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# The Forrester Wave™: Oracle Services Providers, Q4 2009

by Liz Herbert

for Sourcing & Vendor Management Professionals



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IBM And Accenture Lead; Infosys, Oracle, and Deloitte Are Strongest In Key Areas

by **Liz Herbert**

with Christine Ferrusi Ross and Philipp Karcher

### EXECUTIVE SUMMARY

In Forrester's 60-criteria evaluation of Oracle services providers, we found that IBM and Accenture led the pack because of the overall breadth and depth of their Oracle services resources across applications and industries, and the breadth of services offered (implementation, maintenance and support, hosting). Deloitte proved its strength through its application expertise, an impressive track record with clients and awards, and its continued build out of low-cost delivery resources. Oracle Consulting scored high, driven by its leading technical expertise across the product suite, significant scale, and tight link to the product vendor. Offshore providers continue to build momentum in this market: providers like Infosys, TCS, and Wipro have strong all-around practices whereas Cognizant, HCL, and Genpact have targeted more specific areas (like Cognizant's focus on PeopleSoft/Siebel and HCL/Genpact's strong focus on operational support for E-Business Suite in key industries). Providers with breadth of capabilities spanning implementation through to strong infrastructure (hosting) footprint also scored well, with providers like Capgemini, CSC, Fujitsu, and Logica providing strong all-around choices from implementation through to ongoing operational support.

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Forrester surveyed the following 14 Oracle services providers: Accenture, Capgemini, Cognizant, Computer Sciences Corporation (CSC), Deloitte, Fujitsu, Genpact, HCL, IBM, Infosys, Logica, Oracle, TCS, and Wipro. We also interviewed approximately 70 provider-supplied client references.

#### Related Research Documents

["Best Practices For Selecting And Managing Your Oracle Implementation Provider"](#)  
September 18, 2009

["Looking Beyond Oracle's Global Partner Network For PeopleSoft Implementation Expertise"](#)  
October 31, 2008

["The State Of Enterprise IT Services: 2008"](#)  
September 9, 2008

## “CORE FOUR” INVESTMENTS CONTINUE; ACQUISITION APPS CREATE NEW OPPORTUNITIES

Firms continue to invest in Oracle’s four core products — E-Business Suite, PeopleSoft, JD Edwards, and Siebel — rolling out to new divisions, consolidating to a single instance, and upgrading to newer versions. Firms also view newer additions to the Oracle family — Hyperion, Primavera, Demantra, G-Log, Retek, and numerous others — as additional value-add. In many cases these investments build on firms’ existing Oracle footprint, allowing them to complete a shorter implementation, high ROI project in industry-specific process areas or analytics/business intelligence (BI). As many of these investments are substantial, strategic components of firms’ application strategy and business strategy, they are frequently investing in third-party services firms for implementation support — spanning strategy consulting, change management, technical implementation, and training.

Key areas driving new services investment include:

- **Core Four: E-Business Suite, JD Edwards, PeopleSoft, and Siebel.** Despite previous ramblings about the long-term success potential for earlier acquisitions, Oracle’s Applications Unlimited strategy combined with firms’ entrenched IT dependence on products like JD Edwards, PeopleSoft, and Siebel has shown that these products have life left in them yet. Firms continue to expand on existing investments — including upgrades, consolidation, and rollout to new divisions/geographies. E-Business Suite, as a core component of Fusion and Oracle’s strategy going forward, is also a key driver of new investments. While some firms will standardize on one product suite for ease of integration, the combined Oracle family also gives buyers the power to take a best-of-breed approach — which often requires additional integration work as a tradeoff.
- **Business intelligence: Hyperion.** Many firms seek to unlock additional value out of their existing ERP/supply chain/CRM investments. They have a wealth of data about various business processes — customers, manufacturing processes, and back-office transactions — but limited ability to report on the data to gain insight and drive decision-making. Analytics/BI investments are often a way to gain better insight and make data-driven decisions to improve business processes. Additionally, analytics/BI investments are often shorter-term, higher ROI initiatives — and therefore very attractive to today’s results-obsessed buyers fed up with large investments of the past that failed to deliver on promises.
- **Acquisition/Edge products.** Oracle’s acquisition binge in recent years has given Oracle IT shops a host of products to augment their existing Oracle cores, including: Oracle Retail (formerly Retek); Oracle Customer Care and Billing (formerly SPL); Oracle Utilities (formerly LODESTAR), Oracle Policy Automation for Public Sector (formerly Haley); Demand Management (Demantra); and Oracle Transportation Management (OTM, formerly G-Log). Many of these are industry-specific and/or process-specific; most have prebuilt integration/connectors to relevant pieces of the Oracle core, such as the customer care and billing connector to Siebel or prebuilt integration between OTM and E-Business Suite.

## Oracle Implementation RFPs Inquire About Ongoing Maintenance, Support, And Hosting

Oracle application buyers take various approaches to ongoing management — from a fully outsourced model (fully run and managed by the provider) to staff augmentation (where they use some third-party resources as needed) to managing their deployment fully in-house. And, for those firms that use third-party resources post-implementation, some prefer to keep the same partner that did their implementation to gain knowledge transfer and cost savings, whereas others take a best-of-breed approach, selecting a partner that focuses and excels at application management/outsourcing. Many Oracle implementation services buyers include questions about ongoing support, maintenance, and even hosting capabilities in their implementation RFPs; therefore, this year's Oracle services evaluation includes an expanded breadth of criteria that includes support and hosting capabilities of the implementation providers.

## ORACLE IMPLEMENTATION AND SUPPORT SERVICES EVALUATION OVERVIEW

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

### Providers' Scored On Breadth Of Services, Application Knowledge, Industry Focus, and Size

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 60 criteria, which we grouped into three high-level buckets:

- **Current offering.** Current offering criteria include the ability to provide end-to-end implementation services — from initial upfront strategy consulting through to technical implementation and post-implementation services such as training and change management. This year's evaluation also looked at broader services capabilities than past years' evaluations by including the ability to perform ongoing support and maintenance services and hosting. Providers were scored on their focus on each of the major Oracle applications as well as experience in specific industry sectors. Client references made up a significant portion of the evaluation, with clients rating providers on business process expertise, value for the money, industry experience, and overall satisfaction.
- **Strategy.** Key areas that Forrester evaluated when considering provider strategy in the Oracle services market include pricing innovation, relationship and co-development with Oracle, and investment in the Oracle practice. Key metrics include relationship status with Oracle, key awards that demonstrate ability and leadership in the market, and pricing flexibility aligned with buyer needs.
- **Market presence.** To score a provider's market presence, Forrester evaluated its client base across key geographies (North America, EMEA, Asia Pacific, and Latin America) as well as overall staff dedicated to the Oracle practice. Furthermore, we considered overall financials for the Oracle practice as well as growth within Oracle services.

**Leading Oracle Services Providers Have Global Scale And Strength Across Oracle Portfolio**

Forrester included 14 vendors in the assessment: Accenture, Capgemini, Cognizant, CSC, Deloitte, Fujitsu, Genpact, HCL, IBM, Infosys, Logica, Oracle, TCS, and Wipro. Each of these vendors has:

- **Experience and skills spanning Oracle application portfolio, breadth across industries.** The providers included in our evaluation have capabilities that span Oracle’s application portfolio. Specialist providers with strength heavily around a particular application (e.g., Systime in the JDE space, CedarCrestone in the PeopleSoft space) were not included in this evaluation. Providers were also required to showcase broad industry expertise, with capabilities across multiple key sectors relevant to Oracle services buyers — such as retail/CPG, public sector, utilities, financial services, and high-tech (see Figure 1).
- **Strong Oracle services practice with broad geographic reach and more than 1,500 resources.** Firms considered for this evaluation all have significant global scale, with a minimum of 1,500 resources in their overall Oracle application services practice excluding database. Regional service providers were exempt from consideration, regardless of size. Additionally, providers were required to showcase scale related to application implementation — not simply support, hosting, database, and/or custom development related to Oracle.

**Figure 1** Providers’ Top Three Oracle Verticals

Accenture	<ul style="list-style-type: none"> <li>• CPG/retail</li> <li>• Telecom and media</li> <li>• Government and public sector</li> </ul>	HCL	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Life sciences</li> <li>• CPG/retail</li> </ul>
Capgemini	<ul style="list-style-type: none"> <li>• Telecom and media</li> <li>• Government and public sector</li> <li>• Utilities/energy</li> </ul>	IBM	<ul style="list-style-type: none"> <li>• Government and public sector</li> <li>• CPG/retail</li> <li>• Banking and financial services</li> </ul>
Cognizant	<ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• Life sciences</li> <li>• Banking and financial services</li> </ul>	Infosys	<ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• CPG/retail</li> <li>• Banking and financial services</li> </ul>
CSC	<ul style="list-style-type: none"> <li>• High-tech</li> <li>• Government and public sector</li> <li>• Banking and financial services</li> </ul>	Logica	<ul style="list-style-type: none"> <li>• Utilities/energy</li> <li>• Banking and financial services</li> <li>• Telecom and media</li> </ul>
Deloitte	<ul style="list-style-type: none"> <li>• CPG/retail</li> <li>• Telecom and media</li> <li>• Government and public sector</li> </ul>	Oracle	<ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• Government and public sector</li> <li>• Banking and financial services</li> </ul>
Fujitsu	<ul style="list-style-type: none"> <li>• Government and public sector</li> <li>• CPG/retail</li> <li>• High-tech</li> </ul>	TCS	<ul style="list-style-type: none"> <li>• Telecom and media</li> <li>• Manufacturing</li> <li>• Banking and financial services</li> </ul>
Genpact	<ul style="list-style-type: none"> <li>• Manufacturing — discrete and process</li> <li>• High-tech</li> <li>• Banking and financial services</li> </ul>	Wipro	<ul style="list-style-type: none"> <li>• CPG/retail</li> <li>• Telecom and media</li> <li>• High-tech</li> </ul>

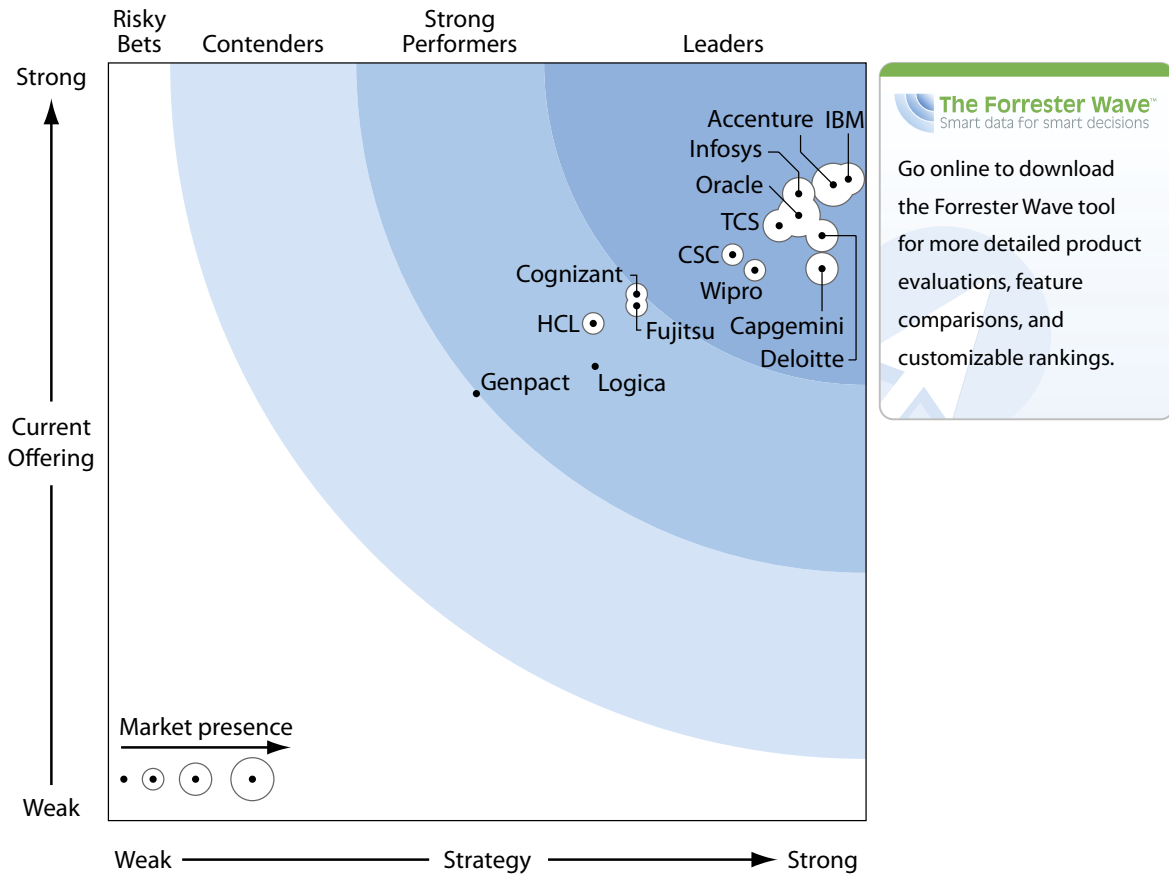
## PROVIDER STRENGTHS DIFFER BY APPLICATION, BREADTH OF SERVICES

The evaluation uncovered a market in which (see Figure 2):

- **IBM and Accenture lead for overall breadth of services.** Accenture and IBM dominate the Oracle services market in terms of overall global scale, which is relevant to services buyers who want to ensure relevant resources will be available for their projects — and accessible within a reasonable time frame and cost as needs arise. These firms not only have breadth in implementation skills across most major Oracle applications but they also have low-cost delivery resources and hosting infrastructure necessary to provide ongoing applications maintenance, support, and hosting for Oracle products. Beyond E-Business Suite, Siebel, JDE, PeopleSoft, and Hyperion, both Accenture and IBM have substantial practices around key acquisition products — and have made substantial R&D investments to keep up with Oracle customers' evolving needs (i.e., Siebel CRM OnDemand, AIA, Fusion).
- **Infosys, Oracle, and Deloitte are strongest in key areas.** Infosys, Oracle, and Deloitte each scored well in the evaluation — but each for its own unique reason. Infosys emerged a leader of the offshore firms, with a sizable practice and strong client references to showcase its ongoing foray into the Oracle services space. Oracle Consulting, as the services arm of the software provider, also scored very well — helped by its unique position as the technical expert and closest to the product development across every application and future release from Oracle. Because of this unique position, Oracle Consulting touches an extraordinarily high percentage of client projects within the Oracle (software) client base, although not necessarily as prime. Deloitte emerged as the strongest Oracle partner for implementation services in North America — with more client projects than any other firm in that region; an enormous, impressive list of Titan Awards; and overall strong scores on criteria related to pure implementation work (versus support and hosting).
- **Firms that offer implementation and ongoing operational support are strong choices.** Many services buyers seek an implementation provider that can support their needs long term and therefore need strong maintenance and support as well as hosting capabilities related to Oracle. Leaders in this market include Capgemini as well as CSC, Fujitsu, and Logica. All of these providers offer the benefits of smoother transition and more effective knowledge transfer between implementation and operational phases — and potentially cost savings for the client as well. CSC is frequently used only when long-term operations are part of the plan; Capgemini, Fujitsu, and Logica have a strong mix of standalone implementation work as well.
- **Offshore providers continue to gain steam.** Beyond Infosys as the top scorer of Indian firms, several offshore providers are strong choices in the Oracle market: TCS, Wipro, Cognizant, HCL, and Genpact. While most of the focus is on E-Business Suite and newer areas such as Fusion, AIA, Process Integration Packs (PIPs), and BI, there are also resources for “older” acquisition products. For example, Cognizant and Infosys are heavily focused on PeopleSoft and are leading offshore providers of PeopleSoft services. HCL, TCS, Infosys, Cognizant, and Wipro all have strong Siebel practices as well.

This evaluation of the Oracle services market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

**Figure 2** Forrester Wave™: Oracle Services Providers, Q4 '09



Source: Forrester Research, Inc.

**Figure 2** Forrester Wave™: Oracle Services Providers, Q4 '09 (Cont.)

	Forrester's Weighting	Accenture	Capgemini	Cognizant	CSC	Deloitte	Fujitsu	Genpact
<b>CURRENT OFFERING</b>	50%	4.26	3.70	3.52	3.79	3.90	3.48	2.86
Overall value	30%	4.63	3.40	3.85	4.30	4.08	4.23	3.83
Vertical expertise	10%	2.90	2.40	2.25	3.30	2.70	2.95	0.85
Implementation	15%	4.00	4.80	4.10	4.20	4.90	4.90	3.30
Discrete product capabilities	10%	2.70	1.90	2.30	2.40	3.10	1.60	1.80
Post-implementation	5%	4.34	4.33	3.68	4.66	4.67	5.00	4.67
Global capability	10%	5.00	4.30	2.10	3.70	4.30	2.70	1.20
Low-cost, remote global delivery	20%	5.00	4.50	4.50	3.50	3.50	2.50	3.00
<b>STRATEGY</b>	50%	4.85	4.70	3.45	4.10	4.70	3.45	2.35
Oracle alliance	40%	5.00	5.00	3.00	5.00	5.00	3.00	1.00
Oracle awards and recognition	15%	5.00	3.00	1.00	1.00	5.00	3.00	2.00
Well-defined areas of differentiation	15%	5.00	5.00	4.00	4.00	5.00	4.00	3.00
Investment towards accelerating ROI	15%	5.00	5.00	5.00	4.00	4.00	4.00	4.00
Pricing strategy	15%	4.00	5.00	5.00	5.00	4.00	4.00	4.00
<b>MARKET PRESENCE</b>	0%	4.38	3.70	2.50	2.56	3.36	2.18	1.54
Client base and engagements	60%	4.30	3.50	2.50	2.60	3.60	2.30	1.90
Financials	40%	4.50	4.00	2.50	2.50	3.00	2.00	1.00

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

Source: Forrester Research, Inc.

**Figure 2** Forrester Wave™: Oracle Services Providers, Q4 '09 (Cont.)

	Forrester's Weighting	HCL	IBM Global Services	Infosys	Logica	Oracle	TCS	Wipro
<b>CURRENT OFFERING</b>	50%	3.34	4.32	4.14	3.05	4.06	4.00	3.69
Overall value	30%	3.98	4.65	4.38	3.68	4.20	4.38	4.08
Vertical expertise	10%	3.10	3.20	3.00	2.75	2.65	1.70	2.50
Implementation	15%	3.00	4.90	4.80	4.10	4.70	4.10	3.90
Discrete product capabilities	10%	2.90	3.10	3.00	2.60	2.40	2.70	2.60
Post-implementation	5%	3.67	4.33	5.00	4.33	3.99	4.66	3.33
Global capability	10%	2.10	4.40	3.60	1.80	4.90	4.00	3.10
Low-cost, remote global delivery	20%	3.50	4.50	4.50	2.00	4.50	5.00	4.50
<b>STRATEGY</b>	50%	3.15	5.00	4.55	3.15	4.55	4.40	4.25
Oracle alliance	40%	3.00	5.00	5.00	3.00	5.00	5.00	5.00
Oracle awards and recognition	15%	2.00	5.00	4.00	2.00	5.00	3.00	2.00
Well-defined areas of differentiation	15%	3.00	5.00	4.00	4.00	5.00	4.00	4.00
Investment towards accelerating ROI	15%	4.00	5.00	5.00	4.00	4.00	5.00	5.00
Pricing strategy	15%	4.00	5.00	4.00	3.00	3.00	4.00	4.00
<b>MARKET PRESENCE</b>	0%	2.64	3.72	3.58	1.68	4.60	3.42	2.92
Client base and engagements	60%	2.40	4.20	3.30	1.80	5.00	3.70	3.20
Financials	40%	3.00	3.00	4.00	1.50	4.00	3.00	2.50

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

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders

- **IBM Global Services.** Global giant IBM has an Oracle implementation practice 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.
- **Accenture.** A global giant in the Oracle implementation space, 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 and across a broad range of industries.
- **Infosys.** Infosys has a large and growing Oracle practice worldwide with heavy capabilities around technical implementation and support work as well as a growing focus on strategy consulting. The provider has expertise across a range of industries including banking and financial services, high-tech and discrete manufacturing, and retail.

- **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.
- **Deloitte.** Deloitte has nearly 8,000 Oracle resources worldwide with deep and broad industry expertise. The provider excels at strategy consulting and pure implementation work but is increasingly moving into support and maintenance deals as well. Deloitte differentiates through its integrated tax and audit consulting services. Deloitte boasts numerous Titan awards as evidence of its leadership in the market.
- **Capgemini.** Capgemini has more than 8,000 Oracle resources worldwide including a significant presence in EMEA. The provider is strong across the implementation life cycle and has substantially invested in its low-cost “RightShore” delivery resources — now at approximately 2,800. 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.
- **TCS.** TCS has a substantial Oracle practice that heavily leverages low-cost delivery from India, China, and other emerging low-cost delivery geographies. Key industries include financial services, manufacturing, telecommunications, and travel; TCS has prebuilt, industry-specific solutions within these and other sectors that speed implementation time and reduce implementation effort.
- **Wipro.** Wipro’s Oracle resources are 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 and heavily leverages offshore in its projects and ongoing support. Its 2008 acquisition of Infocrossing makes it a provider of hosting services as well.
- **CSC.** CSC is a leading provider of outsourcing solutions in the Oracle space 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 and can leverage its expertise in key verticals like financial services and insurance, healthcare, and the public sector.

### Strong Performers

- **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. Fujitsu also has a large hosting

footprint that it can leverage for outsourcing. Fujitsu underwent major organizational changes in 2009 and continues to work to bring its acquisitions together into a unified approach to the market.

- **Cognizant.** Cognizant is an offshore firm with a heavy concentration on PeopleSoft and Siebel implementations. The provider is particularly strong in life sciences and financial services, and has expertise across implementation through to ongoing support and maintenance. Cognizant heavily leverages the offshore delivery model to gain cost and resource efficiencies.
- **HCL.** HCL has a smaller, more technically focused presence in the Oracle space with implementation work as well as significant focus on ongoing support and maintenance. HCL has particular strength in industries like communications, financial services, high-tech, manufacturing, and transportation and logistics. HCL acquired Axon in 2008, which built up its SAP management consulting expertise — but has not made a similar move to beef up strategy consulting specific to Oracle.
- **Logica.** Logica primarily serves European clients (primarily Western European nations and the Nordics) across Oracle's portfolio of applications and across the full life cycle of application needs from pre-implementation strategy work through to technical consulting and outsourcing. Outsourcing represents approximately 40% of Logica's revenues.

## Contenders

- **Genpact.** Genpact is a smaller offshore provider heavily focused on E-Business Suite work. Within its client base, it heavily boasts manufacturing firms including some significant household brands. Genpact has a Lean- and Six Sigma-based approach to Oracle work. Genpact is heavily focused on application management and support in addition to implementation work.

## 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:

- **Provider 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.

- **Executive strategy briefings.** We asked vendors to conduct an executive strategy briefing to cover key differentiators and value proposition to the market as well as strategic direction. We used findings from these discussions to augment the written survey responses and client reference feedback.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also required a minimum of eight references to complete a Web survey. Following the Web survey, we also conducted reference calls with key client references.

### 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 we 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.

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Making Leaders Successful Every Day

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