Gartner

Research

Publication Date: 5 September 2007 ID Number: G00151042

Magic Quadrant for Information Access Technology, 2007

Whit Andrews

This year's Magic Quadrant for information access technology includes two new Leaders. The Challengers quadrant also now includes two new megavendors that were not previously in it, which implies consolidation could be coming closer.

WHAT YOU NEED TO KNOW

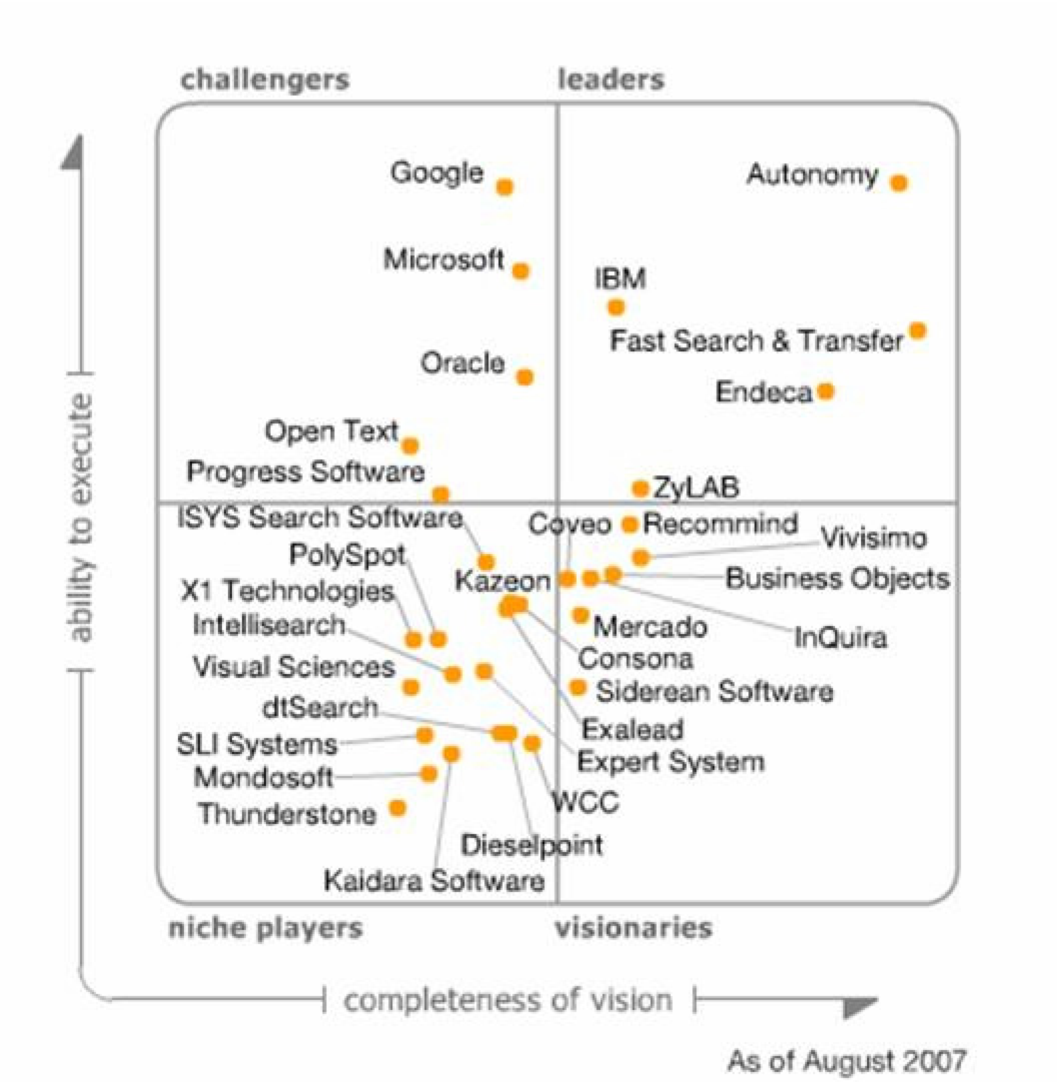
This Magic Quadrant includes vendors with capabilities that go beyond enterprise search to encompass a collection of technologies, including: search; content classification, categorization and clustering; fact and entity extraction; taxonomy creation and management; information presentation (for example, visualization) to support analysis and understanding; and desktop (or personal knowledge) search to address user-controlled repositories to locate and invoke documents, data, e-mail and intelligence.

We consider all enterprise search vendors to be information access technology vendors; however, those that only offer search capabilities (frequently called "keyword search") are inherently not Visionaries or candidates for the Leaders quadrant. Finding information, and acting on it intelligently, demands increasingly sophisticated and innovative strategies and technologies alike.

We now recommend that Global 2000 enterprises at least select a platform vendor for the majority of future projects. Platform vendors offer modular architectures, wide varieties of relevance modeling, multiple vertical applications and significant customizability. Enterprises should also typically have a tactical vendor to increase the agility for short-term and quick-start projects. Such tactical vendors may lack architectural sophistication and customizability, but they are quicker to deploy and easier to understand. Enterprises must also recognize the need to explore more specialized products for important and specific projects, such as e-discovery, e-commerce search or research science support.

MAGIC QUADRANT

Figure 1. Magic Quadrant for Information Access Technology, 2007



Source: Gartner (August 2007)

Market Overview

The first and most mature information access technology is search engine technology, which is typically applied to unstructured data in document repositories, and which has been commonplace since the mid-1990s. Increasingly, auto categorization, creative visualization, desktop search and taxonomy support technologies are being added to the category. Also, structured data is being included in information access projects with increasing frequency, both for the purpose of locating individual data elements and for giving holistic perspectives on a variety of information types in enterprises.

Information access technologies access applications such as document management, Web content management or relational database management systems and provide users with insight into their contents. Increasingly, information access technology is also expected to address enterprise applications, such as customer relationship management and legacy systems. Information access technology is often acquired as an embedded aspect of such other applications, and OEM arrangements are significant for information access vendors.

This Magic Quadrant addresses enterprise information access. (Clients often ask what we mean by "enterprise" in this context — we mean, not major portals such as Yahoo, Google.com or Ask.) Many of these vendors orient their technology specifically toward addressing particular business problems, such as legal discovery or publishing. Many of the vendors offer personal (desktop) search applications as well, and while personal search is not a primary focus or requirement for many of the vendors we've included, its offering is increasingly critical. Information access appliances are still rare, but are likely to become increasingly popular as enterprises seek their simplicity. Content analytics is emerging as its own category and is not fully covered here. Many vendors that don't have search do provide numerous content analytics functions.

The enterprise information access market, as with most technology markets (although not necessarily with many of those that have lived so long), has seen many acquisitions. The long-term trends of consolidation and new vendor influx counterbalance each other. Since our last update a year ago, Microsoft has entered the market, and Inxight was acquired by Business Objects.

Market Definition/Description

Information access technologies collect and condense information or map its native location so that users may actively seek it out, effectively analyze it and remain informed of it.

Inclusion and Exclusion Criteria

We have included only those vendors that incorporate search as the foundational capability of their information access products. Many include other capabilities such as auto categorization, taxonomy functions and clustering, but those that offer these capabilities only, with no search, were excluded. There are open-source search engines, but none are significant enough to threaten the commercial market. Lucene is the most prominent, but we did not include it, as enterprises don't consider it a significant alternative. Its future is tied largely to IBM, its most powerful supporter and user. We believe that if IBM or another powerhouse vendor invests substantially in Lucene's future, it may serve as a foundation for others to index data. Without such major champions, it is unlikely to reach its potential.

We include vendors that act as application service providers (ASPs) in providing their technology — many provide such services, but it is a particular focus of Visual Sciences and SLI Systems. Enterprises that are currently seeking information access technology are unlikely to make an early choice between an ASP or conventional installation; they are more likely to compare an ASP with an installed option. In short, the ASP model for information access technology is no longer its own small market.

Again, we did not include vendors that sell information access technology only as an element of a suite or set of applications that must be acquired to function. This excluded SAP, which did not sell its search products separately from its portal products as of August 2007, although the vendor says that will change with the release of the new SAP Enterprise Search in early 2008.

Added

The shift from a specialist focus on search technology to a broader field of information access technology capabilities has resulted in an influx of new vendors. Siderean and Expert System are new to the market, as is appliance vendor Kazeon.

Dropped

Nervana remains relevant to the market, but has no presence in inquiry and did not respond to requests for information. Convera is now a specialist in vertical searches for publishers, which is so narrow a niche that we no longer consider it. Inxight was acquired by Business Objects.

Evaluation Criteria

Ability to Execute

Product/Service is largely determined by the product's versatility in providing connectors for security models and its ability to connect to repositories effectively. This is the first year in which these capabilities are considered an aspect of execution, rather than vision, and has resulted in significant changes in terms of vendor positioning. A minor factor is the number of operating systems supported.

Overall Viability of a vendor is determined by a number of financial indicators, such as cash and cash equivalents, number of full-time equivalent employees and profits.

Sales Execution/Pricing is defined by the licenses sold in the last year, revenues and the appeal of pricing models the vendor selects.

Marketing Execution, and *Market Responsiveness and Track Record* are not covered.

Customer Experience is reflected by what we know of a vendor's performance, independent knowledge of their position and performance via our inquiry and outreach processes.

Operations is defined by geographical breadth in sales and support.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	high
Market Responsiveness and Track Record	no rating
Marketing Execution	no rating
Customer Experience	high
Operations	low

Source: Gartner

Completeness of Vision

Market Understanding is a combination of the vision that management has for how to thrive in the extremely challenging market for information access technology, and how that vision is manifested in practice.

Marketing Strategy is defined as how the vendor actually brings its product to market, including its target vertical and horizontal markets and the logic of that strategic goal.

Offering (Product) Strategy is assessed by a vendor's ability to scale from a user volume and data volume perspective; its ability to provide innovative and broad relevancy models using document content and other means (such as user behavior); its ability to effectively analyze user queries; and its ability to address desktop, enterprise and Web content together.

Business Model is not covered.

Vertical/Industry Strategy looks at a vendor's variety of credible vertical market offerings, and how appropriate those markets are for strategic investment, based on the likely future "fertility" for the vendor.

Sales Strategy includes the vendor's success with system integrators, and its training and recruiting programs for developers in integrator and enterprise organizations.

Innovation is assessed by looking at several diverse factors, such as: the ability to address non-textual documents and objects (including audio and video); to federate queries and mix or juxtapose results; to perform content analytics; and to use elements not resident within documents to establish relevancy (such as citation analysis). Finally, the ability to provide enterprise administrators with a meaningful report on why particular data is returned as relevant in a transparent fashion is critical.

Geographic Strategy is calculated based on a vendor's diversity across the globe in terms of where its development originates and its ability to support multiple languages robustly.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	standard
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	no rating
Vertical/Industry Strategy	standard
Innovation	high
Geographic Strategy	no rating

Source: Gartner

Leaders

All Leaders have demonstrated significant architectural flexibility. They also have a strong, innovative and broad means of determining relevancy of return results to users and providing developers with the flexibility and appropriate tools to tune these relevancy settings. They are financially prepared to weather hard times, and they possess sufficient resources to invest inorganically and organically in technology and business growth. They have established sufficient depth and strength to serve as platform vendors whose software might be used to solve most information access problems. One particular Leader, Fast, recently announced accounting changes that reflect "growing pains." Fast must improve its performance to realize its ambitions, but its Leader status will not be affected in the short term.

Challengers

Challengers possess sufficient resources to effectively penetrate the information access technology market. Nevertheless, they typically lack the vision necessary to address all the information access opportunities. It is significant that information access technology for enterprise use is not a core revenue category for Challengers. Any of these vendors could emerge as Leaders in less than 24 months if they choose to invest in information access technology and do so adeptly.

Visionaries

Visionaries have demonstrated imaginative and insightful approaches to the information access technology market, but have so far lacked the resources to prove their leadership and guaranteed strength in the future. They all possess architectural flexibility and creative means of establishing relevancy. Greater manifested financial depth and market traction would improve their positioning. Any could emerge as Leaders through stronger market performance.

Niche Players

Niche Players possess the attributes necessary to satisfy particular categories of projects, but they lack the depth and breadth to satisfy a variety of projects. They do not have the proven financial resources that Leaders and Challengers can point to (this is particularly true of privately held vendors that avoid revealing their financial foundation). Nor can they demonstrate the depth of vision that indicates they are leading the market. On the other hand, they are typically right for a particular set of needs, and they offer attractive pricing, special capabilities and vertical-industry knowledge.

Vendor Strengths and Cautions

Autonomy

Strengths

- Autonomy has invested significantly in the ability to locate and transcribe video and audio objects.
- The vendor has sound financials and a strong customer list bolstered by its recent acquisition of Verity and its intended purchase of Zantaz.
- The Verity acquisition gave it access to the Keyview product line and, as a result, it possesses a market-leading roster of connectors for external content sources.

Cautions

- Autonomy still has a deserved reputation for complexity and sophistication, and it lacks the passion to simplify the product for unsophisticated administrators who may nevertheless have strategic needs to fulfill.
- Enterprise prospects often report that the Autonomy sales process goes poorly.
- Autonomy must improve its ability to support existing customers when they face challenges in strategic implementations.

Business Objects

Strengths

- Inxight (which has been acquired by Business Objects) offers market-leading technologies for extracting entities and facts. The vendor offers effective analysis of the natural narratives that documents contain.
- It has unusually strong capabilities to make its broad relevancy modeling transparent for administration.
- Query analysis for relevancy calculation is deep and detailed.

Cautions

- Individual user profiling is limited.
- Vertical support is mostly oriented toward the government intelligence community.

Consona

Strengths

- Consona offers deep natural language processing technologies with special emphasis on insights about customer interaction initiations and results. Plain language queries may be examined with particular skill.
- Consona's administrative tools are unusually transparent and effective.

Cautions

- The vendor has not invested significantly in the ability to federate queries among multiple search engines.

Coveo

Strengths

- Coveo offers a competitive price range for its relatively strong functionality, including broad relevancy modeling.
- Microsoft-centric enterprises will appreciate its tight integration with Microsoft products, including, in particular, SharePoint functions.
- It has simple and intuitive administrative interfaces.
- It has recently invested in improving its handling of video and audio.

Cautions

- Coveo does not yet have the resources to have developed a substantial body of products targeted at a broad set of vertical industries.
- The vendor has not invested significantly in the ability to federate queries among multiple search engines.

- Microsoft is expanding to address an increasingly large portion of the Coveo value proposition; Coveo has extended beyond being just Microsoft oriented, however, and is expanding further still to mitigate this risk.

dtSearch

Strengths

- Products are, in particular, broadly embedded in other vendors' products (such as e-mail archiving and compliance monitoring), thanks to an aggressively priced OEM sales program.
- Highly user- or developer-customizable relevancy models use keyword modeling.
- The vendor has particularly strong desktop search tools and forensic search capability.

Cautions

- It has limited user profiling, query analysis and other non-conventional relevancy determinations.
- dtSearch's limited conventional connector libraries are a major factor in its shift in "ability to execute" this year. dtSearch is widely embedded and integrates with a broad variety of applications; the lack of packaged connectors does not imply that it operates discretely.
- No substantive change has occurred in its viability or operational execution. dtSearch has been a stable, but small, vendor for the history of the enterprise search market.

Dieselpoint

Strengths

- Dieselpoint is unusually capable at addressing structured (or "columnar") data through search and navigation interfaces. Historically, it had focused on addressing data in relational database management systems (RDBMSs) but has since expanded.
- Dieselpoint supports a large number of operating systems considering its comparatively small size.

Cautions

- Dieselpoint does not yet have the resources to have developed a substantial body of products targeted at a broad set of vertical industries.
- The vendor has not invested significantly in the ability to federate queries among multiple search engines.

Endeca

Strengths

- Endeca offers an excellent set of administrative tools to manage its strong product architecture. This allows for intelligent and effective query federation in complex installations that address heterogeneous data sets.

- The vendor is natively focused on query refinement through navigation, which is increasingly important in information access. It is a pioneer in such capabilities.
- It can apply security within documents based on their content, and not just on explicit permissions.
- Endeca offers deep user profiling to customize relevancy to individual users.

Cautions

- Endeca is alone among information access leaders in lacking a native desktop search facility.

Exalead

Strengths

- Exalead has a particularly strong combination of Web, desktop and intranet search.
- It offers creative means to develop results interfaces.
- Exalead offers rich content analytics for a comparatively young vendor.
- It is credibly pursuing very-large-scale contracts.

Cautions

- Exalead offers only limited individual user profiling.

Expert System

Strengths

- Expert System offers extremely rich content analytics and user profiling for such a comparatively young vendor.
- It also has a strong content connector list for such a young vendor.

Cautions

- It has a limited ability to make relevancy calculation transparent.
- The young vendor is still developing its partner channel.

Fast Search & Transfer

Strengths

- Fast's architectural facility serves its platform ambitions extremely well, allowing it to be fully customized and for applications to be developed that leverage its elements. It has invested more deeply in service orientation than any other vendor, and offers a significant facility for multi-stage relevancy processing and the ability to call on external applications to augment relevancy function.
- The vendor offers a broad spectrum of relevancy determination capabilities and specific products, including some that serve vigorously growing target markets.

- The vendor has developed a strong desktop search strategy that is intended to offer the desktop facility as a customizable platform. It also offers a business intelligence (BI) add-on, intended to attract enterprises seeking to address exploratory BI.
- It combines external data sources, such as premium content and hot Web content, like blogs, effectively with internal corpora.

Cautions

- Fast lacks a low-priced answer to Google and its inexpensive, good-enough competitors.
- Extremely quick growth has caused some sales and support hiccups — it recently made significant staff reductions, which is a cause for concern in terms of its ability to extend its record of strong innovation.
- Recent accounting changes reflect "growing pains." Fast must improve its performance to realize its ambitions. The company intends to return to profitability in 2008. While its leadership status is not contingent on such an achievement, it will be an important factor.

Google

Strengths

- Google markets a broad line of search appliances very effectively, and could execute an effective and expanded cross-product integration to rival Microsoft's reach in the enterprise.
- Google's popular desktop search facility interoperates effectively with the appliance product line and Google.com.
- The OneBox application programming interfaces (APIs) that Google offers are simple and easy to use.
- The appliances' enormous popularity makes Google the most important vendor to interoperate with and serve for content and data storage vendors.
- Google's out-of-the-box relevancy modeling is more likely to be initially successful in straightforward installations than any other vendor's.

Cautions

- Google's pre-sales activity still disappoints some major enterprises who feel it is insufficiently attentive to their particular concerns. Post-sales support also does not yet meet the standards of established players, but Google is making significant improvements through partnerships (such as the one with Dell) and system integration alliances.
- The appliance line lacks sophisticated tuning and customization capabilities that are necessary for platform installations.

IBM

Strengths

- IBM offers extremely rich content analytics considering its comparative newness to the market, a reflection of its depth in information access technology in terms of lab and pure research. Its most sophisticated products in the OmniFind line are particularly capable.
- IBM's UIMA model for metadata interchange among applications is a visionary plan to allow for the interoperation of multiple stages in the query and document analysis processes.
- IBM's relationship with Yahoo to produce a free search tool could mature into a deeper partnership for both vendors.

Cautions

- IBM is still developing its partner channel, and must increase its visibility and strength.
- The OmniFind product line is currently confusing for enterprises who need better guidance on which OmniFind product is best for them, and on how they can expect IBM to serve them as that changes.

InQuira

Strengths

- InQuira offers deep natural language processing technologies with special emphasis on the vocabularies used in its particular target markets of financial services, telecom, automotive and high-tech.
- It has developed a significant capability in packaged processes to support customer service.

Cautions

- Its sophistication of relevancy model limits the transparency of its results.

Intellisearch

Strengths

- Intellisearch has an unusually broad set of content and security connectors for such a young vendor.
- For an inexpensive product, Intellisearch offers comparatively broad capabilities for establishing relevancy.

Cautions

- Intellisearch does not offer any significant ability to profile individual users in order to tailor relevancy.
- The young vendor is still developing its partner channel.

ISYS Search Software

Strengths

- ISYS offers inexpensive but rich content analytics for such a comparatively small vendor.
- It sells a mature, intelligently designed desktop search tool that can be integrated with its enterprise search.
- ISYS's appeal in the government, law enforcement and legal environments is due in part to its solicitous attention to its customer base.

Cautions

- ISYS's partner channel includes few major integrators (although it is fairly strong among smaller regional shops).
- Individual user profiling is limited.
- ISYS has not committed the resources to have developed a substantial body of products targeted at a broad set of vertical industries.

Kaidara Software

Strengths

- Kaidara is particularly strong in its specialist area of enabling enterprises to expand their understanding of the customer experience.
- The vendor is particularly effective at explaining the process through which it arrives at search results.

Cautions

- Kaidara has not yet committed the resources to have developed a substantial body of products targeted at a broad set of vertical industries.

Kazeon

Strengths

- Kazeon's appliance model makes sales simple and pricing transparent.
- Its document analysis for relevancy is comparatively strong for such a young vendor.

Cautions

- Kazeon offers only limited individual user profiling.
- Kazeon has not yet committed the resources to have developed a substantial body of products targeted at a broad set of vertical capabilities outside e-discovery and compliance.

Mercado

Strengths

- Mercado is more focused on e-commerce than any other information access vendor, and has treated it as its primary vertical since it was founded.
- Mercado identifies and extracts product attributes effectively to improve online catalog offerings.
- The vendor's administrative tools stand out in their clarity and ease of use, and have done so for the duration of the company's existence.

Cautions

- Mercado is unlikely to expand its focus beyond the e-commerce vertical in the near future.

Microsoft

Strengths

- Microsoft shows good potential to combine Web, desktop and intranet search.
- It has a unique opportunity in its ability to integrate with SharePoint functions.
- Microsoft's significant partner channel is hungry for a strong Microsoft search product with which it can improve existing SharePoint installations and other Microsoft-centric projects.

Cautions

- Microsoft will need particularly strong query pre-processing for federation, which is currently absent.
- It must expand its ability to address video and audio objects.
- Content analytics of documents is not an area of significant focus for Microsoft. However, we expect its depth in Office applications and messaging to profitably inform its People Search expertise.

Mondosoft

Strengths

- Microsoft-centric enterprises will appreciate Mondosoft's tight integration with Microsoft products, particularly SharePoint functions.
- Mondosoft offers rich content analytics for such a comparatively inexpensive vendor.

Cautions

- Microsoft is expanding to address an increasingly large portion of the Mondosoft value proposition.
- Mondosoft has not yet committed the resources to have developed a substantial body of products targeted at a broad set of vertical industries.

Open Text

Strengths

- Open Text's stand-alone enterprise search offers comprehensive, if conventional, relevancy analysis capabilities.
- Open Text has the strong ability to federate to other enterprise search engines.
- Extremely large-scale installations have been built on the Open Text search platform.

Cautions

- The vendor does not offer visionary relevancy calculation capabilities.

Oracle

Strengths

- Oracle intelligently connects to Oracle Applications for relevant data as well as traditional unstructured data sources.
- Oracle has comparatively strong query analysis, especially for early vendor products.

Cautions

- Content analytics of documents is not an area of significant focus for Oracle.
- Limited explicit revelation of relevancy modeling for administrators as a function for evaluating why a set of results is returned.

PolySpot

Strengths

- PolySpot offers rich content analytics for such a comparatively young and inexpensive vendor.
- PolySpot has identified potentially rich target markets.

Cautions

- PolySpot has only recently expanded to seek to address the U.S. market.

Progress Software

Strengths

- Progress Software remains highly competitive in EasyAsk's historical core market of e-commerce and catalog search.
- Properly worded, plain language queries can be intelligently analyzed and expanded. The resulting query then can be used as a foundation for an effectively federated query.
- EasyAsk offers the unusual facility of BI and business performance analysis through opportunistic querying.

Cautions

- Progress has limited capability when it comes to addressing relevancy based on user behavior and other non-documentary sources.
- E-commerce is the only industry vertical that is robustly supported, although capabilities exist for other general installations.

Recommind

Strengths

- Recommind's sophistication in determining document relevancy is significant, particularly in professional services and legal services target markets. As a consequence, it is particularly qualified in addressing law firms' needs, including litigation support and e-discovery.
- Recommind has deep individual user profiling and examines a broad range of aspects of user behavior within the documents to be searched (including authorship and explicit citation analysis).
- Recommind is investing significantly in effective federation strategies.

Cautions

- The complexity of Recommind's primary relevancy model (Probabilistic Latent Semantic Analysis) affects its transparency.

SLI Systems

Strengths

- SLI Systems' e-commerce facility includes relevancy modeling and analytics specifically intended to address commercial needs.
- The vendor uses user behavior, particularly how users respond to search results, to help it improve relevancy calculations.
- Its purely ASP model makes sales strategy and pricing simple.

Cautions

- Its profiling of individual users remains light.
- SLI Systems is most useful for public Web sites, and e-commerce installations are unlikely to be expanded.

Siderean Software

Strengths

- Siderean offers an innovative relevancy determination facility.
- The vendor is natively focused on query refinement through navigation, which is increasingly important in information access.
- Siderean offers extremely rich content analytics for a comparatively young vendor.

Cautions

- The young vendor is still developing its partner channel.
- Siderean does not yet have the resources to have developed a substantial body of products targeted at a broad set of vertical industries.

Thunderstone

Strengths

- Thunderstone's relevancy is "good enough" for many conventional projects.
- Its appliance — which uses the same kernel as its other products — competes with Google's and is more capable of tuning and customization.
- Thunderstone works with an extremely broad range of operating systems. Its capabilities are transparently displayed and customizable, which makes it an appropriate platform for search application development.

Cautions

- Thunderstone offers only limited individual user profiling and relevancy analysis beyond document content.
- Thunderstone does not offer native desktop search or a Web index.

Visual Sciences

Strengths

- The vendor's purely ASP model makes its sales strategy and pricing simple. (Visual Sciences was formerly known as WebSideStory, which had rolled up a variety of ASP products, including the Atomz search engine and content management services.)
- The vendor offers a significant collection of relevancy controls, particularly for an ASP. Its administration tools are also quite intuitive and expressive for an ASP.

Cautions

- Visual Sciences is most useful for public Web sites, and e-commerce installations are unlikely to be expanded.

Vivisimo

Strengths

- Vivisimo is particularly skillful at clustering search in relation to a user query.
- It offers sub-document security when results reflect merged aspects of multiple documents.
- Vivisimo combines broad relevancy modeling and deep individual user profiling.

Cautions

- Vivisimo's extremely fast growth may provide the potential for disruption, but this is not currently an issue.

WCC

Strengths

- WCC offers unparalleled depth in its chosen verticals of employment search and identity matching. Its e-commerce prospects are also promising.
- WCC is effective at identifying the course that relevancy calculations have taken in returning a given result.

Cautions

- WCC offers only limited profiling of individual users.

X1 Technologies

Strengths

- X1 offers very effective and appealing desktop search.
- X1's architectural strategy for combining desktop and enterprise search is innovative and compelling.

Cautions

- X1 has not been particularly successful in its efforts to attain a mature enterprise strategy.
- X1 has not invested in any visionary capabilities for model relevancy.
- Individual user profiling is limited.

ZyLAB

Strengths

- ZyLAB is unusually strong in the compliance and legal-discovery categories, with specific process functionality and relevancy modeling intended to attract users.
- No other leading vendor offers a comparable history of native and robust desktop search.
- ZyLAB offers particularly rich and flexible content analytics for such a comparatively inexpensive vendor.
- No other generalist information access vendor has spent a similar amount of resources on supporting scanned document sets.

Cautions

- For a leading generalist vendor, ZyLAB's user profiling is comparatively light.
- ZyLAB is the only leading vendor that supports only the Windows family of operating systems.
- ZyLAB has not developed a substantial body of products targeted at a broad set of vertical industries besides its core targets.

RECOMMENDED READING

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

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 in order 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.

REGIONAL HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
U.S.A.
+1 203 964 0096

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters
Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509