

The Data Management Survey 20

The voice of the data management community

The Sample, KPIs and Methodology

This document provides background information to help gain a clearer understanding of The Data Management Survey 20



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Introduction

The Data Management Survey 20 is the largest and most thorough fact-based analysis of the data management software market currently available. It is not based on anecdotal accounts or personal opinions, unlike much analyst research, neither is it intended to be a measure of market shares. Instead, it sets out to analyze market trends and produce meaningful comparisons of competing products across a wide range of critical software and vendor-related criteria. The Data Management Survey also provides a detailed quantitative analysis of why customers buy data management tools, what they are used for, what problems they experience with the tools and how successful they are.

This is the second edition of The Data Management Survey. It employs the same proven methodology as The BI Survey, which has been conducted annually since 2000. Based on the real-world experiences of 782 respondents, much of its value lies in the effective analysis of such an impressive, well-distributed sample.

The Data Management Survey 20 features 12 data management products from 9 different vendors. It includes not just products from well-known global giants such as Oracle, SAP and Microsoft, but also tools from much smaller vendors that ordinarily don't get much press but which, in many cases, offer outstanding value to customers.

After data cleansing and removing responses from participants unable to answer specific questions about their use of data management products, we were left with 782 people who responded to the survey with 634 answering a series of detailed questions about their use of a named product. Participants from all over the world took part in The Data Management Survey 20.

The findings from The Data Management Survey 20 are presented in several documents, each focusing on a specific set of the survey results.

Document	Description
The Data Management Survey 20 – The Results	An overview and analysis of the most important findings and topical results from The Data Management Survey 20. Includes advice to buyers of data management software as well as users of existing data management solutions based on the results of our analysis.
The Data Management Survey 20 – The Sample, KPIs and Methodology	Details of the sample, the products included and an overview of our methodology. Descriptions of the KPIs used in The Data Management Survey 20 are also provided, including details of our calculation methods.
The Data Management Survey 20 – Vendor Performance Summaries	A series of executive reports on each product featured in The Data Management Survey 20. Each report contains a short vendor and product overview by BARC's analyst team plus a summary of the relevant product-related results from The Data Management Survey 20.

About BARC

BARC is a leading enterprise software industry analyst and consulting firm delivering information to more than 1,000 customers each year. Major companies, government agencies and financial institutions rely on BARC's expertise in software selection, consulting and IT strategy projects.

For over twenty years, BARC has specialized in core research areas including Data Management (DM), Business Intelligence (BI), Customer Relationship Management (CRM) and Enterprise Content Management (ECM).

BARC's expertise is underpinned by a continuous program of market research, analysis and a series of product comparison studies to maintain a detailed and up-to-date understanding of the most important software vendors and products, as well as the latest market trends and developments.

BARC research focuses on helping companies find the right software solutions to align with their business goals. It includes evaluations of the leading vendors and products using methodologies that enable our clients to easily draw comparisons and reach a software selection decision with confidence. BARC also publishes insights into market trends and developments and dispenses proven best practice advice.

BARC consulting can help you find the most reliable and cost-effective products to meet your specific requirements, guaranteeing a fast return on your investment. Neutrality and competency are the two cornerstones of BARC's approach to consulting. BARC also offers technical architecture reviews and coaching and advice on developing a software strategy for your organization, as well as helping software vendors with their product and market strategy.

BARC organizes regular conferences and seminars on Business Intelligence, Enterprise Content Management and Customer Relationship Management software. Vendors and IT decision-makers meet to discuss the latest product updates and market trends, and take advantage of valuable networking opportunities.

For further information see: www.barc-research.com

The sample

Most surveys are conducted or sponsored by an organization based in, and focused on, one country. However, data management is a worldwide market and we wanted to capture a larger international sample.

The net result was an extraordinarily international panel. Respondents were located in 56 countries. The countries with the most respondents were Germany, the United States and Switzerland. The regions with the most respondents were Europe, North America and Asia Pacific.

The online questionnaire was published in two languages: English and German.

Sample size and make-up

Many thousands of people around the world were invited to participate in The Data Management Survey 20, using BARC's online research panel and the support of vendors and various websites. The questionnaire offered different sets of questions for vendors and users (or consultants answering on behalf of users).

The results of the online data collected are shown in the following chart, with the numbers of responses removed also displayed.

Table 1: Responses to the survey

	Responses	
Total responses	817	100%
Filtered during data cleansing	-35	-4%
Remaining after data cleansing (total answering questions)	782	96%
Non-user (did not answer questions about products)	-48	-6%
Vendor (did not answer questions about using products)	-87	-11%
Total answering product-related questions	647	79%

The number of responses is split between users, consultants, vendors and non-users. Vendors answered a different set of questions to those answered by users. This document focuses on the analysis of the user results.

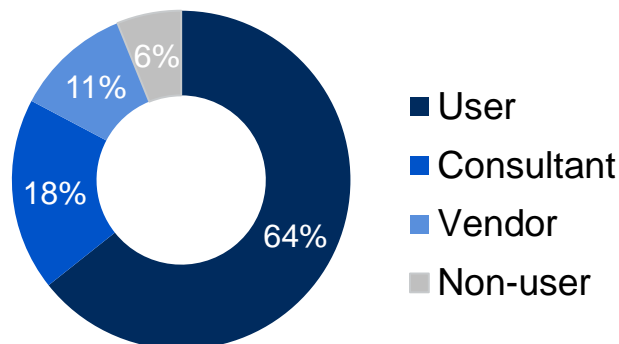


Figure 1: Does your business use data management tools? (n=782)

Organization sizes by headcount

Specialist data management software is most commonly found in medium and large organizations. A high percentage of the responses we received were from medium-sized companies between 101 and 2,500 employees (see Figure 2).

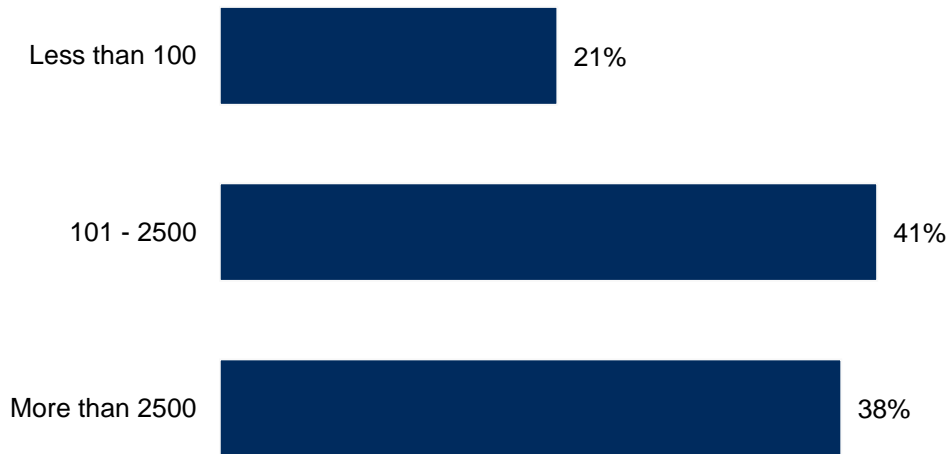


Figure 2: How many employees are there in your entire organization, including all of its branches, divisions and subsidiaries? (n=620)

Vertical markets

We asked all respondents which industry sector their company operates in. The chart below summarizes the responses to this question. Most respondents work in manufacturing, followed by services and IT.

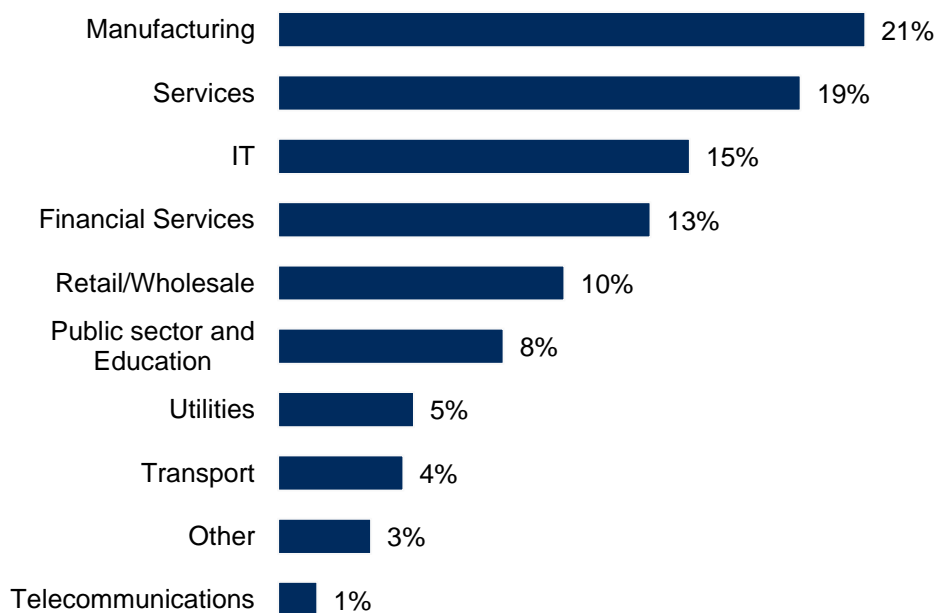


Figure 3: Which of the following best describes your organization's industry sector? (n=782)

Featured products

When grouping and describing the products featured in The Data Management Survey, we did not strictly follow the naming conventions the vendors use. Note that the names we use in this document are our own and are not always the official product names used by the vendors.

One of the key reasons for this is that the products we analyze are not necessarily the latest version of the tool. Vendors often change the product name between versions, making it difficult to have a single official name for several versions of the same product. The point is not to challenge the naming conventions of the vendor, but simply to reduce the complexity of the survey findings for the convenience of the reader. In some cases, we also shorten the names of the products to improve the formatting of the charts.

We asked respondents explicitly about their experiences with products from a predefined list, with the option to nominate other products. Our predefined list can be found at the end of this document. In cases where respondents said they were using an 'other' product, but from the context it was clear that they were actually using one of the listed products, we reclassified their data accordingly.

The following table shows the products included in the detailed analysis. In this, the second edition of The Data Management Survey, a minimum of 20 responses is required for a product to be included in the detailed analysis. The number of responses about 'other' products is not included in the following table.

Table 2: Products included in the sample

Vendor	Product name	Respondents
Amazon	Amazon RedShift	21
AnalyticsCreator	AnalyticsCreator	29
Exasol	Exasol Database	29
HumanIT	InfoZoom & IZDQ	85
Microsoft	Microsoft Azure	26
Microsoft	Microsoft SQL Server	58
Microsoft	Microsoft SQL Server Integration Services	33
Oracle	Oracle Database	32
SAP	SAP BW on HANA	28
SAP	SAP BW/4HANA	28
Snowflake	Snowflake	27
Talend	Talend Data Integration	24

In The Data Management Survey 20, twelve products (or bundles of products) are featured. The products in the sample vary in their market focus and origin.

Peer groups

The Data Management Survey 20 features a wide range of data management tools. Therefore, we use peer groups to help readers identify and compare competing products. The peer groups are defined using the criteria outlined in Table 3.

The peer groups are designed to help readers compare similar tools in terms of the scenarios the products are used in. See Table 4 for an overview of the products in each peer group. These functional peer groups are mainly data-driven and based on how customers say they use the product.

Table 3: Peer group descriptions

Peer group	Description
Data warehouse technologies	Data warehouse technologies prepare, store and provide data for data warehousing purposes.
Data warehousing automation products	Data warehousing automation products cover data-driven or requirements-driven data warehouse design and implementation. They mainly focus on the simplification and automation of data integration and data modeling tasks.
ETL products	ETL products (including ELT) connect, extract, transform and load data from various source systems to a target system for data warehousing purposes.
Global vendors	Global vendors have a sales and marketing reach through subsidiaries and/or partners which gives them a truly global presence. They are present worldwide and their products are used all around the world.
Data management products	Data management products are tools that help to connect, transport, transform, prepare and enrich, monitor and protect data.
Analytical database products	Analytical database products prepare, store and provide data for analytical purposes.

Table 4: Products by peer group matrix

	Data warehouse technologies	Data warehousing automation products	ETL products	Global vendors	Data management products	Analytical database products
Amazon Redshift	x			x		
AnalyticsCreator		x			x	
Exasol Database	x					x
InfoZoom & IZDQ					x	
Microsoft Azure	x			x	x	x
Microsoft SQL Server	x			x		x
Microsoft SSIS		x	x	x	x	
Oracle Database	x	x		x		x
SAP BW on HANA	x	x	x	x	x	
SAP BW/4HANA	x	x	x	x		
Snowflake	x			x		x
Talend Data Integration		x	x	x	x	

Overview of the key calculations in The Data Management Survey 20

Means and medians

This survey makes frequent references to different forms of averages: means and medians. Just in case your statistical knowledge is a little rusty, here's a quick reminder of the definition of the terms:

The mean is the usual arithmetic average. Its value is affected by every value in the sample, so a single large outlier can materially affect the mean, particularly with small samples.

The median is the value in the middle of the sample; that is, half of the sample is larger than the median, and the other half is smaller. It could be regarded as the 'typical value', and is affected by the number, but not the value, of outliers. One or two large or small outliers therefore do not affect the median.

Understanding multiple response questions

Several questions in The Data Management Survey 20 allow the user to make multiple responses. For example, we asked users what problems (if any) they encountered in their projects. Because many users had more than one problem, the number of responses is larger than the number of respondents.

This means that there are two ways to calculate the percentage of a given response: based on the total number of responses or based on the total number of respondents. We present The Data Management Survey results based on the number of respondents.

Calculating percentages based on the number of respondents tells us how likely a given respondent is to have the problem but results in percentages higher than 100 percent when all the problems are added together (e.g., 47 percent of all respondents reported that they have no significant problems). Conversely, calculating percentages based on the total number of responses would result in a total of 100 percent.

Survey data collection

The survey was conducted by BARC, with data captured from January to May 2020. All data was captured online from a total of 817 respondents.

Respondents were solicited individually via BARC's own research panel and from dozens of vendor and independent lists, as well as websites from many different countries, with emailed invitations being sent to the lists in a staggered fashion.

At our request, most of the vendors notified their customers about The Data Management Survey using either their regular newsletters or websites. We also asked some bloggers to promote it. Each list and website had a different survey URL, though in all cases, the same questionnaire (in English or German) was used.

Understanding the KPIs

The goal of this section is to help the reader spot winners and losers in The Data Management Survey 20 using well-designed dashboards packed with concise information. The survey includes a set of 12 normalized KPIs for each of the 12 products.

We have calculated a set of KPIs for each of the six peer groups. The values are normalized on the whole sample. Peer groups are used to enable fair and useful comparisons of products that are likely to compete.

The KPIs all follow these simple rules:

- Only measures that have a clear good/bad trend are used as the basis for KPIs.
- KPIs may be based on one or more measures from The Data Management Survey.
- Only products with samples of at least 15-30 (depending on the KPI) for each of the questions that feed into the KPI are included.
- For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best). A linear min-max transformation is applied, which preserves the order of, and the relative distance between, products' scores.

KPIs are only calculated if the samples have at least 15-30 data points (this varies from KPI to KPI) and if the KPI in question is applicable to a product. Therefore, some products do not have a full set of KPIs. It is important to exclude KPIs based on small (and therefore not representative) samples to ensure that the graph scales are not distorted by outlier KPIs. In such cases, the product is still shown in the tables, but with a blank KPI value and no bar in the bullet graph or bar chart.

Table 5: The KPIs

KPIs
Product satisfaction
Recommendation
Developer efficiency
Time to market
Performance
Price-to-value
Innovation power
Platform reliability
Support quality
Openness
Breadth of supported use cases
Functionality

Reading the KPI charts

We provide two different types of dashboards for viewing the KPIs. The first type is the Product Dashboard. A Product Dashboard displays all the KPIs for a single product. The second type is the KPI Dashboard, which displays the KPI values for each product in a peer group using simple bar charts. The products are sorted by value in descending order.

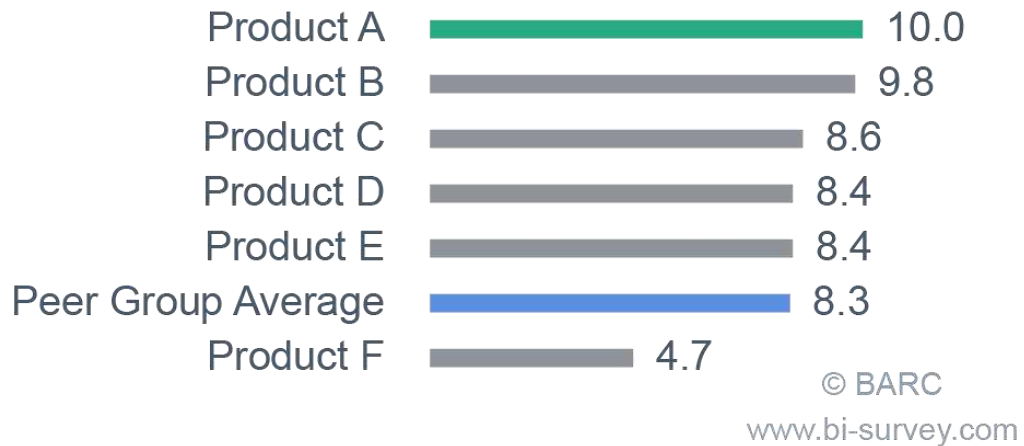


Figure 4: KPI dashboard used for displaying KPIs

In the KPI Dashboards (see Figure 4), the peer group average is indicated by a blue bar.

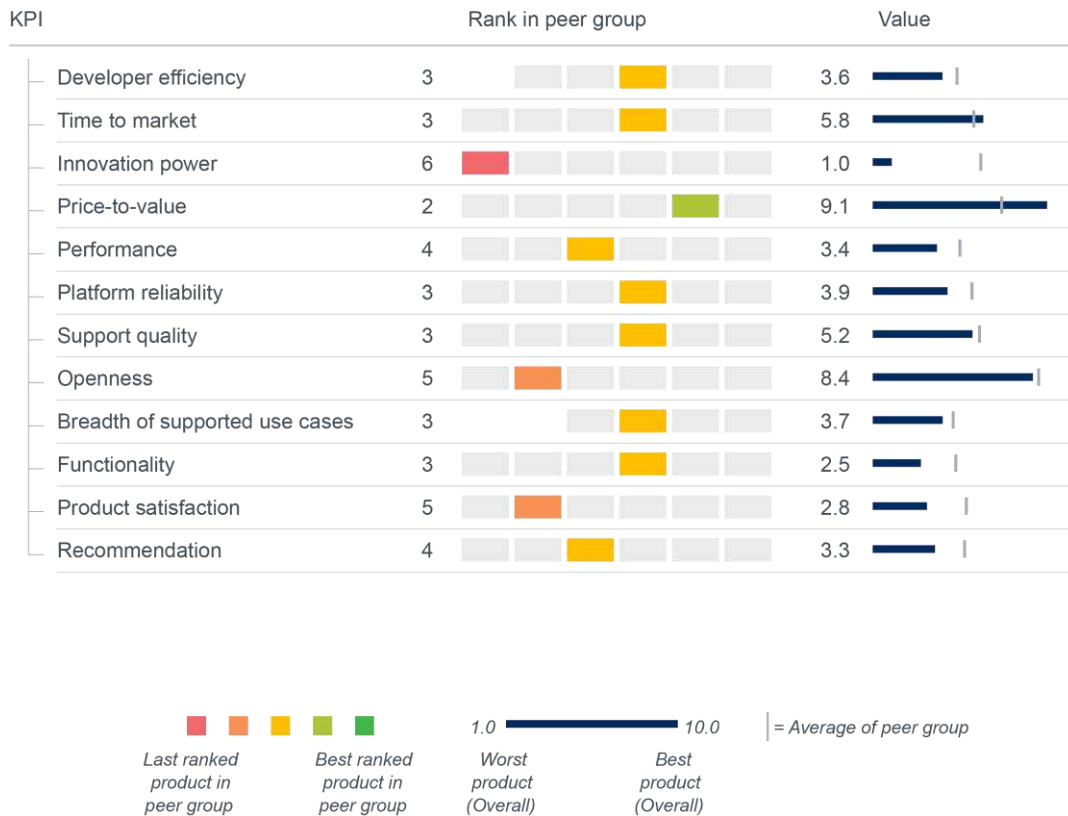


Figure 5: Product dashboard used for displaying all KPIs for a product in a specific peer group

In Figure 5, the first column shows the KPI name and the second column indicates the product rank in the specific peer group. As previously mentioned, not every product is represented by the complete set of KPIs. The gray squares show how many products in the peer group have an adequate sample to be classified in each KPI. The next column shows the KPI values for the product in question in each KPI and the blue bars in the final column represent those KPI values against the peer group average, which is indicated by a vertical gray line.

The KPIs (overview)

The following section provides a list of the KPIs calculated for The Data Management Survey 20, as well as a description of the calculations.

KPIs are only calculated if the samples have at least 15-30 data points (depending on the KPI), so some of the products do not have a full set of KPIs. It is important to exclude KPIs based on small (and therefore unreliable) samples to ensure that the graph scales are not distorted by outlier KPIs based on small data samples. In such cases, the product is still shown in the tables but with a blank KPI value in the bar chart.

Different readers will have their own views on which of these KPIs are important to them. For example, some people will regard 'Price-to-value' as vital, while others may consider 'Recommendation' or 'Performance' to be more important.

The KPIs below provide a good selection from which readers can choose those that best fit their own organization's requirements.

Developer efficiency

What we measure

This KPI is based on how users rate their tool in terms of developer productivity (e.g., for testing, deployment, reusability, ease of coding and use of metadata).

Why it is important

80 percent of development effort is spent on preparing data before users can use it. The data preparation process is complex and time-consuming. In order to make this process as efficient as possible, experts should be able to concentrate on the task at hand. Therefore, the extent to which a tool can support experts with development and testing functions or relieve them of administrative tasks is of vital importance.

How we measure

We ask participants to rate the developer productivity (IT cost, IT backlog reduction, reusability, focus on development) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Time to market

What we measure

This KPI is based on how users rate their tool in terms of time-to-market (implementation speed of new requirements or changes).

Why it is important

This gives an indication of the extent to which the tool supports the ability to react quickly and adequately to changes or to create new applications as efficiently and quickly as possible.

How we measure

We ask participants to rate the time to market of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Performance

What we measure

This KPI is based on how users rate their tool in terms of performance (query performance, load performance, processing performance).

Why it is important

Performance satisfaction is crucial when loading or querying (large) datasets or when calculating data. In some ways, complaints about performance are more important than performance measured in seconds, because acceptable delays can vary depending upon how the system is used.

How we measure

We ask participants to rate the performance (query performance, load performance, processing performance) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Price-to-value

What we measure

This KPI is based on how users rate their tool in terms of its price-to-value ratio.

Why it is important

Price-to-value is an important metric in today's cost-conscious age. As many a data management tool user has found, the costs of buying and supporting software quickly add up, especially when attempting to cost-justify adding new users. As more capabilities are pushed out to the business, this perception of value becomes even more critical.

How we measure

We ask participants to rate the price-to-value ratio of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Recommendation

What we measure

This KPI is based on the proportion of users that say they would recommend the product to others.

Why it is important

No one knows more about how a product performs in the real world than the customers already using it. All too often, they find that products don't live up to expectations, or that the vendor does not support the product properly. Therefore, if existing users say they would recommend the product, we regard this as a positive indicator of its value.

How we measure

Users are asked whether they would recommend the product they are most familiar with. This measure is based on the proportion of positive responses and the degree of certainty with which respondents say they would (or would not) recommend the product.

Product satisfaction

What we measure

This KPI is based on the proportion of users that say they are satisfied with their product.

Why it is important

The interaction of several architectural and technical factors, the concept of application use and the fulfillment of set expectations form the foundation of product satisfaction. This KPI provides an indication of whether – and in what quality – the performance promise has been fulfilled and how conveniently the tool can be used. The KPI goes beyond specific functionality and evaluates the product as a whole.

How we measure

Users are asked whether they are satisfied with the product they are most familiar with. This measure is based on the degree of satisfaction reported and the proportion of positive responses.

Innovation power

What we measure

This KPI is based on how users rate their tool in terms of innovative strength.

Why it is important

Efficiency in data management can be significantly improved by using innovative technologies such as AI. The development and user adoption of new, useful features as well as a robust, well thought-out and transparent vendor roadmap are important indicators for companies wanting to leverage the tool in the best and most efficient way in the medium to long term.

How we measure

We ask participants to rate the innovative strength (amount of innovative functionality in the tool, market trend adoption time and rate) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Platform reliability

What we measure

This KPI is based on how users rate their tool in terms of platform reliability.

Why it is important

A tool brings benefits if it works reliably and is always available. Tool failures are not only annoying but they can also lead to time-consuming troubleshooting or even threats to the business. This KPI indicates how robust and stable the tool is in everyday use, and therefore how reliable it is.

How we measure

We ask participants to rate the platform reliability (i.e., stability, functional reliability, monitoring capabilities) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Support quality

What we measure

This KPI is based on how users rate their tool in terms of support quality.

Why it is important

Product support from the vendor is a key determinant of project success. There can be a big difference between the level of support services offered and the quality of the actual support provided. This KPI helps buyers to understand how helpful the software vendor's customer support really is.

How we measure

We ask participants to rate the support quality (i.e., availability, geographic coverage, support channels, effectiveness, efficiency, reaction time) provided for their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Openness

What we measure

This KPI is based on how users rate their tool in terms of openness and integration options.

Why it is important

Openness is one of the most important criteria when selecting software. Tools must be able to be integrated into existing processes and system landscapes. Openness is an indicator of how easily a tool can be integrated (e.g., by supporting standards). This KPI is an indicator of the effort required to integrate the product with other applications and how robust the interfaces are in handling changes in the environment (e.g., to the source system's model or front-end applications).

How we measure

We ask participants to rate the openness (i.e., connectivity to data sources and interfaces for integration with other applications) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Breadth of supported use cases

What we measure

This KPI is based on how users rate their tool in terms of the range of use cases it supports.

Why it is important

The current trend in the data management market is to bring different tools together in a unified, platform-based approach. The goal is to support as many use cases as possible with one platform. The introduction of a platform in a company is usually associated with high costs. This KPI serves as an indicator to estimate whether the platform in question will support the range of use cases a potential buyer requires.

How we measure

We ask participants to rate the breadth of supported use cases of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Functionality

What we measure

This KPI is based on how users rate their tool in terms of functionality.

Why it is important

In order to perform various data management tasks, the requisite functionality must be available to users. This KPI is an indicator of the efficiency and effort with which tasks can be implemented, based on the scope and completeness of the functionality offered with the product.

How we measure

We ask participants to rate the functionality (i.e., capabilities and functional scope) of their chosen product. To obtain the final KPI, we calculate an average weighted score per product.

Product picklist used in The Data Management Survey 20

2150 Datavault Builder

Ab Initio Co>Operating System

Action DataConnect

Amazon DynamoDB

Amazon Elastic MapReduce (EMR)

Amazon Redshift

Amazon Relational Database Service (RDS)

Attunity Compose

Data Virtuality Platform

Denodo Platform

Google BigQuery

Google BigTable

Google Cloud Dataflow

Google Cloud Spanner

Hortonworks Data Platform

IBM Data Refinery

IBM Db2

IBM Db2 Warehouse on Cloud

IBM Cloud Private for Data

IBM InfoSphere Federation Server

IBM InfoSphere Information Server

IBM Integrated Analytics System (PureData System for Operational Analytics)

Informatica Intelligent Cloud Service

Information Builders iWay DataMigrator

Microsoft Analytics Platform System

Microsoft Azure Analysis Services

Microsoft Azure Cosmos DB

Microsoft Azure Data Factory

Microsoft Azure Data Lake Store

Microsoft Azure HDInsight

Microsoft Azure SQL data warehouse

Microsoft Azure SQL DB

Microsoft SQL Server

Microsoft SQL Server Integration Services

Oracle Autonomous Data Warehouse Cloud

Oracle Data Integrator

Oracle Database

Oracle Exadata

Oracle Exalytics

Oracle Warehouse Builder

Hitachi Pentaho Data Integration (Community und Enterprise Edition)

SAP BW

SAP BW on HANA

SAP BW/4HANA

SAP Data Hub

SAP Data Services

SAP HANA

SAP HANA Smart Data Integration

SAS Data Integration Server

SAS Viya

Snowflake

Talend Data Fabric

Teradata Aster Analytics

Teradata Database

TimeXtender Discovery Hub

Trivadis biGENiUS

Wherescape RED

IBM InfoSphere Data Architect

Oracle SQL Developer Data Modeler

SAP PowerDesigner

Erwin Data Modeler

Pitney Bowes Spectrum

Ataccama ONE

Information Builders Omni-Gen

AnalyticsCreator

IBM Watson Studio

IBM Watson Knowledge Catalog

Ab Initio Metadata Hub

Action Vector

Adaptive Metadata Manager

Adverity Datatap

Alation Data Catalog

Alex Solutions Alex

Altair Knowledge Hub

Alteryx Semanta

Alteryx Platform

Amazon Glue

ASG Enterprise Data Intelligence Solution (Rochade und Becubic)

Attivio Platform

Big Eval

Cloudera Enterprise (incl. Navigator)

Collibra Data Governance Center

Collibra Data Catalog

Conweaver Linksphere

Data Clarity

Datameer

Altair Knowledge Works

Dell Boomi AtomSphere Platform

Domo

eccenca Corporate Memory

emagixx enfoxx

Erwin Data Intelligence Suite

Exasol Database

Exasol ExaCloud

Exorbyte Matchmaker Double & Matchmaker Post

Google Data Catalog

Vertica Analytics Platform

InfoZoom & IZDQ

Infogix Data3Sixty

Informatica PowerCenter

Informatica Intelligent Data Lake

Informatica Enterprise Data Catalog

Informatica AXON

Informatica Data Quality

Informatica MDM

Information Builders Big Data Integrator

Information Builders iWay Data Quality Server

Information Builders iWay Service Manager

ISO Professional Services Marlin

ISO Professional Services Scarus intelliDataQualitySuite

Jitterbit Harmony

Magnitude Master Data Management

MariaDB MammothDB

MariaDB Server

MarkLogic

Microsoft Azure Data Catalog

MioSoft Miovantage

MongoDB

MuleSoft

Neo4J Graph Platform (incl. Neo4j Database)

Omikron Data Quality Server

Oracle Enterprise Metadata Management

Paxata Adaptive Information Platform

Qlik Data Catalyst (former Podium Data)

Qubole Data Platform

Record Evolution Repods

Riversand

Rosslyn Analytics Rapid Platform

SAP Information Steward

Semarchy xDM

Silwood Technology Safyr

SnapLogic

Software AG Apama Streaming Analytics

Software AG webMethods OneData

Sparx Systems Enterprise Architect

Stibo Systems STEP Uniform MDM Platform

Synabi D-QUANTUM

Syncsort Big Iron

Syncsort Connect ETL

Syncsort Connect for Big Data

Syncsort Trillium Cloud

Talend Big Data Platform

Talend Data Catalog

Talend Data Integration

Talend Real-Time Big Data Platform

Teradata Appliance for Hadoop

Teradata Integrated Big Data Platform

Teradata Kylo

TigerGraph DB

Trifacta Wrangler

Unifi Data Platform

Uniserv Customer Data Hub

Waterline Data Smart Data Catalog

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