Publication Date: 20 March 2009 ID Number: G00166464

User Survey Analysis: Technology Providers Have Great Opportunity in Brazil's Channels

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Brazil’s IT channels have a higher level of maturity versus their counterparts in other top emerging markets, with consolidations on the 2009 horizon.

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KEY FINDINGS AND RECOMMENDATIONS

- Brazil's IT distribution market is about 65% indirect, with the channel landscape resembling more of that of a mature market, such as the U.S., rather than other emerging markets.
- Brazil's channels are mostly small to midsize firms with consolidations on the horizon, and international IT distributors are the mostly likely to survive channel consolidation. Channel consolidation may be a good thing and will lead to the revision of contracts between technology providers and their channel partners, providing an opportunity for improving terms and conditions.
- For a majority of the market, Brazil's channel hierarchy follows the classic two-tier distribution model (manufacturer, distributor and partner); however, there is still a sizable amount of product moving directly from the manufacturer to the channel in a single-tier model.

INTRODUCTION AND SURVEY OBJECTIVES

The large geographical size and number of small businesses in Brazil means that it is extremely challenging for any IT vendor to cover the country exclusively on its own. Vendors must rely heavily on their distribution and channel partners to ensure they cover the market appropriately. The choice of channel partners is a critical component of any go to market (GTM) strategy and will ultimately determine the success and growth for an individual vendor in this (or any other) market.

The main objective of the survey was to allow Gartner to better understand the IT channel structure in Brazil and provide insights for channel leaders within IT vendor organizations. In November and December 2008, Gartner surveyed 150 IT channel organizations. In our survey sample: 20%% of respondents are system integrators, 20%% are IT resellers, 20% are IT retailers, 20% are IT distributors and 20% are value-added resellers (VARs).

METHODOLOGY STATEMENT

The interviews were conducted via CATI methodology, and the respondents were personally knowledgeable about the IT products and services' sales and business strategies within their organization.

GARTNER RECOMMENDATIONS BASED ON FINDINGS

- Select your channel partners based on size, revenue generation and target customer base, developing comprehensive recruitment and enablement campaigns to attract the appropriate number of partners to deliver adequate market coverage.
- Where appropriate, invest in vertical training of channel partners that have indicated an interest in becoming more (vertically) specialized organizations, especially if they currently have established customers in target vertical markets.
- Increase distribution engagement in country to manage and recruit smaller channel partners, provide credit and financing, and make available integration and logistics services, while at the same time reducing the amount of direct/internal partner management.

Additional Key Findings

- Despite the poor economic conditions in 2009, the long-term prospects remain positive in Brazil, so much so that both vendors and channels should consider this country as one of interest and continue to invest where appropriate.
- Channels in Brazil offer managed services to end users on behalf of IT companies desiring to increase their market share or introduce their product/services in the country, creating stronger service relationships.
- About 71% of the channels feel that the market requires new vertical knowledge and skills, and they are not ready to meet those challenges.
- Three-quarters of the channels are willing to embrace major changes in their model with the appropriate vendor training and compensation.
- Across the board, there is a general lack of vertical investment in training programs in the market by technology providers.
- A large portion of channel companies sell IT services (80%) and software (73%), which is a significantly larger percentage than hardware.
- Support and maintenance is offered by 100% of IT resellers and IT retailers in the sample, while managed services are collectively offered less today.
- Software as a service (SaaS) and hardware as a service (HaaS) still have considerable market opportunity to be capitalized on by the entire IT channel.
- Only 38% of channel companies are leveraging online sales to reach customers, similar to that of other emerging regions.
- On average, channel companies procure 65% of all their IT products directly from the OEM while 35% is obtained via distribution companies.
- About 99% of channel organizations still do not participate in any authorized reseller program.
- About 63% of the channel earned less than $10 million during the first half of 2008, with 23% earning from $10 million to $50 million during the same time period.
- As with most regions, a majority of channel companies sell only into their local region, with less than 5% being sold into other major regions.
- HP, Microsoft, IBM and Lenovo accounted for the highest percentage of sales revenue in the channel during the first half of 2008.
- Although there are major distribution companies in Brazil, channel companies are still obtaining IT products primarily through manufacturers (65%).

Additional Recommendations

- Generate relationships with local (regional) channels (both partners and distributors) since they already have the know-how and experience in this field.

- Continue finding both product and GTM differentiation to make yourself distinguishable for the channel and for the markets in this competitive environment.
- Improve channel distribution penetrations by improving cost of sales and partner coverage.
- Develop in-country channel advisory counsels to ensure vendor and channel companies are in alignment with requirements necessary to improve market penetration.
- Aim at gaining greater economies of scale and market coverage, while reducing costs by building stronger engagement with local distributors to manage smaller local partners.
- Provide credit and financing either directly, via distribution or with a banking partner to smaller channel partners that do not have the ability to offer terms to customers.
- With the acceleration of consolidation likely, vendors will need to ensure account and market coverage is not negatively impacted when multiple partners combine efforts.

Economic Fundamentals

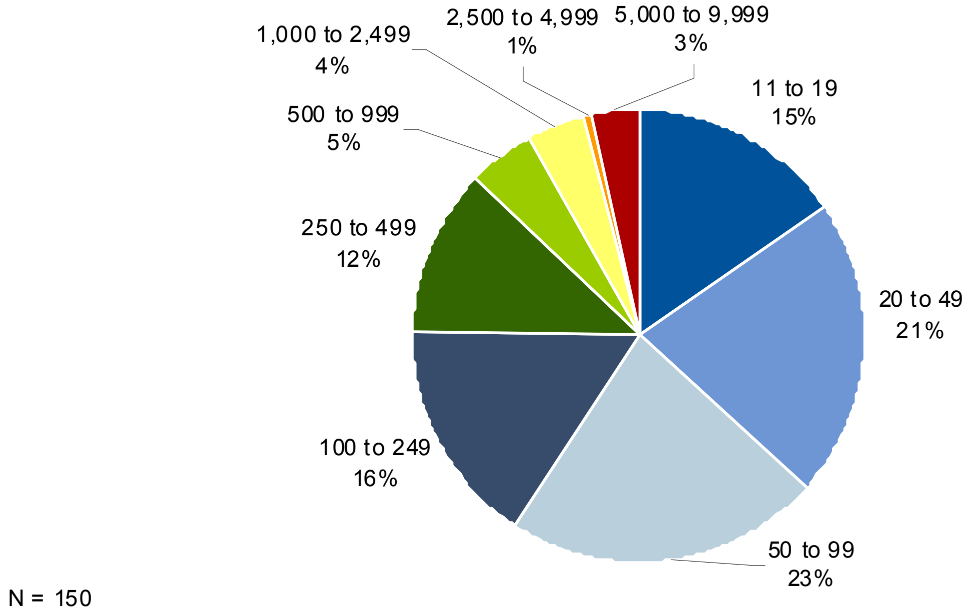
The Brazilian economy is expected to post a decline of about 1.6% in real gross domestic product (GDP) in 2009, according to Global Insight's March 2009 revision. Global Insight is Gartner's preferred source of macroeconomic information. This newly released figure for Brazil is substantially lower than the previous economic forecast. An element of concern in Brazil's market is the depreciation of the local currency — the real vis-à-vis the U.S. dollar. This is generating higher prices for imported IT goods and services. Brazil is also starting to experience lower and tougher access to credit, which will have considerable impact on the retail markets and manufacturing, among others. The current recession in the U.S. and Europe will continue having a considerable impact on Brazilian exports, despite the devaluation of its currency. Nonetheless, with considerable decelerated economic conditions in 2009, the long-term prospects for Brazil remain quite positive with above 3% real GDP growth in 2010 and beyond. Both IT providers and channels should continue considering Brazil a high priority in their international operations, an area in which to expand investments where appropriate.

Introduction

With its high percentage of service offerings, the Brazilian IT channel landscape resembles more of that of a mature market such as the U.S. than other emerging markets. Another critical contributing factor to that maturity is a highly demanding IT market in Brazil.

While the Brazil channel structure is somehow fragmented (see Figure 1), it is also true that it is much more evenly distributed than that of Russia, for example, with 13% of channels with more than 500 employees (large enterprises); 28% have between 100 and 499 employees (midsize); and, 59% have up to 99 employees (small firms). It is interesting to note that while this survey did not measure the size of the market segments, our assessment points to the fact that these percentages are within reasonable boundaries of what Gartner sees as Brazil's size of its market segments.

Figure 1. Channel Structure by Number of Employees in an Organization in Brazil



Source: Gartner (March 2009)

Employee size is one way to analyze these companies; the other is top-line revenue. Within this sample, 63% of channels generated less than $10 million in country-level revenue for the first half of 2008 (January through June 2008) while another 23% generated from $10 million to $50 million.

The size and revenue generation of these companies contributes to the fact that vendors will need to develop comprehensive recruitment and enablement campaigns to attract the appropriate number of partners to deliver market coverage.

It is worth noting that self perception differs from the realities of channel company size in Brazil. This survey has surfaced an interesting point that the majority of respondents disagreed that the market is dominated by many small-size organizations. Although not a bad thing from a marketing perspective (as long as they can deliver), this suggests that most channel companies, in an effort to remain competitive and win new business in a challenging IT environment, project a larger-than-reality image of themselves. Consequently, it is important that technology providers, when selecting channel partners or expanding their relationships with them, assess them on their actual dimension and capabilities, using all available information (internal or external, such as financials and additional secondary research). This is validated by the fact that only 25% of survey respondents say that they agree or strongly agree that the Brazilian IT distribution market is dominated by many small-size companies. A total of 75% think differently.

According to this survey, the channels in Brazil recognized that Ingram Micro, Tech Data, Bell Micro, Westcon, Officer and Brazil IT were the top five distributors/resellers in the country.

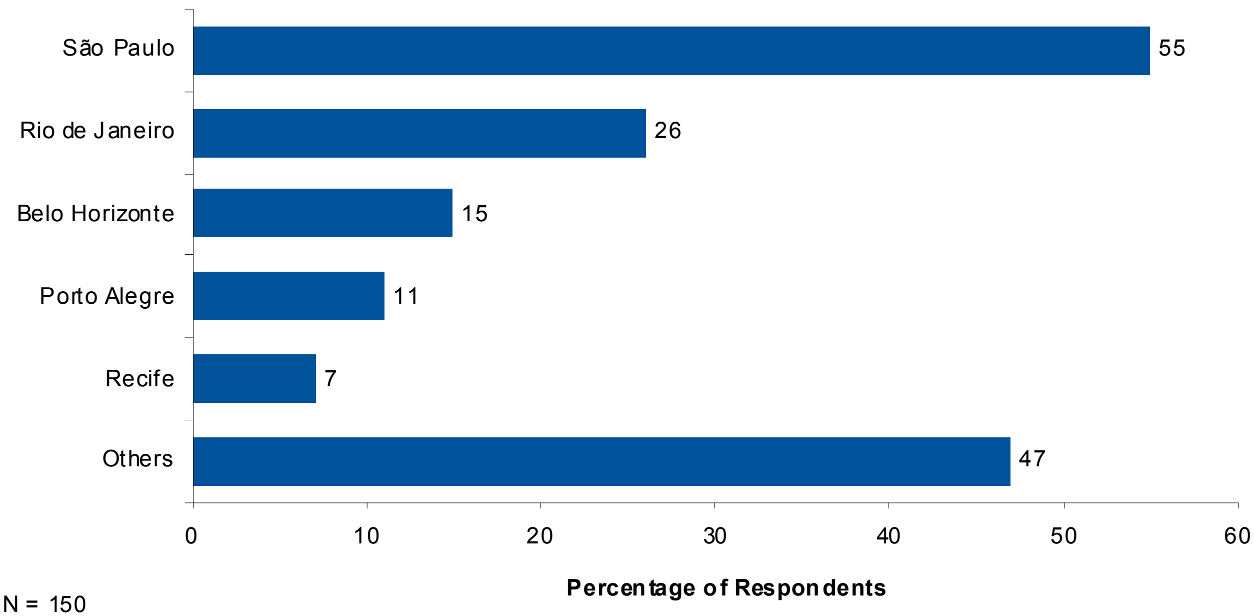
The sheer number of large international and local channel companies tends to be more representative of a more-mature market in which a mix of large and subregional distributors competes with the increasing demand for products and services.

Those companies that have a dominant sales presence in Latin America (mainly in Brazil, Argentina and Mexico) are less likely to be actively selling in other regions, especially Asia/Pacific, Central and Eastern Europe, and the Middle East and Africa. Indeed, according to respondents, 95% of their business comes from Latin America and only 5% is from other regions. This fact could limit the ability for these relatively smaller regionally oriented channel companies to attract large and even midsize organizations that require multinational or international capabilities to meet their IT demands. Portuguese is the official language in Brazil. However, English is widely spoken in the “corporate circles” in major cities, but it becomes a challenge in penetrating the market as a whole, and that is a powerful reason to partner with local channels with local employees.

Some of the large companies based in Brazil serve as the regional hub for other Latin America countries. In addition, the growth of the retail markets during the past several years has not only allowed many local retailers to expand beyond their traditional geographies, but it has also allowed international retailers to enter the market. Credit and financing conditions may present some challenges in the future expansion of the retail channel.

Governmental and economic concentration is very prevalent in most Latin American countries. In Brazil, while the center for government (in Brasilia) and economy (in Sao Paulo) are separate, one-third of economic activity is still concentrated in Sao Paulo (see Figure 2). To meet the demands of mainly midsize and large businesses, 55% of IT channels have sales offices in the city of Sao Paulo. Interestingly enough, 75% of sales revenue comes from this city alone. Channel companies tend to concentrate on other top cities, such as Rio de Janeiro and Belo Horizonte, with the rest of the cities representing a much-smaller portion of the total addressable market. But as other regions of the country continue to develop, subregional channels must expand their geographic reach, while paying close attention to the logistical and competitive implications.

Figure 2. Location of Organizations' Sales Channel in Brazil



N = 150

Source: Gartner (March 2009)

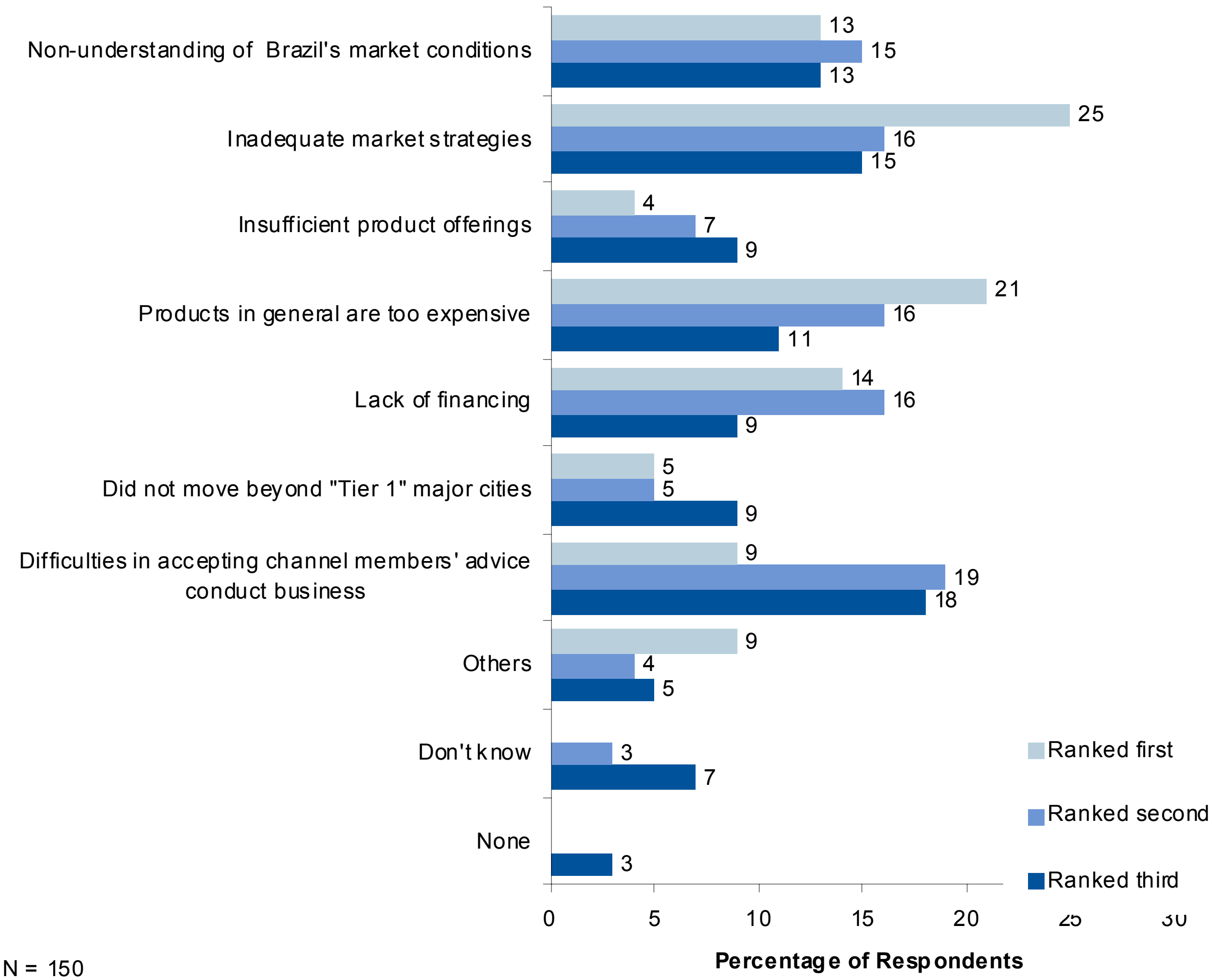
Difficulties in Penetrating Brazil's IT Market

Entering a market the size of Brazil is not without its issues (see Figure 3). Designing a well-thought-out and effective GTM strategy takes time, patience and the willingness to test and adjust sales and marketing initiatives along the way.

It is common to analyze a notable disconnect between what vendors think the channel needs and what the channel needs from their vendors. When asked what the three most-important reasons that IT manufacturers are encountering difficulty in penetrating the Brazil market, the answers highlight these disconnects.

The bottom line is that the channel clearly feels IT vendors have inadequate market strategies to penetrate the market effectively and drive demand; vendors ignore their recommendations on ways to improve both the relationship and sales; and vendors generally overprice products. In this current economic climate, vendors should pay close attention to channel concerns, including the fact that they do not feel technology providers are providing the adequate financing to effectively service the market.

Figure 3. Three Most-Important Reasons That IT Manufacturers Are Encountering Difficulty in Penetrating Brazil



N = 150

Source: Gartner (March 2009)

How Does the Channel Acquire Products?

Suppliers

Brazil follows a classic two-tier distribution model of IT acquisition resulting mainly from OEMs, distributors and IT resellers. Two-thirds of the channels in Brazil obtain 65% of their IT products directly from OEMs. A total of 45% of the channel obtains IT products from distributors and 11% obtain IT products from other IT resellers.

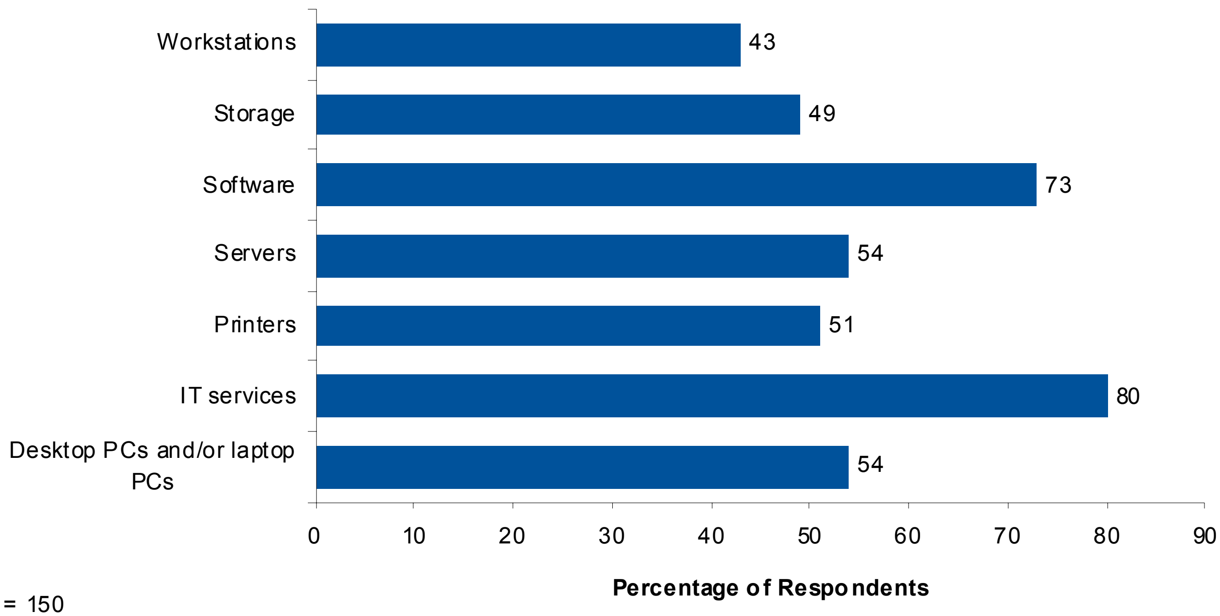
While this is not conclusive evidence from this survey because other factors are in play, we may infer that 35% of IT products are shipped directly by OEMs to customers, bypassing the channel altogether. However, in many instances sales are originated and followed up by the OEM and the deal gets closed and fulfilled by the channel. In this type of case, the survey does not provide information on whether those final deals were included in the responses provided by the participants. Overall, these percentages are in line with Gartner's assessment of direct versus indirect channel penetration in the Brazilian market.

What Products Do They Sell?

The Brazilian market is fundamentally an indirect market. Figure 4 shows the types and percentage of IT hardware, software and IT services offered by the channels. The survey results show a high volume of IT services offered by the channel. A total of 80% of Brazilian channels offer IT services, followed by software at 73%. It is interesting to note that Russia, another member of the emerging Brazil, Russia, India and China (BRIC) club, shows IT services accounting for only 15% and software representing 18%. This is another data point suggesting that Brazil indeed is a more-mature IT market than other emerging markets. The maturity in this case lies in the adoption by the market (particularly the professional segments) of legal software that is purchased through channels. This is an interesting data point that differs from other emerging markets, such as Russia, where the markets show low channel sales of software, which also may suggest higher levels of piracy. In the same line of analysis, it is interesting to realize that in the fourth-largest PC market in the world (Brazil), indirect channels distribute only 54% of these systems. This could be attributed to the fact that 51% of the PC market in Brazil is white boxes (nonbranded builders), and these organizations fall outside of this study.

This also leads us to formulate an important assumption in this section, which is that what you see in Figure 4 is strictly related to products and services within the legal IT "ecosystem." Yes, many white-box manufacturers in Brazil are outside this ecosystem as they use parts and components that are shipped into the country without paying any duty. They also keep their PC sales unreported to the government. This is also corroborated by the high volume of software participation in the channels, which would be substantially lower if white boxes were included (white boxes are the biggest software pirates in the country).

Figure 4. Percentage of IT Hardware, Software and IT Services Offered by Channels in Brazil



N = 150

Source: Gartner (March 2009)

Financing

According to the channels in Brazil, government-owned Banco do Brasil is double its closest competitor, ABN AMRO, in their perception regarding which financial entities provide the most-attractive financing schemes to small and midsize enterprises. On the side of private banks, such as Itaú and Bradesco, they appear in second and third place, showing that these entities are the private option for most of IT small and midsize organizations. In general, the Brazilian banking system is fundamentally healthy when compared with mature markets and other emerging markets. Specifically, Brazil relies much less on credit to buy goods than other emerging markets, especially since the interest rates are extremely high.

Providing financing, credit and leasing is also a major added value offered by distributors. Outside of supply chain and logistics, this is a very important aspect of the services they deliver to both vendors and the channel. With the constrained economic climate, financial institutions must continue to provide alternative credit and financing options that will be imperative to the financial health of the collective channel.

Support and IT Services Offered in Brazil

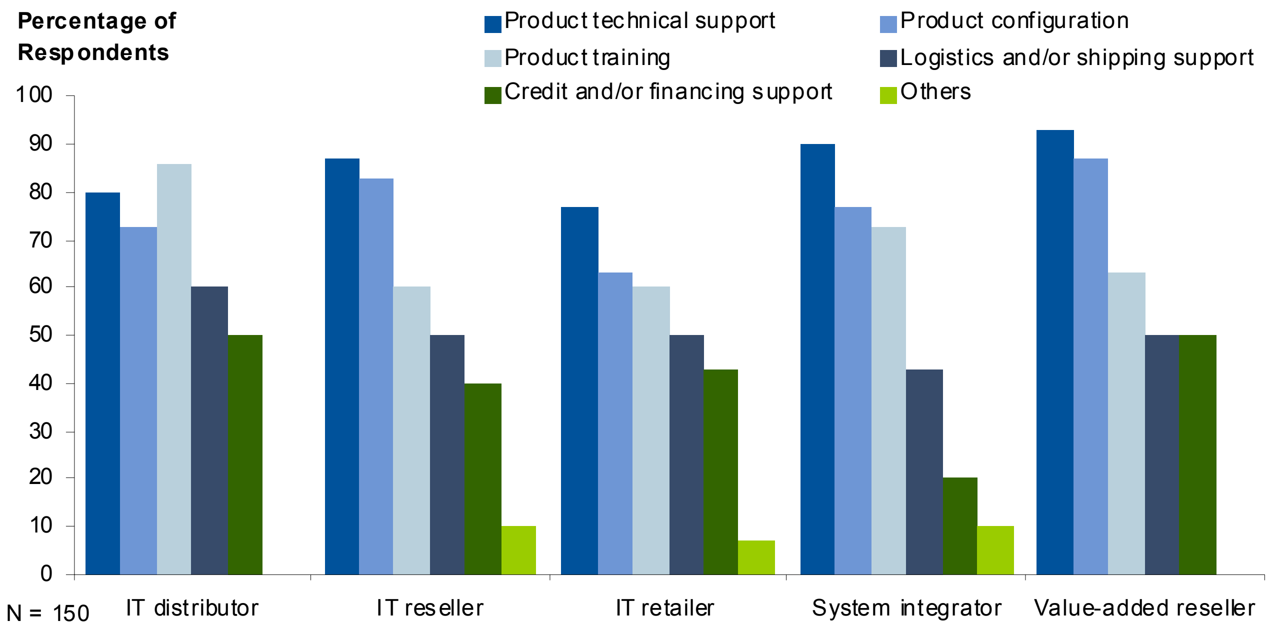
Support Services

Product technical support, product configuration and product training ranked as the top support services offered by the channel (see Figure 5). While these offerings are what we see in other emerging markets, it is especially good news for technology providers in Brazil because the country poses enormous challenges in reaching and servicing customers due to language barriers and its geographical configuration.

Value-added resellers were classified as the highest in terms of support services deliveries, with Brazil IT and Senior Solution as top providers. Respondents also pointed to HP and IBM as top system integrators in Brazil. These four, among others, were pointed as most likely survivors of channel consolidations; this is good news for the local companies to be associated with strong international players, such as HP and IBM, which will no doubt weather the economic crisis.

Most global IT companies establish local strategic alliances as a way to increase reach and customer satisfaction of their products. Technology providers must have a clear picture of the real capabilities of these various channels to establish these partnerships. Product technical support, configuration and training are extremely important to end users, and vendors also must continue to invest in training and certification.

Figure 5. Support Services Offered by IT Channels in Brazil



Source: Gartner (March 2009)

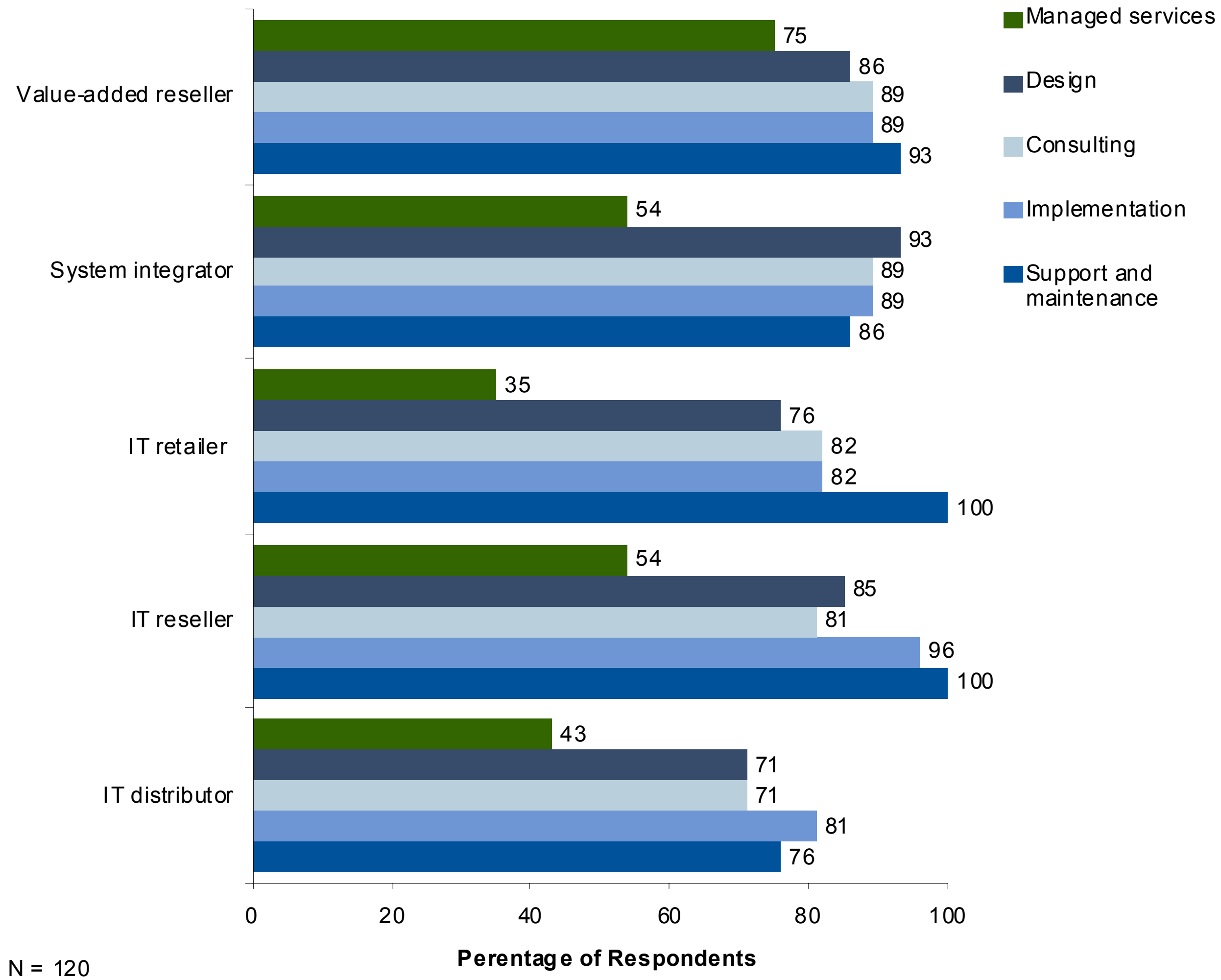
IT Services

With 91% of respondents offering IT services, support and maintenance is the most common service offered in the country, according to our sample (see Figure 6), followed by implementation (88%), consulting (83%), design (83%) and managed services (54%). In comparison, during another regional channel survey conducted in Russia, the classification and percentages of these IT services vary. Support and maintenance leads in Russia with 93%, followed by consulting with 80%; implementation with 70%; design with 59%; and, managed services with 29%.

All channel companies affirm that they offer consulting services; these providers include IT retailers and IT distributors, which are not a common IT services provider. Managed services ranked higher than expected, with VARs offering it the most. It is interesting to note that 44% of respondents offer remote managed services in Brazil, compared with 13% in Russia.

Overall, the comparison of Brazil with Russia in IT services distinguishes Brazil as a more-mature user market in which demand for IT services from channel partners is higher in general. The message here to IT providers is that the IT services market in Brazil is strong, with lots of potential for expanding and implementing strategic alliances.

Figure 6. IT Services Offered by the Channel in Brazil



Source: Gartner (March 2009)

It is important to note that IT resellers and IT retailers have a less important role in managed services since they usually work with lower-value contracts. Value-added resellers have the most equally distributed bundle of services offered.

Remote Managed Services Offerings to Customers

Remote management services are externally provided operations and management capabilities offered over a networked infrastructure. These are dynamic offerings that use people, processes and technology to manage IT, while striving to reduce associated operational expenses. The service provided is generally outlined in detail in service-level agreements between the provider and user organizations. Managed resources are often installed at client premises.

Remote managed services in Brazil are growing, with some local niche players, as well as big foreign companies, exploring the most common segments. Remote infrastructure monitoring is the most common remote manage service offered in Brazil, according to respondents. A total of 51% of channel companies offer remote infrastructure monitoring (RIM), with value-added resellers being the channel delivering the most RIM with 64%. The target markets for remote monitoring in Brazil are data centers, networks, security, e-mail, specific business applications, storage management, IT asset management, print management and remote management, and PCs and related peripherals.

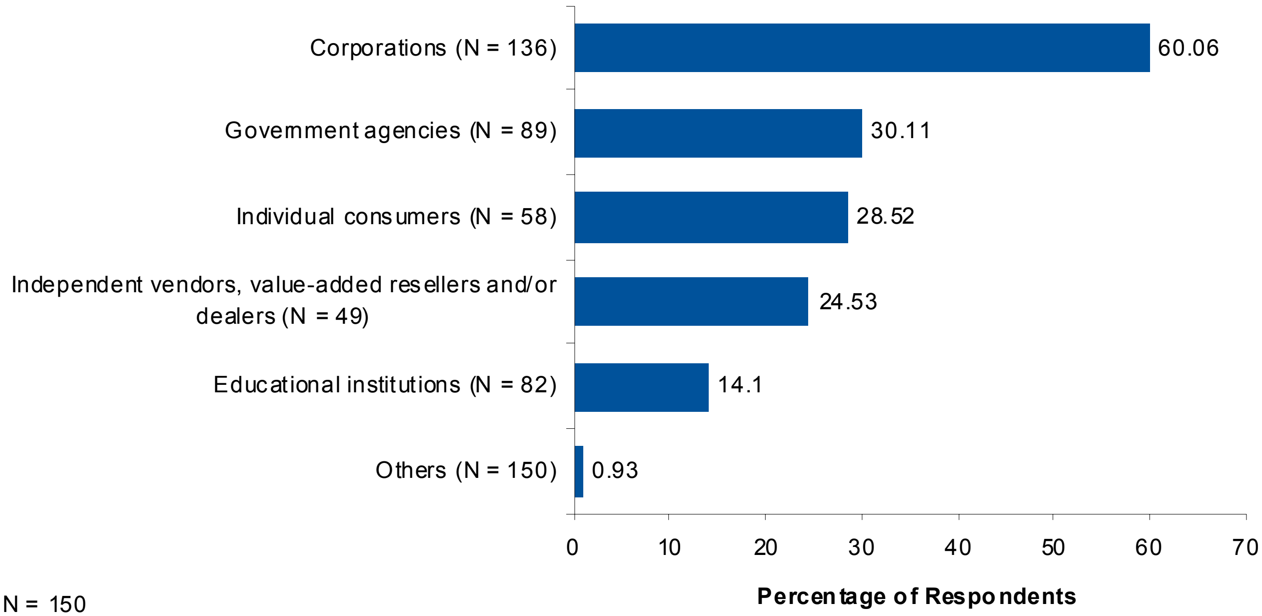
Channels also offer SaaS and HaaS. The survey shows that 23% offer SaaS and 16% offer HaaS. The potential for growth of SaaS and HaaS is substantial in Brazil. Large organizations are already working on their SaaS strategies, as is the case of IBM software in the financial vertical and Brazilian-born, Stefanini IT Solutions (now a multinational, with operations in Latin America, Europe and India).

Who Are the Buyers in Brazil?

A total of 91% of the channel companies interviewed sell to corporations (not including other channel companies such as VARs and dealers), suggesting a highly competitive and concentrated corporate environment (mainly large business) in the Brazilian market. Government agencies follow with 59% as a selling target market, corroborating the strong demand from the Brazilian government for IT products as it seeks modernization of its IT infrastructure. Educational institutions ranked as third in the channel target markets with 55%. An example would be the recent government decision to purchase from local provider Positivo Informatica a total of 325,000 Linux-based PCs for the local education establishment. The survey did not disclose whether this penetration was only within private educational entities. However, our assessment is that this is most likely the case because public education purchases are mostly reported as government acquisitions (see Figure 7).

Overall, regardless of the product, the competitive landscape in Brazil is intense at the upper-midsize and large enterprise. This suggests that IT providers must continue finding both product and GTM differentiation to make themselves distinguishable for the channel and for the markets to remain a market leader.

Figure 7. Who Are the Customers in Brazil?



N = 150

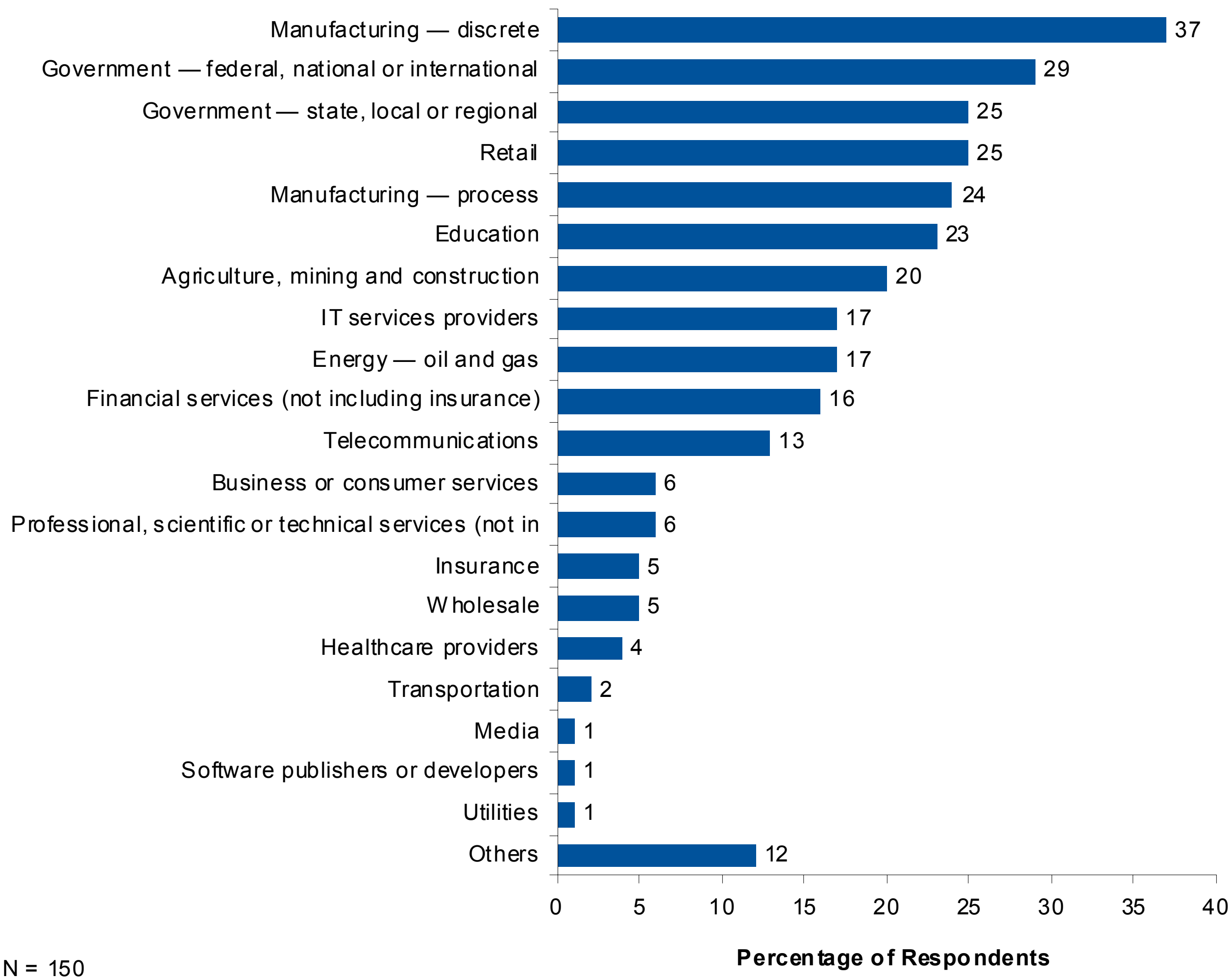
Source: Gartner (March 2009)

What Are the Vertical Industries Buying in Brazil?

Overall, manufacturing (discrete and process) contributed 61% to the channel sales revenue in the first half of 2008, with utilities at a minimum with 1%. It is not a surprise that government (federal and state), ranked second and third, respectively (see Figure 8). Both of these combined accounted for 30% of total channel revenue. However, due to the current economic environment, 2009 may change these percentages with overall manufacturing channel sales revenue declining and government rising, as government infrastructure investments are expected in Brazil as a way to control the growth of unemployment. There will be vertical opportunities in 2009, and therefore the need for technology providers and channel partners to identify which ones will be most lucrative and jointly penetrate those vertical markets.

It is imperative that technology providers train their partners to better address these two giant vertical markets in Brazil, which implies a complete understanding of the industries involved, along with their IT needs.

Figure 8. Organizations' Sales Revenue by Vertical Market in Brazil, 1H08



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Source: Gartner (March 2009)

Channel Conversion and Training to "Think Vertically"

While some channels have a more-aggressive approach toward market segments (large enterprises, government and so forth) and as is the case in most emerging countries, channels tend to be nonspecialized in specific vertical industries and/or market niches in Brazil.

Almost one-third of the interviewed channel companies were adverse to reconvert themselves with the necessary compensation and training toward specific vertical industry; nevertheless, 71% expressed interest in such a possibility. This indicates that an overwhelming majority of the channel market feels that they require new knowledge and skills, and that they (the channel) are not ready to meet those challenges without some additional training. Even with the prospect of additional training that is needed, channel companies are willing to embrace major changes in their model and skill set. This also suggests that, in general, there is a lack of vertical training programs in the market by technology providers.

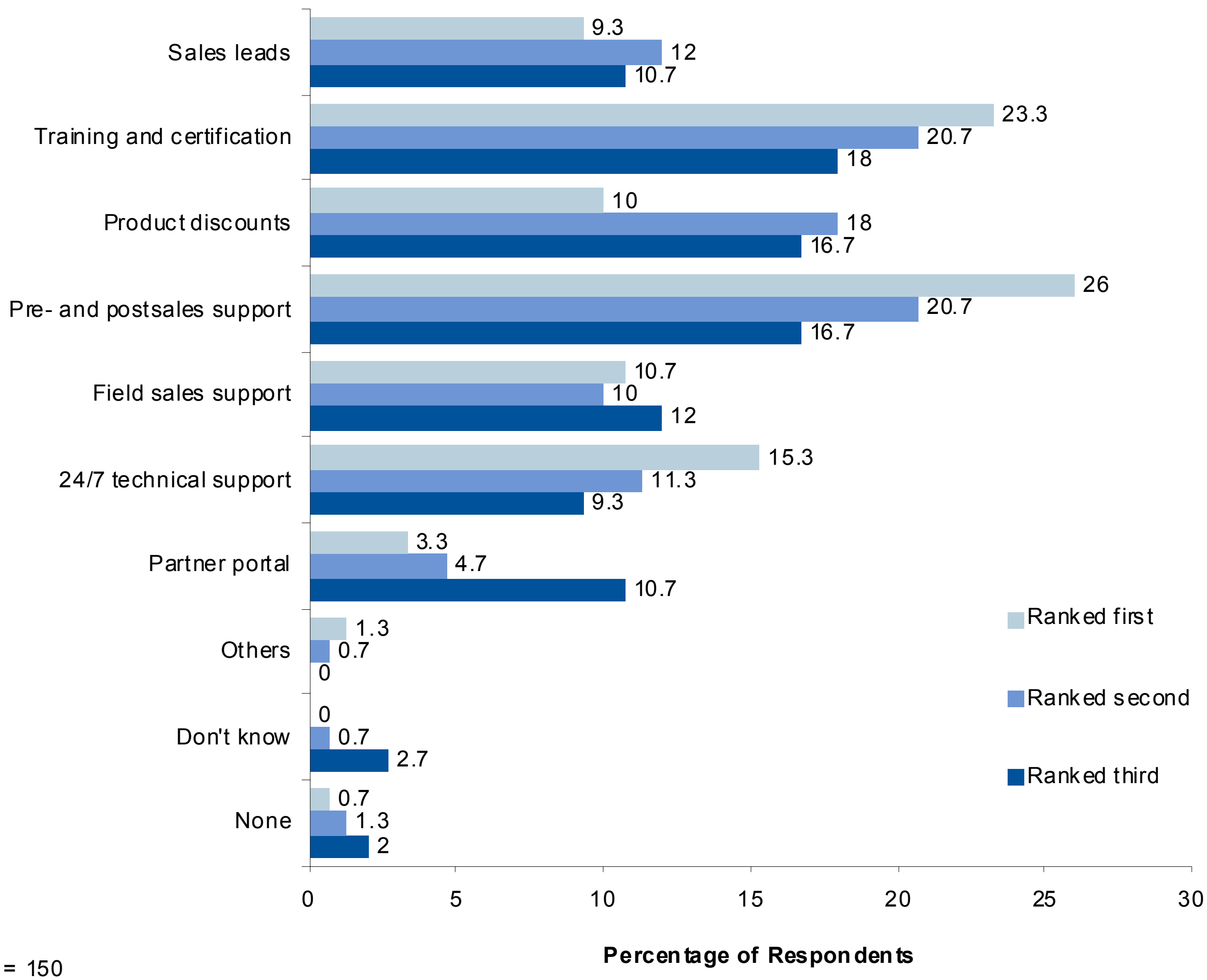
The survey result also shows that vertical needs are met in a 50% ratio. Indeed, on a scale of 1 to 7, with 7 meaning the needs are being met extremely well, vertical market training was ranked with a mean of 3.36 out of the total 148 interviews in Brazil. This points to the fact that technology providers still do not view the market as needing or demanding products and services targeted at vertical markets, but clearly the channel does see a need or potential for such specialization.

Channel Program Participation Remains Low

Although IT vendors attempt to build structure into the management of their partner populations with channel programs, there are still an unusual number of companies that are not participating (39%). The programs that have the greatest attach rate in Brazil are Microsoft (44%), HP (36%) and IBM/Lenovo (38%). It is interesting to note that in Russia the program participation is almost even with Brazil except Acer has far greater presence (22% in Russia) versus 1% in Brazil.

The programmatic elements that stood out the most for channel companies were pre- and post sales support, training and certification, and 24/7 technical support. Surprisingly (and unlike in other regions) sales leads and product discounts were not in the top three most-important elements, leaving the new account acquisition and development up to the partners (see Figure 9).

Figure 9. Most-Important IT Vendor Program Offerings Ranked by Companies in Brazil



N = 150

Source: Gartner (March 2009)

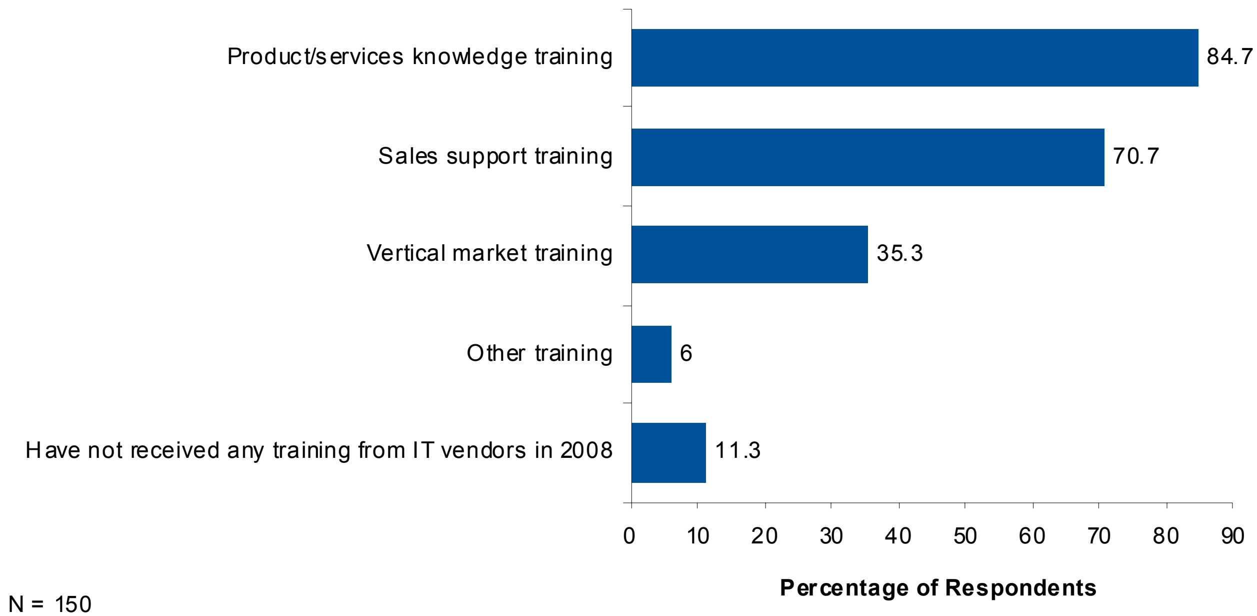
It was also noted that the top brands, which accounted for the highest percentage of sales revenue, can be attributed to those companies that have high levels of program participation (HP, IBM, Lenovo and Microsoft). Participating in formal programs will create a more-productive and capable channel.

Partner Vertical Training

Even without participating in formal programs, channel companies continue to find tremendous value in product/services training, sales support and vertical market training from vendors (see Figure 10). However, even though the channel sees value in the training offered, overall the market doesn’t necessarily agree that all the organizations' training needs are being met. Product/services knowledge training had a mean average of 5.01 (on a scale of 1 to 7 in which 7 means the needs are being met extremely well); sales support training had a mean average of 4.49; and in third place was vertical market training at 3.36. Interestingly enough, the vertical market training having such a low score may be the result of vendors not being interested in investing in vertical specialization.

Vendors appear to have done a good job at providing the very basics of partner training, but have much room for improvement when it comes to specific vertical market training and other training (outside of technical and product training). Vertical training looks as if it may be an ideal place to invest in new training initiatives since partners have indicated they would be willing to reconvert themselves into more vertically specialized organizations if given the opportunity. Still, not all partners are participating in training, which will negatively impact customer experience.

Figure 10. Types of Training Received by Organizations From IT Vendors in Brazil in 2008



Source: Gartner (March 2009)

Consolidation and Changes in Channel Dynamics

Many distribution channels have begun feeling the effects of the economic deceleration in emerging markets. Whether they are retailers hit by lower consumer spending or resellers impacted by small and midsize businesses' retraction from the market, it is anticipated that IT channels in Brazil will go through consolidation during the next 12 months.

The survey found that most channels in Brazil do not see themselves as small companies and that there is not an excess of channel companies; however, it is interesting that they also expect channel consolidation in the next 12 months. If this consolidation occurs, we foresee a very competitive environment in which technology providers will have to further revise their existing contractual conditions with their channel partners and enhance them.

A major trend in most emerging markets is the presence of a large number of IT channel companies, resulting in a very fragmented marketplace. These, often, are small companies and they compete aggressively for local businesses, mostly on price. The result often produces limited business effectiveness and added value, and because of this, they see the need for consolidation. In other words, the channel itself realizes that having too many players lowers economic profits for the entire market. Therefore, the channel’s limited solvency, narrow product and geographic coverage, and lack of vertical expertise create challenges for manufacturers and their end-user clients. It is therefore imperative that proper channel evaluation and qualification is performed prior to actual recruitment of a partner.

The study also found that given the economic situation, most channel companies believe that international IT distributors (Ingram Micro, Tech Data and Bell Micro) will be better able to survive channel consolidation during the next 12 months. Such players, although operating in a very challenging economy and in a country that imposes many import tariffs and has a complex taxation system, still have the proper financial leverage, large logistics and distribution capabilities, and diverse product lines to succeed over the long term.

METHODOLOGY

In November and December 2008, Gartner surveyed 150 IT channel organizations in Brazil to better understand the IT channel structure and how they operate in the country. The interviews were conducted via CATI methodology, and the respondents were personally knowledgeable about the IT products and services’ sales and business strategies within their organization.

The main objective of the study was to allow Gartner to better understand the IT channel structure in Brazil. In November and December 2008, Gartner surveyed 150 IT channel organizations. In our survey sample: 20% of respondents are system integrators, 20% are IT resellers, 20% are IT retailers, 20% are IT distributors and 20% are VARs.

RECOMMENDED READING

"Emerging Market Analysis: Top 2009 Recommendations to IT Vendors in Emerging Regions"

"Dataquest Insight: Traditional Channel Programs Must Advance Beyond Resale Model"

"Emerging Market Analysis: IT, Brazil, 2009 and Beyond"

"Dataquest Insight: Critical Initiatives for Channels in Tough Times"

"Analysis of Brazil as an Offshore Services Location"

"SWOT Analysis: Brazil Shifts to Global Sourcing"

"Global Remote Management Services"

"Vendor Survey Analysis: The Future of the Indirect Sales Channel, 2009 and Beyond"

"User Survey Analysis: The Next-Generation Communications Consumer, Brazil, 2020"

Acronym Key and Glossary Terms

BRIC Brazil, Russia, India and China

GDP gross domestic product

GTM go to market

HaaS hardware as a service

RIM remote infrastructure monitoring

SaaS software as a service

VAR value-added reseller

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