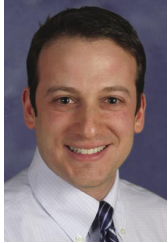


# TECH CHOICES



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## Oracle Is A Leader In Enterprise ETL With A Free, Bundled Solution For Its DBMS

The Forrester Wave™ Vendor Summary, Q2 2007

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### EXECUTIVE SUMMARY

With the long awaited “Paris” release of Oracle Warehouse Builder 10gR2 (OWB) finally available, Oracle has delivered a scalable, user-friendly, and feature-rich ETL solution at a much more attractive price than its competitors: Free! Base OWB functionality is bundled at no charge with the purchase of an Oracle Standard Edition One, Standard Edition, or Enterprise Edition database. That’s great news for enterprises already using — or planning to use — Oracle databases in their environment, but you can’t purchase OWB without an Oracle DB, which is a limiting factor for some enterprises. OWB also offers improved connectivity to non-Oracle source platforms and applications, but target load and connectivity is still optimized for Oracle database and data warehousing environments.

### TARGET AUDIENCE

Information and knowledge management professional

### ORACLE IS BEST SUITED FOR ORACLE DBMS TARGET ENVIRONMENTS

Oracle Warehouse Builder (OWB) is only one tool in Oracle’s extensive software portfolio, and with Oracle’s acquisition of Sunopsis, it no longer holds the distinction of being Oracle’s sole ETL product.<sup>1</sup> Oracle now has two ETL solutions:

- **Oracle Warehouse Builder, including ETL, is bundled with Oracle’s DBMS.** Although Oracle acquired Sunopsis, OWB will continue to be a major component of Oracle’s data warehousing business as part of Oracle’s database group. OWB is embedded in Oracle’s 10gR2 database and is a no-cost to low-cost ETL solution optimized for Oracle databases and data warehouses.<sup>2</sup> OWB leverages many of the native performance tuning, security, and availability features provided with the database. OWB has solid metadata management capabilities supporting extensibility, enterprise security, interactive data lineage, version management and life-cycle management, and the product specializes in building out Oracle data warehouses and BI platforms. Automating the detection and implementation of data quality rules within its data profiling tool is also a relevant differentiator.
- **Sunopsis is best known for its E-LT branded approach to data integration.** This design eliminates the need for an ETL transformation server by leveraging a pushdown optimization technique that makes use of the processing power from source or target systems within the ETL flow. The E-LT (extract, load, then transform) approach, along with Sunopsis’ strong heterogeneous connectivity,

is an attractive option for some IT environments — and was very attractive to Oracle. Oracle acquired Sunopsis — now rebranded as Oracle Data Integrator — to provide the heterogeneous connectivity in the data management layer of its Fusion Middleware product family that OWB was less suited to provide.

Forrester evaluated Oracle Warehouse Builder and its strategy for enterprise ETL against 68 criteria (see Figure 1). Overall, the product has strong support, training, and tool environments, but it lacks change data capture functionality compared with competitors' products. This means the product is an especially good fit for buyers that are:

- **Implementing an Oracle data warehouse.** Information and knowledge management professionals that have chosen to implement an Oracle data warehouse, but don't have a de facto enterprise standard ETL tool that they are required to use, should undoubtedly consider OWB. OWB offers a well-supported, scalable, and user-friendly ETL product that incorporates comprehensive metadata management, data lineage, and data profiling capabilities that support many reporting compliance requirements for auditability and data quality.<sup>3</sup>
- **Seeking an affordable ETL tool that leverages Oracle DB environments.** Any project- or departmental-based batch data integration (DI) effort that must load data into an Oracle database can benefit from OWB. A major attraction is OWB's zero-cost option to the database, with software costs only charged for additional connectors, data quality functionality, and additional CPUs. However, Oracle's extract and load connectivity options are not as comprehensive as the other leaders — IBM, Informatica, and Business Objects — and more complex heterogeneous environments may not be supported as well. Also, since OWB's strengths in scalability, availability, and security leverage native capabilities within an Oracle database, having a skilled Oracle DBA involved in any DI project is highly recommended.

To see how Oracle stacks up against 10 other competitors, see the Forrester Wave evaluation of the enterprise ETL market.<sup>4</sup>

**Figure 1** Oracle OWB Evaluation Overview

CURRENT OFFERING	
Server capability	Oracle Warehouse Builder (OWB) uses the Oracle database as its transformation engine and leverages the native performance and scalability tuning options included with the database. High-availability and failover protection is provided at the database level. OWB uses the Oracle database security mechanisms and policies for both metadata and data. The product provides a very flexible object-level security, allowing individual users to work with different privileges on different objects, projects, data, sources, and targets.
Integration options	OWB supports native Oracle database connectivity, and although not directly accessible from within OWB, the vendor provides additional native interfaces through its Oracle Gateway to access additional relational sources. Connectivity to additional sources such as mainframe data and unstructured content is available through partner solutions. The product's ETL processes and data flows can also be published and called as a Web service.
Tool environments	The UI uses drag-and-drop and wizards, and a library of prebuilt transformations is available for dragging and dropping into the expressions or into the ETL process. Check-in/checkout is organized in a database-centric way, where an object is locked as soon as a developer opens it for editing and remains read-only until it is saved and closed. The product offers an extensible and Common Warehouse Metamodel-compliant repository that requires an Oracle database for storage. OWB's functional areas like ETL, Data Quality, Data Modeling, and Metadata Management use a single metamodel and run on the same repository.
Support and training	Oracle offers world-class support and training across multiple languages, formats, and channels. User documentation is available in seven languages, and the UI is available in nine languages.
Additional data integration techniques	OWB's approach to ETL is to allow users to graphically design and publish views from Oracle and non-Oracle database sources, as long as they are all purely SQL accessible. The product supports change data capture from Oracle databases, and via mainframes through Oracle's partnerships with Attunity and Data Direct.
Information management	OWB uses PL/SQL as its native transformation language and can call or reuse any logic written in PL/SQL packages, procedures, functions, and table functions. Data profiling functionality is embedded within the product, allowing it to be fully integrated in the UI and in the ETL processes. OWB data quality supports core data quality functionality including a predefined and configurable match/merge operator supporting various algorithms and name and address cleansing. Data lineage and unstructured content integration is also supported.

Source: Forrester Research, Inc.

**Figure 1** Oracle OWB Evaluation Overview (Cont.)

STRATEGY	
Product strategy	Oracle has a number of technology partnerships spanning data quality, unstructured data, mainframe extraction, and metadata integration, among others. OWB is optimized for Oracle database platforms, solid metadata management capabilities that support extensibility, enterprise security, interactive data lineage, version management and life-cycle management, and specializes in building out Oracle data warehouses and BI platforms.
Corporate strategy	Forrester estimates that OWB has a nominal revenue contribution for Oracle. At a company level, R&D expenditures were 13% of total revenues in fiscal years 2006, 2005, and 2004.
Cost	Oracle did not disclose. Not as relevant to calculate average sales price because core ETL cost is free. The vendor offers a modular pricing approach for both base and add-on products. POCs are primarily paid hands-on or free self-service.
Partnerships extending reach	Oracle leverages OWB within other solutions offered by Oracle. There are a few additional external vendors that OEM OWB functionality. Forrester estimates that approximately 300 to 400 partners resell the OWB product on a regular basis and that there are approximately 25 systems integrators that are experienced with OWB.
MARKET PRESENCE	
Company financials	Forrester estimates OWB revenues between \$10 million and \$20 million and flat to single-digit growth for OWB product revenue. Oracle has been a profitable company.
Installed base	Oracle estimates the OWB user base at approximately 6,000 customers, based on the number of unique support calls received. Forrester estimates that a much smaller subset of these customers are using the most recent version. Forrester estimates new client installations at between 150 and 200 customers in the past four quarters, and that Oracle's OWB has, at minimum, a significant presence in North America, Europe, and Asia Pacific.
Employees	Oracle has approximately 56,000 employees worldwide. Forrester estimates that Oracle has at least 60 developers focused on its OWB product.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.



## SUPPLEMENTAL MATERIAL

### Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this vendor.

This detailed data and scores for this vendor are also available online through an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### 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 document — and then score the vendors 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 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.

## ENDNOTES

- <sup>1</sup> Forrester analyzed Oracle's business software business and found Oracle to have the richest applications portfolio. See the October 30, 2006, Tech Choices "[Business Software Platform Vendor Profile: Oracle](#)." Oracle acquired Sunopsis in October 2006, adding a more heterogeneous data integration technology to its middleware portfolio. See the October 19, 2006, Quick Take "[Oracle Makes Serious Move In Data Heterogeneity By Acquiring Sunopsis](#)."
- <sup>2</sup> For those that purchase the Enterprise Edition (EE) database, Oracle offers additional licensing options for Enterprise ETL, Data Quality, and connectors to other ERP/CRM sources such as SAP, Oracle E-Business Suite, and PeopleSoft. See the Oracle Web site at [http://www.oracle.com/technology/products/warehouse/htdocs/owb\\_10gr2\\_fa.html#26](http://www.oracle.com/technology/products/warehouse/htdocs/owb_10gr2_fa.html#26).

- <sup>3</sup> The latest release of Oracle Warehouse Builder (OWB), OWB 10g Release 2, includes significantly more information quality capabilities than previous releases. See the September 6, 2006, Quick Take “[Oracle Is Off To A Solid Start In Information Quality With Oracle Warehouse Builder.](#)”
- <sup>4</sup> Forrester evaluated leading enterprise extract, transform, and load (ETL) vendors across 68 criteria and found that IBM and Informatica maintain leadership positions in enterprise ETL thanks to their ability to scale and perform batch and operational data integration (DI) in complex environments, as well as to maintain a consistent focus on providing robust data management capabilities. Business Objects and Oracle have also emerged as Leaders with significant usability and scalability improvements, but they are still primarily used in data warehousing environments and have not been widely adopted for operational DI needs. SAS is a Strong Performer, but it remains most attractive as an integrated piece of a SAS BI platform. Ab Initio offers a highly scalable and configurable data processing platform, but its secretive corporate culture limits prospective customers’ visibility into its strategy. iWay Software, Microsoft, Pervasive, and Sunopsis (acquired by Oracle) round out the Strong Performers best suited for a more targeted subset of DI professionals. As a new player in enterprise ETL, Sybase has some of the raw materials needed to develop a competitive solution, but it must integrate the tools it has acquired into a DI suite with a clear differentiation strategy to gain traction in this crowded market. See the May 2, 2007, Tech Choices “[The Forrester Wave™: Enterprise ETL, Q2 2007.](#)”