

The Forrester Wave™: Services Providers For Oracle SaaS Business Apps, Q4 2020

The 10 Providers That Matter Most And How They Stack Up

by Amanda LeClair and Liz Herbert

October 1, 2020

Why Read This Report

In our 24-criterion evaluation of Oracle software-as-a-service (SaaS) business apps services providers, we identified the 10 most significant ones — Accenture, Capgemini, Deloitte, IBM, Infosys, KPMG, Oracle, PwC, TCS, and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals select the right one for their needs.

Key Takeaways

Accenture And Deloitte Lead The Pack

Forrester's research uncovered a market in which Accenture and Deloitte are Leaders; IBM, Infosys, TCS, and Oracle are Strong Performers; PwC, Wipro, and KPMG are Contenders; and Capgemini is a Challenger.

Full-Suite Oracle Apps Capabilities And A Future-Oriented Vision Are Key Differentiators

As both Oracle customers and SaaS business apps become more mature, customers need a strategic services partner with deep expertise in the Oracle portfolio plus the transformation and program management chops to deliver business value. Providers that can marry business consulting and implementation capabilities with world-class agile delivery and accelerators position themselves to successfully deliver cloud transformation to their customers.

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[Now Tech: Oracle Apps Implementation Services Providers, Q2 2020](#)



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Leaders Invest In Oracle Custom Assets, Intelligence, And Talent

The future of Oracle applications is in the cloud — and most customers acknowledge that journey, whether they're at the early stages of planning the roadmap or have already implemented one of the cloud app modules. These applications are driving growth for Oracle and laying the foundation for the adaptive systems required for digital businesses. But implementing modules is only part of realizing the full value from SaaS apps. Customers rely on strategic services partners to help them select the best solutions for their business as well as manage the program and change management associated with larger, often multipillar, implementations that meet the needs of large global enterprises.

Oracle SaaS business apps customers should look for providers that:

- › **Excel in business consulting and implementation services for Oracle apps.** Adopting Oracle SaaS business apps requires new skill sets and changes to the way you work. Customers must look for partners that can manage the implementation and integration of new apps, accelerate time-to-value, and have the practices, people, and program management skills to manage the cultural shift to standard processes. All providers evaluated have strength across these areas, but customers must also find the provider with the right cultural fit, demonstrated methodologies, and validated tools to fit their individual needs and working styles.
- › **Focus on the future by nurturing relationships with Oracle and beyond.** Strategic services providers are most valuable when they can help customers easily navigate the Oracle landscape and complement functionality gaps without duplicating efforts. Customers should select a partner that can help with today's needs but also future ones, too. Leading providers already invest heavily in industry solutions, next-gen automation, AI, and machine learning and continuously develop top-tier talent. They leverage key and unique partnerships beyond Oracle to help clients stay on the leading edge of digital maturity and market shifts.
- › **Specialize in the relevant SaaS business apps and service areas.** Customer needs span from single-pillar implementations in areas like marketing, HR, and payroll to large, multipillar deployments. While many large enterprises implement multipillar Oracle solutions, most customers still aren't implementing the full suite of Oracle SaaS apps. In addition, some customers seek consulting or implementation support, while others seek longer-term help. Customers should look for partners with the above skill sets and those that are specialized in the applications that are relevant to their Oracle roadmap instead of looking for a one-size-fits-all recommendation.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our report, "[Now Tech: Oracle Apps Implementation Services Providers, Q2 2020.](#)"

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We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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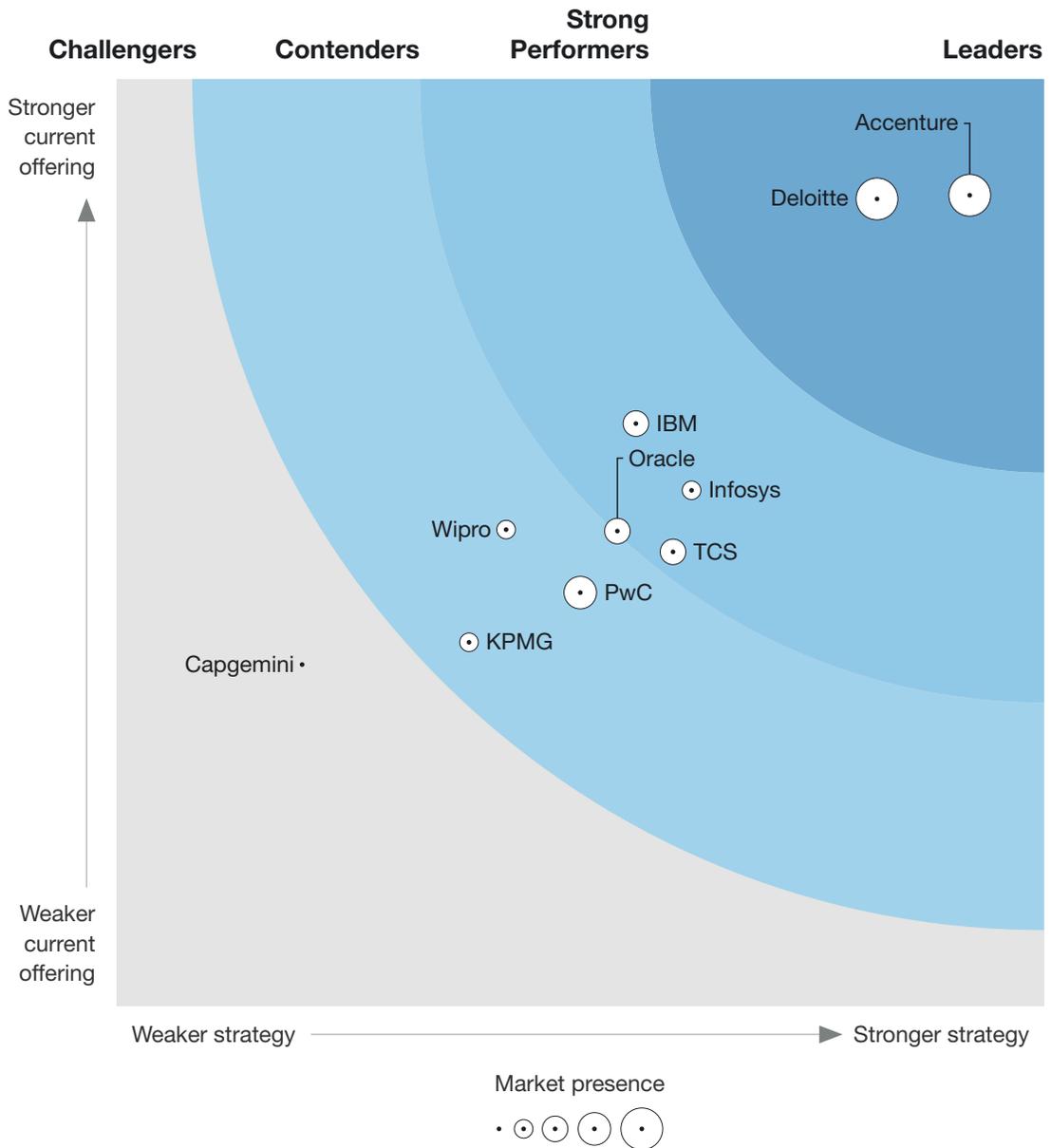
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FIGURE 1 Forrester Wave™: Services Providers For Oracle SaaS Business Apps, Q4 2020

THE FORRESTER WAVE™

Services Providers For Oracle SaaS Business Apps

Q4 2020



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FIGURE 2 Forrester Wave™: Services Providers For Oracle SaaS Business Apps Scorecard, Q4 2020

	Forrester's weighting	Accenture	Capgemini	Deloitte	IBM	Infosys	KPMG	Oracle	PwC	TCS	Wipro
Current offering	50%	4.37	1.84	4.35	3.14	2.78	1.96	2.56	2.23	2.45	2.57
Business consulting	10%	5.00	3.00	5.00	3.00	1.00	3.00	1.00	3.00	1.00	1.00
Experience design capabilities	5%	5.00	3.00	3.00	5.00	1.00	3.00	1.00	3.00	3.00	3.00
Implementation services	10%	5.00	1.00	5.00	3.00	3.00	3.00	3.00	3.00	1.00	1.00
Ongoing support	10%	5.00	1.00	3.00	5.00	5.00	1.00	3.00	1.00	3.00	3.00
Innovation services	5%	5.00	3.00	5.00	3.00	3.00	1.00	1.00	3.00	3.00	3.00
Digital transformation proof points	8%	3.00	1.00	5.00	5.00	3.00	3.00	1.00	3.00	3.00	3.00
Program management	5%	3.00	1.00	5.00	3.00	1.00	1.00	1.00	5.00	1.00	1.00
Talent approach	5%	3.00	5.00	3.00	3.00	1.00	5.00	1.00	1.00	1.00	3.00
Modern delivery methods	5%	3.00	1.00	3.00	3.00	5.00	1.00	5.00	1.00	3.00	5.00
Accelerators and prebuilt IP	5%	5.00	3.00	3.00	3.00	5.00	1.00	1.00	1.00	3.00	5.00
HCM Cloud	8%	5.00	1.00	5.00	3.00	3.00	1.00	3.00	1.00	3.00	3.00
ERP Cloud	5%	5.00	3.00	5.00	1.00	3.00	1.00	5.00	5.00	3.00	3.00
EPM Cloud	5%	5.00	1.00	5.00	3.00	3.00	3.00	5.00	3.00	3.00	1.00
SCM Cloud	4%	5.00	1.00	5.00	3.00	3.00	1.00	1.00	1.00	3.00	3.00
CX Cloud	8%	3.40	1.00	4.40	1.00	2.00	1.00	5.00	0.60	3.60	2.60
NetSuite	2%	3.00	3.00	5.00	0.00	1.00	1.00	5.00	1.00	3.00	3.00
Strategy	50%	4.60	1.00	4.10	2.80	3.10	1.90	2.70	2.50	3.00	2.10
Vision	25%	5.00	1.00	5.00	3.00	3.00	3.00	1.00	3.00	3.00	1.00
Market approach	25%	5.00	1.00	3.00	3.00	5.00	1.00	3.00	1.00	3.00	3.00
Innovation roadmap	20%	5.00	1.00	3.00	5.00	1.00	1.00	3.00	3.00	3.00	1.00
Partner ecosystem	20%	3.00	1.00	5.00	1.00	3.00	3.00	5.00	3.00	3.00	3.00
Commercial model	10%	5.00	1.00	5.00	1.00	3.00	1.00	1.00	3.00	3.00	3.00

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

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FIGURE 2 Forrester Wave™: Services Providers For Oracle SaaS Business Apps Scorecard, Q4 2020 (Cont.)

	Forrester's weighting	Accenture	Capgemini	Deloitte	IBM	Infosys	KPMG	Oracle	PwC	TCS	Wipro
Market presence	0%	5.00	1.00	5.00	2.01	1.67	2.00	2.35	3.67	2.67	1.68
Enterprise customers	34%	5.00	1.00	5.00	3.00	2.00	2.00	4.00	4.00	3.00	3.00
Large SaaS business apps projects	33%	5.00	1.00	5.00	1.00	1.00	2.00	1.00	3.00	2.00	1.00
Revenue	33%	5.00	1.00	5.00	2.00	2.00	2.00	2.00	4.00	3.00	1.00

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

Provider Offerings

Forrester included 10 providers in this assessment: Accenture, Capgemini, Deloitte, IBM, Infosys, KPMG, Oracle, PwC, TCS, and Wipro.

Provider Profiles

Our analysis uncovered the following strengths and weaknesses of individual providers.

Leaders

- › **Accenture offers unmatched global scale and ability to be a marketmaker.** Accenture serves end-to-end customer needs, from business strategy to cloud deployment to ongoing support. The global giant has a leading number of certified resources and client engagements and significant expertise in all major products we evaluated. The firm has further enhanced its scale through acquisitions, such as the 2018 purchase of DAZ Systems. Aside from scale and breadth, Accenture is well known for aligning with the most cutting-edge trends — from its early investments in cloud to automation and AI now under its myConcerto platform to ecosystem-driven approaches. Accenture also offers a significant number of accelerators and platforms, which it can use to help clients speed up rollouts.

Accenture excels across multiple types of services and Oracle products, with strengths in business consulting, experience design, and ongoing support services. The firm also stands out for its bold vision and the deep investments it makes in go-to-market, innovation, and R&D. Accenture customers say that the provider has an excellent reputation and commitment to partnership. On the

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downside, the firm can be expensive to work with, and one customer reference thought Accenture should have done more to create a realistic cost estimate and timeline. Overall, Accenture is well suited to those with the biggest and most complex deployments.

- › **Deloitte stands out with a focus on transformation.** Deloitte has one of the largest global Oracle practices and now offers services at scale across all major categories. The firm is well known for design, consulting, and implementation but more recently has built up its application management and outsourcing services. Deloitte uses its Ascend platform to bring prebuilt intellectual property (IP) to projects — which codifies the learnings from across its client base. In addition to Oracle Cloud consulting and implementation capabilities, Deloitte brings tax and risk consulting to projects where appropriate. In 2019, Deloitte and Oracle announced a sales and delivery collaboration called ELEVATE.¹

Deloitte has strong capabilities at scale for consulting and implementation work related to Oracle, with top scores for innovation services and program management. The firm has significant experience across all major areas of Oracle Cloud — including human capital management (HCM), enterprise resource planning (ERP), enterprise performance management (EPM), supply chain management (SCM), and customer experience (CX). Deloitte customers praised the partner as dedicated, methodical, experienced, and commercially flexible. However, one customer reference felt that Deloitte came across as too “one size fits all” in its approach, especially in change management. Deloitte is best suited for Oracle Cloud deployments in medium and large enterprises where the client seeks meaningful business change and not just a “slam in a package” model.

Strong Performers

- › **IBM is a long-standing Oracle partner with standout design-thinking chops.** IBM is a large Oracle services partner and has been an Oracle partner for more than three decades, despite being traditional competitors in some markets. The firm provides end-to-end services from consulting to implementation to support and brings to bear pan-IBM capabilities, such as the IBM Garage experience for design and Watson for cognitive and AI. IBM also has a significant library of tools, such as its Cloud Impact Assessment and Cognitive Enterprise Business Platform (CEBP) for Oracle Cloud Industry Solutions.

IBM is competent across most major areas of the evaluation, with particular strengths in experience design and transformation proof points, but trails other providers in ERP and CX cloud work, based on limited experience in large enterprise deployments. IBM was also not able to showcase as much commercial innovation versus others in the evaluation, despite having a compelling innovation roadmap. Customers cited a strong sense of creativity and commitment to fast, agile rollouts in their experiences with the firm. Yet they had mixed reviews on change management and the firm’s business consulting capabilities. IBM is best suited for companies that embrace a design-led, agile approach as well as those seeking to push the envelope on AI with a partner that’s making big and bold bets on it.

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- › **Infosys is a stalwart in Oracle services, excelling in ongoing support.** Infosys is a long-standing partner in the Oracle ecosystem, with services across the full lifecycle from consulting to implementation to support. The provider supports legacy Oracle work (including JD Edwards, PeopleSoft, and Siebel) as well as its modern Fusion Cloud products. Infosys has numerous accelerators and methodologies (with lots of names and acronyms to keep up with!), including more than a dozen Oracle-certified apps for sale on the Oracle marketplace. Examples of Infosys solutions include its Automotive Industry Solution and Hi-Tech Industry Solution.

Infosys stands out most for its modern delivery methods and ongoing support. Infosys is experienced in most major categories of Oracle Cloud, including ERP, EPM, HCM, SCM, Sales, and Service, but trails Leaders in this evaluation when it comes to business consulting and experience design. Customers reinforced the idea that Infosys has strong delivery capabilities. However, two customer references said that talent was hit or miss, and one expected Infosys to be stronger at remote delivery. Overall, Infosys is a solid choice for larger and more complex deployments, especially those with significant technical complexity and long-term support needs.

- › **TCS has broadened its business appeal but has work to do to catch peers.** TCS is aligning its brand and services offerings to expand its footprint beyond the CIO's office, powered by its PERPETUITY 4.0 framework. These efforts include investing heavily in a stronger go-to-market presence focused on senior business executives and delivering more consistent technical innovations with AI-powered industry solutions. Looking ahead, TCS's vision is to continue to mature its experience-led approach while retaining core strength in areas like automation with its ignio platform.

TCS has solid scale and experience throughout the Oracle SaaS business apps portfolio, including NetSuite, with particular strength in CX Cloud. However, the firm has fewer business consulting resources than peers and is weaker than peers for implementation services, program management, and talent approach. Reference customers reiterated that engaging with business users and driving strategy is not a strength of TCS but did praise the firm for its value for the money and flexibility. TCS continues to be a solid choice for complex cloud implementation work at competitive rates — as well as a firm to consider for customer and employee experience transformation projects.

- › **Oracle Consulting (OC) bridges product functionality to business needs.** Oracle Consulting is not an end-to-end business transformation partner but instead is laser-focused on helping Oracle customers achieve the cloud foundation required to transform with low cost of ownership. OC is working toward setting the bar for customer success for the whole Oracle ecosystem, while continuing to enable its services partners for effective cloud implementations. Looking ahead, OC will be helping to deliver on Oracle's innovation roadmap by expanding prebuilt industry cloud solutions. For example, OC has developed a solution for the construction industry.

Today, OC excels in modern delivery methods, expanding its Soar offering and bringing to market over 1,500 assets to lower risk and cost for customers. Within the Oracle SaaS business apps portfolio, OC is strongest in core areas like ERP and EPM. The group is not as strong

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as its partners in business consulting or experience design — which fits with its strategy to support rather than compete with its services partner ecosystem. However, reference customers also noted gaps in key areas like program management, where they suggested the consulting organization would benefit by hiring more nontechnical people to manage projects. OC is a smart choice for enterprises with complex or multipillar cloud deployments, particularly those that use newer Oracle products.

Contenders

- › **PwC is best for finance-led transformation, with a narrower focus than Leaders.** PwC is a well-known and respected business partner in the Oracle world and beyond. The firm continues to leverage its BXT framework, giving clients a strong mix of business acumen, design, and technical expertise. Its tax and advisory roots mean PwC is often a fast follower in the services landscape, which shows up in the firm's market approach and innovation roadmap. Clients can expect the value promised to be the value delivered in areas where PwC places its bets but shouldn't expect a forward-leaning partner when it comes to leading-edge innovation.

PwC delivers on its strategy with world-class program management capabilities but lags others in this report in ongoing support, modern delivery, and accelerators. PwC is strongest in Oracle ERP Cloud, followed by EPM and HCM. However, the firm doesn't focus as much on CX Cloud, with capabilities in Sales Cloud only. Reference customers applauded PwC's ability to deliver on time and on budget despite unexpected obstacles but also felt their team should have been more proactive and explicit in the early phases of their project. PwC is a top choice for enterprises looking for a partner to deliver predictable value and mitigate risks, particularly for finance-led Oracle transformations.

- › **Wipro is a solid choice for cloud implementation but lags in transformation.** As a fixture in the Oracle ecosystem, Wipro is dedicated to moving Oracle customers to the cloud. Its vision is to bring 85% of its on-premises customers to the cloud in the next two years. The firm offers customers a wide range of advanced commercial models that offer payment flexibility aligned to value — important to enterprises prioritizing cost reductions in the near term. Wipro also has a solid partner ecosystem through its stakes in Drivestream and Harte Hanks, along with partnerships with EY and KPMG to fill gaps in consulting for some geographies.

While Wipro is not on the bleeding edge for strategy among peers, over the past several years, it has developed strong experience and innovation chops on par with the competition. It excels in accelerators and prebuilt IP but lags others in business consulting, program management, and innovation roadmap. Wipro has strong alignment with Oracle Global Business Units (GBUs) and bolsters these solutions with its HOLMES platform for AI. Customer references reinforce Wipro's deep technical skills and flexibility; however, they also highlighted weaknesses in its ability to develop strategy, change management, and communication that created additional obstacles in projects. Wipro is best suited to customers seeking a solid technical partner that can work at scale and has deep expertise helping clients move to the cloud.

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- › **KPMG is a strong partner in finance but still lags the scale of competitors.** KPMG goes to market with its customer-centric, cross-functional Connected Enterprise strategy. While one of the smallest practices evaluated, KPMG has been a fast mover in the Oracle ecosystem, bolstered by investments in its Powered Enterprise platform. KPMG has an impressive talent development and enrichment approach to continue to expand the practice, and its Oracle-centric R&D strategy focuses on HCM and finance use cases.

KPMG is still ramping up its Oracle practice and across the board has delivered fewer Oracle SaaS business apps than peers we evaluated. KPMG also has work to do to match the depth of capabilities from peers, including in areas like ongoing support, the use of automation, and maturity of accelerators and prebuilt IP. Customer references called out the disparity between the firm's strong ERP/EPM and HCM teams compared with weaker SCM capabilities and highlighted challenges with overall program management. However, they also felt KPMG was eager to work as a true partner and excelled in finance expertise. KPMG is best suited to business-led Oracle implementations, particularly in finance.

Challengers

- › **Capgemini invests heavily in talent but lags in capabilities and SaaS experience.** Paris-headquartered Capgemini is a longtime Oracle partner that offers the full spectrum of end-to-end applications services. Over the years, Capgemini has made numerous acquisitions and investments that help clients become digital businesses, acquiring the agency Fahrenheit 212 and scaling its own Applied Innovation Exchange centers. Capgemini continues to build a more consistent brand and experience across geographies and product lines and to consolidate its various brands in the market (which include Altran, IGATE, Sogeti, and many more).

Overall, Capgemini has been slower to shift to the cloud compared with others in this report and trails in number of skilled resources and completed projects in HCM, EPM, SCM, and CX Cloud work. Customers still praised the firm for its dedication and ability to work in a fast, agile way. On the downside, references had mixed experiences with the firm's consulting and change management offerings and accelerators. Capgemini has Oracle Cloud deployment experience in a range of midsize and larger firms, including with NetSuite. It's a good choice for European-centric companies seeking end-to-end support, especially for traditional Oracle applications.

Evaluation Overview

We evaluated providers against 24 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each provider's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these capabilities include business consulting, implementation services, modern delivery methods, accelerators and prebuilt IP, and capabilities for specific Oracle SaaS business apps.

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- › **Strategy.** Placement on the horizontal axis indicates the strength of the providers' strategies. We evaluated vision, market approach, innovation roadmap, partner ecosystem, and commercial model.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each provider's Oracle SaaS business apps enterprise customers, large projects, and revenue.

Provider Inclusion Criteria

Forrester included 10 providers in the assessment: Accenture, Capgemini, Deloitte, IBM, Infosys, KPMG, Oracle, PwC, TCS, and Wipro. Each of these providers has:

1. **A large-scale Oracle apps practice with a formal alliance relationship.** The providers have at least \$400 million in annual Oracle apps services revenues.
2. **Significant capabilities for Oracle Cloud apps.** Providers have at least \$200 million in annual Oracle SaaS business apps services revenues and experience delivering large Oracle SaaS business apps projects.
3. **Interest from Forrester clients.** Providers have scale, breadth, and depth of capabilities to deliver large, complex business and technology transformations for global enterprises.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by July 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ Source: "Oracle Consulting and Deloitte Collaborate to Help Organizations Move and Innovate with Oracle Cloud," Oracle press release, September 16, 2019 (<https://www.oracle.com/corporate/pressrelease/oow19-oracle-and-deloitte-accelerate-customer-innovation-091619.html>).

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