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About this Report

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About Saugatuck Technology

Saugatuck Technology, Inc., provides subscription research and management consulting services focused on the key market trends and disruptive technologies driving change in enterprise IT, including Software-as-a-Service (SaaS), Cloud Infrastructure, Social Computing, Mobility and Advanced Analytics, among others. Founded in 1999, Saugatuck is headquartered in Westport, CT, with offices in Falmouth, MA, Santa Clara, CA and in Frankfurt, Germany. For more information, please visit [www.saugatucktechnology.com](http://www.saugatucktechnology.com) or call +1.203.454.3900.
UNLEASHING THE POWER OF PaaS TO HARNESS THE CLOUD

PaaS should be seen as a platform for innovation, agility, flexibility and leverage – rather than merely for application development – extending functional assets whether software resources, existing systems or Cloud-based capabilities through integration and workflow design. The target deployment platform may be in the Public Cloud, on an internal Private Cloud or appliance or anywhere in between. The deployed solution may, and probably will, exploit mobility interfaces on smartphones, tablets and laptop PCs.

Loosely-coupled solutions are the shape of things to come – solutions on the horizon, yet not so far distant they can be ignored or postponed. Regardless of the chosen architectural configuration, the PaaS solution can enable a business to operate more efficiently, more effectively or through innovative capabilities. And because of the efficiency of PaaS, it will be deployed in record time.

INTRODUCTION: HARNESSING THE CLOUD

The Cloud has become the dominant global trend in Enterprise IT. Saugatuck Technology estimates that, by YE2014, 65 percent or more of all new business solution decisions in the enterprise will be in favor of Cloud-based or hybrids of Cloud and on-premises solutions. The economics of the Cloud and its potential for innovation are the primary reasons why.

The evolving ecosystem of Cloud solutions, whether acquired or developed, has become increasingly more attractive than the traditional on-premises software model both to enterprise business leaders and to ISVs. Business leaders appreciate low up-front costs, no major investment in infrastructure or personnel, quicker
time to deployment, and lower overall costs of ownership. ISVs can see clearly the growth rates of Cloud solution providers outstripping on-premises vendors. Even as the global economy went through the recent massive recession and pursues the still-tentative recovery, SaaS firms’ revenue growth clearly has outperformed traditional on-premise providers. Most market studies, including our own, indicate that Cloud provider solutions will maintain and increase revenue growth rates well above on-premises software in the coming years.

While the initial impact of the Cloud has been primarily economic – better, faster, cheaper – we are also beginning to see the transformative effects of Cloud technology on businesses. Geographic reach and the ability to coordinate across organizational boundaries are two easy-to-identify transformative effects. The use of mobile devices to access information in the Cloud, share that information with co-workers, launch business transactions and control on-premises assets and workflows remotely through the Cloud brings still another dimension to how businesses can now operate. Therefore, while there are significant benefits to be had in the more limited cost-benefit context, the winners in this new competitive landscape will be those enterprises that adopt Cloud solutions to fundamentally change their business models, not simply improve IT. Cloud technology-based business strategies can achieve compelling returns versus on-premises business re-engineering to fundamentally change the business model.

**WHAT IS PLATFORM AS A SERVICE?**

Managing the transition to Cloud and hybrid solutions is a truly complex challenge. Enterprise Cloud developers can meet that challenge, however – through ongoing, continuous delivery of development assets, integration of Cloud solutions, both developed and subscribed, with data and workflow on premises, and by managing their ongoing change – while boosting productivity and quality and reducing capital investment. Ultimately, enterprise Cloud developers need a coherent platform which includes capabilities to develop, test, manage and maintain applications in the Cloud. Platform as a Service (PaaS) has evolved to meet that need.

PaaS is essentially a middleware-based platform to enable the development and deployment of Cloud Business Solutions. A PaaS offering may be based entirely in the Cloud or partly in the Cloud and partly on-premises. It may enable Public Cloud solutions or those in Private Clouds.

The PaaS value proposition centers on subscription and usage economics, much as Cloud business solutions do, as well as support for distributed organizations and mobile knowledge workers, synergy with other Cloud resources, and the potential for consistency in the availability of a standard tool set. However, each PaaS offering brings its own formula for delivering value. For example, force.com is a proprietary development environment from salesforce.com that emphasizes high productivity, synergy and ease of use. Azure is a platform that leverages both the familiarity and the investment of .NET developers in Microsoft developer tools and APIs. The ideal PaaS offering would combine these advantages: high productivity, ease of use, familiar developer tools and the ability to leverage existing software assets.
Today’s PaaS options are numerous, and they are also varied. No two solutions make the same functionality available. Nor do all PaaS solutions fully enable development. Some provide supporting functionality, e.g., Amazon (testing support) or CollabNet (code management). Some offer Infrastructure as a Service (IaaS) support only for the developed solution, e.g., Salesforce; some offer IaaS services that are independent of the PaaS developed solutions and designed to support solutions migrated from on-premises data centers, e.g., Microsoft and IBM.

While there are many interesting niche PaaS players, the value of selecting a provider with sufficient scale and scope, resources and reach, is not to be underestimated. Each of the major IT vendor ecosystems has PaaS support: Google – AppEngine and Cordys; IBM – Websphere, Pure Systems; Microsoft – .NET, Azure; Progress – OpenEdge; Red Hat – OpenShift; Salesforce – force.com, Heroku. In addition, two notable recent entrants – CloudBees and Fujitsu – provide world-class Java development support (CloudBees) and a collaborative platform for development, workflow automation, and integration for both new and existing solutions (Fujitsu). And this is by no means an exhaustive list. The still-immature PaaS space is growing again after a period of herd-thinning, as many of the innovative early entrants in the space simply failed to gain traction and have faded from view.

However, there are essentially two kinds of PaaS development platforms, those designed to enable the creation of new solutions and those designed to leverage existing solutions, often on a proprietary platform. Salesforce’s force.com began as a way of extend the CRM solutions from the early SaaS innovator, but soon grew beyond that more limited model to enable the development of entirely new solutions. The Netsuite PaaS remains dedicated to extending Netsuite solutions, as does the SAP ByDesign PaaS capability.

Our research at Saugatuck has made clear to us that PaaS is in process of evolving rapidly to encompass a broadening model of Cloud solutions that includes collaboration, mobility, social and analytics functionality with a heavy dose of integration. Every ten to fifteen years a new master architecture emerges that provides businesses and individuals the ability to get their work done in a new computing paradigm.

Usually the computing paradigm is based on a technology platform such as mainframe, client/server or Cloud. However, now we are witnessing the emergence of a new master architecture that is not based on a single computing-platform paradigm as in the past. Rather, it is based on multiple technologies and platforms that build synergies among themselves through loosely-coupled and opportunistic exchanges of value.

**DEVELOPING FOR THE BOUNDARY-FREE ENTERPRISE™**

As business enterprises evolve their understanding of the capabilities of this emerging master architecture, each must find its own way of creating an anytime / anyplace hybrid-computing network that will realize its competitive aims. While the challenges of navigating this journey are significant, the benefits of the Boundary-free Enterprise™ are transformative. And it is the challenge of enterprise Cloud development to transform today’s enterprise into one that is essentially boundary-free, virtually integrated with its suppliers, buyers and distributors worldwide and with its customers and potential customers.
As one large enterprise CTO put it recently,

> Customers want data to be secure, delivered quickly, and remote access is more and more important. So anything that allows these three things to happen is the best environment. Mobility is increasingly important and will be a key focus.

Today’s businesses and individuals are already less encumbered by constraints of time and place, doing their work through a new array of time- and location-independent computing capabilities that make the Boundary-free Enterprise™ possible. Integration is the glue that links these capabilities together and joins them to on-premises data assets in data centers where mission-critical money systems still operate behind highly-secure firewalls (See Figure 1: The Boundary-free Enterprise™ Enabled by the Cloud).

**Figure 1: The Boundary-free Enterprise™ Enabled by the Cloud**

For developers of Cloud solutions targeting the Boundary-free Enterprise™, partnering with a Cloud development platform provider will be a strategic decision. These new Cloud solutions are a loosely-coupled network of functionality that may be extended and combined in a variety of ways. These solutions will not merely be aware of mobile, social/collaborative and analytics platforms, but will be designed to maximize the value exchanged across these platforms in a range of business contexts. The development platform of the near future will require the ability to work with new and existing assets, both components and services, leverage them for new purposes, and connect those component assets to realize the potential of their synergy.
Let’s take a closer look at three persistent myths about the Cloud:

1. **Clouds are not secure** – Public clouds are usually designed as multi-tenant in order to enable the unlimited scale and favorable economics of the Cloud. Because multitenant Clouds manage data via shared conceptual schemas, security is often raised as a concern by uncertain buyers or FUD-wielding, on-premises vendors. In place of the traditional security perimeter, a network firewall, the Cloud security architecture depends on a hypervisor, identity management software, and the underlying design and logic of the Cloud application. To date, security in the Cloud has been at least as good as the typical on-premises data center.

2. **Clouds lock you in and you lose control** – There are different types of Clouds that offer different capabilities and different degrees of control. Essentially, though, Clouds are either on the public Internet – whether Public or Private – or behind a firewall on-premises, either as an Internal Cloud or as a Cloud running in an appliance. In any case, Clouds that implement standard technology stacks and are participating in Cloud standardization efforts are the best bet to ensure your workloads will not be locked in. If you are considering a Cloud Provider, you should consider the full range of options and evaluate not only current functionality, but the provider’s plans for the future. Ask your Cloud provider about their roadmap for the near-term future and the next three years, and consider whether the evolving functionality of that provider will likely match your evolving business needs. Clouds are partnering opportunities, not transactions, and as such should be evaluated for their relationship potential.

3. **Internal Private Clouds are not real Clouds** – Some analysts, and at least one prominent Cloud provider, have contended that the term “Private Cloud” is an oxymoron, because Private Clouds do not really qualify as Clouds. Within the industry everyone from buyers to providers continues to debate the how-and-why of Internal Private Clouds, relying on strict definitions to try and sort out which is which. However, such debate does little more than confuse and delay the effective use of Cloud in too many enterprises. Private Clouds very obviously exist and qualify as “real” Cloud IT. While most Public Cloud offerings have, effectively, unlimited compute resources available for dynamic assignment to any workload, Private Clouds, especially Internal Private Clouds, are typically constructed on a finite infrastructure. Although additional resources can be added to a Private Cloud or expanded through virtualization, this is not as transparent and automatic as with dynamic provisioning in the Public Cloud. Therefore, Private Clouds normally have somewhat more finite limits in the amount of compute resources that can easily be allocated to a workload, dynamically or otherwise. Private Clouds are neither a panacea for all IT ills, nor a thinly-disguised evil to be carefully avoided in all situations. Rather, a Private Cloud, similar to most new technologies, carries both pros and cons which must be understood and evaluated for each customer situation and workload.

**Paas and the Future of Clouds**

The evolving Cloud is built upon the synergy of Cloud and on-premises assets. As the Boundary-free Enterprise™ evolves to express the operational strategies of any given line of business, an IT organization has a new and challenging mission. Acquiring Cloud assets and implementing them, integrating them with other assets in the systems portfolio to exploit their synergies, IT has a more proactive role because
of this transformation – to assemble acquired assets, integrate where possible and develop other assets as needed to fill in the gaps.

It is more than clear that business and IT executives envision this evolving hybrid Cloud. In the 2012 Saugatuck Cloud Survey, we asked enterprise executive buyers from business units and from IT to express their preference for deploying new business software in three timeframes. Survey respondents were asked to indicate whether they would prefer on-premises software, hybrid-Cloud or pure-play Cloud deployment for their newly-acquired business solutions. They were asked to express these preferences as if buying today in 2012, in two years in 2014 and in four years in 2016. As Figure 2 below indicates, buyers expressed different preferences for each of the three timeframes (See Figure 2: Business Software Deployment Preferences 2012-2016).

**Figure 2: Business Software Deployment Preferences 2012-2016**

In 2012, the preference for acquiring on-premises software is still at 50 percent, but this declines rapidly to 18 percent in 2014 and to 13 percent in 2016 (See the blue bars in Figure 2). Meanwhile, the Cloud-based pure-play software preference rises from 10 percent in 2012 to 19 percent in 2014 and to 39 percent in 2016 (See the green bars). What is most striking, however, is the shape of the red bars in Figure 2 above. Rising from 40 percent in 2012 to 63 percent in 2014 and then falling off to 47 percent in 2016, the red bars indicate a transitional emphasis on buying especially for the hybrid architecture, joining Cloud software to on-premises assets, as an interim or transitional stage in the evolution of the Boundary-free Enterprise™.

Developing for the hybrid Cloud will be the primary activity of enterprise developers over the next three-to-five years, and maintaining these Cloud solutions, integrations and workflows will be the mainstay of IT for a decade or more to come. Though the transitional spike in hybrid-Cloud procurement declines after 2014, the next wave to come is the pure-play Cloud, where an equal challenge...
Unleashing the Power of PaaS to Harness the Cloud

awaits enterprise developers and their IT organizations. If any lesson can be drawn from the past, it is that architectural transitions, though gradual, are permanent, as the business IT assets that are created seldom, if ever, go away. It is estimated that not only are there a 100 million lines of COBOL still in production, but another 100,000 lines are added every month. Much of what the Cloud era ushers in will be built on the back of mainframe and client/server IT assets. Even new Cloud business applications will integrate with those legacy assets. Thus, what enterprises need most are forward-looking strategies for managing the business IT portfolio through this transition to the Cloud and to the Boundary-free Enterprise™.

Our research at Saugatuck indicates that one key to successful Cloud development going forward will be the integration of enterprise workflows, leveraging existing functionality and external Cloud capability. Another key is to successful Cloud solutions will be enabling mobile devices to connect and exploit Cloud functionality. As the CIO of a leading biotech company said recently,

*The development of the industry into IaaS and PaaS capabilities has enabled optimization of the back-end experience through integration tools that are emerging today and also the experience that people are used to at home. This convergence of back-end architecture, Bring your own device (BYOD) and mobile platforms is creating a holistic architecture as we put it together in development.*

PaaS solutions that enable both new development and integration of enterprise workflows, as well as providing for easy interaction for mobile devices will be clearly favored by enterprise developers.

**USING PAA S TO RE-ENGINEER LEGACY ASSETS FOR THE CLOUD**

A global pharmaceutical company identified the need for a new decision-support system that could provide real-time information on status of new drug development projects combined with up-to-date information on actual versus budgeted costs per project. The goal was to deploy the new application via private Cloud to the organization’s top 300 senior project managers responsible for new drug commercialization projects.

The firm employed PaaS-based integration and composite application development tooling technologies to extract and combine information from the company’s back-end Oracle Financials and Primavera project management systems to create the new Cloud-based application, which was deployed globally to the firm’s senior project managers.

The company estimated that they were able to reuse 70 percent of existing legacy application functionality and to reduce the operational costs of system integration by 80 percent using PaaS.

The Key Benefits:

- Leverage existing system investments
- Simplify and manage integration requirements
- Allow quick development of new product combinations and extensions
PROVEN BEST PRACTICES FOR DEPLOYING PaaS SOLUTIONS

Our six years of research into PaaS has led Saugatuck to capture a number of best practices. PaaS brings enormous potential within reach. However, managing that potential in a way that yields the return on investment enterprises require is still a challenge, as PaaS has not yet reached its full maturity. We would recommend these five best practices as essential to any successful PaaS implementation.

1. **Have a Clear Business Goal** — Form a clear definition of the end goal for deploying your solution to PaaS — Are you looking for cost savings, global reach, a quick implementation? Something you couldn’t otherwise do because of limited resources or a solution to provide innovative functionality? A way to combine existing functional assets with new capability? A Public or Private Cloud solution?

2. **Once Committed, Stick to What Works on Your PaaS** — Don’t try to do things that are hard to do on PaaS, particularly the PaaS you have decided upon. Know enough about the PaaS platform to do what’s easy, take advantage of its native capabilities and be positioned to evolve with your chosen PaaS solution.

3. **Consider an SI as a Knowledge Transfer Partner** — Make the maximum effective use of system integration resources, working flexibly with the expertise and knowledge capabilities of your SI partner to deliver and manage your solution on PaaS. Understand the nature of your partner relationship, whether your SI is partnering with you as a developer, a co-developer/technology transfer partner or a managed-services partner.

4. **Know the Product Roadmap of Your PaaS Platform** — Understand the technical direction that the PaaS platform will take. Know enough about your PaaS solution to design for it and take advantage of the evolving functionality that it provides you.

5. **Architect Your Solution for Performance and Maintainability** — Architecture is of profound importance to deploying efficient, effective and innovative solutions on PaaS, as good architecture brings agility, cost-effective, high-quality and robust solutions and can be easily maintained. Solutions should scale and exist for many years. Designing for the longer term requires a commitment to your PaaS platform and to a clear understanding of its technical direction.

CONCLUSION: UNLEASHING THE POWER OF PaaS

Loosely-coupled solutions are the shape of things to come – solutions on the horizon, yet not so far distant they can be ignored or postponed. APIs, integration tools, components are key elements of this new view of a Cloud Development PaaS in and for the Cloud and the Boundary-free Enterprise™. This new PaaS development model has several key ingredients:

- Tools to build new components extending functionality
- Tools to extend existing functionality, either open source or developed in-house, by adding code
- Tools to enable integration, either Cloud-to-Cloud or Cloud-to-On-Premises
Tools to enable workflow orchestration among components and services
Tools to manage the integration of mobile devices

The development platform of the near future will require the ability to work with new and existing assets, both components and services, leverage them for new purposes, and connect those component assets to realize the potential of their synergy.

Innovation can be sparked by the potential for new functionality, new platforms for deployment and access to customers, suppliers and other business partners through the Cloud. The Cloud, too, because of its on-demand, pay-as-you-go pricing encourages business innovation and experimentation, even the prototyping of entirely new lines of business because of the lower cost of on-demand or usage pricing versus acquiring and managing fixed assets. Rather than secure approval for the use of investment capital and human resources, innovators can start small and scale up their new business ideas according to demand.

Agility and flexibility are the clear benefits of access to elastic resources, as existing lines of business can scale to meet demand or respond to competitive challenges. The frequent functional enhancements required of competitive situations bring current technology and functionality into the near term. Mobile computing devices not only empower geographically dispersed workers or business travelers these days, but ride along with the freight in eighteen wheelers on the interstate and provide tracking and delivery information, as well as enable the management of supply chain efficiency for both buyers and suppliers.

Leverage increases via the Cloud through access to superior resources and business and technology expertise anywhere in the world. The Cloud plays host to hundreds of functional capabilities, Cloud solutions and technology support services accessible via the Internet. PaaS makes the linking of these Cloud capabilities possible. PaaS also makes reuse of on-premises and open source component assets part of the developer’s working palette. These forms of leverage are compelling reasons to make full use of PaaS for building in or for the Cloud.

PaaS should be seen as a platform for innovation, agility, flexibility and leverage – rather than merely for application development – extending functional assets whether software resources, existing systems or Cloud-based capabilities through integration and workflow design. The target deployment platform may be in the Public Cloud, on an internal Private Cloud or appliance or anywhere in between. The deployed solution may, and probably will, exploit mobility interfaces on smartphones, tablets and laptop PCs. Regardless of the chosen architectural configuration, the PaaS solution can enable a business to operate more efficiently, more effectively or through innovative capabilities. And because of the efficiency of PaaS, it will be deployed in record time.
SPONSOR PERSPECTIVE: ENTERPRISE PRODUCTIVITY PLATFORM ON THE CLOUD

The pace of change in today’s business world is dramatic, and enterprises must be ready to embrace the challenges and opportunities arising from a continuously evolving business environment. Today it’s no longer just what you do that matters, it’s how you do it and how quickly and efficiently you can deploy new processes and services to exploit new market opportunities. Businesses cannot afford lengthy development and change cycles of months or years; they need to be far more agile, with the ability to modify or shift their business and operational strategies for optimal results.

In recent years, Platform as a Service (PaaS) has emerged from the middleware technology space as a new Cloud solution to tackle these challenges. Taking advantage of Cloud-based infrastructure, PaaS offers unprecedented agility, flexibility and speed to help enterprises adapt to the constantly changing business environment, to meet customer needs and to deliver new products and services to market quickly, easily and at a much lower cost.

Fujitsu Interstage Business Operations Platform (Interstage BOP), available as a PaaS solution via the Cloud or as an on-premise solution, is an enterprise productivity platform that helps companies to achieve that level of agility required by today’s changing business environment.

Interstage BOP is a single, unified platform that consists of three vital technology layers:

- Service-Oriented Architecture (SOA)-based system integration to unlock business data and logic from existing systems to create and enhance business
- A full Business Process Management (BPM) suite for continuous process improvement and optimization
- A Composite Application Framework (CAF) for easy-to-use development environments to create rich, interactive applications that combine a wide range of information sources and services

With Interstage BOP, organizations will be able to use the same multi-tenant and elastically scalable platform to integrate disparate IT systems and extend existing IT assets into the Cloud. In addition, Interstage BOP’s BPM suite makes it easy and fast for companies to perform process design, automation and optimization. Building and deploying new applications can be accomplished at a much higher speed due to CAF features such as the model-driven “compose and assemble” tooling that helps improve developer productivity.

Finally, Interstage BOP’s Collaborative Workspace also enables the business and IT to work together to build or change processes so as to adapt to business changes more swiftly.

Interstage Business Operations Platform, a completely unified business productivity platform, boosts the agility and flexibility of the business and helps enterprises shorten their development and process change cycles, be adaptive to dynamic change in business environments and significantly lower the total cost of ownership of their IT assets. Interstage BOP leverages Fujitsu Global Cloud Platform to deliver superior service performance for a truly global Cloud deployment implementation that addresses regional regulatory requirements and business practices.

To learn more about Interstage BOP, please visit our website www.fujitsu.com/interstage. You can also check the product video at http://www.youtube.com/watch?v=1YbZkLXk8O0

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Our Mission is to help our clients make better business decisions and create new business value through trusted and objective insights into the key market trends and emerging technologies driving real change.

Over the last few years, this has included a major focus on Software-as-a-Service (SaaS), Cloud Infrastructure, and Social Computing, among other key trends.

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