

Midmarket Context: 'Magic Quadrant for Transportation Management Systems'

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The midmarket for TMS solutions continues to grow at a fast pace, primarily driven by solutions that have become cost-effective, user friendly, and easy and fast to implement. Supply chain leaders can use this research when evaluating and selecting TMS solutions to support the midmarket for TMS.

Market Differentiators

This document was revised on 22 June 2018. The document you are viewing is the corrected version. For more information, see the [Corrections page](#) on gartner.com.

Transportation management system (TMS) applications focused on small and midsize shippers (see Table 1) is a fast-growing subsegment of the TMS market. These systems manage core transportation management operations, tasks and activities of less complex transportation operations or of smaller shippers with relatively complex operations. These applications are normally targeted specifically at Level 1 and Level 2 transportation networks, but these offerings can often support up to low Level 3 transportation networks (see The Five Levels of TMS Complexity as described in the Evidence section in the "Magic Quadrant for Transportation Management Systems").

In most (but not all) cases, midmarket TMSs are targeted at smaller businesses. There are many environments where the organization might not be small, but the transportation operations share all the characteristics of a small business. An example is a manufacturing company that uses only over-the-road transportation with a limited number of contracted carriers for a large percentage of full truckload transportation. At the same time, some small or midsize companies can have complex transportation networks (they are only smaller in the number of transactions or total freight spend) and would be better served by the holistic TMS solutions.

Midmarket-focused TMS solutions are normally less functionally broad than comprehensive TMS suites. However, these applications adequately cover core TMS application functionality, including transportation procurement, tendering, freight payment and analytics. Vendors that specifically target midmarket transportation operations focus more on providing low cost of ownership, rapid implementation, more intuitive solutions requiring less training, and reduced complexity of implementation and support. Midmarket TMS vendors are more likely to offer strong cloud platforms that help deliver these benefits.

Table 1. Shipper Segments (According to Freight Spend)

Shipper Segment	Freight Spend
Large Shipper	Company that spends over \$100 million in freight per year
Medium Shipper	Company that spends between \$25 million and \$100 million in freight per year
Small Shipper	Company that spends less than \$25 million in freight per year
Very Small Shipper	Company that spends less than \$10 million in freight per year

Source: Gartner (May 2018)

The solutions that are focused on the smaller market and midmarket can be characterized as:

- Products with attributes that appeal to small and midsize enterprises; at the highest level, small and midsize enterprises need help identifying technology solutions that fit within their financial means and available resources.
- Products built with the midmarket resources in mind:
 - Are easy to install, configure, manage and integrate with existing systems
 - Minimize staffing requirements
 - Are bundled solutions that are full end-to-end suites for one fixed price with fewer integration headaches and no surprise additional costs
 - Focus on scale and price, delivering the required functionality at an affordable price
 - Provide solutions that might not be as rich in functionality, but are characterized by a simple, straightforward user interface that requires minimal training.

Megasuite (e.g., ERP) vendors and supply chain management (SCM) suite vendors are not covered in this research, but these can be viable options for midmarket TMS operations. Companies with a strong commitment to a megasuite vendor like SAP, Oracle (NetSuite), Infor, Microsoft and others should shortlist their megasuite vendor's offering, but they should also consider other midmarket-focused solutions. Where functionality will often be the distinguishing issue at the high end, other factors like cost of ownership, simplicity and ease of use will be more important in the midmarket space. The midmarket space in TMS is the fastest-growing segment for TMS. As a result, even the largest vendors also focus on this segment and sometimes have a separate platform offering targeted at the midmarket.

Considerations for Technology and Service Selection

Gartner defines a TMS as a solution used by shippers (such as manufacturers, retailers, distributors and wholesalers) or non-asset-based, third-party logistics (3PL) organizations to manage their transportation operations (see "Magic Quadrant for Transportation Management Systems"). The

primary emphasis is on systems that support for-hire transportation management operations. This is where users employ a variety of shipping modes, including over the road, private/dedicated fleet, small package, rail, intermodal, air and ocean. At a minimum, shipper companies use TMSs to manage freight sourcing, planning, execution and settlement. Multiple subcomponents make up a comprehensive TMS across planning (for example, load consolidation, routing, mode selection and carrier selection) and execution (for example, tendering loads to carriers, shipment track and trace, and freight audit and payment).

TMS suites have been extended to include all transportation management functions across multiple modes — from strategic planning, strategic freight sourcing and procurement to visibility and performance management, and freight payment and audit capabilities. In addition to functional expansion, TMS solution providers have expanded the number of modes they support, adding deeper support for modes such as small package or parcel shipping, private fleet planning and execution, intermodal, and rail. With the expansion of global supply chains, TMSs also embrace global logistics functions and features.

The holistic TMS market breaks down into four broad types of TMS vendor (see Table 2). Only SCM suite vendors and specialist TMS vendors are covered in this research.

Table 2. Four TMS Vendor Types

Vendor Type	Description	Example Companies
Application Megasuite Vendors	These vendors offer broad portfolios of applications across most application categories (for example, back-office financials, supply chain management [SCM] logistics, CRM and product life cycle management [PLM]).	Oracle, SAP
SCM Suite Vendors	These vendors offer a portfolio of applications focused primarily on SCM, including aspects of logistics, but not other functional areas such as financials or human capital management. While these vendors might offer a variety of SCM solutions, they do not necessarily offer an integrated platform (although some do).	BluJay, JDA, Manhattan Associates
Specialist TMS Vendors	These vendors are independent software vendors (ISVs) that focus primarily or exclusively on holistic TMS, although they might offer additional capabilities.	3Gtms, 3T Logistics, Cloud Logistics, FreightPOP, Freightview, Net Logistics, Kuebix, MercuryGate, RateLinx, TMSfirst
TMS Services Vendors	These vendors not only offer the TMS technology but also can provide the services to run the day-to-day transportation management while the shipper maintains and controls key relationships with its carriers and customers. Some of the SCM suite vendors (such as BluJay) and specialist TMS vendors (such as Kuebix) also offer this service but are still primarily technology vendors.	C.H. Robinson (TMC), Transplace

Source: Gartner (May 2018)

Small and Midsize Enterprise TMS Market

Gartner observes several emerging growth markets for TMS:

- Growing demand for TMS in smaller organizations with less complex transportation management needs.
- An overall increased demand for more user-friendly, easier-to-implement TMS solutions with an attractive total cost of ownership (TCO).
- International growth in emerging economies like China, India, Brazil and several other countries outside of the main markets of North America and Europe.

The TMS market is highly fragmented due to the presence of a large number of vendors. In many cases, TMS solutions are focused on specific capabilities, industries, company types and sizes or regions. Addressing the needs of the midmarket is not just about price or simplifying higher-end systems. It is about designing for the needs of midmarket users. Most of the larger TMS vendors focus on advanced functionality in their systems, which generally equates to increased complexity as well as global scale. Even if some functionality can be disabled, the complexity remains, and this will not fit the needs of the midmarket.

For vendors, it is often difficult to effectively focus sales efforts on the high end of the market as well as the low end of the market. The cost of customer acquisition should be significantly lower if the vendor wants to sell the solution profitably to the small end of the market. Gartner notices that very few vendors efficiently organize their sales teams and have sales models that can be deployed on the opposite ends of the market spectrum. Nonetheless, several larger vendors have successfully sold to the middle spectrum of the market in addition to large shippers.

Recommendation: Organizations considering a new TMS should use Gartner research to stratify their transportation operations to determine the primary level for their transportation operations. If they determine their operations are currently at Level 1 or Level 2, and the likelihood they will progress beyond this is low, then they should focus on the vendors in this research that specifically focus on midmarket organizations.

User Experience

Less complex, smaller shippers have a large need for intuitive and user-friendly solutions that not only can be implemented fairly easily, but also can train end users quickly. In many cases, this has led to implementations in three to six weeks and an ROI of six months.

One of the notable areas of differentiation between TMS vendors is user experience. Given customer interest, this has received more consideration in the evaluation of offerings. While UI is important to all strata of the transportation environment, it is critical in the midmarket because these operations rightfully favor ease of use over depth of functionality.

Smaller organizations often struggle with resourcing. Having sufficient resources or the right transportation expertise isn't always a given. For smaller organizations to adopt TMS technology, there needs to be less burden or assumption of a large availability of resources or expertise.

Vendors that provide a better and easier-to-learn solution with a great user experience can help alleviate this scarce resource struggle.

Recommendation: Usability is always a critical factor, but it is particularly important for midmarket organizations where resources are often constrained. Midmarket organizations should invest evaluation time and effort in fully understanding the UI capabilities, configurability and learning curve to ensure that they can easily adopt the new TMS.

Cost of Ownership

In Gartner's 2018 TMS Magic Quadrant customer survey, TCO is rated as one of the top evaluation criteria for customers considering new TMS applications. Consequently, most midmarket TMS vendors focus on mechanisms to accelerate time to value — in some cases dramatically reducing implementation time, effort and cost.

The pricing of midmarket solutions can vary widely from a cost-based on freight under management (FUM) to a per-user license and, in some cases, a free or "freemium" offering. Please refer to the "Key Considerations for Supply Chain Leaders Evaluating Transportation Management Systems" for an in-depth explanation of the different pricing models.

Obviously cost is just one part of the equation. Productivity gained by implementing a TMS is just as important. Please refer to "How to Calculate the ROI for a Transportation Management System Project" to identify the different areas of productivity and how to calculate the overall ROI.

Recommendation: Midmarket organizations should be sure to explore both the cost of the software, and the implementation, training and long-term support costs. Also consider the productivity to calculate the overall ROI of the project.

Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

Table 3 is a list of midmarket vendors that serve less complex shippers and/or specifically focus on the midmarket. (Some of these vendors also offer their solutions to large enterprise shippers.)

Table 3. Midmarket TMS Vendors

Vendor	Headquarters
3Gtms	Shelton, Connecticut
3T Logistics	Leicester, U.K.
Acuitive Solutions	Charlotte, North Carolina
AEB	Stuttgart, Germany
Agistix	San Mateo, California
BestTransport	Columbus, Ohio
BluJay	Manchester, U.K.
Broussard Logistics	Houston, Texas
Cirrus TMS	Palm Harbor, Florida
Cloud Logistics	Fort Lauderdale, Florida
CTSI-Global	Memphis, Tennessee
DDS Logistics	Boulogne-Billancourt, France
Deltion (CarrierNet)	Staines, U.K.
Descartes	Waterloo, Ontario, Canada
Dovetail	Epsom Downs, South Africa
Echo (FlexTMS)	Chicago, Illinois
Evos SmartTools	Bend, Oregon
Freightgate	Fountain Valley, California
FreightPOP	Lake Forest, California
Freightview	Overland Park, Kansas
Generix Group	Lesquin, France
HA Logistics (AdvantageTMS)	Pleasanton, California
HighJump	Minneapolis, Minnesota
Inconso	Bad Nauheim, Germany

Vendor	Headquarters
Infor	New York, New York
InMotion Global (AscendTMS)	Brandon, Florida
INTERLOG	Chanteau, France
JDA	Scottsdale, Arizona
Kuebix	Maynard, Massachusetts
Logicor	Mesa, Arizona
Logility	Atlanta, Georgia
LOG-NET	Tinton Falls, New Jersey
Made4net	Hackensack, New Jersey
MercuryGate	Cary, North Carolina
Microsoft Dynamics	Redmond, Washington
NCR (Retalix)	Duluth, Georgia
Next Generation Logistics	Inverness, Illinois
Nulogx	Mississauga, Ontario, Canada
nVision Global Technology Solutions	McDonough, Georgia
Odyssey	Danbury, Connecticut
One Network	Dallas, Texas
oTMS	Shanghai, China
Pitney Bowes (Enroute Visibility)	Stamford, CT
Precision Software	Lisle, Illinois
Primelog (Pagero)	Gothenburg, Sweden
Princeton TMX	Fort Wayne, Indiana
Ramco Systems	Chennai, India
RateLinx	Madison, Wisconsin

Vendor	Headquarters
Redwood Logistics	Chicago, Illinois
Revenova	Chicago, Illinois
SaaS Transportation	Destin, Florida
ShipHawk	Santa Barbara, California
ShippersEdge	Burnsville, Minnesota
Siemens Postal, Parcel & Airport Logistics	Dallas, Texas
Softeon	Reston, Virginia
SupplyStack	Antwerp, Belgium
Tecsys	New York, New York
TMSfirst	Houston, Texas
Transporeon Group	Ulm and Kempten, Germany
Transportation Warehouse Optimization	Franklin, Tennessee
Transwide (Alpega)	Zaventem, Belgium
TransWorks	Fort Wayne, Indiana
UltraShipTMS	Fair Lawn, New Jersey
Unifaun	Gothenburg, Sweden

Source: Gartner (May 2018)

Below is a more detailed description of the vendors that participated in the Gartner survey focused on the midmarket TMS solutions conducted in 2018 that were not featured in the "Magic Quadrant for Transportation Management Systems." Some vendors in the Magic Quadrant also have a big presence in the midmarket (such as, but not limited to, BluJay, Cloud Logistics, Kuebix and MercuryGate) and are included in Table 3. Those vendors are covered in detail in the Magic Quadrant for TMS, and, therefore, are not included in the detailed descriptions below.

Acuitive Solutions: Acuitive Solutions, headquartered in Charlotte, North Carolina, is a privately held, cloud-based supply chain software company. Acuitive provides multimodal e-procurement and logistics payment process automation solutions as well as a cloud-based global TMS. The TMS offers freight procurement, rate management, and planning and routing capabilities linked to its freight bill audit module. Acuitive Solutions serves leading companies in the home center, premium fashion, retail, home and office décor, and apparel markets. Customers include Ralph Lauren and

JOANN (fabric and craft retailer). Acuitive's TMS solution focuses on companies with a high level of complexity.

Agistix: Agistix, founded in 2004 and based in San Mateo, California, offers a transportation management solution with the goal to automate shipping and simplify daily processing. Agistix global transportation suite was built with the need for supply chain visibility in mind. The TMS is mostly used by large shippers in North America, of which 60% have global operations and global needs, although the transaction-based platform supports clients of all sizes and industries. Agistix has strong experience in the high tech, healthcare and 3PL industries. Besides technology, Agistix also offers a set of professional services including commodity management, export compliance, freight pay and audit, RFP management and analysis, and supply chain benchmarking.

BestTransport: BestTransport, headquartered in Columbus, Ohio, offers a holistic, cloud-based TMS. BestShippers covers the core capabilities of planning, executing and settling freight movements. The vendor has a unique position, having first built its solution to handle "complex loads," which are shipments that are heavy and irregularly shaped that require special handling or unconventional transport. Other capabilities are Supplier Connection, which connects shippers to over 9,000 vendors, and parcel capability through a partnership with ConnectShip. The vendor is mainly active in North America and serves small to very large shippers with high transaction volume and high complexity. BestTransport has a large focus on the metals industry, but also serves several other industries such as consumer products, retail and petrochemicals. BestTransport also offers consulting and supply chain services such as 3PL and brokerage services.

CTSI-Global: CTSI-Global, based in Memphis, Tennessee, offers services including freight audit and payment, business intelligence, global consulting, and fully managed services as well as supporting logistics technologies such as TMS. CTSI-Global offers a TMS SaaS that allows companies to manage all aspects of its inbound and outbound transportation network. The TMS gives users the ability to manage and control inbound/outbound orders; optimize loads; select the best carriers; tender the shipments; manifest parcel, less than truckload and truckload; track progress; and manage claims. CTSI-Global's TMS supports a network of more than 14,000 carriers in all modes and has over 70 TMS customers across different regions in a variety of industries.

FreightPOP: FreightPOP, based in Orange County, California, is a newer TMS vendor focused on shippers with up to \$100 million in annual freight spend. FreightPOP provides shipping software for manufacturers, distributors and 3PLs that automates the shipping processes to shop and ship across all modes. FreightPOP is a web application that easily connects to public cloud order inventory systems, ERPs, warehouse management systems (WMSs) and CRM solutions, and has the ability to very quickly integrate with on-premises applications. FreightPOP has customers across a variety of industries and currently connects to more than 200 carriers.

Freightview: Freightview, based in Overland Park, Kansas, was founded in 2013 to equip shippers with technology to streamline their freight quoting, booking, tracking and reporting. Freightview was acquired by C.H. Robinson in 2015. The solution offered is a lightweight, easy-to-use TMS focused on shippers with less than \$10 million in LTL freight spend. The quick and easy implementation of the tool allows it to be set up in less than 48 hours. Current Freightview customers are using the tool for their LTL, volume and spot quoting shipments. The newly released spot quoting tool enables the

elimination of handling spot or volume quotes via email. The vendor is expanding the solution and plans to release a tool to streamline the invoicing process for LTL and TL shipments moved through the software in the second quarter of 2018.

HighJump: HighJump, headquartered in Minneapolis, Minnesota, is a global supply chain management suite vendor. In August 2017, Körber acquired HighJump to be managed under its division, Körber Logistics Systems. HighJump is well-known for its WMS and is a Challenger in the Magic Quadrant for Warehouse Management Systems. HighJump has more than 2,000 TMS customers using Prophecy Dispatch (on-premises), OnDemand TMS (SaaS) and HighJump TMS (next-generation SaaS). The Prophecy TMS solution is specifically aimed at small to midsize North American trucking and freight brokerage companies. The solution is mainly focused on over-the-road and parcel freight.

LOG-NET: LOG-NET, headquartered in Tinton Falls, New Jersey, is a provider of trade, transportation and logistics information systems. The company has grown from a supplier of custom logistics solutions into a developer of integrated on-demand, end-to-end (E2E) supply chain solutions active in more than 70 countries around the world. LOG-NET serves large cargo owners, importers, exporters and third-party logistics providers, including Dollar Tree, Panalpina, Agility, Ryder, Fender Musical Instruments, FULLBEAUTY Brands, GANT, OEC Group, Scanwell Logistics, Mohawk Industries and many others. LOG-NET's TMS permits customization, rendering in multiple languages, fully integrated electronic data interchange (EDI) interfaces, wireless access and an innovative web user interface.

nVision Global Technology Solutions: nVision Global Technology Solutions is a global freight audit, payment and logistics management service and technology provider. Besides providing freight payment solutions, it offers a cloud-based TMS called iMPact TMS covering all modes and cargo types. iMPact TMS provides global, multimode, cloud, freight audit and payment integration all the way through shipment execution followed by business intelligence and advanced analytics. nVision Global has over 120 TMS clients in different regions around the world, most of which are small and midsize shippers. nVision Global serves all industries and supports more than 17,000 transportation providers, processes more than 100 million transactions annually from over 190 countries and manages \$5.2 billion in annual freight spend.

Odyssey: Odyssey is a global logistics solution provider with a freight network of over \$2 billion. Odyssey's services include international transportation management, intermodal services, trucking services, and managed services and consulting. With operations in North America, Europe and Asia, Odyssey operates in all modes of transport. Odyssey offers shippers the WIN (Web Integrated Network) TMS, a no-cost, no-fee, web-based TMS that offers shippers all the core functions of a TMS as well as access to Odyssey's full carrier network. WIN has appealed to shippers with small, medium and large freight spends in North America.

Primelog: Primelog, based in Gothenburg, Sweden, was acquired in 2017 by Pagero, a global provider of e-order, e-invoice and e-pay services that help businesses streamline operations throughout the full order-to-pay and purchase-to-pay processes. Primelog TMS is a multitenant cloud TMS that provides control, visibility and flexibility in transport operations. Primelog TMS offers functional and process support that monitors, analyzes, integrates and controls freight. Primelog

has customers in 68 countries, including shippers as well as 3PLs and 4PLs. It currently has around 300 carriers connected.

Ramco Systems: Ramco Systems, headquartered in Chennai, India, was established in 1999. Ramco Systems is a fast-growing enterprise software provider offering multitenant cloud and mobile-based enterprise software. Part of the Ramco Group, Ramco Systems has invested in developing logistics solutions, including a multimodal TMS. The TMS covers all the main functions of procurement, planning, execution, rating and billing, and analytics. Ramco Systems is mostly present in midsize and larger businesses in Asia/Pacific and North America. Around 35 customers currently use the Ramco TMS solution. Most of those are 3PLs, freight forwarders, couriers and logistics service providers (LSPs), as well as midsize businesses in the automotive industry and wholesale distribution.

RateLinx: RateLinx, headquartered in Madison, Wisconsin, has been in business since 2002. It focuses on creating customized integrated shipping and logistics management software, TMS and freight invoice management solutions. RateLinx offers a multicarrier, multimodal, multilocation TMS, including track and trace, advanced analytics, and integrated data services. Customers have the choice of cloud, on-premises solutions or both. RateLinx serves around 350 customers, 60% of which are small to midsize shippers, and around 40% are large enterprise customers. RateLinx has a strong presence in retail, wholesale distribution and utilities.

Revenova: Revenova, headquartered in Chicago, Illinois, is a provider of a TMS for shippers, brokers and 3PLs built entirely on the Salesforce platform. The company offers CRM-enabled solutions for managing transportation across all modes and carriers for shippers, brokers and 3PLs, and offers collaboration and connectivity between departmental employees, customers and carriers. Revenova focuses on the small to midsize business market, and it has several enterprise customers as well. The company has over 100 customers in North America, of which a large percentage are brokers.

ShipHawk: ShipHawk, headquartered in Santa Barbara, California, was founded in 2012 and is one of the fastest-growing parcel solutions in the U.S. with over 300 customers. ShipHawk offers a TMS covering LTL, parcel and specialty carriers, and is mainly focused on midsize shippers in North America. The solution is user-friendly and easy-to-use, as well as fast to onboard. ShipHawk mainly serves retailers, manufacturers and distributors. The company has a network of more than 250 carriers, mainly in North America.

ShippersEdge: ShippersEdge, headquartered in Burnsville, Minnesota, has been selling TMS solutions since 2002. It offers cloud-based shipping and logistics software supporting all modes, but its main focus is on FTL and LTL. The solution is scalable from a single user to large enterprises. ShippersEdge has about 60 customers, of which 80% are small shippers with a freight spend of less than \$25 million. The solution has been deployed in North America and more recently in South America. ShippersEdge has a strong presence in the distribution and manufacturing industries and increasingly in custom solutions.

SupplyStack: SupplyStack (formerly Slickss), headquartered in Antwerp, Belgium, has been offering its Control Tower TMS since 2013. Control Tower TMS is a transport management solution that

enables collaborative logistics. The TMS supports transportation workflows and enables shippers to book freight from carriers, communicate with suppliers and extend visibility toward customers. The TMS manages everything from order creation to billing on a single platform for all transportation modes. SupplyStack has around 20 customers, mainly in Europe followed by North America and Asia. It has customers in the 3PL, consumer products and industrial verticals as well as a variety of other industries.

TMSfirst: TMSfirst, headquartered in Houston, Texas, started offering its cloud TMS in 2014. TMSfirst is a web-based browser and app-ready logistics platform that links industrial and commercial companies with their logistics service providers. The TMS includes capabilities for shippers, 3PLs, brokers, private fleets and carriers. It allows cost-saving, transparent online handling of all workflows related to the transportation management process. TMSfirst has about 35 customers, of which 85% are in the midmarket segment, in all regions around the world. TMSfirst has customers across the 3PL, petrochemical, industrial construction and machinery, and wholesale distribution industries.

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