

THE GARTNER RESEARCH PROCESS AND METHODOLOGIES

How our technology-related insight helps our clients make the right decisions, every day.

WHY RESEARCH MATTERS

Clients like you have spoken loud and clear:
You want to understand the thought processes, logic, assumptions and methodologies we use to formulate our research and conclusions. You care about the quality, independence and rigor behind our research engine, and you expect transparency in understanding how it works.

Why do you need research?

Your decisions, especially those that enable your organization's unique strategy, have long-lasting impact, often for years to come. They need to be backed and informed by research you can trust. At Gartner, our promise is to help you make better, more informed decisions about how you use technology to your advantage.

“Gartner is an intelligent filter for the oceans of information I need to track and monitor. With Gartner research and methodologies, I get opinions that are objective, unbiased and candid.”

CIO
Sports Apparel Manufacturer

IT is the business

Our clients are converging IT and business strategy like never before. And the opportunities just keep coming. Developments in enterprise mobility, business intelligence, consumer technology, virtualization and SOA are presenting new investment options every day. Information about how IT enables innovation is plentiful; but insight you can trust to make better decisions relevant to your unique situation is in much shorter supply. That's where Gartner comes in.

We help you decide with confidence

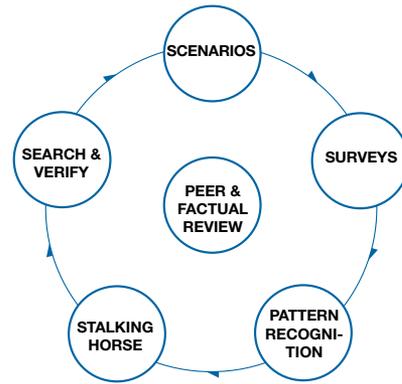
Gartner was founded in 1979 as a research firm to provide clients with unbiased, independent advice regarding their major IT purchases. Thirty years later, we are still the industry leader. Clients continue to trust our rich heritage, our vast knowledge network and our unique research process and proprietary methodologies to help them make more confident decisions every day.

A WAY OF THINKING

Our experienced analysts adhere to a research process and set of methodologies built on principles we consider non-negotiable.

Our research process turns complex information into actionable advice you can use for business advantage. Its underlying methodologies are a tested set of research practices, procedures and rules used to collect and analyze information.

Clients like you depend on the integrity and reliability of our methodologies to support the decisions you make in your role every day. You rely on the experience and expertise of our analysts to help you interpret patterns, aid your understanding of emerging business models and apply technology for innovation.



Applicable across many roles

Perhaps you're a chief information officer, an enterprise architect or an infrastructure manager. Maybe you provide commercial IT solutions or invest in technology companies. In all cases, our research process and unique methodologies help you answer critical questions such as:

- What are the most urgent priorities of today's business and technology leaders? What types of management techniques and best practices are paying off for them?
- Which emerging technologies have the most commercial promise? What types of productivity breakthroughs or revenue streams will they impact?
- How do the buying intentions of Global 1000 companies map to technology provider strategies? Which emerging players have the staying power to rise to the top of their respective sectors?

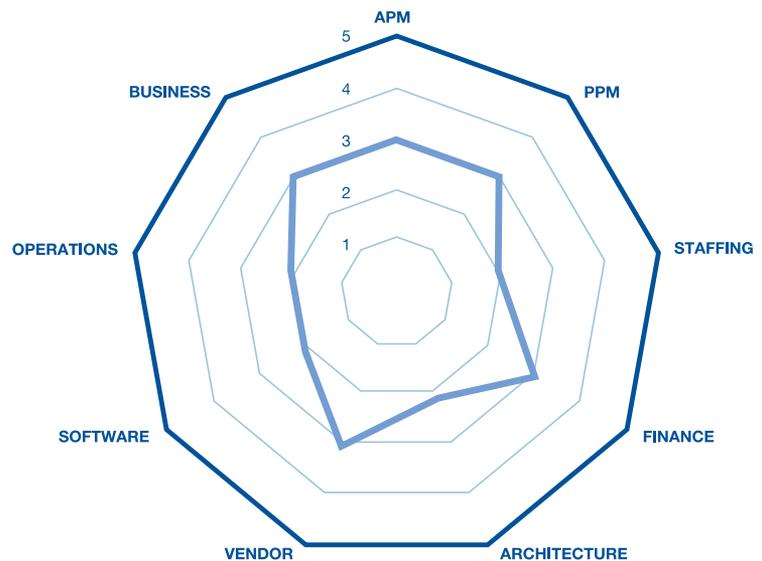
Driven by an experienced analyst community

- **Rigorous.** We are scrupulous in ensuring that the research practices we follow deliver insights that are relevant, appropriate and practical for your business.
- **Systematic.** Our process and methodologies follow a consistent, logical and considered sequence. We don't take shortcuts; we develop solutions that work.
- **Valid.** Our opinions are grounded in a solid base of facts verified by our own experienced analysts and others in business and academia.
- **Empirical.** Our conclusions are based on the hard evidence we collect—through our analysts and market surveys—from the real-life experiences of our clients (who number 60,000 across 10,000 distinct organizations worldwide).
- **Independent and unbiased.** Our process, methodologies and policies are designed to ensure that no one's personal agenda drives the results.
- **Reviewed and evaluated by peers.** All of our written research and presentations get peer-reviewed to inject the most current thinking about recent events and their potential impact.

ITSCORES

Advancing IT Organizational Performance
Against Enterprise Goals

Gartner ITScores are holistic sets of interactive maturity assessments designed to help CIOs and IT leaders evaluate the maturity of both the IT organization as a provider of IT services, and the enterprise as a consumer of information technology. Unlike other IT maturity assessments, a Gartner ITScore measures your organization's capabilities within the context of enterprise culture, behaviors and capacity for leadership—factors that dramatically impact IT's effectiveness and its ability to contribute real business value.



HOW DO ITSCORES WORK?

ITScores are based on three components: Organizational Questions, CIO Survey and Role Surveys.

- 1. Organizational Questions**, in conjunction with at least one of the CIO/Role surveys, capture how well your enterprise leverages IT to improve business outcomes.
- 2. CIO Survey** evaluates your IT organization from a managerial and leadership perspective.
- 3. Role Surveys** assess eight individual roles and disciplines within your IT organization, measuring the effectiveness of IT leaders in developing and exploiting core IT organizational capabilities.

Take as many of the available surveys as you choose. The more surveys your organization completes, the more

accurate your results and the more applicable the recommendations.

Surveys can be taken more than once to track progress, and the tool supports what-if scenarios that can be stored for later reference.

Each time you take the Organizational Questions survey in conjunction with at least one of the CIO/Role surveys, you receive a maturity score and recommendation report for the specific capability or perspective examined, as well as an enterprise IT maturity score and accompanying explanation. The enterprise IT maturity score is updated and refined with each linked, completed ITScore survey.

HOW DO YOU USE ITScores?

Your ITScores provides a holistic view that goes beyond functional/role disciplines to arrive at a nuanced, comprehensive assessment that is truly diagnostic and produces meaningful recommended actions. The ITScores differs from other maturity models in important ways:

- It not only examines IT leadership effectiveness and incorporates business behaviors, perceptions and expectations, but also tests how your capabilities are integrated and their combined power leveraged for enterprise advantage.
- It is outcome-oriented. Maturity models usually focus on attributes and have little to say about whether they are good or bad or how they contribute to desired results. Your ITScores focuses not just on attributes but also on contribution and results.
- It is practical. Real maturity is neither linear nor unidirectional. Achieving a state of near-perfection in key processes or attributes can actually have negative consequences. Your ITScores takes this into account.
- Gartner provides complementary research that helps you understand where you should be on the maturity score based on business realities, not just where you are or what is required to advance. Other maturity models fall short here, leading enterprises to conclude that higher levels of maturity are always “better.”



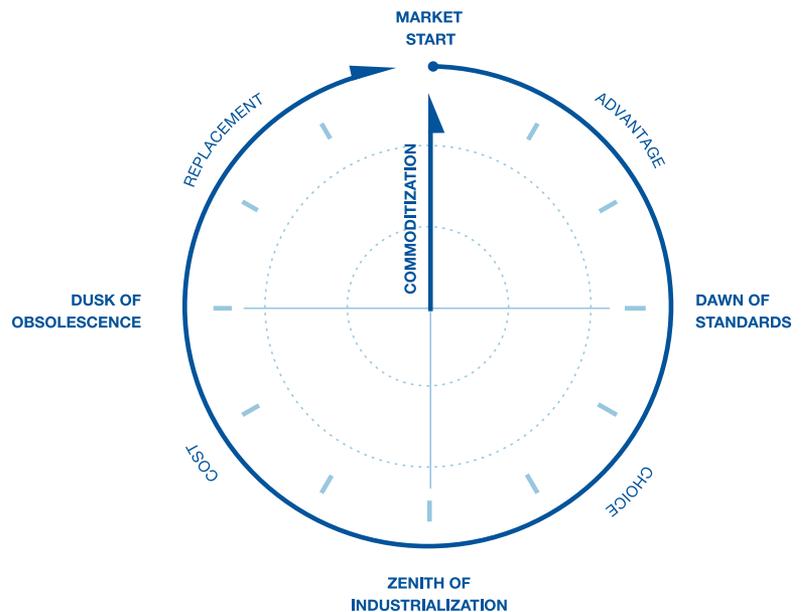
ITScores HELP YOU:

- Gain insights into what you want to accomplish, where you are today in developing the necessary capabilities, and the actions needed to close gaps and advance
- Assess and compare maturity across IT disciplines, and leverage best practices throughout the organization
- Provide an objective basis for cross-functional communication, collaboration and planning

IT MARKET CLOCKS

Providing a Full Life Cycle View of Technology Assets

The useful life of every technology product or service has an end, beyond which it will be more cost-effective to retire and replace the asset than to continue maintaining it. Gartner IT Market Clocks® are decision frameworks that provide a full life cycle view of technology assets—whether capabilities, products or services. They help you better evaluate the technology assets you are responsible for, so you can prioritize IT investments and build technology road maps that support business plans.



HOW DO IT MARKET CLOCKS WORK?

IT Market Clocks use a clock-face metaphor to represent relative market time. Each point on the clock represents an IT asset or asset class. An asset is positioned on the clock using two parameters:

Where it currently lies within its useful market life. Each clock begins at 0 (the “Market Start”) and moves clockwise around to 12.

Its relative level of commoditization.

This determines the distance from the center of the clock—assets further from center are more commoditized.

The clock is divided into quarters, each representing one of the market phases of an asset’s useful life. The quarters are named to highlight the general approach recommended for assets passing through that phase:

Advantage—assets in the customized phase, which provide differentiated technology, service or capability

Choice—assets in the mass-customized phase, subject to increasing levels of standardization and growing supply options

Cost—assets in the commoditized phase, where differentiation between alternative sources is at its minimum level and competition centers on price

Replacement—assets in the disfavored phase, usually legacy technologies, services or capabilities

A Market Clock Recommendation Summary provides a tabular summary of the positions and expected trajectory for each IT asset or asset class, as well as specific recommendations.

“We see potential in applying the Gartner IT Market Clock methodology to transform our purchasing process by treating emerging IT assets differently from mature or commoditized assets ... and by enabling a more effective dialogue between the many stakeholders in the IT decision process.”

CIO Office, Operational Planning and Client Management
European Business Services Provider

HOW DO YOU USE IT MARKET CLOCKS?

The way an organization invests in, deploys, manages and approaches technology assets should change during the asset's useful life. IT and business leader clients use IT Market Clocks as decision frameworks to help them evaluate and prioritize their IT investments.

Understanding how each asset is progressing through its useful life allows you to make informed investment decisions. IT Market Clocks are complementary to Gartner Hype Cycles. In essence, Hype Cycles support technology “hunting” decisions, while IT Market Clocks support “farming” decisions for assets already in use.

Designed to support multiple IT roles and functions, the IT Market Clock provides a consolidated view of IT assets within a specific portfolio and can assist with portfolio balancing, project prioritization and the development of business cases for investment/divestment.

Examples of how the IT Market Clock is used include:

- Development of business cases to replace aging infrastructure
- The establishment of principles for bringing outsourced support services back in-house as underlying technology enters its replacement phase



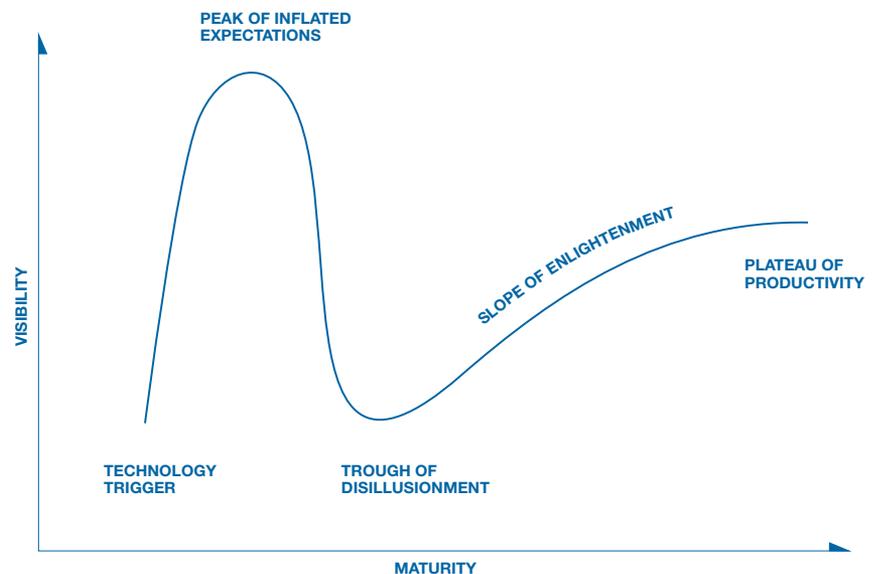
IT MARKET CLOCKS HELP YOU:

- Gain a full life cycle view of your technology assets
- Evaluate and prioritize your IT investments
- Build technology road maps that support business plans

HYPE CYCLES

Interpreting Technology Hype

When new technologies make bold promises, how do you discern the hype from what's commercially viable? And when will such claims pay off, if at all? Gartner Hype Cycles provide a graphic representation of the maturity and adoption of technologies and applications, and how they are potentially relevant to solving real business problems and exploiting new opportunities. Gartner Hype Cycles help you understand how a technology or application will evolve over time, providing a sound source of insight to manage its deployment within the context of your specific business goals.



HOW DO HYPE CYCLES WORK?

Each Hype Cycle drills down into the five key phases of a technology's life cycle:

Technology Trigger. A potential technology breakthrough kicks things off. Early proof-of-concept stories and media interest trigger significant publicity. Often no usable products exist, and commercial viability is unproven.

Peak of Inflated Expectations. Early publicity produces a number of success stories—often accompanied by scores of failures. Some companies take action; many do not.

Trough of Disillusionment. Interest wanes as experiments and implementations fail to deliver. Producers of the technology shake out or fail. Investments continue only if the surviving providers improve their products to the satisfaction of early adopters.

Slope of Enlightenment. More instances of how the technology can benefit the enterprise start to crystallize and become more widely understood. Second- and third-generation products appear from technology providers. More enterprises fund pilots; conservative companies remain cautious.

Plateau of Productivity. Mainstream adoption starts to take off. Criteria for assessing provider viability are more clearly defined. The technology's broad market applicability and relevance are clearly paying off.

“A Gartner Hype Cycle that shows how technology is reshaping the payment business and how competitors are attacking banking’s traditional domain gets executives to sit up in their chairs and listen.”

Executive Vice President
IT Services and Management Consulting Firm

HOW DO YOU USE HYPE CYCLES?

Clients use Hype Cycles to get educated about the promise of an emerging technology within the context of their industry and individual appetite for risk.

Should you make an early move? If you’re willing to combine risk taking with an understanding that risky investments don’t always pay off, you could reap the rewards of early adoption.

Is a moderate approach appropriate? Executives who are more moderate understand the argument for an early investment but will also insist on a sound cost/benefit analysis when new ways of doing things are not yet fully proven.

Should you wait for further maturation? If there are too many unanswered questions around the commercial viability of an emerging technology, it may be better to wait until others have been able to deliver tangible value.



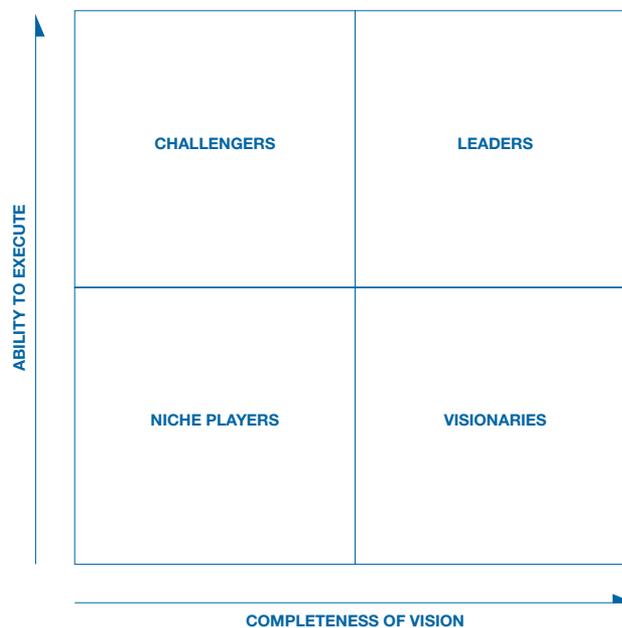
HYPE CYCLES HELP YOU:

- Separate hype from the real drivers of a technology’s commercial promise
- Reduce the risk of your technology investment decisions
- Compare your understanding of a technology’s business value with the objectivity of experienced IT analysts

MAGIC QUADRANTS

Positioning Technology Players Within a Specific Market

Who are the competing players in the major technology markets? How are they positioned to help you over the long haul? Gartner Magic Quadrants are a culmination of research in a specific market, giving you a wide-angle view of the relative positions of the market's competitors. By applying a graphical treatment and a uniform set of evaluation criteria, Gartner Magic Quadrants quickly help you digest how well technology providers are executing against their stated vision.



HOW DO MAGIC QUADRANTS WORK?

Magic Quadrants provide a graphical competitive positioning of four types of technology providers, where market growth is high and provider differentiation is distinct:

Challengers execute well today or may dominate a large segment, but do not demonstrate an understanding of market direction.

Niche Players focus successfully on a small segment, or are unfocused and do not out-innovate or outperform others.

Leaders execute well against their current vision and are well positioned for tomorrow.

Visionaries understand where the market is going or have a vision for changing market rules, but do not yet execute well.

“Gartner Magic Quadrants have helped guide our strategic actions for capturing leadership positions in contact center infrastructure, interactive voice response and enterprise voice portals.”

President and CEO
Contact Management Software Company

HOW DO YOU USE MAGIC QUADRANTS?

Clients use Magic Quadrants as a first step to understanding the technology providers they might consider for a specific investment opportunity.

Keep in mind that focusing on the leaders' quadrant isn't always the best course of action. There are good reasons to consider market challengers. And a niche player may support your needs better than a market leader. It all depends on how the provider aligns with your business goals.



MAGIC QUADRANTS HELP YOU:

- Get quickly educated about a market's competing technology providers and their ability to deliver on what end users require today and in the future
- Understand how a market's technology providers are competitively positioned and the strategies they are using to compete for end-user business
- Compare a technology provider's strengths and challenges with your specific needs

MARKETSCOPES

Understanding Emerging and Mature Markets

When markets are growing and IT solutions are stable, Magic Quadrants provide the best tool for understanding how the players are competitively positioned. But when new markets emerge and user requirements are in flux, solutions are often approached in wildly different ways, making a competitive positioning less useful. Mature markets present a similar challenge, as the differentiators among consolidating technology providers and solutions grow more difficult to discern.



	STRONG NEGATIVE	CAUTION	PROMISING	POSITIVE	STRONG POSITIVE
VENDOR PRODUCT/SERVICE A					
VENDOR PRODUCT/SERVICE B					
VENDOR PRODUCT/SERVICE C					
VENDOR PRODUCT/SERVICE D					
VENDOR PRODUCT/SERVICE E					
VENDOR PRODUCT/SERVICE F					

HOW DO MARKETSCOPES WORK?

A MarketScope rates a market itself and helps you evaluate its participating technology providers against the Gartner vision for that market.

MarketScopes rate each market's technology providers as Strong Positive, Positive, Promising, Caution or Strong Negative.

“We believed we had an opportunity to innovate in our market with a next-generation tool, but we needed to scope the market. With help from Gartner, we got the market validation and insight we needed to launch a unique solution that would rise above the market noise.”

CEO
Software and Professional Services Company

HOW DO YOU USE MARKETSCOPES?

Clients use MarketScopes to understand how the status of an emerging or mature market aligns with their own state of maturity and future plans.

For example, should you invest in emerging market solutions that appear innovative but are potentially risky? On the flip side, should you begin retiring your investments in market solutions that have matured?



MARKETSCOPES HELP YOU:

- Manage the risk of investing in both emerging and mature markets, and what level of promise their future holds
- Support the argument for allowing an emerging market to further evolve before you invest, or support decisions to retire your investments in solutions that have matured
- Understand how technology providers in both market types are performing and which criteria play a key role in their survival

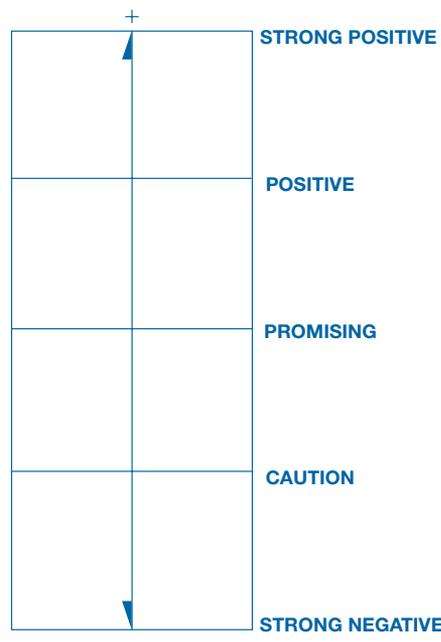
VENDOR RATINGS

Tracking and Monitoring Provider Performance

Clients use our well-defined methodology to rate IT technology providers—large, small, public or private. Gartner Vendor Ratings assess all the different aspects of a technology provider, such as its strategy, organization, products, technology, marketing, financials and support. These ratings are periodically revised to reflect changes in assessment when a significant internal or external event directly affects the provider.

HOW DO VENDOR RATINGS WORK?

Technology providers with a clear focus, solid products and an advantageous market position may be rated Positive or Strong Positive. Providers that face challenges in these areas may be rated Caution or Strong Negative. Those that have potential but still have some areas to develop further may be rated Promising. Vendor Ratings provide actionable advice:



Strong Positive. Customers can feel comfortable investing in a continued relationship with this provider. Potential customers should consider this provider a strong choice for new strategic investments.

Positive. Customers should continue planned investments. Potential customers should consider this provider a viable choice for strategic or tactical investments, while planning for known limitations.

Promising. Customers should consider the short- and long-term impact of possible changes in status. Potential customers should factor issues related to the ongoing evolution and maturity of this provider into their decisions.

Caution. Customers should understand challenges in relevant areas and develop contingency plans based on risk tolerance and possible business impact. Potential customers should consider the provider's challenges in their due diligence.

Strong Negative. Customers should execute contingency options. Potential customers should consider this provider only for tactical investments with rapid payback.

“We review and evaluate our strategic technology providers two times per year.
It’s a difficult process, made simpler by Gartner Vendor Ratings.”

CIO
Financial Services Firm

HOW DO YOU USE VENDOR RATINGS?

Clients use Vendor Ratings to understand how a provider’s offering aligns with their business strategy, and to help assess the health of their own strategic provider portfolio.

Vendor Ratings also reveal solution gaps among providers, and markets that could be ripe for investment opportunity.



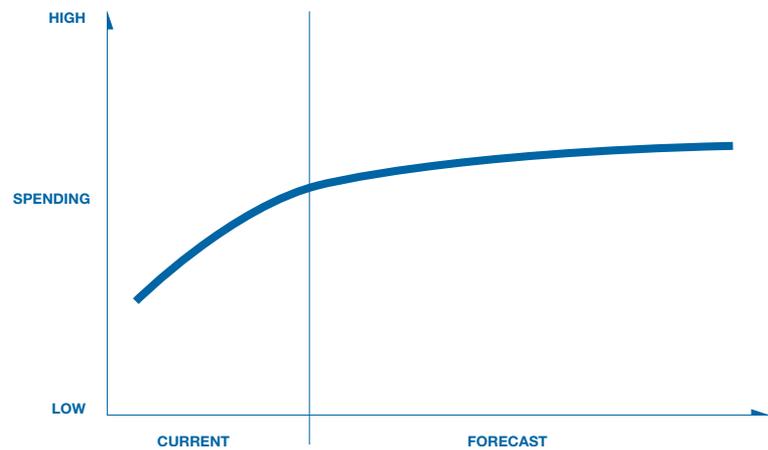
VENDOR RATINGS HELP YOU:

- Support your decisions in a continuing provider relationship or contract renewal opportunity
- Manage the risk of your provider portfolio while you keep an eye on up-and-coming players and potential alternate providers
- Understand how providers are competing and performing, how they are delivering against their vision and strategy, and how they are set up to survive in the long term

MARKET FORECASTS

Where Are Markets Headed?

How do you quantify the impact of a market's business drivers? Is a market growing, retreating or flat? The best answers come from an analysis of both supply and demand, comparing technology investment trends in the provider community with the spending trends of end users. It's a unique picture you get from Gartner, based on our relationships with thousands of end users and providers. And it's a view you can't get anywhere else.



HOW DO MARKET FORECASTS WORK?

Our Market Forecasts use primary surveys, inquiry analysis and secondary sources to help you fully understand a market's future spending pattern. We cover a broad supply chain—from raw materials to semiconductors, to systems, software and services.

Gartner forecasts provide two years of history while peering five years into the future. You get a comprehensive understanding of supply and demand by market, country and global region.

Forecasts track the complete supply chain of hundreds of products and services, allowing us to reconcile top-down and bottom-up approaches to market forecasting. And they are more than a quantitative exercise. Quarterly data includes analysis and a summary of how we believe market trends will play out.

“Our firm has grown up in the large-enterprise market, and we wanted to increase our focus on smaller companies. Gartner forecasts and share analysis helped us quantify our opportunities in smaller, midsize markets.”

Vice President Worldwide SMB Marketing
Networks and Communications Company

HOW DO YOU USE MARKET FORECASTS?

Clients use our Market Forecasts as checks against their own internal forecasts in the telecom, IT services, software, hardware and semiconductor industries.

Clients trust our relationships with 10,000 distinct organizations worldwide across both the provider and end-user communities to give them a picture of supply and demand they can only get from Gartner. They use our forecasts to balance internal bias with an objective view.



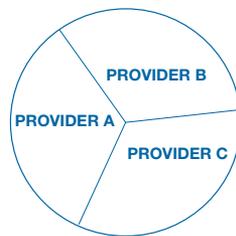
MARKET FORECASTS HELP YOU:

- Understand the market opportunity for IT products and services
- Differentiate which market opportunities are emerging, maturing or declining
- Base your business plans and strategies on fact, not conjecture

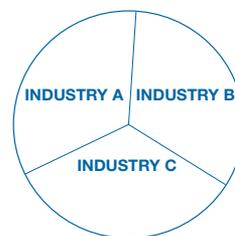
MARKET SHARE ANALYSIS

How Is Revenue Allocated Across a Market's Leading Technology Providers?

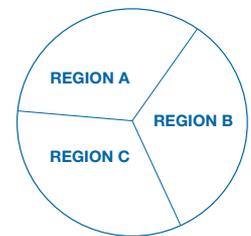
Understanding market share is one of the most important metrics used by executives in any business. Through our market share methodology, clients see how share is allocated among 400 technology providers in 37 key markets. Our detailed analysis of how provider revenue is allocated reveals what types of solutions are succeeding, which are trailing and where opportunities exist for providers to take additional share.



MARKET SHARE BY PROVIDER



MARKET SHARE BY INDUSTRY



MARKET SHARE BY REGION

HOW DOES MARKET SHARE ANALYSIS WORK?

Our approach to Market Share Analysis combines primary surveys and vendor briefings with secondary research such as public financial disclosures, industry trade association material and government statistics.

Multiple data points ensure that the statistics we report are objective and accurate.

Our market share methodology has quality checks in place to make sure potential double-counting across sectors doesn't happen. It's another process to ensure that we accurately quantify market share, helping you make the most informed decisions possible.

HOW DO YOU USE MARKET SHARE ANALYSIS?

End-user clients depend on our Market Share Analysis to validate their evaluation of a market's leading providers. Technology providers use our share analysis to better understand their own market position. The timeliness of our share data gives clients confidence in using it to support their important business decisions. Many markets are updated quarterly. All are updated annually.



MARKET SHARE ANALYSIS HELPS YOU:

- Understand where and how you can take advantage of shifts in market share, both now and in the future
- Identify markets where providers have opportunity to take additional market share
- Understand how leading providers are competing for market share

WHY GARTNER?

Sixty-five percent of the Fortune 1000 and 80% of the Global 500 support their key technology decisions with Gartner insight.

We hope this review has shed more light on the processes and methodologies that underlie the actionable research we provide our clients every day.

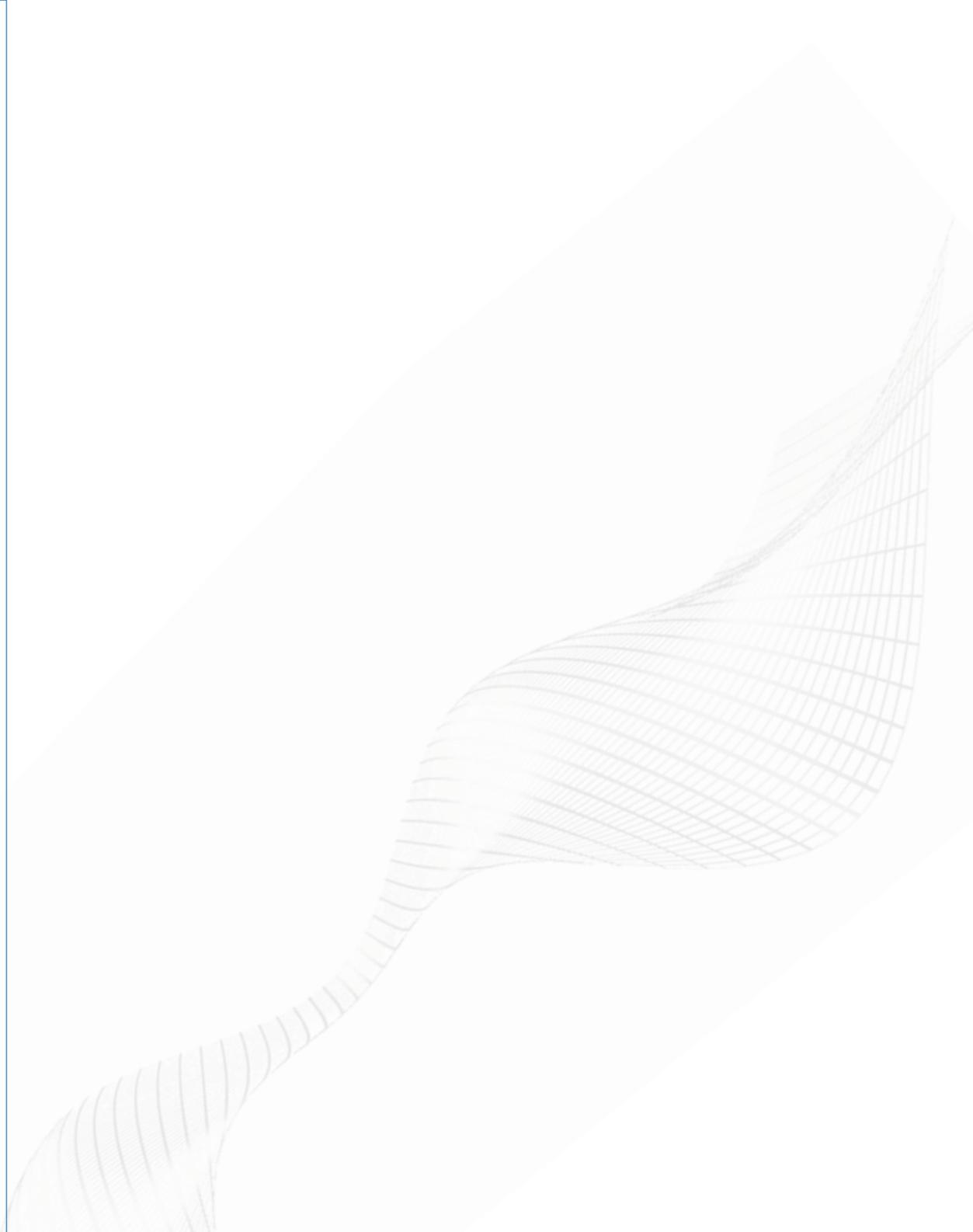
Clients like you make critical decisions about how technology can be used to innovate processes, enable business strategy and strengthen competitive advantage. You take these decisions seriously, and so do we—because we realize they are decisions that will have lasting impact on both your business and ours.

As you continue to look for new opportunities to seize business advantage with technology, we will continue to earn your loyalty through processes and methodologies that you can trust.

For more information about how Gartner methodologies can help you apply technology to your business with greater insight, visit our Web site at gartner.com or contact your Gartner account executive.

ABOUT GARTNER

Gartner, Inc. (NYSE: IT) is the world's leading information technology research and advisory company. We deliver the technology-related insight necessary for our clients to make the right decisions, every day. From CIOs and senior IT leaders in corporations and government agencies, to business leaders in high-tech and telecom enterprises and professional services firms, to technology investors, we are the indispensable partner to 60,000 clients in 10,000 distinct organizations. Through the resources of Gartner Research, Gartner Consulting and Gartner Events, we work with every client to research, analyze and interpret the business of IT within the context of their individual role. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, U.S.A., and has 3,900 associates, including 1,200 research analysts and consultants in 75 countries.



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