The Forrester Wave™: Services Providers For Next-Generation Oracle Application Projects, Q3 2016

The 13 Providers That Matter Most For Oracle Cloud Projects And How They Stack Up

by Liz Herbert
September 6, 2016

Why Read This Report

A growing number of customers are moving business applications to Oracle Cloud and are seeking service partners that can help them with business strategy, implementation, and support related to these solutions. Forrester identified and analyzed the 13 most significant global partners that are leading the move to cloud — Accenture, Capgemini, CGI, Cognizant, CSC, Deloitte, IBM, Infosys, L&T Infotech, PwC, TCS, Tech Mahindra, and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up in today's cloud-centric Oracle application world to help application development and delivery (AD&D) professionals make the best choice for their needs.

Key Takeaways

Accenture, Deloitte, Wipro, IBM, Infosys, And Capgemini Lead The Pack
Forrester's research uncovered a market in which Accenture, Deloitte, Wipro, IBM, Infosys, and Capgemini lead the pack. PwC, TCS, and Cognizant offer competitive options. Tech Mahindra, L&T Infotech, CSC, and CGI lag behind.

AD&D Pros Are Looking For Next-Generation Oracle Cloud Solutions
The market for Oracle services is growing as more AD&D pros see Oracle cloud applications as a way to address their top challenges. This market growth is in large part due to the fact that AD&D pros increasingly trust Oracle services providers to act as strategic partners, advising them on top cloud decisions.

Enhanced Design And Consulting Capabilities Are Key Differentiators
As Oracle grows its cutting-edge solutions, clients need a partner that can go beyond technology implementation. Improved capabilities in design and strategy or business process consulting will dictate which providers will lead the pack. Vendors that can provide these services will position themselves to successfully deliver lasting value to their customers.

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with Christopher Andrews and Bill Seguin
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Notes & Resources

Forrester evaluated services providers in May and June 2016. We only considered capabilities or proof points that existed on or before May 17, 2016, although reference checks and other analysis continued into June. For this evaluation, we conducted RFIs and strategy briefings with 13 vendors: Accenture, Capgemini, CGI, Cognizant, CSC, Deloitte, IBM, Infosys, L&T Infotech, PwC, TCS, Tech Mahindra, and Wipro. We also surveyed or spoke with a total of 99 reference clients of the various vendors.

Related Research Documents

Cloud Powers The New Connected Economy

The Fog Begins To Lift On Oracle's Cloud Shift

The New Breed Of Oracle Services Partner

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Oracle Cloud Has Come Of Age, But Customers Struggle With The Shift

Oracle continues to expand its cloud portfolio and now offers software-as-a-service (SaaS) in a range of categories including customer relationship management (CRM), finance and accounting, and supply chain management.[1] Oracle sales reps are making these SaaS offerings very attractive from a price standpoint. But despite the bold ambitions — and bold statements from key Oracle execs — real-world experience with Oracle Cloud remains limited. AD&D pros and Oracle customers are intrigued by the promise to gain business agility and speed with cloud but need help to:

› **Create a vision and strategy.** The era of standardization and big enterprise resource planning (ERP) rollouts is coming to an end, replaced by a new breed of technologies designed for business agility and innovation. But businesses morphing to become agile and innovative need more than just new technologies; today's Oracle customers need help with understanding customer needs, reinventing products and services, and changing their culture and organization to fit into this new world. One customer told us that he needed a partner that can not only help with the journey, but also help message and articulate that journey to his organization.

› **Implement newer technologies that require breaking new ground.** Oracle cloud solutions are still new — some were released as recently as 2015 — and evolving. But expertise varies widely in the ecosystem. One reference customer told us that her selection was fairly straightforward, as she chose "the partner with the most experience and number of projects in the space." Oracle's newer cloud partner designations — such as Cloud Premier, Cloud Elite, and Global Cloud Elite — can serve as a guide.

› **Gain access to ready-to-use industry solutions with sector-specific features.** Although some processes where cloud has been successful are horizontal and fairly generic across industries, such as recruiting and talent management, many other business needs are unique to particular sectors. To meet these unique industry needs, clients are looking for partners that know what those needs are and have invested in solutions that meet them. For example, Deloitte unveiled a ready-to-use, subscription-based restaurant management cloud solution at Oracle Open World 2015. Another example is Accenture's cloud for life sciences R&D processes that includes Oracle Health Sciences Data Management Workbench.

Business Acumen Matters Most In The Shift To Next-Generation Oracle Applications

Tectonic shifts continue in the landscape of Oracle services providers as technology-heavy partners fade away while partners heavy on business consulting continue to thrive. Why? Oracle's cloud solutions have built-in hardware and require less technical setup than traditional on-premises systems like E-Business Suite, JD Edwards, and PeopleSoft. Oracle Cloud projects require a heavier focus on business alignment, solution enablement, and change management. In the market for Oracle services, we see that:

- **Consulting and design skills are at a premium in new Oracle application projects.** The shift to cloud favors the inherent skills of consulting-heavy firms such as Accenture, Deloitte, IBM, and PwC because clients are putting more emphasis on business change than technical implementation when selecting partners. Smart clients are prioritizing industry knowledge, experience design, and change management when picking partners — which aligns more to the skills of business consultants than technology implementation partners. Thus, technology-centric vendors such as Wipro, Infosys, TCS, and Cognizant continue to invest in consulting and design capabilities and integrate those more tightly into their Oracle practices. At the same time, consulting-oriented firms such as PwC are capitalizing on their heritage and their strong C-level and line-of-business relationships.
- **Technology service providers are partnering with and acquiring cloud boutiques.** The agile, small-scale nature of many Oracle Cloud projects has made small, flexible, specialized boutiques popular with Oracle Cloud customers. But smaller shops lack the breadth or depth for more complex projects that span multiple technologies or require business process change. At the same time, larger technology services firms have been looking to boost their own organic investments in Oracle's cloud suite to leap ahead of the competition. Examples we have seen to date include Cognizant's acquisition of KBACE Technologies in early 2016 and Wipro's investment in and exclusive partnership with Drivestream.
- **Outsourcers and IT outsourcing partners must pivot to stay relevant.** Several of Oracle's longest-standing alliance partners must shed their skin to survive in the modern Oracle world. Although database and hardware still represent hefty business lines for Oracle, modern Oracle applications require no separate database or infrastructure work or hosting. This means that providers such as CSC (and its successor company, created via the impending merger of CSC and HPE Enterprise Services) and CGI must pivot their own business models if they want to stay in the top tier of Oracle services providers. All of these firms are investing, but we predict that some will not invest quickly enough to survive the market shakeout and stay in the top group of Oracle alliance partners.

Services Providers For Next-Generation Oracle Application Projects Evaluation Overview

To assess the state of the services providers for next-generation Oracle application projects market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top services providers for next-generation Oracle application projects. After examining past research, user needs assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 17 criteria, which we grouped into three high-level buckets:

- **Current offering.** In current offering, we evaluated how the providers stack up in key service areas: experience design, including customer journey mapping and ideation; business consulting, including scale of practice and proof points; and technology capabilities, including implementation and support. We also looked at resources and experience for Oracle's evolving cloud portfolio of ERP and enterprise performance management; CRM; configure, price, quote (CPQ) and order management; human resources; and supply chain.
- **Strategy.** To evaluate strategy, we analyzed how providers are investing in building an ecosystem of partners relevant to next-generation Oracle Cloud projects and how they are investing in innovation. We also evaluated providers' vision for the services market and how that stacks up against buyer needs. Finally, we looked at pricing and delivery models with an emphasis on prebuilt solutions and outcome-based models.
- **Market presence.** To assess providers' market presence, we looked at just two items: client base and financials. For client base, we rated number of clients the provider had worked with in the past 12 months. For financials, we looked at Oracle application revenue only (not hardware- or database-specific revenue).

Evaluated Vendors And Inclusion Criteria

Forrester included 13 vendors in the assessment: Accenture, Capgemini, CGI, Cognizant, CSC, Deloitte, IBM, Infosys, L&T Infotech, PwC, TCS, Tech Mahindra, and Wipro. Each of these vendors has (see Figure 1):

- **Relevance to large enterprises with $1 billion or more in revenue.** Forrester clients are predominantly large enterprises with $1 billion or more in revenue. Thus, we required not only an overall Oracle customer base of 50 customers in the past 12 months, but also a minimum of 25 customers with $1 billion or more in annual revenue.
- **A global practice based on practitioners and revenues.** In addition to the customer requirement, we included only larger Oracle practices. The minimum cutoffs for inclusion were 2,500 practitioners and more than $100 million in revenue from Oracle services.
- **Capabilities important for next-generation Oracle projects, especially cloud.** As part of the screening process, we ensured that any provider selected had proof points and examples of work in newer Oracle technologies, especially cloud — as this is where we see the majority of clients making investments now and in the future.

FIGURE 1 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor
Accenture
Capgemini
CGI
Cognizant
CSC
Deloitte
IBM
Infosys
L&T Infotech
PwC
Tech Mahindra
TCS
Wipro

Vendor selection criteria
Evaluated vendors get more than $100 million in revenue from Oracle services.
Evaluated vendors have more than 50 Oracle customers; at least 25 represent large enterprises with more than $1 billion in annual revenue.
Evaluated vendors have more than 2,500 Oracle practitioners.
Demonstrated significant interest from Forrester clients.
Evaluated vendors are seen as a key option for next-generation Oracle projects, especially cloud projects.
Evaluated vendors operate globally and have cross-industry relevance.

Vendor Profiles

This evaluation of the services providers for next-generation Oracle application projects market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 Forrester Wave™: Services Providers For Next-Generation Oracle Application Projects, Q3 '16

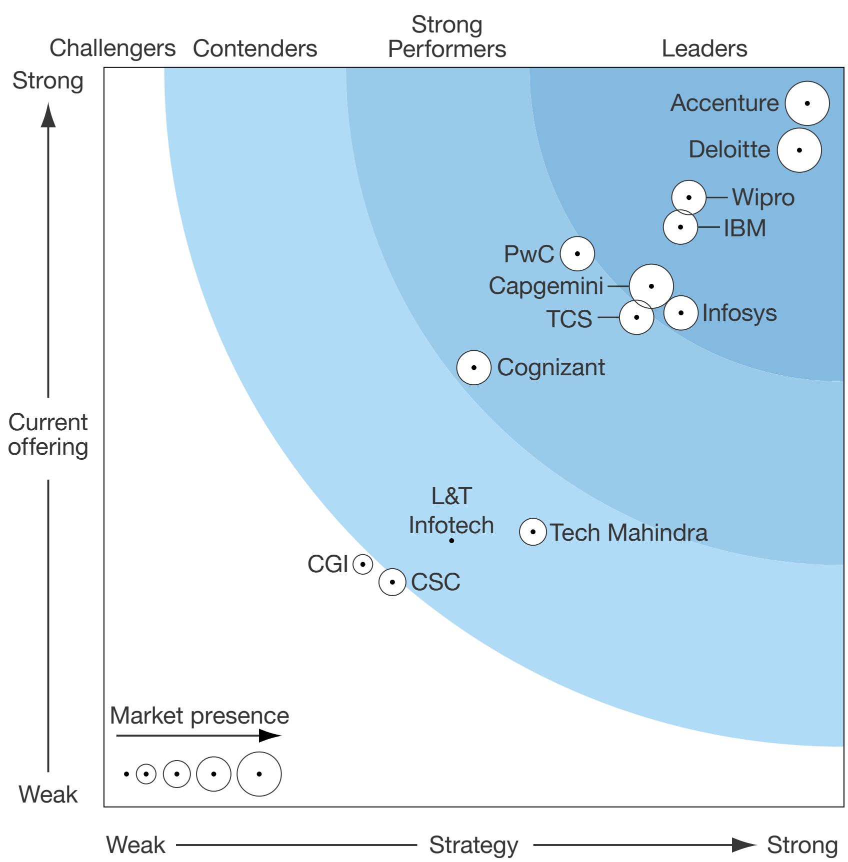

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FIGURE 2 Forrester Wave™: Services Providers For Next-Generation Oracle Application Projects, Q3 ’16 (Cont.)

	Forrester’s Weighting	Accenture	Capgemini	CGI	Cognizant	CSC	Deloitte	IBM	Infosys	L&T Infotech	PwC	TCS	Tech Mahindra	Wipro
CURRENT OFFERING	50%	4.76	3.52	1.64	2.97	1.52	4.44	3.92	3.34	1.80	3.74	3.31	1.86	4.12
Experience design	25%	5.00	4.00	1.00	2.00	1.00	5.00	4.00	3.00	1.00	4.00	3.00	2.00	4.00
Business consulting	25%	5.00	4.00	3.00	3.00	2.00	5.00	5.00	4.00	2.00	5.00	4.00	2.00	4.00
Technology implementation and support capabilities	10%	5.00	4.00	3.00	3.00	3.00	4.00	4.00	4.00	2.00	3.00	4.00	2.00	4.00
Experience with Oracle Cloud solutions	30%	4.85	3.40	0.80	3.40	0.90	3.45	2.90	2.95	2.15	3.30	2.85	1.85	4.40
Client experience	10%	3.00	1.00	1.00	4.00	2.00	5.00	4.00	3.00	2.00	2.00	3.00	1.00	4.00
STRATEGY	50%	4.75	3.70	1.75	2.50	1.95	4.70	3.90	3.90	2.35	3.20	3.60	2.90	3.95
Partner ecosystem	25%	4.00	2.00	1.00	1.00	1.00	5.00	3.00	3.00	1.00	2.00	2.00	1.00	3.00
Innovation road map	25%	5.00	4.00	2.00	3.00	2.00	5.00	5.00	5.00	2.00	4.00	4.00	3.00	4.00
Service vision	20%	5.00	4.00	2.00	3.00	3.00	5.00	4.00	4.00	3.00	4.00	4.00	3.00	4.00
Delivery model	10%	5.00	4.00	2.00	3.00	2.00	4.00	5.00	5.00	4.00	3.00	5.00	5.00	4.00
Pricing strategy	20%	5.00	5.00	2.00	3.00	2.00	4.00	3.00	3.00	3.00	3.00	4.00	4.00	5.00
MARKET PRESENCE	0%	5.00	4.50	2.00	3.50	3.00	4.50	4.00	4.00	1.00	3.50	4.00	2.50	4.00
Client base and engagements	50%	5.00	5.00	2.00	4.00	3.00	4.00	4.00	4.00	1.00	4.00	4.00	3.00	4.00
Financials	50%	5.00	4.00	2.00	3.00	3.00	5.00	4.00	4.00	1.00	3.00	4.00	2.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

- **Accenture is on the bleeding edge of business and technology change.** Its Oracle practice exemplifies this enviable trait. The largest Oracle partner in terms of people and revenues by a significant margin, Accenture’s close alliance with the applications giant has propelled it ahead in the race to the cloud. Accenture has significant experience implementing the full suite of Oracle Cloud solutions and in cloud-enabling traditional Oracle applications such as E-Business Suite. Accenture combines its strong technology expertise with a worldwide network of labs and innovation centers, design experience capabilities from Accenture Interactive, renowned business consulting, and cutting-edge thought leadership.

  Accenture attracts criticism for higher costs, but one reference told us that “Costs are higher than the market average — but the results make it worthwhile.” We also hear from clients that Accenture is not easy to use for small, quick projects. However, one large European public-sector client we surveyed told us that Accenture met the agreed five-month timeline.

› **Deloitte brings strong business acumen and has impressive cloud experience.** It has been a top provider of Oracle application consulting and implementation services for years. Oracle's recent pivot to the cloud has been a boon for Deloitte, as Oracle customers' needs for cloud deployment align well with Deloitte's strengths in business transformation, strategy consulting, change management, and systems integration work. Deloitte was the first provider to achieve Global Cloud Elite status — and the only one to have done so by the time of our evaluation. Deloitte is one of the only top global Oracle partners that brings a full portfolio of risk, tax, and compliance services to its clients. Deloitte's clients praise it for bringing business innovation and for being a relationship-oriented partner.

  Due to its partner ownership structure, Deloitte uses a more local, country-level model than some of the peers evaluated in this report, and capabilities vary by geography. Deloitte also has a smaller base of offshore resources than other global leaders in the Oracle services provider market; this can limit Deloitte's opportunities to lower prices via labor arbitrage and its ability to take a heavy factory-based approach for scaling solutions and services (i.e., test and run).

› **Wipro is a proven provider making big investments in the shift to cloud.** It has a long track record of delivering Oracle services and is recognized by Oracle as a Diamond partner — the top tier of Oracle partners. Wipro has worked with Oracle to build solutions such as Smart Grid for Utilities and Warranty Management for the high-tech and manufacturing industries and was recognized by Oracle with a co-innovation award at Oracle's Collaborate conference in 2016. Wipro has worked with dozens of Oracle customers deploying cloud solutions, including Oracle SaaS as well as Oracle on non-Oracle cloud solutions such as Amazon Web Services.

  Wipro wants to be the partner of choice for tomorrow's digital businesses; it has invested in its own artificial intelligence tool, Holmes, and in next-generation Oracle technologies. Wipro has recently started to invest in digital experience and customer journey mapping capabilities, including its acquisition of Designit and associated studios. However, Wipro lags several of its global peers in this area in both brand and capabilities.

› **IBM's vast portfolio gives it unique advantages, but also creates some hurdles.** 2016 marks the 30th year of the IBM/Oracle relationship. Although coopetition between the two technology behemoths remains the norm, IBM has one of the largest practices on the planet for Oracle application services. IBM combines world-class digital experience capabilities from IBM iX with best-in-class business consulting and technology implementation and support work from IBM Global Business Services. IBM also has several unique value propositions for the Oracle space, most notably its ability to take advantage of Watson for advanced cognitive scenarios.

  On the downside, the heaviest competition between IBM and Oracle takes place at the infrastructure and platform layers of the technology stack; clients may encounter this friction in the battle for hyperscale cloud at the infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS) layers. Some clients have also complained that IBM is too hard to navigate and that the mix of skill sets that looks ideal on paper can be hard to achieve in practice — but this can be mitigated with the right attention to the relationship and the contract.

- **Infosys remains a leading choice for Oracle while pivoting to newer Oracle solutions.** The India-based giant has more than 14,000 Oracle practitioners and a full spectrum of design, build, implement, and run capabilities. Infosys has been aggressively investing in Oracle's next generation of solutions and was recognized by Oracle with excellence awards for both CX Cloud and PaaS/IaaS. The provider has numerous co-innovation initiatives with Oracle, including the smart asset IoT-enabled Service Cloud and HCM Cloud for retail.

  Infosys does not have the breadth of design and digital experience resources of the top providers we evaluated. Although Infosys has been building consulting and industry expertise for several years, it also lacks the brand cachet for business transformation of some of the multinationals and business consulting-oriented firms included in this evaluation. This means that although Infosys has plenty of proof points for transformational work, it may not always stand out as a natural choice due to lingering perceptions or older stereotypes of India-based firms.

- **Capgemini has made early investments in industry-specific cloud solutions.** It is a leading, global provider of the full spectrum of Oracle application services — from design to consult to implement to maintain. Capgemini makes use of its global network of Accelerated Solutions Environments for technology showcasing, customer journey mapping, and rapid prototyping. Capgemini has invested significantly in products and solutions such as its offerings for police (t-Police) and telecommunications (FAST Digital Telco). Capgemini has significant local presence in Europe and has also been growing its US operations, both organically and through acquisitions of firms such as iGate.

  Although Capgemini has significant experience in cloud-enabling legacy Oracle products and industry solutions, it has less experience with Oracle SaaS products than other global leaders evaluated in this report. Customer reference feedback varied from excellent to mediocre; this serves as a strong reminder that a great service partner relationship will depend on specific team members as well as your ability to be a strong partner and lend the right attention to the relationship.

Strong Performers

- **PwC continues its massive foray into Oracle services.** While Forrester clients used to question whether PwC competed in the Oracle technology space at all — even after the notable BearingPoint resource acquisition of 2009 — the provider has ramped up rapidly in recent years, both in terms of resources and brand visibility. PwC has also aligned itself tightly to Oracle's cloud shift and has been an early partner in several Oracle Cloud areas. PwC's strong management consulting brand and business strategy capabilities are well-suited to cloud projects due to their great need for business process enablement and change management work.

  Overall, PwC's Oracle practice is best-suited to Oracle application customers seeking business strategy and management consulting. The provider also has strong experience design capabilities and a network of design studios, but the fragmented acquisition path that created these capabilities combined with competing demands from nearly all PwC technology services groups means that clients may have difficulty getting access to the best of these resources. Additionally, PwC has significantly smaller scale in offshore resources and managed services work compared with other large Oracle application partners — which means that Oracle customers will often find a better fit elsewhere for work such as global template rollouts or application management.

› **TCS's internal digital transformation sets it up to help clients transform.** TCS is moving fast to serve clients in new ways. Highlights of TCS' transformation include investing in experience design capabilities, launching digital studios for co-innovation with clients, deepening business consulting expertise, shifting to Agile methodologies and tools, and working with Oracle and its customers on next-generation products such as Oracle Cloud. Today's TCS wants to help clients with digital reimagination — a significant deviation from the labor arbitrage-focused TCS that many service buyers have known over the past few decades.

  Although TCS has made great progress — reflected in its revenue and employee growth numbers — it does not always have brand permission to do major business transformation work and can suffer from a lingering negative perception of India-based providers. Execs and business leaders who don't already know and trust TCS may hesitate to consider it for business model change — but they shouldn't. That said, clients should not expect that every TCS practitioner has become a strategy consultant overnight; many technology-heavy resources remain, and some won't change easily but will persist in TCS accounts.

› **Cognizant leverages its acquisition of KBACE to boost cloud capabilities.** It is one of the top providers in terms of volume for Oracle SaaS implementations. Although Cognizant had been focusing on Oracle SaaS solutions for several years and had a strong track record for multimodule deployments, the practice got a major boost when Cognizant acquired boutique KBACE earlier this year. (KBACE customers will benefit from Cognizant's broad range of business process experience and technology skills in areas such as analytics and integration.) As a provider with a significant offshore footprint in India, Cognizant is a strong choice for ongoing application management work as well as consulting and implementation work.

  Although Cognizant has made strong progress in newer Oracle technologies, it lags other global Oracle partners in legacy technologies such as E-Business Suite. Thus, Cognizant is not well-suited to big pockets of classic Oracle applications work. Although early signs of the KBACE acquisition look good, service acquisitions are nearly always fraught with challenges such as turnover and methodology alignment. When selecting a provider, clients should put extra emphasis on understanding the proposed team's experience working together and make sure that they clarify replacement and average tenure expectations in their statements of work.

Contenders

› **Tech Mahindra has a broad library of ready-made industry solutions.** It has worked with hundreds of Oracle customers. Tech Mahindra has a strong library of products and solutions to speed up and simplify Oracle work, including Service Knowledge Management on Cloud for Auto and a rapid cloud implementation kit called ERP-EDGE that has preconfigured, fixed-scope packaged services. Tech Mahindra is an especially strong fit for telco customers; this sector dominates its customer base, and Tech Mahindra has done Oracle work for a Who's Who of telco brands.

Tech Mahindra combines ready-made service packages with design experience capabilities focused on helping clients innovate and reinvent business models. It has experience in customer journey mapping and co-innovation using its Accelerated Solution and Creative Experience Design Labs. But Tech Mahindra is not well-known among business leaders and CEOs, which makes it harder for it to take the lead in major business model reinvention, where buy-in and organizational change are critical.

› **L&T Infotech offers a smaller alternative, with big cloud capabilities for its size.** Although its Oracle practice is smaller than those of other providers in this analysis, L&T Infotech punches above its weight in deploying Oracle's newer SaaS solutions for functions such as ERP, CRM, and human capital management (HCM). It has also partnered with providers of non-Oracle IaaS options to support a wide range of alternatives for cloud deployment of traditional Oracle products. L&T Infotech has also invested significantly in automation tools to help clients become more efficient and simplify environments to become more innovative and agile.

L&T Infotech's size is a double-edged sword. Some clients prefer to be a bigger fish in a smaller pond to get more attention, but they should not expect the same bench strength, breadth of skills, or geographic presence as they would get from larger partners. Additionally, L&T Infotech has had to be more selective and measured with its own transformation to digital services; the provider has not made any aggressive plays in experience design and lags many larger firms that have been able to make significant investments in creative and design skills.

Challengers

› **CSC has limited cloud experience, but major change is on the horizon.** CSC has been slower than its leading global peers to pivot its outsourcing-heavy Oracle application business to next-generation projects for SaaS and digital business transformation. One specific gap is Oracle SaaS deployment, where CSC has limited experience. Today, the provider is a strong choice for work on traditional Oracle applications such as E-Business Suite, especially where there is a need for a long-term partner that can perform application and infrastructure management work.

CSC is poised for a major shift: It plans to have the merger with HP Enterprise Services and the resulting new management team in place in early 2017. While the new entity will have experience design and consulting capabilities, its core focus will likely remain operations, including helping customers digitize operations through solutions such as cloud and DevOps.

› **CGI is moving fast but still has a way to go in the journey to Oracle Cloud.** CGI is a global Oracle Platinum partner with significant depth in providing Oracle application services in Europe thanks to its acquisition of Logica in 2012. CGI is a strong choice for traditional Oracle products, including the cloud enablement of those traditional products through its partnerships with Microsoft and Hitachi Data Systems. CGI is an especially strong choice for longer-term operations and the "run" elements of Oracle work, although the provider also has significant experience in business consulting and build work for Oracle applications.

Compared with the other providers in this evaluation, CGI is more heavily skewed toward traditional Oracle work. In our view, CGI is underinvested in next-generation digital experience studios for ideation and prototyping. CGI's experience implementing Oracle SaaS products is limited as primarily comes from ERP and HCM, not the newest Oracle SaaS products such as supply chain and CPQ.

Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by May 17, 2016.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference surveys/calls.** To validate product and vendor qualifications, Forrester also conducted reference online surveys and calls with 8 of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

1 To learn more about Oracle's changing strategy and charge into the cloud, see the "The Fog Begins To Lift On Oracle's Cloud Shift" Forrester report.

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