers.

## Oracle

Oracle had struggled to develop a strategy for enterprise search that would define it as a Leader. To do this, it has repurposed [Oracle Secure Enterprise Search](#) as a tool that informs all its applications. The acquisition of Endeca catapults Oracle forward in terms of search facility, though, at Oracle, [Endeca](#) is more prominent as a means of improving business intelligence than as a search product.



## Strengths

- Oracle offers strong flexibility for the design of conversational search capabilities to reduce the ambiguity of results.
- Oracle has very strong experience in e-commerce use cases.
- Oracle has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.

## Cautions

- Oracle is shifting its Endeca product away from the acquired vendor's long-standing model of pricing by data record; it is instead starting to price by processor, Oracle's long-standing model. Conversations with Gartner clients indicate that they are often dissatisfied with this processor-based model and that Oracle is wrestling with how best to make the transition.
- Oracle is positioning Endeca as a search technology in the e-commerce arena, which might weaken its development as a stand-alone enterprise search engine.

## Perceptive Software

Isys Search Software had been a popular alternative to other vendors of fairly low-priced offerings for over 10 years when [Perceptive Software](#) acquired both its search technology and the connectors that enable its use for making content systems interoperable. Perceptive, a business unit of Lexmark International, is a small Australian vendor that had struggled to develop a profile in the shadow of Google and Microsoft, but is now well-regarded for its flexibility and client responsiveness.

## Strengths

- Perceptive offers strong flexibility for the design of conversational search capabilities to reduce the ambiguity of results.
- A clear pricing model makes costs predictable.
- Perceptive is well regarded for the quality of its professional services and flexibility of installation.

## Cautions

- There is currently little contextualization of results beyond entity extraction and subject matching.

## PolySpot

[PolySpot](#) is one of a number of vendors building a product — in its case, PolySpot Enterprise Search — on the Apache Solr 4 and Lucene open-source stack, with extensive customizations to meet customers' requirements.

### Strengths

- PolySpot is particularly deft at providing a foundation for mobile apps; its offerings include a mobile app that relies on "push" more than "pull" for user interaction.
- PolySpot offers strong flexibility for the design of conversational search capabilities to reduce the ambiguity of results.
- A clear pricing model makes costs predictable.
- PolySpot's product is extremely easy to install, according to clients.

### Cautions

- Federation options lag behind those of vendors that have developed this aspect of their products more completely.
- PolySpot's process for understanding why a particular set of results is returned to the user is especially difficult to understand, although an audit trail is available to administrators.
- The administration interface is very flexible and may therefore be seen as overwhelming, though it can be simplified at the time of installation.

## Sinequa

[Sinequa](#) is a French company that markets its enterprise search engine as the combination of its Unified Information Access platform and an analytics platform. Its market recognition is slowly growing and it has a strong presence in French-speaking countries.

### Strengths

- Sinequa has invested particularly strongly in the searching and analyzing of structured data for hybrid structured/unstructured use cases.
- The process for understanding why a particular set of results is returned to the user is comparatively transparent.
- Sinequa is particularly deft at providing a foundation for mobile apps.
- There is a broad range of choices for using the system on a cloud or SaaS platform.

### Cautions

- Sinequa is still developing its market profile outside Europe.

- Clients have indicated that Sinequa's documentation for very deep integrations is insufficient.

## Vendors Added or Dropped

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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 a Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year but not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

This document's predecessor was "MarketScope for Enterprise Search." In switching to a Magic Quadrant, we have added Dassault Systemes, which has acquired Exalead; Perceptive Software (a business unit of Lexmark International), which has acquired Isys Search Software; Oracle, which has acquired Endeca; and Attivio, Coveo, Expert System, LucidWorks, MarkLogic, PolySpot and Sinequa, which now meet the inclusion criteria.

### Dropped

Endeca, Exalead, Isys and Vivisimo have been acquired and therefore do not appear in this Magic Quadrant.

## Inclusion and Exclusion Criteria

To be included in this Magic Quadrant a vendor:

- Must offer a product marketed as "a search engine" or an "enterprise search" product, and that product must meet Gartner's definition of enterprise search.
  - Such product or products must be available separately from all other products (such as portal, infrastructure, content and records management, e-discovery and CRM products).
- Must have earned over \$5 million in revenue from enterprise search products in 2011.
- Must have identified at least three reference customers who acquired the product in 2011; alternatively, Gartner must have received a sufficient number of inquiries from clients indicating interest in the vendor for us to drop the requirement for reference customers.

## Evaluation Criteria

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### Ability to Execute

The completeness of products and their success in terms of customers' experiences of them are particularly important to a vendor's Ability to Execute. The market's comparative maturity makes

vendors' viability increasingly important as well — despite changes in how search technology is delivered and in what it can do, clients tell us that they value vendors with strong foundations.

**Table 1. Ability to Execute Evaluation Criteria**

<b>Evaluation Criteria</b>	<b>Weighting</b>
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Standard
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	No Rating
Marketing Execution	No Rating
Customer Experience	High
Operations	No Rating

Source: Gartner (April 2013)

## Completeness of Vision

Thriving in a market where major vendors are clashing demands agility and creativity. We also place significant value on innovations that invigorate this market.

**Table 2. Completeness of Vision Evaluation Criteria**

<b>Evaluation Criteria</b>	<b>Weighting</b>
Market Understanding	High
Marketing Strategy	No Rating
Sales Strategy	No Rating
Offering (Product) Strategy	Standard
Business Model	No Rating
Vertical/Industry Strategy	No Rating
Innovation	High
Geographic Strategy	No Rating

Source: Gartner (April 2013)

## Quadrant Descriptions

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### Leaders

Leaders demonstrate exceptional technological flexibility. They recognize what end users in significant segments of the market require to accomplish their business goals, and provide the necessary functionality and extensibility. They have some of the means to provide consumer-class search experiences on enterprises' public and private websites.

### Challengers

Challengers have the resources and visibility to capture the attention of enterprises, but they lack the vision to be classed as Leaders. They have the foundations necessary to enter the market and they also have operational strength, but they must offer greater extensibility and possibly richer functions if they want to win the most demanding opportunities.

### Visionaries

Visionaries address the keen desire of enterprises to pursue consumer-class search experiences with fresh capabilities and flexibility. They understand that chasing the "Google experience" is not sufficient, but that providing search features that allow for better collaboration, application development, and innovative means of finding and working with content is particularly valuable.

### Niche Players

The enterprise search market rewards vendors that establish specialties in particular vertical markets or categories of application; these Niche Players may not achieve huge revenues or the highest visibility, but they can nevertheless deliver great value in their focus areas. Such vendors may remain in their specialties or use them as starting points from which to grow in breadth and strength.

## Context

This Magic Quadrant introduces search managers and information architects in end-user organizations to the range of enterprise search vendors they can choose from. It's important, however, for them to recognize that so many different technological models and kinds of analysis support the field of search that no evaluation can adequately reduce the selection process to the two dimensions of a Magic Quadrant.

The first step for those undertaking an enterprise search project should be to establish a staffing strategy.

They should then concentrate on defining the project's scope or breadth of application (see "Your Enterprise Search Project: The Outward Spiral"; *this document has been archived; some of its content may not reflect current conditions*).

Next comes the task of selecting several prospective enterprise search vendors — or, in many cases, choosing to retain and possibly expand their usage of, a vendor whose product or products they already use.

Then, if they intend to choose a new vendor, or think they might do so, a proof-of-concept exercise should be undertaken to improve the chances of the project being completed successfully and in a timely fashion.

## Market Overview

In Gartner's experience, clients contemplating an enterprise search project generally ask first about technologies from Microsoft or Google. Only later do they consider options that are more platform-oriented or specialty-focused.

Google continues to invest in deepening the sophistication of its product, which demands that it address the tension between functional depth and its core requirement for ease of use.

Microsoft, meanwhile, has tied its search efforts absolutely to SharePoint for future releases, and will no longer provide new licenses independent of SharePoint. This has opened up the market for the many competing vendors, small and large, that have so far survived Microsoft's increased ambition.

Although most enterprises choose a simple enterprise search product from a vendor featured in this Magic Quadrant, the Nexus of Forces is creating new opportunities for them to serve their customers or constituents. Not even Google or Microsoft can always fulfill all their requirements to seize these opportunities, so it's important also to consider vendors that did not meet the inclusion criteria for this Magic Quadrant.

Vendors excluded from this Magic Quadrant because they did not meet one or more of the inclusion criteria include:

- **Adobe**, which provides search products as part of its SaaS offerings that are aimed at improving electronic commerce and are tightly integrated with its Web analytics.
- **Amazon**, which has only recently entered the market with a cloud-based solution.
- **BA Insight**, which improves other vendors' products and open-source search offerings with increased features and installation aids, as well as professional services.
- **dtSearch**, which now focuses on providing its engineer-friendly search product to other vendors that need solid, transparent capabilities for their products.
- **EasyAsk**, which has pursued e-commerce and business intelligence opportunities effectively with its exceptional plain-language query technology through multiple corporate identities, and which could experience a surge in interest thanks to Apple's popular Siri technology.
- **Elasticsearch**, a small open-source vendor that is attracting attention from enterprises in Europe.

- **EMC**, which does not offer its search technology for general-purpose use separately from its other products.
- **Exorbyte**, which targets customers performing large-scale searches of data with an error-tolerant query system.
- **OpenText**, which has only recently reinvigorated its search products and will need time to develop a profile and possibly re-establish a leadership position in the field of enterprise search technology.
- **Q-Sensei**, a company founded in 2007 that offers a general-purpose search engine, as well as one aimed at scholarly use cases.
- **Recommind**, which has an extremely strong profile among legal enterprises, is also pursuing other professional services use cases, and offers a general enterprise search platform that may gain a higher profile with sustained investment.
- **Thunderstone**, which although not a well-known vendor has provided, for longer than most others, search technology as an appliance and in conventional installations intended to appeal to customers needing a low price and transparent, search engineer-friendly customization.
- **WCC**, which targets the fields of e-commerce, careers and employment, and identity matching using biometric systems.

## Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

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

### Evidence

Vendors answered a questionnaire based on the needs that enterprises express when talking to Gartner. Additionally, vendors identified reference customers, with whom we corresponded in order to discuss their merits.

#### 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 and so on, 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 that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales 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 initiatives, 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 and so on.

**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 website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products 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 sets 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 vertical markets.

**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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