

Cool Vendors in Risk Management and Compliance, 2009

French Caldwell, Earl Perkins, Roberta J. Witty, Jeffrey Wheatman, John E. Van Decker, Jay Heiser, Richard J. De Lotto

Despite the worldwide economic downturn — perhaps even because of it — enterprises are increasingly seeking guidance from Gartner about risk management and compliance solutions. This is a rich and vibrant marketplace, and enterprise decision makers with risk and compliance responsibilities should look to both established and new vendors, including the 2009 Gartner Cool Vendors, for innovative solutions.

Key Findings

- Risk management and compliance solutions are, in most cases, not replacing older technologies, but rather automating manual processes. This makes these high-return-on-investment (ROI) purchases easier to justify to business leaders who are trying to cut costs.
- All the risk management and compliance Cool Vendors' solutions focus tightly on innovative means to resolve the critical weaknesses left by current market solutions, and all are characterized by the ability to keep up with evolving business objectives that are affected more by business and regulatory cycles than by technological innovation.
- Dashboards, mapping, management workflow and collaboration are common components of the most innovative and effective risk management and compliance solutions.

Recommendations

- When evaluating risk and compliance solutions — including those from Gartner's 2009 Cool Vendors — make domain expertise a key selection criterion and do not focus on technological functionality alone. This is crucial to ensuring that the solutions that are purchased meet enterprise-specific business objective and regulatory requirements.
- Ensure that IT representatives on the enterprise teams that typically select these solutions are familiar with business objectives, so that the technical aspects can be aligned with business needs, and the selection process does not become too protracted.

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ANALYSIS

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

1.0 What You Need to Know

Risk management and compliance are now at an inflection point. Enterprises can either move toward maturing and improving their investments to deliver better business performance or — because of the intense pressures caused by the worldwide economic crisis and fast-growing requirements from auditors and regulators — retreat to a tactical "checklist" approach with little business value. The product and service offerings from this year's Cool Vendors vary widely in purpose and implementation, but they are all similar in at least one critical respect: They all offer real benefits in terms of business performance, information quality and continuity of service, as well as the core proposition of improving effectiveness and reducing the costs of compliance and risk management.

Whenever you decide to automate processes and controls for risk management and compliance, you should be attentive to the goals and needs of the business, and seek organizationally compatible products that can help deliver recognizable benefits to the line of business. The products in this report, and many others that Gartner will be researching this year, are intended to bolster business value.

2.0 Aveksa

Waltham, Massachusetts, USA (www.aveksa.com)

Analysis by Earl Perkins

Why Cool: Aveksa, founded in 2004 by Netegrity founder Deepak Taneja, believes that identity and access management (IAM), in some ways, impedes effective business, rather than enables it. The critical function of assigning entitlements and providing a structured, certifiable process for assignments is broken, and Aveksa believes it can fix it. Aveksa is no stranger to access management and the problems it has addressed — and highlighted. One major issue that remains for many enterprises is the gap between technology-focused implementations that address user access, on the one hand, and the business stakeholders who should be directing and using that technology, on the other. This gap is particularly acute when businesses seek a structured way to validate and certify access granted to business workers to IT systems to perform their jobs but still address compliance needs and minimize IT risk. Aveksa's Enterprise Access Governance platform addresses the concerns of auditors, information security planners and line-of-business representatives with three offerings: Compliance Manager serves as an access policy automation tool to drive the entitlement assignment process; Sat Manager provides a structured, workflow-based system for assigning entitlements responsibly; Access Request and Change Manager (ARCM) adds a more formal, standardized interface for business access requests.

Aveksa has several competitive advantages. Its executive leadership has broad experience in the access management market, with several executives who were directly involved in founding or shepherding early access management technology vendors to maturity and acquisition. The company also has a strong network of partner and customer contacts at the right levels of the organization, as well as an effective marketing strategy for positioning its product suite for

business stakeholders and decision makers. Aveksa also has the ability to market to a technical audience that is facing IAM issues, particularly IAM integration with offerings from many of the big names in user provisioning, including IBM Tivoli, Novell, Oracle and Sun Microsystems. The company has developed significant partnerships with major IAM consulting and integration providers, and has built a core customer base that includes Cigna, Deutsche Bank and MassMutual. The technology itself can provide a starting point for many enterprises seeking to expand their IT governance capabilities to include access administration.

Challenges: Despite these advantages, Aveksa also faces significant challenges. The market and "feature set definition" for role life cycle management and identity analytics are beginning to coalesce, and several major IAM vendors have acquired former Aveksa competitors and more acquisitions are likely. Aveksa possesses good technology, but product customization driven by business-level requirements remains complex and depends heavily on good consulting and integration partners. Governance, risk and compliance management (GRCM) vendors are incorporating some features of "access governance" into their own product sets, and more market entries are likely. Considerable debate remains regarding the role life cycle management feature set and its possible incorporation with user provisioning. Aveksa's channels for worldwide availability and support are also limited at present.

Who Should Care: A better question is, "Who shouldn't care?" The need for transparency in business transactions is increasing, and enterprises in industry segments that require some level of transparency and formalism around the assignment of entitlements and the structured application of access policy should review Aveksa's capabilities. These include, but are not limited to, the healthcare, financial services, utility, energy and government segments. Larger, more-complex enterprises will likely evaluate Aveksa solutions as a possible replacement for custom implementations.

Related Research

"Q&A: Role Life Cycle Management"

"Continuous Controls Monitoring for Transactions: The Next Frontier for GRC Automation"

3.0 Clarity Systems

Toronto, Ontario, Canada (www.claritysystems.com)

Analysis by John Van Decker

Why Cool? The financial reporting and disclosure tools offered in the emerging financial governance market represent a major opportunity for enterprises to improve their controls in the final steps of finance management. This stage, which is sometimes called "the last mile of finance," is the point where an enterprise sends its publisher the financial statements and explanations that will appear in its quarterly and annual reports to regulators and investors. Clarity Systems — a corporate performance management (CPM) vendor that, despite significant market consolidation in that space, has remained a stand-alone niche vendor — has established itself in financial governance through the recent successful introduction of its Financial Statement Reporting (FSR) product.

Clarity is in an attractive market position, because many enterprises do not wish to pursue an offering from a "megavendor." The company's CPM business is experiencing significant growth, and this new product actually has the potential to outsell its CPM product. FSR makes it possible to transfer financial statements in a controlled environment, using a workflow-collaboration process that is auditable and has visibility and transparency. FSR can also apply XBRL tags for external disclosure that will aid in passing financial information to regulatory agencies. This

workflow process also has the capability to extend into other critical "last mile" areas, such as tax reporting, International Financial Reporting Standards (IFRS)/generally accepted accounting principles (GAAP) reconciliations and financial-close management.

FSR is not the only product in the market space. Trintech's OneClose product — acquired from Movaris — offers similar functionality and was actually first to market. However, Clarity has been able to establish significant partnerships with the leading auditor/business service providers, targeting their service offerings in finance transformation and improvements in financial reporting. The company has also established a major original equipment manufacturer (OEM) agreement with Bowne, one of the major financial reporting publishers.

Regulatory requirements — for example, the 21st Century Disclosure Initiative — continue to intensify, and XBRL will likely be the main vehicle for disclosure of financial and operational metrics to meet these requirements. Gartner believes that approximately 90% of enterprises outsource current XBRL financial reporting to their publishers. This will prove to be a disadvantage when enterprises face additional regulatory disclosure requirements. Clarity can provide a platform for collecting these elements and creating the appropriate XBRL tags.

Challenges: Clarity FSR is a leader in this market, Gartner believes it is likely that CPM and business intelligence (BI) and megavendors will develop products to close the gap between the financial consolidation process and the process of disclosure to regulators and the investment community. Clarity will need to establish a larger market share during the next two years to maintain its position when this happens.

Another issue is that many enterprises still do not understand the full impact of XBRL and how future regulation will extend XBRL requirements. For this reason, many do not understand the predicament they may face if they continue to outsource XBRL tagging and disclosure to their publishers.

Who Should Care: Publicly traded companies in the U.S. that have or will soon have XBRL disclosure requirements should evaluate the Clarity offering, as should any enterprise that wishes to close the control gap in financial reporting. Many enterprises have enterprise resource planning (ERP) systems that control transactions and CPM systems that control financial consolidation, but then use a loose Microsoft Excel-based process to create and distribute financial reports to regulators and publishers. This represents a major opportunity for fraud and error. Enterprise IT organizations that want to bring XBRL tagging back in-house after it has been outsourced to publishers may also benefit from this offering.

Related Research

"Q&A on Financial Governance Market Trends"

4.0 Network Frontiers

Lecanto, Florida, USA (www.unifiedcompliance.com)

Analysis by French Caldwell

Why Cool: The Unified Compliance Framework (UCF) from Network Frontiers is little more than a collection of Excel spreadsheets, so how cool can it really be? Way cool, if you're an IT compliance manager or IT auditor who's been trying to come up with a common set of controls that map to a zillion regulations and standards. The consultants you engage, the Gartner compliance research you read, the conferences you attend, and your own experience with overlapping regulations and standards all make it clear that if you want to reduce complexity and cut the costs of compliance and audit, you have no choice but to rationalize your IT controls. But it's an overwhelming task, with no clear starting point.

Network Frontiers is cool first because it provides IT compliance and audit professionals that place where they can start rationalizing their controls. That set of spreadsheets maps more than 2,000 IT control statements to more than 400 regulations, standards and frameworks, and each control statement links to detailed explanatory material at the UCF Web site. How do they do it? That's the fascinating part. Did you know there are people who get advanced degrees in how written language is constructed and deconstructed? These people, known as semanticists, break down the authoritative source into control statements, most of which can be mapped to statements that are already in the UCF. They occasionally have to add a new control statement, but that's rare.

Here's another reason the UCF is cool: Network Frontiers has a partnership with an international law firm, Latham & Watkins, that shares the copyright for the framework and ensures a thorough legal review of the mappings to the authoritative sources. That should provide corporate compliance officers some assurance that they can trust the mappings.

And the UCF is cool because it's inexpensive — just \$1,000 per year for an individual user and \$10,000 per year for an enterprise license, with free quarterly updates. At that price, just about anyone can get some value from the UCF even if your organization has already put the effort into developing your proprietary mapping. An XML version of UCF is available for \$100,000 to governance, risk and compliance (GRC) vendors that want to include UCF as part of their offerings. One vendor that does so is CA, which markets UCF as part of its CA GRC Manager offering.

Challenges: The biggest challenge for Network Frontiers is its spreadsheet delivery model. UCF is delivered in spreadsheet format, and its complexity has grown to the point that navigation can be a nuisance. Another challenge is that Network Frontiers does not hold licenses for the authoritative sources, so for sources that are not public domain, the user must manually refer back to those sources. Also, because the UCF is not directly linked to many of the authoritative sources, it is impossible to search an authoritative source (on one screen), compare it side-by-side to other sources linked to the same control statement, and confirm that the relevant UCF control statements and relationships to multiple authoritative sources are correct for your environment. When considering these drawbacks of the spreadsheet model though, also consider the price — a better delivery format would drive up the price, and the inherent flexibility of spreadsheets could be lost as well.

Network Frontiers is not the only vendor that offers compliance mapping content. A direct competitor, Avior Computing, adds reporting and analytics to the compliance content, but its product does not yet support an equivalent breadth of authoritative sources. IT GRC management application vendors Archer Technologies, Symantec and Relational Security also offer compliance mapping content. None of these competitors claim that their content has had professional legal review and none of them claim the breadth of regulatory coverage, but they are larger companies than Network Frontiers and have stronger marketing capabilities.

Who Should Care: CIOs, corporate compliance officers, IT compliance and risk managers and internal auditors trying to lower the costs of compliance should consider Network Frontiers' UCF. Vendors that want a specialist partner to develop and maintain the IT compliance mapping content for their IT GRC management, enterprise GRC platform and policy management offerings should also evaluate Network Frontiers.

Related Research

"Which Regulations Apply to Me?"

"How to Implement a Risk-Oriented Approach to Compliance"

5.0 Preparis

Atlanta, Georgia, USA (www.preparis.com)

Analysis by Roberta J. Witty

Why Cool: Preparis is a two-year-old company in the BCM space that focuses on organizational disaster preparedness assessment and training. Preparis's Action Platform offering is a workforce continuity training tool and information portal, and it is the first technology provider to bring together crisis-event-specific content (for example, covering anthrax attacks and other health-related crises, workplace violence, tornadoes, hurricanes and terrorism) and training, so that an enterprise can assess its internal level of preparedness and then respond with event-specific actions. Previously, this information was available to enterprises, either through custom consulting engagements that developed event-specific recovery plans without maintenance processes tied to them, or through a mashup of government-sponsored training offerings that were not developed for the private sector (for example, they use terminology more appropriate for a first-responder/emergency management audience than for the private sector).

Delivered as a SaaS solution, Action Platform provides ongoing information and response instructions on more than 200 threats, as well as training modules and tools that are accessible from any Internet-connected computer and from some mobile devices. The company has a team of experts, called the X-Force, drawn from both the private and public sectors, who maintain the currentness, applicability and viability of the training materials, as well as the response steps. Enterprises can leverage the content and deliver the training modules to crisis teams, executives and their workforces ahead of the threat, through a customizable, enterprise-branded portal. There is a document management system for posting and sharing of crisis and business continuity plans, in addition to a simple emergency notification tool built into the offering. Not a risk assessment tool, Action Platform has an interesting feature called Geospatial Analysis that can evaluate potential threats and terrorist targets within a 10-mile radius of any location.

Enterprises can use the built-in training modules to improve their response maturity levels for organizational disaster preparedness and obtain Preparis certification, as indicated by the Preparis Preparedness Score. This is not personal certification in recovery, of the type offered by the Disaster Recovery Institute (DRI) or the Business Continuity Institute (BCI). It has yet to be determined whether it could be an accepted form of certification for an enterprise that wishes to obtain U.S. Department of Homeland Security (DHS) Title IX certification.

Challenges: Historically, most of the purchasing in the BCM market has been for products and services associated with technology recovery, emergency notification and recovery plan management. The traditional buying center for these services has been the business continuity manager or the IT disaster recovery manager. This has not been the case for Preparis, whose buyer base has been the COO, the HR manager or the corporate security officer — roles that tend to have responsibility for crisis management and workforce continuity. To drive more sales, Preparis needs to get the attention of the business continuity manager — which shouldn't be difficult to do, because the business continuity manager is becoming the enterprise's focal point for all the components of a complete recovery solution.

Preparis will also need to overcome some enterprises' reluctance to recognize the need for crisis preparedness training, which is a challenge that business continuity managers face every day in many areas of recovery. Preparis is working with insurance companies on behalf of customers certified under its training program — they must reach a certain score to receive this certification — to help them obtain discounts on their business interruption insurance (part of their property and casualty coverage), workers' compensation, and directors' and officers' liability insurance policies. However, there has not yet been any indication from the insurance industry that such

discounts are possible, as has been the case with the early business-driver discussions for the Title IX initiative.

Preparis, which to date has found most of its success in the legal industry, will have to demonstrate the value of its offering to other industries, and should be able to do so. If Preparis expands its offering into risk assessment, recovery plan management and incident management, it could be a very important contender in the BCM market, because no other vendor offers training content as a service.

Who Should Care: Emergency/crisis management managers, COOs and HR managers will continue to be likely buyers in enterprises that haven't completely aligned their recovery efforts in a single cohesive program under a BCM organization. As the business continuity manager's role evolves, it will likely represent an important buying center for Preparis' services.

Related Research

"Workforce Continuity: Best Practices for Workforce Management"

"Workforce Continuity Defined"

6.0 Strategic BCP

Plymouth Meeting, Pennsylvania, USA (www.strategicbcp.com)

Analysis by Roberta J. Witty

Why Cool: Strategic BCP is a business continuity management (BCM) planning software vendor. The company's ResilienceONE tool has an integrated technical architecture and methodology that begins where BCM should — with business process and resource mapping — and ends with real-time incident management. To address needs between these two points, Strategic BCP develops business impact analyses, availability risk assessments and recovery plans for multiple levels within the enterprise — the business process step, business process, department, location and division levels — as well as the enterprise level. The methodology embedded in ResilienceONE was developed to begin by decomposing business processes into detailed steps, providing enterprises with the optimal approach to defining recovery plans. The opposite approach — beginning by defining recovery requirements (technical or business) without understanding the business process — is all too frequently the way recovery planning is done.

The detailed business process and resource mapping capability enables recovery managers to perform "what if?" analyses for a resource/component outage and to see the cascading impact on all affected business process steps or IT services. Some enterprises that are using ResilienceONE see it as more than a BCM tool and, in fact, use it for high-value activities in addition to their BCM ones. These clients see the value of the tool for business activities such as mergers and acquisitions, cost optimization, business process re-engineering, continuous business and IT process improvement (streamlining and redundancy elimination), and IAM role management, as well as for recovery and new-hire business training.

ResilienceONE was developed from the ground up as a pure software as a service (SaaS) all-in-one tool, rather than a module-based offering. Most of the other tools on the market today, originally designed as client/server applications, have been "Webified" and transitioned to service offerings, but the potential cost-benefits of a true SaaS model may not be passed on to clients. Data captured for recovery planning purposes is integrated across all planning, exercising and incident management activities of the tool.

Challenges: The current economic crisis is putting pressure on all parts of the enterprise, whether through personnel and project elimination or delays in purchasing decisions. BCM

planning software tools are not immune to these effects. The Strategic BCP tool's business process focus should make it possible to convince management of its usefulness in cost optimization efforts for at least the next 12 months.

Strategic BCP is, however, a small vendor competing against recovery powerhouses, such as SunGard and IBM, each of which has its preferred BCM planning tool, LDRPS and myCOOP from COOP Systems, respectively. Strategic BCP is in the process of developing partnerships with complementary BCM solution offerings in order to offer a complete BCM software suite.

Who Should Care: Senior business executives, business continuity managers, IT disaster recovery managers and operational risk managers looking for a new approach to developing, exercising and executing recovery plans should take note. Because of its business process focus, ResilienceONE can be used with success by the business end user rather than just the BCM specialist.

Cost optimization and business process management professionals should evaluate ResilienceONE. Its detailed business process mapping capability enables redundancies in process and resources to be identified, so that business and IT processes can be streamlined, providing greater cost savings and optimization opportunities.

Finally, identity management professionals can use the tool to develop access roles that map to specific business functions.

Related Research

"Automate Recovery Planning With Business Continuity Planning Tools"

7.0 Vantos

Seattle, Washington, USA (www.vantos.com)

Analysis by Jay Heiser and Richard De Lotto

Why Cool: The Vantos V-Flex offering takes a Web-based, appliance-delivered approach to investigative case management. V-Flex is designed to encourage collaboration between corporate departments that have traditionally purchased — or developed and maintained — their own "stovepiped" investigative support systems. Vantos also extends cross-enterprise compatibility to a wide variety of data types, making it feasible to automate previously manual tasks, such as the tedious process of correlating electronic access control (physical security) logs and surveillance video with network and system logs.

Vantos' templated approach to workflow — the company calls its templates "playbooks" — is designed to improve the efficiency and consistency of investigative activities, ensuring that corporate policies and processes are reliably followed, and facilitating the rapid escalation and handover of investigations between individuals and departments. Playbooks enable reduced managerial oversight of new investigators, who may be unsure of proper procedures, and highly skilled experts, who may be willing to cut corners. This offering acts as a trusted partner rather than as an electronic nag. Enterprise leadership gains the ability to demonstrate that all situations are handled with equal care, and are subject to the same rules of detection, selection and investigation, decreasing the ability of managers to sweep problems "under the corporate rug" or to sideline investigations that are personally embarrassing or inconvenient. Site references report rapid return on investment (ROI), high ease of operation and willing acceptance by field staff.

Challenges: To transcend a case management marketplace that is composed of numerous point products aimed at specific corporate roles, Vantos must find a defensible niche, probably within the competitive corporate security market, and leverage it across additional corporate

departments and buying centers. The company will also need to acquire and maintain domain expertise, to keep workflow fresh and adaptable to changing circumstances.

Making enterprise sales in a splintered product market characterized by point products and "homemade" systems that are jealously guarded by the departments that purchase and use them will present challenges for Vantos, as will competition for mind share and credibility with well-established vendors.

Finally, Vantos will need to demonstrate that a single, highly secure electronic enterprise system of record is desirable, doable and affordable.

Who Should Care: The Vantos offering should interest CIOs and compliance managers who are looking to cut costs and improve managerial controls by reducing the number of parallel applications. Risk officers and corporate counsel seeking to provide a best-practice-type model for staff actions, improved coordination between internal and external investigative functions, and better documentation of incident response activities should also evaluate V-Flex. Vantos will likely also interest managers responsible for investigations — including CISOs, corporate security officers, general counsels, HR managers and auditors, and other corporate officers responsible for addressing their companies' reputation risk.

Related Research

"Introduction to Investigative Case Management Products"

8.0 Varonis

New York City, New York, USA (www.varonis.com)

Analysis by Jeffrey Wheatman

Why Cool: Auditors continue to expand the scope of their audits. Enterprises are increasingly required to identify and secure data such as personally identifiable information (PII), financial information, confidential and proprietary data, and other critical enterprise information, because of legal regulatory compliance requirements. Many tools are available that can perform this function on structured data platforms, such as relational database management systems (RDBMSs), but the capability to do this on dynamic, unstructured network file stores has been elusive. There are tools that can help do so in a static manner, but the Varonis DatAdvantage offering provides both the capability to do so dynamically and in near-real time, and its DataPrivilege offers enhanced workflow capability for role and permission attestation by asset owners.

Varonis offers a comprehensive tool to provide deep visibility into data access control. While some Gartner clients have been able to get a handle on the issues (who has access to what, and who uses it) within structured data environments, the majority of clients we speak with still have little or no insight into their unstructured data. Shared directories, home directories, departmental directories and other storage media are spread across enterprise environments. Most enterprises simply do not know what data exists where. Varonis DatAdvantage captures data around usage patterns, aggregates the data and applies mathematical analysis to model behavior and map it back to business usage patterns. From this analysis, users can make determinations about user behavior and make more-educated decisions about what is appropriate from an access perspective. Varonis' solutions, which support Microsoft's Active Directory, Unix LDAP v3.0, NIS and local Unix stores, as well as a variety of SAN and NAS devices, help enterprises gain visibility into access controls and security as they relate to unstructured data.

Challenges: Varonis does a great job with unstructured data that resides on network file shares within the data center; however, it does not have coverage for RDBMSs and other types of structured data, including non-relational DBMS, packaged application schemas and data

warehouses. This is important, because RDBMSs and these other types of data structures are increasingly becoming a centralized repository for critical data, largely as a result of data center consolidation, data warehousing, and increases in processing and storage on modern server platforms.

Varonis also does not support discovery on endpoints (for example, notebook computers, mobile devices and removable storage media), and Gartner research has indicated that considerable data leakage takes place at endpoints.

Another challenge is that Varonis seems to be struggling with its marketing message. Gartner has at different times heard the company's representatives refer to Varonis as a data governance, compliance, risk management and security vendor. While the company's offerings, which do not fit cleanly into any existing product category, can do all of these things, it is critical that Varonis standardize on one message and gain a strong foothold in a specific niche market before expanding its marketing message.

Finally, Varonis is a smaller vendor, and under current economic conditions, it may be difficult for the company to break out of the niche vendor category and compete with more-established security and risk management vendors.

Who Should Care: Information security managers and IT risk managers all need to understand who has access to what within their environments, and so, they should consider the Varonis offerings. Auditors and compliance professionals will also be interested in Varonis' ability to clearly identify asset owners and to provide privilege attestation mapped to business functional roles.

Related Research

"Hype Cycle for Data and Application Security, 2008"

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
9º andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509