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# The Forrester Wave™: Oracle Implementation Providers, Q1 2008

by Liz Herbert  
for Sourcing & Vendor Management Professionals



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## The Forrester Wave™: Oracle Implementation Providers, Q1 2008

Accenture And Deloitte Lead An Extremely Well-Qualified Pack

by **Liz Herbert**

with Christine Ferrusi Ross and Sean Galvin

### EXECUTIVE SUMMARY

Forrester evaluated major Oracle implementation providers across 107 criteria and found that Accenture and Deloitte lead due to overall strong end-to-end implementation capabilities as well as industry breadth and depth. Oracle and Satyam fare well based on extremely strong technical ability and growing strategy consulting practices. Global giant IBM emerges as a leader particularly well suited to large, multinational, end-to-end implementation projects. Indian-providers Tata Consultancy Services (TCS), Infosys, and Wipro also emerge as category leaders fueled by strong technical skills, large offshore practices, and strong technical IP including pre-built, industry-specific solutions. Capgemini rounds out the Leaders category with strong end-to-end implementation skills and uniquely situated as a provider with experience heavily weighted towards Europe. Four additional providers that emerged as Strong Performers in this market are HCL, BearingPoint, CSC, and Fujitsu. To find the best Oracle services partner, Forrester clients should customize the Forrester Wave™ tool to reflect their individual needs and preferences.

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Forrester surveyed the following 13 providers in the Oracle implementation market: Accenture, BearingPoint, Capgemini, CSC, Deloitte, Fujitsu, HCL, IBM, Infosys, Oracle, Satyam, TCS, and Wipro. We also interviewed 48 provider-supplied client references.

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## FIRMS' DEMAND FOR ORACLE IMPLEMENTATION SERVICES IS GROWING

The landscape for Oracle services has evolved significantly in the past few years. Oracle's acquisition binge and move to Fusion architecture leaves many clients facing important decisions about their long term applications strategy, and seeking services providers with the expertise to help guide them. The services demand is fueled by:

- **New additions to the Oracle family.** As Oracle clients seek to take advantage of newer acquisitions like Hyperion for performance management or Oblix for identity management, they frequently require third-party services to help with implementation. Additionally, firms often look to their services providers for guidance in mapping the expanding family of Oracle products to their business needs.
- **Upgrades.** Oracle offers its full Premier Support for five years beyond a product's original availability date. After that, some product lines offer Extended or Sustaining Support that give clients reduced sets of benefits. In other cases, support is not offered at all beyond the Premier Support period. This means that clients running products like PeopleSoft 8.8, Siebel 7.0 and 7.5, and JD Edwards 8.9 that recently reached or soon will reach the end of their Premier Support period are faced with upgrades to newer versions or moves to Oracle Fusion Applications.
- **Planning for Fusion.** Many Oracle clients have questions about Oracle's Fusion strategy and what it means for their application portfolio planning. This means that they are seeking help understanding what is involved in the migration and getting ready for an eventual move to the new architecture. Services providers are responding to this need by creating formalized offerings like Capgemini's CxO Fusion Experience, which helps companies prepare to migrate to Fusion, and Wipro's Fusion Middleware Lab, which is developing conversion and integration tools that will accelerate moves to the new architecture.

## Services Providers Are Expanding Their Capabilities To Meet Demand

Oracle practices at leading implementation partners are growing, expanding into new skill sets, industries, and geographies. Key trends include:

- **Double-digit growth at several leading implementation firms.** Several of the providers in this Forrester Wave are growing at double-digit rates. Indian-based Infosys, Satyam, TCS, and Wipro are all growing at more than 50% year-over-year. Accenture, which dominates the Oracle implementation market in terms of practice size with more than 21,000 consultants, is growing at more than 30%, and IBM at an estimated 25%, year-over-year.
- **Indian-based firms and Oracle continue to ramp up their strategy consulting capabilities.** Offshore providers and Oracle Consulting, previously viewed as strong primarily in the technical components of an implementation, are ramping up their strategy consulting practices so as to be better able to provide full end-to-end service delivery rather than come in for only the back end of an implementation.

- **Providers investing most heavily in Fusion, E-Business Suite, and Oracle BI.** When asked about growth priorities, providers said their top priorities were in the new Fusion architecture, the core E-Business Suite products that will eventually encompass acquisitions like Agile and G-LOG, and Oracle Business Intelligence (BI) products including recently acquired Hyperion. Other product lines like JD Edwards and PeopleSoft are much lower on the growth priority list.

## ORACLE IMPLEMENTATION PROVIDERS EVALUATION OVERVIEW

To assess the state of the Oracle implementation providers market and see how the providers stack up against each other, Forrester evaluated the strengths and weaknesses of the top Oracle systems integrators.

### Evaluation Criteria Span Strategy Consulting, Technical Skill, Industries, And Geographies

After examining past research, user need assessments, and provider and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated providers against 107 criteria grouped into three high-level buckets (see Figure 1):

- **Current offering.** To evaluate the services providers' current offerings, we looked at their ability to provide end-to-end implementation services including process and strategy consulting, low-cost technical implementation work, and post-implementation services like training and knowledge transfer. We also looked at the providers' mix of capability across Oracle products including E-Business Suite, Siebel, PeopleSoft, Hyperion, JD Edwards, and Fusion Middleware, the providers' industry expertise, and their mix of consulting capabilities globally.
- **Strategy.** To measure strategy and vision, Forrester considered criteria like provider commitment to Oracle (as evidenced by partner status and recent awards), thought leadership in the Oracle services market, and provider plans for investment in key vertical and functional areas.
- **Market presence.** We evaluated the providers' presence in the Oracle implementation services market based on the number of implementation projects, Oracle implementation services revenues, and the number of employees dedicated to Oracle implementation services. We also took into consideration in our evaluation the strength of the larger corporation that supports the services organization.

**Figure 1** Evaluation Criteria

CURRENT OFFERING	
Overall value	What is the overall value of the provider's Oracle implementation work?
Business expertise	What is the provider's Oracle implementation business expertise?
Vertical expertise	What is the provider's Oracle implementation vertical expertise?
Implementation	How strong is the provider's overall Oracle implementation project expertise?
Discrete product capabilities	What are the provider's implementation capabilities across specific functional areas like Fusion Middleware, JD Edwards, Oracle BI, Oracle E-Business Suite, PeopleSoft, Siebel, and Vertical Product Capability?
Post-implementation	What are the provider's post-implementation capabilities?
Global presence	What is the breakdown of the provider's resources across the globe?
Low-cost, remote global delivery	How strong is the provider at low-cost, remote global delivery?
STRATEGY	
Overall vision	What is the provider's overall vision for the Oracle implementation market?
Plans for growth of horizontal capabilities	Where is the provider prioritizing growth by functional area?
Plans for growth of vertical capabilities	Where is the provider prioritizing growth by vertical?
Future investments	What are the provider's plans for future investments in the Oracle implementation market?
Commitment to Oracle	How committed is the provider to Oracle?
MARKET PRESENCE	
Client base and engagements	What is the provider's Oracle implementation client base?
Staff dedicated to Oracle implementation	How many staff does the provider have dedicated to Oracle implementations?
Financials	What are the provider's financials?

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Source: Forrester Research, Inc.

**Providers Evaluated Have Global, Cross-Industry Presence In Multiple Oracle Product Lines**

Forrester included 13 providers in its assessment: Accenture, BearingPoint, Capgemini, CSC, Deloitte, Fujitsu, HCL, IBM Global Services, Infosys, Oracle, Satyam, TCS, and Wipro. Each of these providers has (see Figure 2):

- **Global presence in the Oracle services market.** Forrester invited all twelve of Oracle’s Global Systems Integrators to participate. All except EDS accepted the invitation. Forrester also included two additional players with global traction in the Oracle space that are showing momentum and generating questions from the Forrester client base, HCL and Fujitsu.

**Figure 2** Evaluated Providers: Provider Information And Selection Criteria

Provider	Number of Oracle implementation projects in the last 12 months	Total number of all Oracle consultants†
Accenture	1,051	21,283
BearingPoint	502	3,390
Capgemini	850	5,979
CSC	143	3,500+
Deloitte	252	5,425
Fujitsu	530	Appr. 2,500
HCL	80	Appr. 1,900
IBM Global Services	400+	Appr. 6,700
Infosys	350	3,000+*
Oracle	1,000+*	9,000+*
Satyam	52	5,807
TCS	155	6,897
Wipro	200+	6,175

**Provider selection criteria**

Does the provider have a global presence in the Oracle services market?

Does the provider have expertise across a range of industries and Oracle products?

†Please note that although Forrester did its best to ensure consistency in the way that providers counted their Oracle consulting resources, correlations between resource numbers and other practice size numbers indicate that not all providers use the same methodology for measuring headcount.

\*Forrester estimate

- **Expertise across a range of industries and range of Oracle products.** Providers included in the Forrester Wave have broad industry experience and skillsets. The providers all have experience and trained consulting staff that spans multiple Oracle family products. Specialist implementation providers that focus only on particular products (such as PeopleSoft) or particular functions (such as BI) were not considered.

## ORACLE IMPLEMENTATION SERVICES BUYERS HAVE SEVERAL STRONG CHOICES

The evaluation uncovered a market in which (see Figure 3):

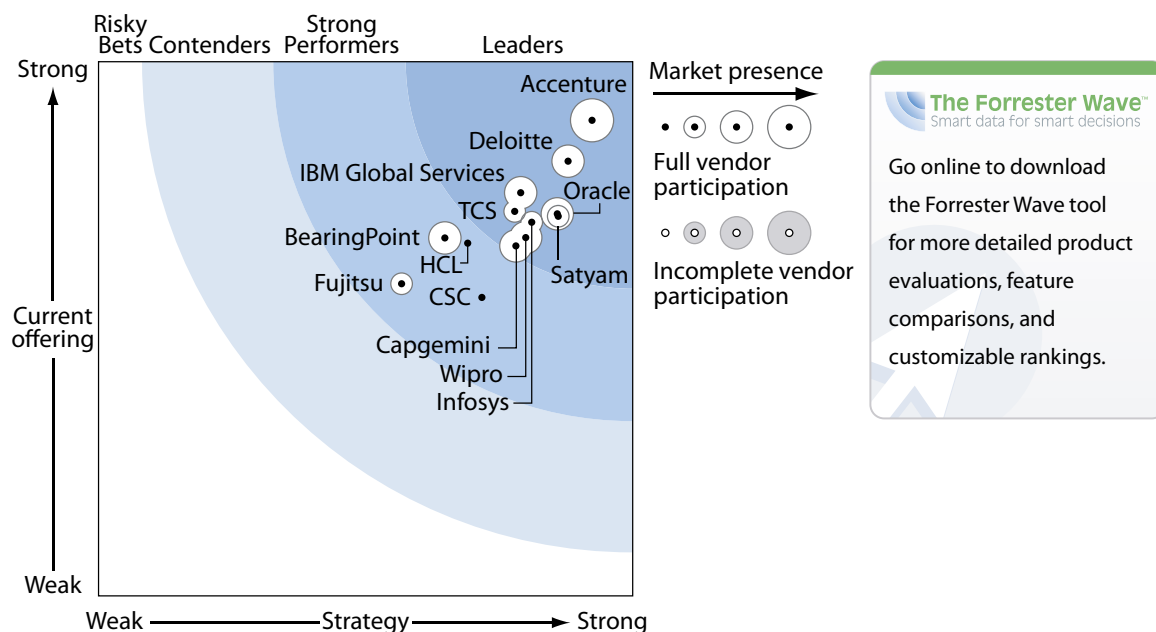
- **Accenture leads in overall capability and dominates in terms of practice size.** Accenture stands out from the pack with strong skills across all phases of the implementation life cycle, strong worldwide presence, and continued aggressive practice R&D and growth. Accenture's Oracle implementation practice has more than 21,000 resources, approximately three times the consulting staff of its nearest competitor.
- **Deloitte stands out for overall implementation capability and strategy.** Deloitte scored extremely well in the higher value portions of the implementation life cycle as well as on industry breadth and depth. Deloitte was also one of only three providers in the evaluation to achieve a perfect score on overall client satisfaction. Beyond its strong implementation capabilities, Deloitte also scored well on strategy components of the evaluation like its unique value proposition as an integrated tax and audit firm.
- **Oracle and Satyam excel at technical work and are moving into higher value consulting.** Oracle and Satyam, often thought of as most suitable for the technical portions of an implementation, have shown strong momentum in the market including growth of their strategy consulting capabilities. Both firms have healthy practices, with more than 5,000 resources and significant plans for expansion.
- **IBM is a category Leader with a global client base and \$1 billion-plus practice.** IBM has one of the largest Oracle practices in terms of revenue and experience serving some of the largest Oracle implementation projects worldwide. The provider is strong across all phases of the implementation life cycle as well as in post-implementation application management. IBM's 6,700 Oracle consultants are most heavily aligned with E-Business Suite, PeopleSoft, and Siebel; the provider has smaller numbers aligned with JD Edwards and with emerging areas like Oracle BI and Fusion Middleware.
- **Indian-based firms Infosys, TCS, and Wipro all earn Leader spots.** Infosys, TCS, and Wipro all made it into the Leader category. Infosys scored well due to strong implementation capabilities as well as strong client reference scores, particularly around value for the money and project management. TCS and Wipro (along with Satyam) have the largest offshore capabilities of the providers in the market. At 5,000 and 4,200 offshore resources, respectively, they have a substantial

lead over firms like Accenture (approximately 2,800), IBM (approximately 1,800), and Deloitte (1,100), making them a particularly strong fit for firms seeking to leverage the offshore model.

- Capgemini rounds out the Leaders group with strong overall capabilities and EMEA presence.** Capgemini is strong across most phases of implementation and across a breadth of verticals. It is also unique in being the only provider in the evaluation with a client base and resource mix more heavily skewed towards Europe. On the downside for firms seeking offshore delivery, Capgemini has a tiny offshore presence with barely more than 400 Oracle consultants located in low-cost delivery centers.
- BearingPoint, CSC, Fujitsu, and HCL emerge as Strong Performers.** Indian-based HCL scored the highest of the Strong Performers. This offshore specialist has a small Oracle practice of approximately 1,900 consultants, but is growing rapidly. BearingPoint also scored well within the Strong Performers group thanks to its ability to deliver upfront strategy work. CSC and Fujitsu round out the Strong Performers category. Beyond implementation, CSC generates approximately 30% of its Oracle revenue from maintenance work. Fujitsu has grown its Oracle practice through acquisition, meaning the provider has strong practices within various geographies, but is less integrated on a global scale than some of its competitors.

This evaluation of the Oracle implementation providers market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based provider comparison tool.

**Figure 3** Forrester Wave™: Oracle Implementation Providers, Q1 '08



Source: Forrester Research, Inc.

**Figure 3** Forrester Wave™: Oracle Implementation Providers, Q1 '08 (Cont.)

	Forrester's Weighting	Accenture	BearingPoint	Capgemini	CSC	Deloitte	Fujitsu	HCL
<b>CURRENT OFFERING</b>	50%	4.45	3.35	3.27	2.79	4.07	2.92	3.28
Overall value	10%	4.00	4.60	1.20	1.20	4.70	3.80	4.00
Business expertise	10%	5.00	3.80	4.30	4.00	4.80	3.20	3.20
Vertical expertise	10%	5.00	3.90	4.10	3.90	5.00	3.90	4.00
Implementation	15%	4.30	4.10	2.80	2.60	5.00	4.60	4.00
Discrete product capabilities	20%	3.74	2.35	3.16	2.36	3.45	1.71	2.15
Post-implementation	15%	5.00	3.67	4.00	3.33	4.00	2.34	3.33
Global presence	5%	4.25	1.75	2.50	2.00	2.50	1.75	1.25
Low-cost, remote global delivery	15%	4.65	2.65	3.55	2.80	3.00	2.40	3.80
<b>STRATEGY</b>	50%	4.62	3.24	3.91	3.59	4.40	2.84	3.45
Overall vision	35%	5.00	3.00	4.00	4.00	4.60	3.00	3.40
Plans for growth of horizontal capabilities	10%	3.65	3.85	4.55	3.65	4.35	2.85	3.85
Plans for growth of vertical capabilities	0%	4.00	4.25	4.25	1.75	4.25	3.50	3.25
Future investments	25%	4.00	3.00	3.40	3.40	4.00	2.40	3.60
Commitment to Oracle	30%	5.00	3.50	4.00	3.25	4.50	3.00	3.25
<b>MARKET PRESENCE</b>	0%	4.29	3.01	3.31	1.58	3.22	2.46	1.76
Client base and engagements	10%	4.25	3.05	3.65	1.15	2.60	3.40	1.40
Staff dedicated to Oracle implementation	40%	4.40	3.00	3.60	2.40	3.40	1.80	1.80
Financials	50%	4.20	3.00	3.00	1.00	3.20	2.80	1.80

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

Source: Forrester Research, Inc.

**Figure 3** Forrester Wave™: Oracle Implementation Providers, Q1 '08 (Cont.)

	Forrester's Weighting	IBM Global Services	Infosys	Oracle	Satyam	TCS	Wipro
<b>CURRENT OFFERING</b>	50%	3.77	3.49	3.57	3.55	3.60	3.34
Overall value	10%	1.30	4.00	3.70	3.80	4.60	2.10
Business expertise	10%	5.00	4.20	3.40	3.20	3.20	3.70
Vertical expertise	10%	5.00	3.10	3.00	3.10	3.10	3.10
Implementation	15%	3.00	4.60	4.10	3.70	3.50	3.40
Discrete product capabilities	20%	3.28	2.49	3.20	2.61	3.05	2.80
Post-implementation	15%	5.00	3.00	3.67	4.00	3.33	3.34
Global presence	5%	2.75	2.00	3.50	2.25	2.50	2.50
Low-cost, remote global delivery	15%	4.30	4.15	3.85	5.00	5.00	5.00
<b>STRATEGY</b>	50%	3.95	4.06	4.30	4.30	3.90	4.00
Overall vision	35%	4.00	4.00	3.80	4.00	3.60	4.00
Plans for growth of horizontal capabilities	10%	3.00	4.35	4.20	3.50	3.85	3.00
Plans for growth of vertical capabilities	0%	3.00	3.25	3.75	3.50	4.00	3.75
Future investments	25%	3.60	4.40	4.20	4.80	4.20	4.40
Commitment to Oracle	30%	4.50	3.75	5.00	4.50	4.00	4.00
<b>MARKET PRESENCE</b>	0%	3.74	2.90	3.95	2.87	2.82	3.18
Client base and engagements	10%	3.55	1.95	4.30	1.45	2.55	2.40
Staff dedicated to Oracle implementation	40%	3.20	3.00	3.80	3.80	3.40	3.60
Financials	50%	4.20	3.00	4.00	2.40	2.40	3.00

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

Source: Forrester Research, Inc.

## PROVIDER PROFILES

### Leaders

- **Accenture.** A global giant in the Oracle implementation space, with more than 21,000 Oracle resources worldwide, Accenture is well suited to the world's largest multinational Oracle rollouts and capable in all phases of the implementation life cycle. Accenture has a strong practice in all major Oracle product lines except JD Edwards.
- **Deloitte.** Deloitte has more than 5,000 Oracle resources worldwide with deep and broad industry expertise. The provider excels at strategy consulting and differentiates through its integrated tax and audit consulting services. Deloitte's consultants are strong across all of the major Oracle products, and it is one of the few providers with a substantial JD Edwards practice.
- **Oracle.** Oracle Consulting is in a unique position as the consulting arm of the technology provider, which means it is closely tied into product and support teams at the provider level.

Although strongest in the technical phases of implementation, Oracle has been ramping up its strategy consulting capabilities in an effort to round out its ability to provide end-to-end implementation services.

- **Satyam.** Satyam has approximately 5,800 resources aligned across verticals like airlines, financial services, higher education, life sciences, retail, telecom, and utilities. The provider has focused on building out industry-specific solutions and accelerators to reduce costs and speed time-to-market for its clients across a range of Oracle products. Most of Satyam's Oracle client base is in North America.
- **IBM Global Services.** Global giant IBM has an Oracle implementation practice that generates more than \$1 billion in annual revenue serving some of the world's largest multinational implementation projects. IBM is capable of serving all phases of the implementation life cycle across a broad range of industries.
- **Infosys.** Infosys has more than 3,100 Oracle professionals worldwide as well as strategy consultants that it can leverage from its Infosys Consulting practice. The provider has expertise across a range of industries including banking and financial services, hi-tech and discrete manufacturing, and retail. Although Infosys's Oracle practice is still small in terms of revenue, it has been growing at 50% year-over-year for the past four years.
- **TCS.** TCS has 7,000 resources in its Oracle practice including approximately 5,000 low-cost delivery employees, one of the largest offshore groups in this evaluation. Key industries include financial services, manufacturing, telecommunications, and travel; TCS has pre-built, industry-specific solutions within these and other sectors that speed implementation time and reduce implementation effort. TCS has approximately \$400 million in annual Oracle implementation revenue and is experiencing rapid growth in this market
- **Wipro.** Wipro has more than 6,175 Oracle resources dedicated to serving industries like manufacturing, retail, and telecommunications across a range of Oracle product lines. The provider has one of the larger bases of offshore resources, with approximately 4,200 low-cost delivery employees.
- **Capgemini.** Capgemini has more than 6,000 Oracle resources worldwide including a significant presence in EMEA. The provider is strong across the implementation life cycle despite a smaller offshore resource base of only 760 low-cost delivery employees. Capgemini has been investing in R&D around SOA and Fusion including its Capgemini-Oracle Fusion Experience (COFE) lab targeted at building knowledge and industry-specific solutions.

## Strong Performers

- **HCL.** Although HCL has a smaller consulting base of approximately 1,900 Oracle resources, the provider has been growing rapidly at more than 50% year-over-year, particularly in industries like communications, financial services, high-tech, manufacturing, and transportation and logistics. HCL is strongest in the technical portions of implementation, and received very strong marks on value for the money from its client references.
- **BearingPoint.** BearingPoint's 3,000-strong Oracle practice has a heritage of strong strategy and process consulting. Its Oracle practice has focused most heavily on energy, financial services, food and beverage, manufacturing, professional services, retail, and telco. Client references gave BearingPoint strong scores on vertical expertise. BearingPoint recently announced that it would not spin off European operations, which should remove some of the uncertainty that buyers were experiencing in 2007.
- **CSC.** CSC has approximately 3,500 Oracle resources and provides strong value for the technical phases of an Oracle implementation, but has less experience and skill in front-end strategy and process consulting. The provider has, however, been building out its strategy and process consulting skills in key verticals like financial services and insurance, healthcare, and the public sector. Beyond implementation, CSC is one of the strongest choices for firms ultimately seeking a fully outsourced Oracle solution in which CSC manages the infrastructure as well as the application.
- **Fujitsu.** Fujitsu has been ramping up its Oracle implementation services business through a combination of organic growth and acquisitions like BORN Information Services, the 2006 purchase of US firm Greenbrier & Russel, and Rapidigm. This approach means that skills are strong within geographies but not necessarily consistent worldwide, making Fujitsu less well-suited for global rollouts.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 3 is an Excel-based provider 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 provider:

- **Provider surveys.** Forrester surveyed providers on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed provider surveys, we conducted provider calls where necessary to gather details of provider qualifications.
- **Executive strategy briefings.** We asked providers to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each provider's product capabilities.
- **Client reference calls.** To validate product and provider qualifications, Forrester also conducted reference calls with each provider's current clients.

### The Forrester Wave Methodology

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

After examining past research, user need assessments, and provider and expert interviews, we develop the initial evaluation criteria. To evaluate the providers 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 providers for their review, and we adjust the evaluations to provide the most accurate view of provider 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 document — and then score the providers based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate a graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update provider evaluations regularly as product capabilities and provider strategies evolve.

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Making Leaders Successful Every Day

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