WAVE REPORT

The Forrester Wave™: Supplier Value Management Platforms, Q3 2024

The Nine Providers That Matter Most And How They Stack Up

September 17, 2024

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FORRESTER®

Summary

In our 33-criterion evaluation of supplier value management (SVM) platform providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps technology architecture and delivery professionals select the right one for their firm and their chief procurement officer's needs.

Additional resources are available in the online version of this report.

Cloud Services, Embedded AI, And Automation Fuel Growth In The SVM Market

In 2023, the supplier value management (SVM) market thrived, experiencing significant growth. Organizations now integrate sourcing and procurement with their strategic vision at the highest levels, making SVM technology a must-have alongside CRM, enterprise resource planning (ERP), and human capital management (HCM). Technology advances like cloud and embedded AI, ML, and blockchain solutions empower chief procurement officers to 1) enhance the purchasing process, 2) optimize supplier management, 3) drive sustainability, and 4) transform their roles to ensure successful business outcomes. The SVM ecosystem is vibrant, marked by the entry of numerous startups and specialist vendors as well as ongoing M&A activity. Advanced procurement organizations are not only adopting comprehensive SVM suites but also complementing these suites with specialist best-of-breed solutions to enhance their teams' efficiency. As a result of these trends, supplier value management platform customers should look for providers that:

- **Offer smart SVM solutions to help shape today's procurement processes.** Procurement and supply chain leaders must keep up with their end customers' needs and demand real-time insights on spending patterns, supplier dynamics, market trends, and sustainability from vendors. SVM vendors are stepping up by investing in new capabilities and accelerating their pace of innovation. Leading SVM suites enable customer self-service in order to reduce the costs, delays, and frustrations of central/shared services procurement functions. SVM platforms help identify cost-savings opportunities and support the firm's sourcing strategies by nudging buyers toward preferred suppliers in some categories and diverse suppliers in others. Leading SVM tools also prevent the abuse of that empowerment via AI-assisted monitoring of employee behavior to identify waste, profligacy, or fraud and deliver on strategic objectives.

- **Enhance supply chain resilience proactively.** SVM software providers must effectively manage supplier-related risks and help customers with risk mitigation and acceptance decisions. SVM platforms conduct initial supplier risk assessments and use continuous monitoring to trigger action if the risk of supply disruption increases or if there's a breach of the company's environmental, social, and governance (ESG) policies. Procurement professionals and their providers must integrate this information in real time with other sourcing processes, ensuring that all purchasing decisions appropriately consider risk and ESG factors. SVM software enables firms to diversify their sourcing locations and supplier base,

implement risk assessment frameworks, and foster collaboration with key suppliers.

- **Automate source-to-pay by adding AI capabilities and embedded decision support.** SVM solutions enhance interactions with suppliers, positioning them as strategic contributors of value. Leading SVM products foster more effective collaboration between buyers and sellers, eliminating friction in their relationships. These solutions digitize both formal transactions — including RFXs, orders, and invoices — and informal collaborations, such as introducing new products or responding quickly to unexpected supply shortages. Generative AI (genAI)-based algorithms notify users of issues needing action or investigation, assist with demanding tasks like contract redlining, and nudge users to choose options with lower carbon emissions.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in our report on The Supplier Value Management Platforms Landscape, Q2 2024.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.
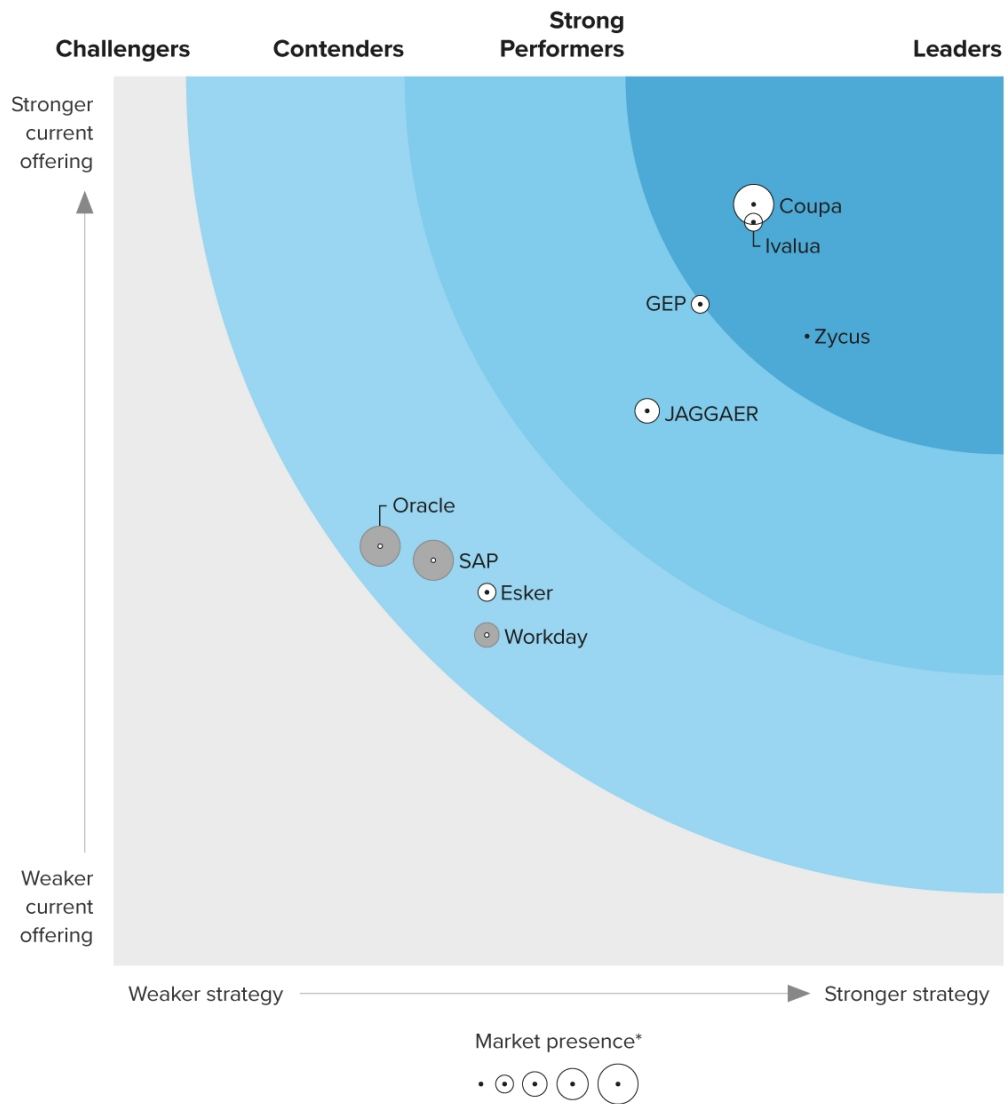
THE FORRESTER WAVE™
Supplier Value Management Platforms
Q3 2024

*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2

Forrester Wave™: Supplier Value Management Platforms Scorecard, Q3 2024

	Forrester's weighting	Coupa	Esker	GEP	Ivalua	JAGGAER	Oracle*	SAP*	Workday*	Zycus
Current offering		4.28	2.10	3.72	4.18	3.12	2.36	2.28	1.86	3.54
Sourcing event management	6%	5.00	1.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Contract management	5%	3.00	1.00	3.00	5.00	3.00	3.00	1.00	1.00	5.00
Supplier onboarding	5%	5.00	3.00	3.00	5.00	5.00	3.00	1.00	3.00	1.00
Performance monitoring	5%	3.00	1.00	5.00	3.00	3.00	3.00	3.00	1.00	3.00
Risk monitoring and mitigation	6%	5.00	1.00	5.00	5.00	5.00	3.00	3.00	1.00	3.00
Guided procurement	6%	5.00	3.00	3.00	3.00	3.00	1.00	3.00	1.00	5.00
Invoice automation	5%	5.00	5.00	3.00	3.00	1.00	1.00	3.00	3.00	5.00
Supplier adoption	3%	5.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	1.00
Product co-innovation	3%	3.00	1.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Platform extensibility and configuration	4%	5.00	3.00	5.00	5.00	3.00	3.00	1.00	1.00	3.00
Coherence	3%	3.00	3.00	5.00	5.00	1.00	3.00	1.00	1.00	5.00
Open extensibility	5%	5.00	3.00	3.00	5.00	3.00	1.00	1.00	3.00	3.00
Process optimization	4%	3.00	1.00	3.00	3.00	5.00	1.00	3.00	3.00	3.00
Spend optimization	4%	5.00	1.00	5.00	3.00	3.00	3.00	3.00	1.00	5.00
Supplier lifecycle management	3%	5.00	1.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Category management	5%	3.00	3.00	5.00	5.00	3.00	1.00	1.00	3.00	3.00
Spend analytics	5%	3.00	1.00	3.00	5.00	3.00	3.00	5.00	1.00	3.00
Measuring outcomes	2%	5.00	1.00	5.00	5.00	1.00	3.00	1.00	1.00	3.00
Managing tail spend	4%	3.00	3.00	5.00	3.00	3.00	3.00	3.00	1.00	5.00
Embedded AI	5%	5.00	3.00	5.00	5.00	3.00	1.00	1.00	1.00	5.00

All scores are based on a scale of 1 (weak) to 5 (strong).
*Indicates a nonparticipating vendor

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

	Forrester's weighting	Coupa	Esker	GEP	Ivalua	JAGGAER	Oracle*	SAP*	Workday*	Zycus
Current offering		4.28	2.10	3.72	4.18	3.12	2.36	2.28	1.86	3.54
Supplier collaboration	3%	5.00	1.00	3.00	3.00	5.00	3.00	1.00	3.00	3.00
Supplier management	2%	5.00	1.00	3.00	5.00	3.00	3.00	1.00	3.00	3.00
Archiving and integration	2%	5.00	3.00	3.00	3.00	3.00	3.00	1.00	3.00	3.00
Procure-to-pay analytics	3%	5.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	5.00
Mobile procure-to-pay	2%	3.00	1.00	1.00	3.00	1.00	1.00	3.00	1.00	3.00
Strategy		3.60	2.10	3.30	3.60	3.00	1.50	1.80	2.10	3.90
Vision	20%	3.00	1.00	5.00	5.00	5.00	1.00	1.00	1.00	5.00
Innovation	25%	5.00	3.00	3.00	3.00	3.00	1.00	1.00	3.00	5.00
Roadmap	20%	3.00	3.00	3.00	3.00	1.00	1.00	1.00	3.00	3.00
Partner ecosystem	15%	5.00	1.00	1.00	3.00	3.00	3.00	5.00	1.00	3.00
Adoption	10%	3.00	1.00	3.00	5.00	3.00	3.00	3.00	1.00	3.00
Pricing flexibility and transparency	10%	1.00	3.00	5.00	3.00	3.00	1.00	1.00	3.00	3.00
Market presence		5.00	2.00	2.00	2.00	3.00	5.00	5.00	3.00	1.00
Revenue	50%	5.00	1.00	3.00	3.00	3.00	5.00	5.00	3.00	1.00
Number of customers	50%	5.00	3.00	1.00	1.00	3.00	5.00	5.00	3.00	1.00

All scores are based on a scale of 1 (weak) to 5 (strong).
*Indicates a nonparticipating vendor

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Vendor Offerings

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Coupa	Coupa	N/A
Esker	Esker Source-to-Pay	N/A
GEP	GEP SMART	N/A
Ivalua	Ivalua Source-to-Pay	Release 180
JAGGAER	JAGGAER One	N/A
Oracle	Oracle Fusion Cloud Procurement	N/A
SAP	SAP Ariba	N/A
Workday	Workday Spend Management	N/A
Zycus	Zycus SVM Suite with Merlin GenAI	Maple Release

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **Coupa stands out with its AI use, exceptional innovation, and customer focus.**
  Coupa offers an SVM platform that covers the whole range of an organization's
  procurement needs. In December 2022, Thoma Bravo acquired Coupa; it has
  taken Coupa private and enacted several key leadership changes. Coupa's vision
  is to strengthen collaboration among finance, procurement, and supply chain
  professionals. Coupa shows a strong customer-oriented culture with a market-
  leading innovation strategy and an extensive partner ecosystem, and it has on-par
  levels of customer adoption, but its approach to pricing lacks the flexibility of its
  peers.

  Coupa excels with its source-to-contract and supplier relationship modules, which
  leverage AI for optimization and offer customizable templates and content suitable
  for a wide range of enterprise maturity levels. Coupa offers a no-code and user-
  friendly platform with superior extensibility and strong integration with ESG

principles. Coupa's contracts management module is weaker, and it needs to improve the application of AI in contract lifecycle management. Reference customers noted Coupa's ease of use, rapid implementation, and strong support, but clients and prospects complained about its high prices and lack of flexibility. Organizations looking for an SVM vendor with a comprehensive solution and exceptional customer support should look to Coupa.

View Coupa's detailed scorecard.

- **Ivalua has strength across its entire suite, particularly in source-to-contract.** Ivalua's strategy is to help clients manage all their spend with all their suppliers via one unified SVM platform, underpinned by transparency, adoption, efficiency, and collaboration. Ivalua's go-to-market approach overly focuses on this "single source of truth" messaging, which may not resonate with prospects that have a best-of-breed strategy. Ivalua has a lower customer count than others in this evaluation, but it has a 96% customer retention rate. Ivalua needs to pay more attention to innovation, where it lags the other leading providers. Ivalua demonstrated a strong partnership strategy for systems integrators; it works with them on change management initiatives to drive higher rates of enterprise adoption.

  Ivalua leads in source-to-contract and supplier risk and performance. Its comprehensive, unified platform empowers firms to manage all their spending in one place: Its SVM platform is built with a single code base and data model to ensure a consistent user experience, and a single reporting and analytics capability spans all solutions. Ivalua is particularly strong in supplier management, spend analytics, event management, contracts, and risk monitoring, but it needs to invest more in its ESG capabilities to make them as comprehensive and strong as those of other leading vendors. Reference customers praised Ivalua's integrated platform that caters to all their procurement needs, its flexibility, and the peer exchanges it facilitates, but some noted that the high level of customization needed adds to their costs and extends implementation timeframes. Firms seeking a more customized solution to suit their specific industry needs should consider Ivalua.

  View Ivalua's detailed scorecard.

- **Zycus excels with its Merlin genAI capabilities for its SVM suite.** Zycus uses its exceptional understanding of customer demand to offer a comprehensive SVM suite with a strong go-to-market approach and vision. Its Merlin AI capabilities support its SVM suite, while its executive AI council informs Merlin's strategy

development and AI use case focus. Zycus has a compelling vision for the SVM space, and its innovation and strategy tie into this, allowing it to win new clients. Zycus demonstrates market-leading flexibility in adapting to customer needs in its strategic approach.

Zycus' strongest capabilities are its spend optimization and procure-to-pay analytics (P2P) solutions. The conversational-AI-enabled Merlin Assist integrates across SVM components to automate routine procurement tasks, freeing up time for users to focus on strategic activities. Zycus has launched numerous AI-powered apps and products, all unified under its DewDrops user interface (UI). Zycus offers embedded AI in its solid supplier collaboration features with a strong UI. However, it needs to improve its capabilities in supplier onboarding, supplier adoption, and ESG practices to match those of other leading vendors. Reference customers praised Zycus for its flexible pricing and ease of collaboration, but they expressed concerns about staff attrition within the implementation teams. Zycus is an ideal partner for organizations seeking an SVM platform that emphasizes product innovation and demonstrates strong customer centricity.

View Zycus' detailed scorecard.

Strong Performers

- **GEP has strong AI and no-code capabilities but needs full out-of-the-box functionality.** GEP offers AI-driven procurement and supply chain software, strategy, and managed services to large global enterprises. GEP has invested in a low-code platform that integrates SVM and supply chain management (SCM); in the past 18 months, it has focused investments on genAI and developed over 250 procurement-focused use cases. GEP has a strong vision for integrating ESG and resilience into procurement via its GEP SMART and GEP NEXXE SCM suites. GEP recently acquired OpusCapita to boost its P2P solutions. GEP needs to work on its go-to-market strategy and approach, which are weaker than those of other vendors in this evaluation.

  GEP's SVM platform heavily uses AI to automate routine procurement tasks. GEP shines with its embedded AI, specialist sourcing, and category management capabilities. It also handles risk monitoring, performance monitoring, and tail spend identification well compared with other vendors in the space. Reference customers lauded GEP for its fair pricing, flexibility, and willingness to help when issues occur. They also expressed a wish for out-of-the-box features and

functionality rather than configured and/or customized solutions. Firms wanting a comprehensive SVM suite from a single vendor with strong category and risk management as well as plenty of customization options should consider GEP.

View GEP's detailed scorecard.

- **JAGGAER has strong industry solutions, but the platform's UI lacks strong coherence.** JAGGAER provides intelligent source-to-pay and supplier collaboration solutions. JAGGAER is reframing its SVM vision and strategy after recent leadership changes: It's enhancing its focus on innovation and demonstrating customer value beyond tracking savings and intelligence. JAGGAER's go-to-market approach is more industry specific than that of other vendors in this evaluation: It shows particular strength in its industry solutions for education, manufacturing, the public sector, and life sciences. It has also launched a new supplier intelligence module that offers rich information about suppliers throughout the procurement lifecycle. JAGGAER's roadmap is less ambitious and differentiated than those setting the pace in the market.

  JAGGAER's current platform capabilities are in line with the wider market today, showing strength in supplier onboarding, risk monitoring and mitigation, supplier collaboration, and process optimization. JAGGAER still lags other evaluated vendors in invoice automation, outcome measurement, and the coherence of the overall platform. Reference customers found JAGGAER's industry solutions to be unique and praised it for its flexibility and customer focus. However, they voiced concerns about the platform's user-friendliness and coherence. Clients looking for a specific solution tailored to their industry should consider JAGGAER.

  View JAGGAER's detailed scorecard.

Contenders

- **Esker needs to improve its source-to-contract capabilities to compete.** Esker was founded in 1985 and recently entered the SVM space. In June 2022, Esker acquired a majority stake in Market Dojo, enabling it to add e-sourcing to its platform proposition via Market Dojo's flagship sourcing module. Esker's source-to-pay software suite helps procurement and finance leaders meet their goals by streamlining procurement processes. Esker focuses on enforcing procurement policy compliance and improving supplier relationships with increased visibility into the whole buying process. Esker is investing heavily in AI, sustainability, and automation for the SVM platform suite, but its vision and roadmap lag those of

other providers that already offer these features. Esker also has a weaker partner ecosystem than other vendors we evaluated.

Esker is strongest in procure-to-pay, offering a strong back-office automation solution suite. Esker's solution (including Market Dojo) covers source-to-pay, invoice-to-cash, and customer services. Esker must improve its out-of-the-box offerings to serve a larger share of its clients, rather than requiring major customization to meet individual customer needs. Reference customers praised Esker for its invoice automation offering and P2P analytics, but they said it lags in supplier risk and performance management, sourcing event management, and spend analytics. Esker focuses on the $1 billion to $5 billion enterprise segment. Esker is a good fit for midlevel enterprises that want strong support for their source-to-pay implementations and affordable prices.

View Esker's detailed scorecard.

- **SAP Ariba relies mostly on its size and brand to maintain market share.** SAP Ariba enables exchanges between buyers and sellers in the SVM space. SAP provides a wide range of solutions for upstream and downstream procurement as well as supplier relationship and performance management. As an early entrant in the SVM space, SAP benefits from being invited by default to RFXs and tenders globally. However, SAP Ariba underwhelms with its vision and roadmap; it lacks coherence and stability due to frequent leadership changes and limited investment in the Ariba product. SAP Ariba's pricing flexibility is limited, and its pricing approach is overly complicated. SAP Ariba has a wide partner network that is constantly expanding, and it works with firms like Icertis, Keelvar, and Scoutbee. It appeals to a significant group of buyers due to SAP's reputation and its ability to cross-sell to existing SAP customers.

  SAP Ariba has a comprehensive SVM suite that covers all aspects of SVM, and it has improved its sourcing capabilities. SAP Ariba has formed new partnerships for contract lifecycle management and autonomous sourcing to help it compete in these areas, and it is strong in invoice automation and spend analytics. However, it has room for improvement in platform extensibility, embedded AI, and category management. One customer we spoke with lauded SAP Ariba for its flexibility in accommodating customization requests for its supplier module. Large and midmarket enterprises that use SAP for ERP and finance solutions should consider SAP Ariba. SAP Ariba declined to participate in the full Forrester Wave evaluation process.

View SAP's detailed scorecard.

- **Workday's SVM platform shows promise but suffers from roadmap execution challenges.** Workday provides tools for sourcing, contract management, and supplier management; it also offers contingent workforce management and expense management, unlike other vendors in this market. Its vision is to underpin its capabilities with AI/machine learning and to offer intelligent spend management solutions for its marquee client base. Workday has done well at integrating acquired products, such as Scout RFP and VNDLY. Workday is innovative and has a clear roadmap for features and functionality. Its AI investments, particularly for asset-intensive industries, haven't been as strong as some of its key competitors.

  Workday's strengths are in its category management, supplier management, and pricing flexibility. It has a strong user interface for its spend management product portfolio, and it has implemented many new features underpinned by AI, such as contract analysis, clause comparison, metadata extraction, sourcing bid optimization, and invoice document scanning. While these features are helpful, they arrived later to market than those of other vendors because of investment issues, undermining their impact. Workday also needs to improve its contract compliance, supplier risk and performance management, and P2P modules, which weren't as functional as other offerings. Workday's spend management suite is a good choice for enterprises that lack SVM maturity and need a comprehensive suite that covers most SVM components. Customers using Workday's financial management and HCM suites should also consider Workday Spend Management as a strong option for SVM. Workday declined to participate in the full Forrester Wave evaluation process.

  View Workday's detailed scorecard.

- **Oracle Fusion Cloud Procurement's functionality falls behind the rest of the SVM pack.** Oracle Fusion Cloud Procurement is a complete source-to-settle solution with modules for managing suppliers, sourcing, contracting, purchasing, and settling. Oracle targets procurement and finance roles in organizations, with a focus on upselling Oracle Fusion Cloud Procurement to its existing ERP customers. Oracle has enhanced its procurement suite by incorporating embedded AI and analytics, and it continues to emphasize this in its vision and improvement roadmap. However, these are somewhat muddled and not very distinct from its broader ERP roadmap. Oracle needs to refine its innovation strategy and execute more quickly, as smaller specialists in some modules are outclassing it. Oracle

Fusion Cloud Procurement benefits from Oracle's extensive partner network, which offers a range of implementation partners to clients.

Oracle is a relatively late entrant to SVM, given its history in the ERP space, but many aspects of its solution are competitive. Oracle has strong industry-specific enhancements for industries like healthcare, medical devices, high-tech, and consumer packaged goods. It also offers solid modules for supplier management, P2P analytics, and tail spend. Oracle must improve its capabilities in supplier risk monitoring, supplier performance management, and invoice automation, as large enterprises need real-time supply chain visibility. Oracle supports e-invoicing, but the market demands touchless invoice automation — and Oracle's current capabilities lag behind. Customers requiring a procurement platform that understands their industry nuances should consider Oracle. Oracle declined to participate in the full Forrester Wave evaluation process.

View Oracle's detailed scorecard.

Evaluation Overview

We grouped our evaluation criteria into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies, including elements such as vision and innovation.

- **Market presence.** The size of each vendor's marker on the graphic reflects Forrester's assessment of its market presence.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- **Product revenue.** Subscription revenues from enterprise customers in the SVM categories in the previous four quarters are at least $10 million.

- **SVM platform capabilities.** The SVM platforms possess functionality for four out of the following six components of SVM: spend analytics; sourcing of goods and services; contract lifecycle management; supplier risk and performance management; procurement of goods and services; and invoice automation.

- **Forrester mindshare.** To ensure relevance to Forrester clients and the quality of the references being provided, Forrester considers the level of interest from our

clients based on inquiries, advisories, consulting engagements, and other interactions.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by June 28, 2024, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with our vendor review policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with our vendor participation policy and publish their positioning along with those of the participating vendors.

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