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# SAMPLE: Ad Serving

## Buyer's Guide

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# SAMPLE: Ad Serving



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# 1. Introduction

Econsultancy's buyer's guides are the ideal starting place for anybody researching new suppliers in digital market sectors. They contain **in-depth vendor profiles**; to help you quickly evaluate suppliers and service providers, as well as **market analysis** to help you put things into perspective. Vendors are selected for the report based on a combination of factors, *not limited to but including*:

- **Analysis of capabilities** (services / products)
- **Clients**
- **Experience** (qualifications / trade bodies / case studies)
- **Expertise** (by sector / topic)
- **UK and/or USA status** (occasional exceptions are made)
- **Ability to take on and fulfil new projects**
- **Recommendations from trusted sources** (or anecdotal evidence to the contrary)
- **Google visibility**
- **Business model** (a high proportion of turnover should be related to these services)
- **Company website**

Econsultancy does not explicitly recommend any of the suppliers featured in these guides, principally because it is impossible for us to work with all of them to form a first-hand opinion. But we do believe - based on an intensive and careful selection process - that the chosen vendors represent quality.

Buyer's Guides are updated on an annual basis, so the information contained within is recent and thus valid. Send any questions or comments to Econsultancy's Research Director Linus Gregoriadis ([linus@econsultancy.com](mailto:linus@econsultancy.com)).

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## 1.1. About Econsultancy

Econsultancy is a [digital publishing and training group](#) that is used by more than 200,000 internet professionals every month.

The company publishes [practical and timesaving research](#) to help marketers make better decisions about the digital environment, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy has offices in New York and London, and hosts more than [100 events](#) every year in the US and UK. Many of the world's most famous brands use Econsultancy to [educate and train](#) their staff.

Some of Econsultancy's members include: Google, Yahoo, Dell, BBC, BT, Shell, Vodafone, Virgin Atlantic, Barclays, Deloitte, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works.

Call us to find out more on +44 (0)20 7269 1450 (London) or +1 212 699 3626 (New York). You can also [contact us online](#).

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<http://econsultancy.com/uk/reports/dsps-buyers-guide>

#### Online Advertising Survey

<http://econsultancy.com/reports/online-advertising-survey>

#### Online Advertising Networks Buyer's Guide

<http://econsultancy.com/reports/online-advertising-networks-buyers-guide>

#### Marketing Budgets 2011

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#### Display Advertising – Digital Marketing Template Files

<http://econsultancy.com/reports/display-advertising-digital-marketing-template-files>



## 2. Executive Summary

The focus of this report is **ad serving technology**, including an analysis of online advertising market trends and detailed profiles of leading ad servers. The report is particularly relevant for publishers, agencies and advertisers who are looking for technology to manage online advertising.

While evidence from all directions suggests significant growth of the online advertising market as a whole, ad servers are increasingly challenged by emerging players such as demand-side platforms. The wide range of platforms promotes choice among advertisers, and means that ad serving vendors need to ensure that they are differentiating themselves through their focus and quality of technology.

### **Trends covered in this guide include:**

- The role of the ad server is changing, forcing providers to reconsider their approach.
- The significant growth of social media advertising puts Facebook and Twitter on a collision course with Google, Yahoo and other major players.
- Despite the hype surrounding in-game advertising, it is not expected to represent a major revenue driver.
- First-party ad serving providers are benefiting from increased demand for actionable insights and are expected to drive growth in the ad serving sector.
- New ad formats and advanced targeting techniques aim to increase engagement, relevance and acceptance.
- Mobile and video advertising growth is accelerating, but standardisation is still holding back these channels.

The *Supplier Marketplace and Profiles* section (*Section 9*) contains profiles of the following ad serving providers: 24/7 Real Media, Adap.tv, ADTECH, aiMatch, Atlas, DoubleClick, Facilitate Digital, MediaMind, Mediaplex, OpenX, RealVu, TradeDoubler, TruEffect, Videoplaza, ZEDO.

The content of this report is relevant globally. Ideally, it should be read in conjunction with our [Online Media Report](#) and [Demand-Side Platforms Buyer's Guide](#), which also examine the online advertising ecosystem in detail, as well as looking at emerging platforms and their impact on media buying.

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## 3. The Market

### 3.1. Market definition and scope of report

The online ad serving solutions market comprises those suppliers that offer technologies and services that facilitate the placement of ads on websites. Ad servers represent digital ad management platforms that enable advertisers (buy-side) and publishers (sell-side) to manage, deliver, track and report on their digital advertising campaigns.

This report includes both those vendors that are predominantly focused on 'sell-side' ad serving solutions (i.e. for publishers) as well those with a proposition aimed at the 'buy-side' (i.e. advertisers and agencies). The market can be broadly divided up into these two categories although there are suppliers who cater for both camps.

The **Matrices** in *Section 8* are separated along buy-side (advertiser) and sell-side (publisher) lines, to provide a snapshot of each vendor's capabilities in each area.

The **Market Positioning charts** (explained in *Section 7* and included after each vendor profile in *Section 9*) can also help the buyer to understand the focus and capabilities of each supplier. The charts also highlight whether the supplier is a specialist in core ad serving technology with a relatively narrow proposition focused on this area, or a company which offers ad serving solutions as part of a wider portfolio of services.

#### 3.1.1. Core capabilities

The technology providers featured in this guide have been selected on the basis of criteria which are explained in the introduction and apply to all our Buyer's Guides.

At a fundamental level, all the ad serving technologies profiled in this report offer some key areas of functionality, enabling clients to traffic and serve ads as well as offering a varying degree of reporting to their clients. Additionally, the publisher-oriented technologies all offer management of inventory as a core function.

Other key services...

#### 3.1.2. Who are the customers?

The buyers of ad serving technology are generally either publishers, client-side marketers or their agency representatives.

- **Publishers** can range from...

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### 3.1.3. Who is this report aimed at?

This guide will be of interest both to those engaged in existing relationships with suppliers and also to those who are looking to buy ad serving technology and services for the first time. It is intended that the report is useful for companies of all sizes, from small, 'one-man-band' companies to multinational organisations.

As well as buyers, the guide should be of interest to other parties, including the technology suppliers themselves, their shareholders, analysts and digital marketers who want a deeper understanding of this sector.

Through reading this report, buyers and other interested parties should be able to build a clearer picture of what ad serving is about, the key issues and the most important players.

### 3.1.4. Note on market valuation

We have not made a valuation specifically for the ad serving market because we do not feel that we have enough information to give a credible estimate. As discussed below, emerging players like demand-side platforms are putting pressure on ad servers and forcing prices down which means that the proportion of budgets allocated for ad serving solutions have fallen considerably.

There is some information about overall display advertising spend in the next section.

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## 3.2. The online display advertising market – value and growth

An assessment of the ad serving sector can only be done in the context of the overall online display advertising market, so this section aims to provide an overview of the market's growth and recent trends.

Over the last few years, interest in display advertising has intensified and the market has become extremely fragmented, with a wide range of players entering the arena to reap the benefits of higher digital media consumption.

According to figures from the Internet Advertising Bureau (IAB), US online advertising revenues reached \$6.4bn in the third quarter of 2010, an increase of 17% from the same period in 2009. Latest numbers from WPP's Kantar Media show that display advertising had the second largest growth rate among media sectors (after television media), up 7.7% compared to last year.

In the UK...

### What the experts say

“Agencies and major advertisers are embracing the power of automated buying through real-time bidding technology. This is creating a whole new class of revenue predominantly focused on audience buying. As a result, publishers are rapidly understanding that this new revenue channel is going to be an important part of their revenue portfolios and are looking for ways to harness it optimally.”

Sample quote

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## 3.3. Market trends

### 3.3.1. The role of the ad server is changing

While evidence from all directions shows significant growth of the online advertising market as a whole, ad serving providers increasingly feel more pressure as prices continue to fall considerably in a highly commoditised and crowded market.

### 3.3.2. Facebook and Twitter challenge Google's dominant position in display advertising

More marketers have been shifting their advertising dollars from traditional channels such as print, radio and TV to social platforms. For example, Procter & Gamble, the world's biggest advertiser, announced in December 2010 that it would shift the majority of its advertising budget from daytime TV to social media.

### 3.3.3. In-game advertising: is it really paying off?

The in-game advertising frenzy began in 2007, with major players pouring resources in this area – Microsoft purchased Massive for over \$200m in 2006 and Google acquired AdScape Media for \$23m in 2007. Barack Obama was the first presidential candidate to buy ad space in games, having spent more than \$40,000 for ads running in games such as Burnout Paradise for the Xbox 360.

### 3.3.4. First-party ad serving in a data-driven ecosystem

Over the last few months, data has become a focal point of the display advertising ecosystem, with data management platforms (DMPs) increasingly seen as the new engines powering the growth in display.

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### 3.3.5. New ad formats and advanced targeting techniques aim to increase engagement, relevance and acceptance

Over the last few months, banner advertising has undergone a profound transformation in order to better appeal to consumers and advertisers. This change is not only in terms of how ad units are bought and served, but also the extent of rich-media functionality that they provide.

### 3.3.6. Advertisers demand more transparency and brand safety

Advertisers want to understand the role that each digital channel plays in the conversion funnel, increasingly adopting a more holistic approach to how media are bought and managed and demanding more advanced attribution models. However, they continue to be concerned about the lack of transparency and inappropriate placements of ad units.

### 3.3.7. Mobile and video advertising growth is accelerating

Traditional banner advertising is expected to lose a significant share of advertising budgets to emerging ad formats and media such as mobile and video. Online video is expected to be the fastest growing online advertising segment according to MagnaGlobal. It is predicted that the sector will grow by 19.6% each year on average through 2016, rising from \$4.7bn in 2011 to \$11.4bn in 2016 [*Figure 3*].

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## 3.4. Return on investment

Effective use of the latest generation of ad serving solutions and services can offer advertisers and publishers a range of benefits outlined below:

### Drive revenue

- Publishers can maximise the value of their high-quality inventory space and increase the overall CPM for their sites.
- Advertisers can benefit from greater returns from their campaigns.
- Technology can help marketers improve understanding of relative value of constituent components of online marketing. Integrated tracking across multiple channels (e.g. display, PPC, affiliate, email) can enable ROI comparison and ensure that investment is going into the most profitable areas.

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## 4. Strengths, Weaknesses, Opportunities and Threats (SWOT)

This section contains a 'SWOT' analysis of the market for both ad serving vendors and the online display advertising sector at a general level. It also serves as a summary of some of the points made above.

### 4.1. Strengths

- **Strong growth in display advertising** means that ad serving solutions will continue to attract a share of advertisers' budgets.
- **Measurability and accountability**
  - As market players focus on more accurate and transparent measurement and reporting tools, display advertising continues to be an attractive option for both advertisers and publishers alike. Marketers are adopting a more integrated and sophisticated approach to how media is purchased and managed.

#### What the experts say

"A key strength is more people are coming online or consuming content digitally."

Sample quote

### 4.2. Weaknesses

- **Only the fittest will survive**
  - Increased competition and consolidation put pressure on smaller, less established players. Only the most effective ad servers that provide unmatched up-time and reliability and have proven track records will survive.

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# 5. Costs and Pricing Models

## 5.1. Introduction

The cost of ad serving solutions depends on a number of key criteria including the following:

- Whether you are a publisher or an agency/advertiser.
- The volume of ads being served.
- Whether you want licensed software or a hosted/ASP solution.
- The extent of services and solutions you are looking for, over and above core ad serving technology.

The price paid to your supplier...

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# 6. Finding the Right Ad Serving Solution - Tips and Pitfalls

## 6.1. Introduction

In order to identify the best ad serving solution that suits your company's objectives and needs, you need to decide on the extent to which you want to outsource your ad serving activity. Do you want a vendor to provide basic technology or do you need a supplier to remove the burden of a full range of tasks such as trafficking, advanced reporting, sales planning and billing?

You need to define your requirements and evaluate your internal resources – in-house technical capabilities, budget and staff levels. You also need to ensure that the technology and solutions you are buying address an identified need or issue. Rather than being wowed by a particular piece of software, you should ensure that the solution you purchase will help you meet your business goals in as tangible a way as possible.

If you are a **publisher**, it is important to have a good initial understanding of the revenue opportunities offered by your website in terms of your content, traffic and user base.

The detailed company profiles and market positioning charts included in this guide will help you find the right fit. This section contains some key questions and considerations that you need to keep in mind – and some pitfalls to avoid.

Sample only, please download the full report from:

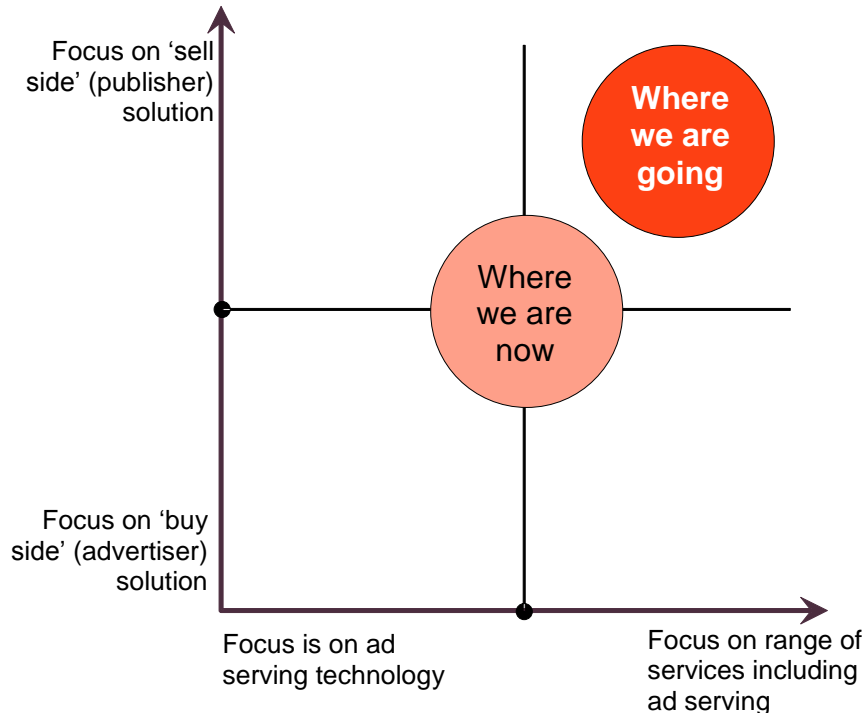


<http://econsultancy.com/reports/ad-serving-buyers-guide>



# 7. Market Positioning Charts

## 7.1. Explanation for Chart 1: Business focus



The **vertical** axis charts to what degree the ad serving technology provider caters for publishers (the 'sell side') versus focusing on solutions for advertisers/media agencies.

The **horizontal** axis charts the extent to which the supplier is focused purely on ad serving as opposed to offering a portfolio of services and solutions which includes ad serving technology.

For example, an ad server positioned in the bottom right quadrant will offer a range of service which includes ad serving for advertisers/media agencies.

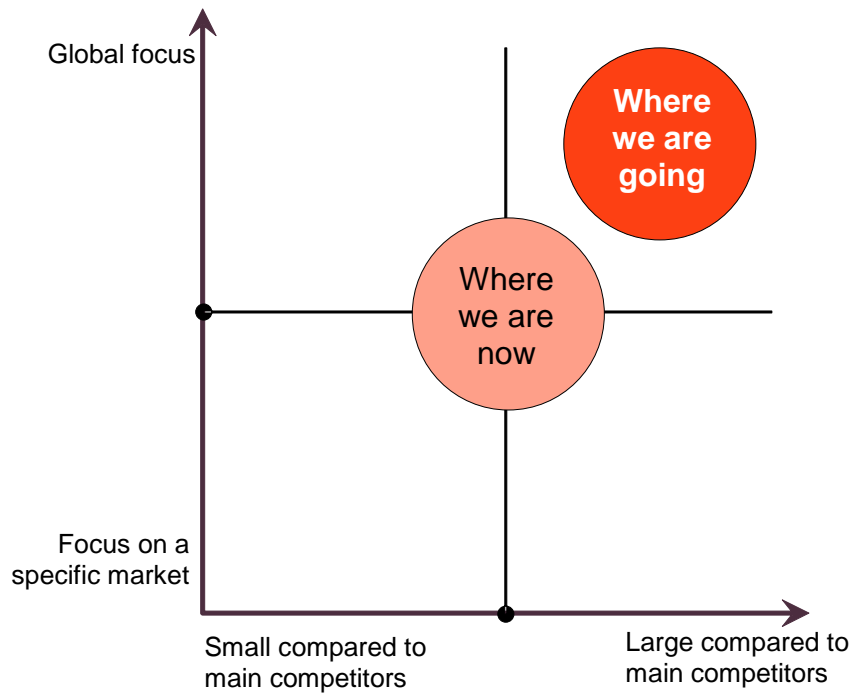
Sample only, please download the full report from:



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## 7.2. Explanation for Chart 2: Geographical focus



The **vertical** axis charts the extent to which the vendor is geared towards a specific market, as opposed to being a more global player.

The **horizontal** axis charts the size of the company compared to its competitors.

For example, an ad server positioned in the bottom right quadrant will focus on a specific market and will be large compared to its competitors.

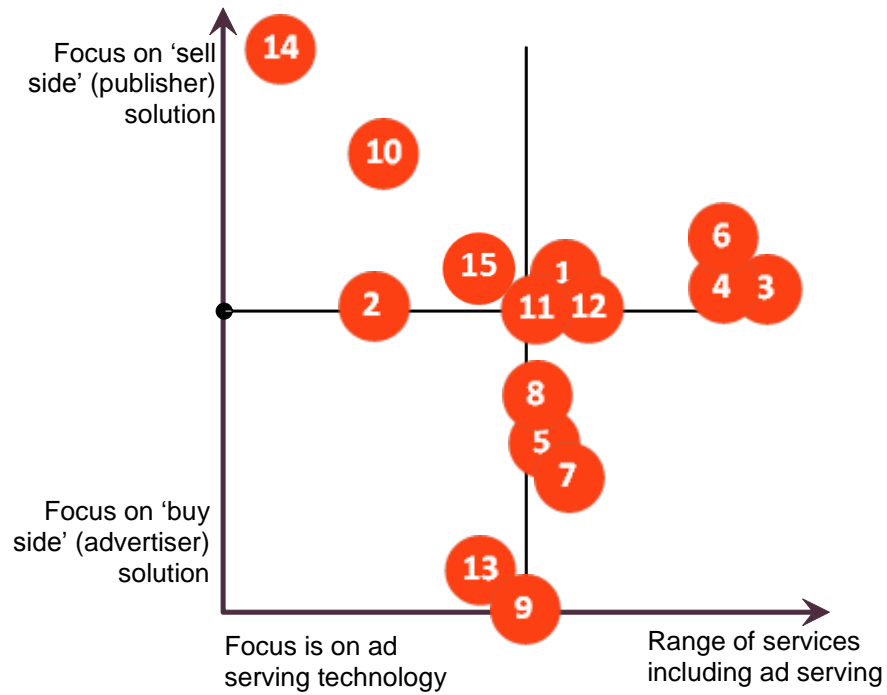
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## 7.3. Market positioning overview: Business focus



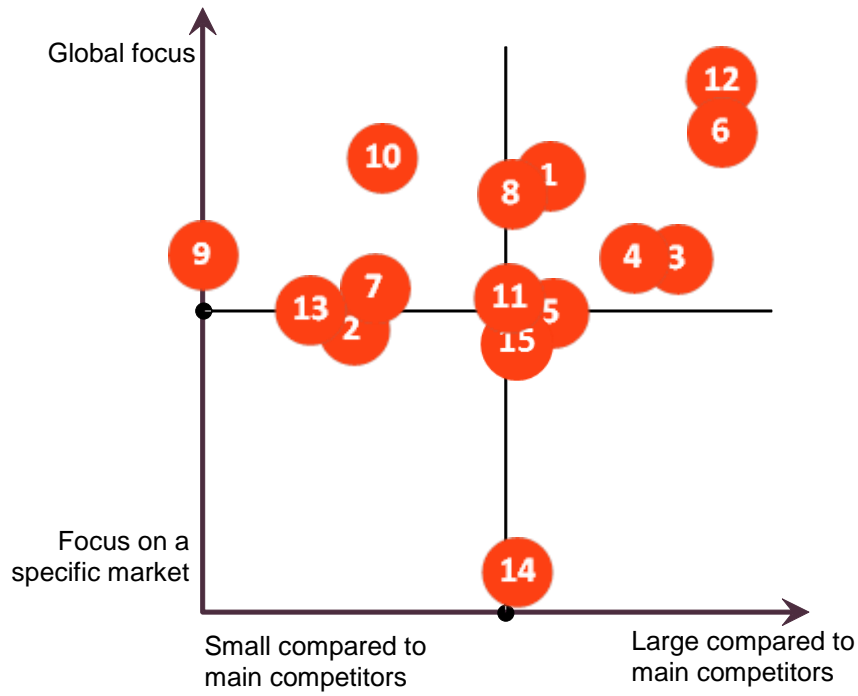
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## 7.5. Market positioning overview: Geographical focus



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# 8. Supplier Matrix

## 8.1. Publisher solutions matrix

An at-a-glance overview of who's doing what...

Supplier matrix: a fast guide to services	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample
	<b>Delivery Model</b>									
Hosted/ASP	●	●	●	●	●	●	●		●	●
Licence	●			●	●		●	●		
<b>Core Services</b>										
Media Planning		●	●		●			●	●	
Proposal Generation	●		●	●	●		●	●	●	
Inventory Management	●	●	●	●	●	●	●	●	●	●
Ad Trafficking	●	●	●	●	●	●	●	●	●	●
Ad Delivery	●	●	●	●	●	●	●	●	●	●
Reporting	●	●	●	●	●	●	●	●	●	●
Invoicing	●	●		●			●	●	●	
Integration with Affiliate Networks	●	●	●	●				●	●	●
Automatic Inventory Optimisation	●	●	●	●	●	●	●	●	●	●
<b>Other Services</b>										
Real-time management	●	●	●	●	●	●	●	●	●	●
Search engine marketing	●				●			●		
Email marketing						●		●		
Training	●	●	●	●	●	●	●	●	●	●
Integration	●	●	●	●	●	●	●	●	●	●
<b>Targeting Features</b>										
Re-targeting	●	●	●	●	●	●	●		●	●
Behavioural targeting	●	●	●	●	●	●			●	●
Geo-targeting	●	●	●	●	●	●	●		●	●
Contextual targeting	●		●	●	●		●	●	●	●
Campaign prioritisation	●	●	●	●	●	●	●		●	●
Keyword targeting	●		●	●	●	●	●		●	●

Supplier matrix: a fast guide to services	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample
<b>Other Platforms</b>										
Email	●		●	●		●		●		
Affiliate marketing				●	●			●		
Mobile	●	●	●	●	●	●		●	●	●
iTV	●	●	●	●					●	
In-game advertising	●	●	●	●	●	●		●	●	●
<b>Reporting</b>										
Ability to integrate tracking and reporting across different channels	●	●	●	●	●	●		●	●	●
Shared tagging system	●		●		●	●	●	●	●	●
Reporting on individual channel effectiveness	●	●	●	●	●	●	●	●	●	●
Ability to harmonise with offline reporting	●	●		●		●	●	●	●	●
Real-time reporting of impressions, clicks and conversions	●	●	●	●	●	●	●	●	●	●
Frequency reporting	●	●	●	●	●	●	●	●	●	●
Overlap reporting	●	●		●	●				●	
Post-click tracking	●	●	●	●	●	●	●	●	●	●
Customisation of reporting	●	●	●	●	●	●	●	●	●	●

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## 8.2. Agency/Advertiser solutions matrix

An at-a-glance overview of who's doing what...

Supplier matrix: a fast guide to services	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample
<b>Delivery Model</b>											
Hosted/ASP	●	●	●	●	●	●	●	●	●		●
Licence				●					●	●	
<b>Core Services</b>											
Media Planning	●	●	●	●	●	●				●	●
Ad Creation		●		●	●	●	●		●	●	
Ad Trafficking	●	●		●	●	●	●	●	●	●	●
Ad Delivery	●	●	●	●	●	●	●	●	●	●	●
Reporting	●	●	●	●	●	●	●	●	●	●	●
Integration with Affiliate Networks	●	●	●	●	●	●	●			●	
<b>Other Services</b>											
Real-time management	●	●	●	●	●	●	●	●	●	●	●
Automatic inventory optimisation	●	●	●	●	●	●	●	●	●	●	●
Search engine marketing			●	●	●	●				●	
Email marketing			●		●	●	●			●	
Training	●	●	●	●	●	●	●	●	●	●	●
Integration	●	●	●	●	●	●	●	●	●	●	●
<b>Targeting Features</b>											
Re-targeting	●	●	●	●	●	●	●	●	●		●
Behavioural targeting	●	●	●	●	●	●	●	●			●
Geo-targeting	●	●	●	●	●	●	●	●	●		●
Contextual targeting		●		●		●	●		●	●	
Campaign prioritisation	●	●		●	●		●	●	●	●	
Keyword targeting		●		●		●	●	●	●		

Sample only, please download the full report from:



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Supplier matrix: a fast guide to services	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample	Sample
	<b>Other Platforms</b>										
Email		●			●	●	●	●		●	●
Affiliate marketing			●	●	●	●	●			●	●
Mobile	●	●	●	●	●	●	●	●		●	●
iTV	●	●		●							
In-game advertising	●	●		●	●	●		●		●	●
<b>Reporting</b>											
Ability to integrate tracking and reporting across different channels	●	●	●	●	●	●	●	●		●	●
Shared tagging system		●	●	●	●	●	●	●	●	●	●
Reporting on individual channel effectiveness	●	●	●	●	●	●	●	●	●	●	●
Ability to harmonise with offline reporting	●		●	●	●	●	●	●	●	●	●
Real-time reporting of impressions, clicks and conversions	●	●	●	●	●	●	●	●	●	●	●
Frequency reporting	●	●	●	●	●	●	●	●	●	●	●
Overlap reporting	●		●	●	●	●	●	●			●
Post-click tracking	●	●	●	●	●	●	●	●	●	●	●
Customisation of reporting	●	●	●	●	●	●	●	●	●	●	●

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# 9. Supplier Marketplace and Profiles

## 9.1. Sample

### Company name

URL

Company logo

### Company Proposition

<Sample>

#### COMPANY OWNERSHIP

<Sample>

### Brief Company History

<Sample>

#### CLIENTS

<Sample>

### USP – What sets you apart from competitors?

<Sample>

#### OFFICE LOCATIONS

<Sample>

### Case Study and/or Testimonials

<Sample>

#### UK OFFICE ADDRESS

<Sample>

#### CONTACT

<Sample>

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## Type of Ad Serving Solution

### Focus

Publishers

Advertisers/Agencies

## Publisher Solutions – Services, Features and Functionality

### Delivery Model

Hosted/ASP

Licence

### Core Services

Media planning

Proposal generation

Inventory management

Ad trafficking

Ad delivery

Reporting

Invoicing

Integration with affiliate networks

Automatic inventory optimisation

### Other Services

Real-time management

Search engine marketing

Email marketing

Training

Integration

Other (*please specify*)

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<b>Targeting Features</b>	
Re-targeting	
Behavioural targeting <i>(please explain what you mean by this)</i>	
Geo-targeting	
Contextual targeting	
Campaign prioritisation	
Keyword targeting	
Other <i>(please specify)</i>	
<b>Other Platforms</b>	
Email	
Affiliate marketing	
Mobile	
iTV	
In-game advertising	
Other <i>(please specify)</i>	
<b>Video/Rich Media</b>	
Please describe your video /rich media capabilities	
<b>Reporting</b>	
Ability to integrate tracking and reporting across different channels <i>(e.g. PPC and email marketing)</i>	
Shared tagging system	
Reporting on individual channel effectiveness	

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Ability to harmonise with offline reporting	
Real-time reporting of impressions, clicks and conversions	
Frequency reporting	
Overlap reporting	
Post-click tracking	
Customisation of reporting	
Other ( <i>please specify</i> )	

## Agency/Advertiser Solutions – Services, Features and Functionality

### Delivery Model

Hosted/ASP

Licence

### Core Services

Media planning

Ad creation

Ad trafficking

Ad delivery

Reporting

Integration with affiliate networks

### Other Services

Real-time management

Automatic inventory Optimisation

Ad trafficking

Search engine marketing

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Email marketing	
Training	
Integration	
Other ( <i>please specify</i> )	
<b>Targeting Features</b>	
Re-targeting	
Behavioural targeting ( <i>please explain what you mean by this</i> )	
Geo-targeting	
Contextual targeting	
Campaign prioritisation	
Keyword targeting	
Other ( <i>please specify</i> )	
<b>Other Platforms</b>	
Email	
Affiliate marketing	
Mobile	
iTV	
In-game advertising	
Other ( <i>please specify</i> )	
<b>Video/Rich Media</b>	
Please describe your video /rich media capabilities	

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## Reporting

Ability to integrate tracking and reporting across different channels (e.g. PPC and email marketing)

Shared tagging system

Reporting on individual channel effectiveness

Ability to harmonise with offline reporting

Real-time reporting of impressions, clicks and conversions

Frequency reporting

Overlap reporting

Post-click tracking

Customisation of reporting

Other (please specify)

## Support and Pricing

### Customer Support

What level of customer support do you provide?

Please provide details of turnaround times

What additional costs are there for support?

### Data Centres

How many data centres do you have and where are they?

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## Costs and Pricing Methods

Fixed costs (e.g. annual/monthly charges)

Delivery charges (e.g. CPM/CPC)

## Costs and Pricing (additional information)

Please provide any information about any additional costs

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# Sample – Market Positioning Charts

Chart 1: Business focus

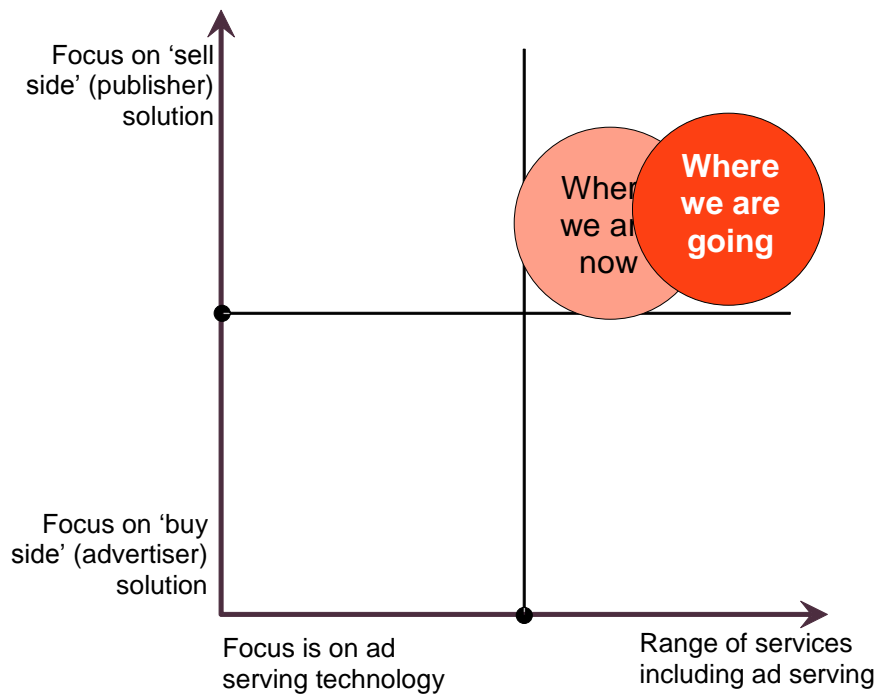


Chart 2: Geographical focus

