

The Case for Microsoft[®] Hosted Exchange

Introduction

The time for debating the usefulness of email in business has passed. Email in many respects has turned into a utility service, like electrical, gas or phone service. And as with utility services, the desired outcome has become a) ensuring that service remains available as close to 100 percent of the time as possible while b) procuring it as inexpensively as possible.

Email, quite simply, is fundamental to how we communicate, whether at work, at home or on the go. What is increasingly open for debate, however, is how businesses deploy email, whether through a self-managed, on-premise arrangement, or via a cloud-based hosting service. Today, hosted systems and on-premise management provide IT and business decision-makers with a clear choice of email system deployments.

The lion's share of organizations currently implement on-premise solutions. It's been the traditional approach: A company needs email so it buys the equipment, sets it up and manages it. But with the increasing adoption of cloud-based services, hosted email messaging has now entered the mainstream of business strategies. The adopters include not only small and medium-size firms, long the main users of email hosting services because of their affordability, but large enterprises as well. The reasons are largely economic, but include other factors, including stronger information security and safety protection.

This white paper compares the costs and benefits of on-premises and hosted, cloud-based Exchange models. It then makes a case for adoption of a hosted Microsoft[®] Exchange solution. This report has been adapted from *The Case for Microsoft Exchange*¹, a white paper authored by Osterman Research. Osterman Research provides market research, industry analysis reports, white papers, webinars, surveys and related services for vendors and customers in the messaging, Web 2.0, social media, mobile, collaboration, information management and other markets. We are grateful to Osterman Research for sharing the results of its findings with us. All data in this report comes from Osterman Research.

What is Hosted Exchange?

In the hosted email services model, a remotely located, third-party provider manages all backend email services for a flat monthly per-user fee. The advantages of this approach include high uptime of the email infrastructure and relatively low cost of service—typically more than a 50 savings compared with on-premises management, as shown in the table below. Further, the use of a hosted email service provider allows an in-house IT staff to be deployed to other projects that may return more value to the organization as a whole.

Microsoft Exchange is the industry's leading business-grade messaging system. Exchange's major features include email, calendaring, contacts and tasks; wireless synchronization of those elements with major mobile devices; browser-based access to information; and support for data storage. Hosted Exchange providers often offer feature-rich hosted enterprise-grade messaging and collaboration, with anti-virus and spam-filtering protection, support for wireless email and a broad range of other features and capabilities geared to enterprise needs.

In 2011, Microsoft Exchange was estimated to have a worldwide installed base of 360 million mailboxes². On-premises deployments accounted for 76 percent of the worldwide installed base of Microsoft Exchange mailboxes in 2011, according to research from the Radicati Group. However, this share is expected to gradually decrease as the popularity of hosted, cloud-based solutions increases.

Monthly, Three-Year Cost of Ownership per Seat for Hosted and On-Premise Microsoft Exchange

DELIVERY MODELS	10 USERS	100 USERS	1,000 USERS
On-premise	\$389.65	\$39.85	\$24.13
Hosted	\$32.46	\$14.45	\$10.85
\$ SAVINGS FROM USING HOSTED EXCHANGE	\$357.19	\$25.40	\$13.28
% SAVINGS FROM USING HOSTED EXCHANGE	92%	64%	55%

WHO PROVIDES HOSTED EXCHANGE?

Hosted Exchange has been offered for several years by a large and growing number of providers. There are about 150 providers of hosted Exchange services worldwide. These vendors vary widely in their capabilities, number of supported users, ancillary services and pricing. As of 2011, there were about 54 million³ users of hosted Exchange worldwide, up from just 1.5 million seats in 2007.

WHO IS THE IDEAL CANDIDATE FOR HOSTED EXCHANGE?

There has been a perception that hosted Exchange suits small businesses, while on-premise Exchange fits mid-sized and large organizations. This is no longer true. Certainly, smaller organizations can realize dramatic per-seat savings with hosted Exchange. Larger organizations, however, can experience significant cost savings as well. Data from a 2010 study by Osterman Research, for example, found that a firm with 1,000 users could realize a 55 percent reduction in monthly costs over a three-year period using a hosted Exchange model versus an on-premises model.

Benefits for IT

With the potential cost savings realized with the hosted Exchange model, it makes sense to research the benefits of making the move. Cost savings alone, however, are not the only consideration. Factors to consider beyond direct costs include opportunity costs, security, deployment speed and scalability, and other benefits, as discussed below.

LOWER COSTS

Many IT decision makers sincerely believe that an internally managed Exchange infrastructure costs less to deploy and operate than to pay for a hosted Exchange arrangement. The facts dispute that perception. Osterman Research's cost models have demonstrated that an on-premise, 100-seat Exchange deployment costs nearly \$40 per seat per month over a three-year timeframe, compared with less than \$15 per seat per month for an equivalent hosted solution.

The hosted solution yielded savings of 64 percent. The same research found a per-seat monthly cost of a little over \$24 for a 1,000-seat, on-premise deployment, versus less than \$11 per seat for the hosted model. In either case, the direct cost savings from hosted Exchange were substantial. It is also important to note that leading providers of hosted Exchange include the licensing costs as part of their service, further reducing the cost of hosted compared to on-premise Exchange.

MORE PREDICTABLE COSTS

A hosted Exchange deployment provides more predictable costs than on-premise deployments. That is because the cost per seat is fixed over the lifetime of the contract with the hosting provider. This cost predictability manifests itself in two important ways:

LOWER RISKS: Unforeseen problems can create additional costs for an on-premise deployment. Natural disasters, power outages, moves to new facilities and other events can add to the cost of managing an on-premise Exchange model.

GREATER SCALABILITY: An organization that continually adds users will, at some point, reach the maximum number of users that its infrastructure will support. It will then need to add servers and other infrastructure to support new users. This can drive up the total cost of ownership for an Exchange environment dramatically.

REDUCED OPPORTUNITY COSTS

Among the important issues that any organization should consider are opportunity costs. Investopedia defines opportunity cost as the cost of an alternative that must be forgone in order to pursue a certain action. In the case of an on-premises Exchange setup, the question should be asked, what are the benefits you could have received by eliminating the expense of capitalizing and maintaining the Exchange infrastructure? In this sense, you can think of it not only as opportunity cost but opportunity lost.

It costs a lot to hire, train and retain IT staff. So it makes financial sense to engage in-house IT staff members in a way that provides maximum benefit to the company, while also giving them a satisfying work experience. This not only benefits IT employees, but it also inspires loyalty and longevity. Using hosted Exchange frees IT staff members from constantly having to monitor the email servers to ensure continuous uptime. Untethered from those obligations, IT staff can then

focus on projects that offer more competitive value to the organization and also result in greater IT job satisfaction. For example, instead of maintaining the email server, an IT staff member could implement new Customer Relationship Management (CRM) capabilities. These new CRM capabilities could convert a higher proportion of prospects into customers. Thus, the same investment in IT staff yields a greater return.

ACCESS TO EXCHANGE EXPERTISE

Exchange is an intuitively easy system for users, but it demands technical expertise for IT staff to set up and manage. This includes advanced knowledge in the several server roles comprising the Exchange platform, as well as numerous technologies integral to the Exchange ecosystem. The cost to develop this expertise can be high and, for smaller organizations, even prohibitive.

In contrast, the use of a hosted Exchange provider can offer access to well-trained technical support staff who are available on a continual basis. The hosted Exchange provider's engineers and technicians can typically resolve problems quickly and with little or no involvement of customers.

The service advantages of hosted Exchange should not be overlooked. Few companies nowadays operate on an 8-to-5, Monday through Friday schedule. It is just as critical to gain access to Exchange expertise at, say, 11 p.m. on a Saturday night, as it is during normal business hours. Around-the-clock service allows users to have their issues resolved quickly without the cost and burden of maintaining in-house staff to manage a help desk.

ROBUST BUSINESS CONTINUITY AND DATA BACKUP

With hosted Exchange, the provider manages the entire backend infrastructure. This minimizes or eliminates service outages and the ensuing loss of email. A hurricane, flood or tornado, for example, can knock out on-premise systems for days or even weeks. Even less catastrophic events like power outages or thunderstorms can bring down messaging capabilities for hours or days. While disasters can hit providers of hosted Exchange services as well, leading providers back up their customers' email, allowing uninterrupted receipt of email until their systems come back online. In the event of damage to an organization's offices, employees can still access their hosted Exchange accounts from anywhere using a Web browser, a mobile device or their Outlook client on their home computer.

RAPID DEPLOYMENT AND SCALING

Hosted Exchange is surprisingly easy to get started, considering its robust capabilities. Deploying hosted Exchange typically requires little more than the modification of an MX record and possibly a change in the configuration of local email clients. Adding new users to an existing hosted Exchange deployment normally requires a few, simple modifications in a Web-based administration tool. This makes it easy to add or eliminate small numbers of users, or even entire business operations—a timesaver when integrating merged or acquired companies into an Exchange infrastructure.

DEPLOYMENT FLEXIBILITY

A hosted Exchange capability allows organizations greater flexibility in how they deploy email to their employees. Take the example of a company with remote locations. It may opt to manage Exchange in-house for its corporate headquarters but provide hosted Exchange to each of its field offices without in-house IT staff. This hybrid solution allows the organization to provide highly available messaging services and a consistent user experience across the entire organization. Yet it can achieve these benefits at much lower cost than if the IT staff was used to manage email for the satellite offices.

Another variant of the hybrid approach offers hosted Exchange for some users and a less feature-rich email offering for other users with less-robust needs. For example, an organization could deploy hosted Exchange for home office workers while deploying an email-only, non-Exchange solution for workers behind the retail counter or on a factory floor.

RELATIVELY PAINLESS MIGRATION TO NEW EXCHANGE VERSIONS

With hosted Exchange, migrating from one version of Exchange to another is just that – a migration, not an upgrade. Organizations that manage their own on-premise implementations do not fare as well. Exchange prohibits in-place upgrades to new versions. That makes the cost of migration very high or even prohibitive for smaller organizations. Using a hosted Exchange provider, on the other hand, minimizes or even eliminates the cost of migration, since some providers will migrate their customers to a new version at no charge. This minimizes the IT pain and time required to migrate, as well as the potential for downtime in the system. It also dramatically reduces the overall cost of Exchange management over the long term.

MINIMIZING THE IMPACT ON THE INTERNAL NETWORK

Hosted Exchange reduces network traffic. That's because much of the network traffic that would normally take place with an on-premise deployment of Exchange is transferred to the hosting provider. For example, a hosted Exchange provider that also offers anti-virus and anti-spam filtering will eliminate 75 percent or more of the email that would normally come into the network as spam, only to be quarantined and eventually discarded by end users. This saves significantly on both bandwidth and storage, costs that are growing exponentially and unpredictably in smaller organizations.

VIGOROUS PHYSICAL SECURITY

Virtually all leading hosted Exchange providers operate highly secure physical facilities. These facilities employ comprehensive physical security controls such as video surveillance, multi-factor employee authentication and other monitoring tools that protect their customers' data. In most cases, the security provided by hosted Exchange providers exceeds the security that their customers could afford to deploy.

In addition to the range of physical controls, leading hosted Exchange providers adhere to well-established, internationally recognized standards, such as the Statement on Auditing Standards (SAS) 70 and the Payment Card Industry (PCI) Data Security Standard. Audits against these standards provide an extra level of assurance that assesses the provider's internal controls as well as the auditor's opinion on the effectiveness of these controls.

REFOCUSING ON CORE BUSINESS PROCESSES

Some IT decision makers may believe that managing messaging capabilities constitutes a part of their core competency. Yet allowing a hosted Exchange provider to manage this function actually frees IT staff to contribute much more highly valued services to the organization. Using hosted Exchange services lets an organization focus on its core business processes rather than on managing its Exchange infrastructure.

Benefits for End Users

The benefits of a hosted Exchange deployment go beyond IT. End users enjoy numerous ways to access their email from any platform, any device, anytime.

A VARIETY OF ACCESS OPTIONS

A hosted Exchange account can be accessed via multiple channels. This includes Microsoft® Outlook® on the Windows® operating system, Microsoft Entourage and Outlook on the Apple® Macintosh® OS, and from any leading Web browser, including Safari®. This permits users to access their email, calendar, tasks, address lists, Exchange public folders and other content and data sources from virtually any desktop, laptop, netbook or other platform. In addition, an Exchange account can also be accessed from any POP or IMAP client, including the VMWare Zimbra® desktop.

Further, Microsoft recently introduced Entourage Web Services Edition, allowing Entourage users to access all of the features available in Exchange. Previous versions of Entourage permitted access only to the email and calendar functions of Exchange.

ROBUST MAC SUPPORT

Apple Mail, the mail client that comes with Mac OS X, has allowed users to access Exchange for many years as a POP or IMAP client. The version of OS X introduced in August 2009, Snow Leopard, provides full support for Exchange. Exchange support is also built into iCal, the default Mac calendaring application; and Address Book, all of which come standard on a Mac. Mail, iCal and Address Book provide robust and native functionality for hosted Exchange users.

MOBILE ACCESS

In addition to access from a variety of desktop and browser-based platforms, a hosted Exchange account can be accessed using Windows Mobile, BlackBerry® OS, iOS for Apple iPhone® devices and other mobile platforms. This is an important issue, since a large and growing number of email users consider their mobile platform to be a critical component of their email access. For some users, their mobile device is their primary after-hours email platform.

For organizations that employ BlackBerry devices, a hosted solution can provide further cost savings. Having hosted Exchange eliminates the need to manage a BlackBerry Enterprise Server infrastructure on-premise.

SYNCHRONIZATION ACROSS ALL PLATFORMS

Users who create content in Exchange see it automatically synchronized across all of their access devices. For example:

- » Users can create an appointment in Microsoft Outlook on their desktop, and it will appear on their Windows Mobile device.
- » Users can create and send an email using Outlook Web Access on a laptop, say, at work, and it will show up in the Sent Items folder in Outlook on their desktop at home.

SUPPORT FOR THE MOBILE OFFICE WORKER

Being able to access email, calendars and contacts on mobile devices is important. However, the ability for individuals to work on any application, from any location, on any device, is gaining importance as workers become more mobile. For a growing number of workers, the desk is anywhere they happen to be sitting at the time. An increasing proportion of organizations are allowing their employees to work from home and come into the office only when necessary.

Hosted Exchange is a key enabler of this mobile capability. It allows workers to access their email, calendars, contacts, task management tools and so on, regardless of where they might be working—be it from home, a hotel room or a client's conference room. This can add to the cost savings provided by a hosted Exchange deployment far beyond the IT-related savings that it provides.

Comparing Costs of Hosted vs. On-Premise Exchange

Hosted Exchange can significantly reduce the per-seat cost of an Exchange environment. As shown in the following three tables for organizations of 10, 100 and 1,000 users, the cost of hosted Exchange has proved to be significantly or even dramatically lower in all three categories than for an on-premise deployment of Exchange.

Three-Year Cost of Ownership for Hosted and On-Premise Microsoft Exchange: 10 Users

HARDWARE	Hosted Exchange	On Premise Exchange
E-mail server (Dell PowerEdge T510)	\$0	\$2,378
Three-year 24 × 7 support, four-hour response	\$0	\$2,199
AV/AS appliance (Barracuda Spam & Virus Firewall 200)	\$0	\$1,698
SOFTWARE	Hosted Exchange	On Premise Exchange
Server software	\$0	\$699
Client access licenses, 10	\$0	\$670
Software maintenance for 10 clients	\$0	\$1,050
Windows Server 2008	\$0	\$3,699
Clients, 10	\$0	\$1,000
LABOR	Hosted Exchange	On Premise Exchange
External consultant (4 hours per week at \$125 per hour)	0.025	\$26,000
IT admin cost (Year 1)	\$2,000	\$32,000
IT admin cost (Year 2)	\$2,100	\$33,600
IT admin cost (Year 3)	\$2,205	\$35,280
HOSTING FEES	Hosted Exchange	On Premise Exchange
\$14.95 per user per month	\$5,382	\$0
THREE-YEAR TOTAL COST OF OWNERSHIP	\$11,687	\$140,273
TOTAL THREE-YEAR TCO PER USER	\$1,168.70	\$14,027.30
TOTAL ANNUAL COST PER USER	\$389.57	\$4,675.77
TOTAL MONTHLY COST PER USER	\$32.46	\$389.65

Three-Year Cost of Ownership for Hosted and On-Premise Microsoft Exchange: 100 Users

HARDWARE	Hosted Exchange	On Premise Exchange
E-mail server (Dell PowerEdge T510)	\$0	\$2,378
Three-year 24 × 7 support, four-hour response	\$0	\$2,199
AV/AS appliance (Barracuda Spam & Virus Firewall 200)	\$0	\$3,397
SOFTWARE	Hosted Exchange	On Premise Exchange
Server software	\$0	\$699
Client access licenses, 100	\$0	\$6,700
Software maintenance for 100 clients	\$0	\$10,500
Windows Server 2008	\$0	\$3,699
Server OS software client access licenses or equivalent, additional 75 (Windows only)	\$0	\$2,996
Clients, 100	\$0	\$10,000
LABOR	Hosted Exchange	On Premise Exchange
FTE IT admins (\$80,000/year fully burdened salary growing at 5% per year)	0.05	0.4
IT admin cost (Year 1)	\$4,000	\$32,000
IT admin cost (Year 2)	\$4,200	\$33,600
IT admin cost (Year 3)	\$4,410	\$35,280
HOSTING FEES	Hosted Exchange	On Premise Exchange
\$10.95 per user per month	\$39,420	\$0
THREE-YEAR TOTAL COST OF OWNERSHIP	\$52,030	\$143,448
THREE-YEAR TCO PER USER	\$520.30	\$1,434.48
TOTAL ANNUAL COST PER USER	\$173.43	\$478.16
TOTAL MONTHLY COST PER USER	\$14.45	\$39.85

Three-Year Cost of Ownership for Hosted and On-Premise Microsoft Exchange 1,000 Users

HARDWARE	Hosted Exchange	On Premise Exchange
E-mail server (Dell PowerEdge T510)	\$0	\$9,512
Three-year 24 × 7 support, four-hour response	\$0	\$8,796
AV/AS appliance (Barracuda Spam & Virus Firewall 200)	\$0	\$4,397
SOFTWARE	Hosted Exchange	On Premise Exchange
Server software	\$0	\$15,996
Client access licenses, 1,000	\$0	\$67,000
Software maintenance for 1,000 clients	\$0	\$105,000
Windows Server 2008	\$0	\$14,796
Server OS software client access licenses or equivalent	\$0	\$38,951
Clients, 1,000	\$0	\$100,000
LABOR	Hosted Exchange	On Premise Exchange
FTE IT admins (\$80,000/year fully burdened salary growing at 5% per year)	0.2	2.0
IT admin cost (Year 1)	\$16,000	\$160,00
IT admin cost (Year 2)	\$16,800	\$168,00
IT admin cost (Year 3)	\$17,640	\$176,400
HOSTING FEES	Hosted Exchange	On Premise Exchange
\$9.45 per user per month	\$340,200	\$0
THREE-YEAR TOTAL COST OF OWNERSHIP	\$390,640	\$868,848
THREE-YEAR TCO PER USER	\$390.64	\$868.85
TOTAL ANNUAL COST PER USER	\$130.21	\$289.62
TOTAL MONTHLY COST PER USER	\$10.85	\$24.13

SAVINGS ARE SUBSTANTIAL, EVEN FOR LARGE ORGANIZATIONS

The cost savings of a hosted Exchange implementation are significant for all organizations. In the study, smaller organizations saved the most on a per-seat percentage basis, with 100-user firms experiencing a remarkable 92 percent cost reduction compared with on-premise arrangements. But 1,000-user organizations still saved a substantial sum, both in the per-seat percentage savings (55 percent) and the total dollars saved. Notably, the 1,000-seat organization saved more money over the three-year span of the study, \$478,208, than it spent, \$390,640.

It is also important to note that much of the cost savings for hosted Exchange comes from significant IT labor cost saving. For example, in the tables above, the labor component for 100 seats represented 70 percent of the total cost of ownership for an on-premises Exchange deployment. For a 1,000-seat on-premises implementation, labor represented 58 percent of the total cost of ownership.

What to Look for in a Hosted Exchange Provider

Once you have opted for a hosted Exchange implementation, your next step will be to choose a provider. Not all hosted Exchange providers are created equal, however. Critical distinctions do exist, even among the leading vendors. The key for decision makers is to evaluate provider candidates based on your specific requirements. The following information should help you to evaluate and choose your new hosted Exchange provider.

MULTIPLE DATA CENTERS

Ask whether the provider operates multiple data centers. If they do, find out whether these data centers themselves are served by multiple, Tier 1 Internet providers. They should be. These are important considerations for disaster recovery purposes. Robust backend support is much more likely to enable higher levels of continuous service.

Multiple data centers can enhance messaging system performance. The reason is simple. With geographically distributed data centers, it's more likely that there's a particular data center within closer proximity to your location. The closer the location, the better the performance. This also gives you the ability to specify which data center serves which mailboxes—an option not offered by all hosted Exchange providers.

THE PROVIDER'S TRACK RECORD

The provider's track record is another important consideration. Find out how long they have been in operation. Ask them to provide you with their long-term uptime numbers. Research their past and current financial performance. What is their customer base, and how has it changed? All of these questions should be answered to your satisfaction.

THE PROVIDER'S LONG-TERM ROADMAP

A provider's long-term roadmap of planned feature and function enhancements is an important consideration in choosing a provider. Find out when will they migrate to the newest version of Exchange. Ask if they offer other services such as hosted Microsoft® SharePoint® or Microsoft Office Communications Server. Do they offer hosted archiving? Learn what other services, features and functions are on their long-term roadmap. And discover how consistently they have been deploying new services, features and functions in the past.

THE COST AND PAIN OF MIGRATING TO A NEW PROVIDER

What about migration help? Consider the tools and services the provider offers to help in the migration of data, either from another hosted Exchange provider or from an on-premises deployment of Exchange. Either way, this is an important issue. Migration can be time-consuming and somewhat onerous, but a good provider should ease the burden considerably.

THE PROVIDER'S SUPPORT CAPABILITIES

Work to understand the specific support capabilities that the hosted provider offers. A good example is customer-inquiry responsiveness, particularly after hours. What is the provider's average response time to an inquiry during business hours? Ask them to document their response time after hours and on weekends. Finally, find out what other support capabilities the provider offers both for your tech support staff and your end users.

Summary

Hosted Microsoft Exchange is a cloud-based, business-grade messaging platform employed by about 54 million users around the world. The market share of hosted Exchange is growing. Hosted Exchange offers a comprehensive Exchange experience for end users, including hosted email, calendar and contacts. Users access it from their desktop, mobile device or Web browser. The benefits of a hosted implementation extend to IT departments, freeing them from the burden of managing an Exchange infrastructure internally. As a result, the cost of hosted Exchange service can be significantly lower than the cost of Exchange managed on-premise, for organizations ranging from 10 users to 1,000 or more users.



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¹The Case for Hosted Microsoft Exchange, an Osterman Research White Paper, Black Diamond, WA 98010, 2009–2010

²Microsoft Exchange Server and Outlook Market Analysis, 2011–2015, The Radicati Group, Inc., Palo Alto, CA 94303

³Ibid

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