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The Forrester Wave™: Business Intelligence Services Providers, Q4 2012

by Boris Evelson and Liz Herbert, October 18, 2012

KEY TAKEAWAYS

Only The Bravest Should Dive Into BI Programs Without Professional Help

Success with BI strategy, platforms, programs, projects, and applications largely depends on experience. Increase your chances of success by employing experienced professional consultants who, across their organization, have accumulated hundreds, if not thousands, of best practices, lessons learned, and do's and don'ts.

Key BI Services Provider Differentiators Lie In People, Industry, And Domain Expertise

Leaders can no longer differentiate on strategy, methodology, and execution alone. When short-listing and selecting a BI services provider from the leading firms, users should emphasize the remaining differentiators, such as industry and domain expertise, plus the actual people proposed to work on your initiatives.

Use Forrester's Four-Step Approach To Select The Best BI Services Provider To Fit Your Needs

Use the following battle-tested approach to select your BI services provider: 1) Short-list vendors using Forrester's BI Service Provider Short-Listing Tool; 2) adjust the shortlist based on your unique circumstances; 3) tune our model based on your requirements; and 4) use our model to select the finalist.

The Forrester Wave™: Business Intelligence Services Providers, Q4 2012

The 12 Market Leaders That Deserve To Be On Most Shortlists

by [Boris Evelson](#) and [Liz Herbert](#)

with [Chris Andrews](#) and Shannon Coyne

WHY READ THIS REPORT

In the past few years, the business intelligence (BI) services market has evolved significantly: advisory and management consulting firms have beefed up their implementation capabilities, while traditional development and outsourcing firms have rapidly acquired talent and built up management consulting and strategic advisory practices. In Forrester's 53-criteria evaluation of business intelligence services providers, we found 12 elite Leaders that all offer strong choices for BI services buyers: Accenture, Capgemini, Cognizant, CSC, Deloitte, HP, Infosys, KPMG, IBM, PwC, TCS, and Wipro. IBM, Accenture, Deloitte, KPMG, CSC, Wipro, Infosys, Capgemini, HP, PwC, TCS, and Cognizant lead the market in BI strategy work, whereas IBM, Accenture, CSC, Deloitte, Wipro, Infosys, HP, Capgemini, TCS, Cognizant, KPMG, and PwC lead the market in technology expertise. Numerous other options exist in this market that is in some ways very mature yet in other ways still evolving rapidly from global systems integrators to hundreds of second tier midsize firms to thousands of boutiques. In addition to reviewing these evaluation results, we recommend applying our evaluation methodology (the Forrester Wave™ model) to short-list your other BI services providers based on your specific and unique requirements.

Table Of Contents

- 2 **BI Is A Speeding Train With Only A Distant Light At The End Of The Tunnel**
- 4 **It's Not Business As Usual In The BI Services Market**
- 6 **Make The Best Choice By Following Our Battle-Tested Approach**
- 7 **Business Intelligence Services Evaluation Overview**
- 9 **BI Services Leaders Differ In Their Approach To Clients And Solutions**
- 15 **Vendor Profiles**
- 18 **Supplemental Material**

Notes & Resources

Forrester conducted services evaluations in Q1 2012 and interviewed 12 vendors and more than 30 user companies.

Related Research Documents

[Drive Business Insight With Effective BI Strategy](#)

April 30, 2012

[Updated 2012: BI Service Provider Short-Listing Tool](#)

January 10, 2012

[Buyers Of BI Services Navigate A Crowded Landscape](#)

January 24, 2010



BI IS A SPEEDING TRAIN WITH ONLY A DISTANT LIGHT AT THE END OF THE TUNNEL

BI, a never-withering perennial darling of business and IT, continues to top all charts in terms of interest among IT professionals (see Figure 1). Among multiple reasons for continued increase in BI interest, adoption, and spending, two main ones stand out:

- **There's no management without measurement.** To execute on business strategy, business and IT executives need a business-focused, strategic, and pragmatic way to measure their finances and operations. Without such measurements — supported by enterprisewide BI deployments — businesses can't link operational results to strategy. Organizations will also find it difficult to get a coherent view of their internal and external processes, customers, logistics, operations, and finances.
- **Information is the last frontier of competitive differentiation.** For the foreseeable future, we will compete on information. In addition to its traditional role as a financial, management, and compliance and risk reporting platform, BI now has a much more important role. All products and services continue to become more commoditized in our global economy. As a result, it's becoming harder and harder for enterprises to differentiate and compete on quality and margins. But if there are two businesses that are marketing and selling identical products or services and one has more insight into its customers' behavior — or even if two share the same insights but one gets that information a day sooner — that business has a much higher chance of success.

But adoption, interest, and increased budgets do not necessarily translate into mature BI environments and successful implementations. Just the opposite: Our recent Q2 2012 Global BI Maturity Online Survey shows mostly below-average levels of BI maturity, and anecdotal evidence points to very low levels (often in single digits, hardly ever more than 20%) of enterprise-level BI penetration (see Figure 2).¹ We see several important reasons for this:

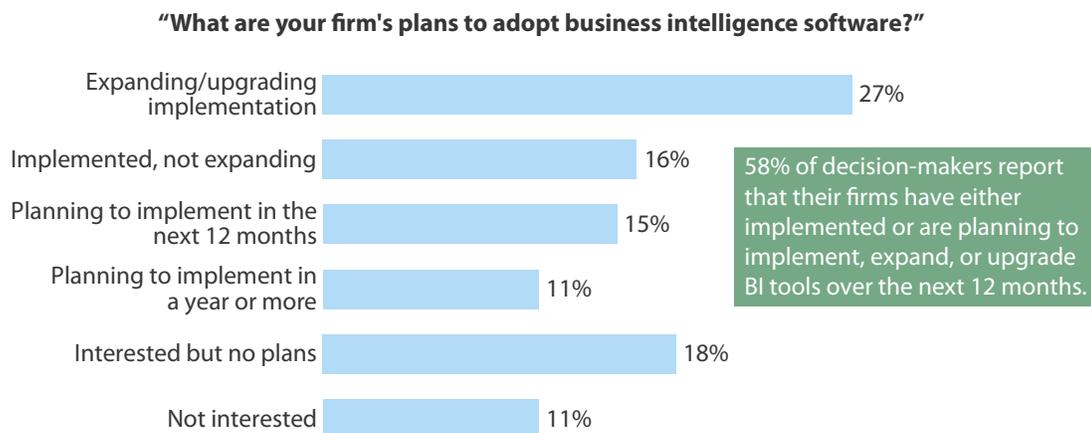
- **BI change moves faster than any other enterprise software or applications.** BI challenges even the most experienced by continually defying predictability and planning. In a typical situation, even when everything is done by the book, by the time you finish with the first iteration of your BI application, it's already too late. Your competitor may have rolled out a new market disruptive product and you need to react immediately, or a key regulation has changed and you have to go back and adjust your regulatory reporting rules.² Therefore your seemingly fresh business requirements often become outdated on the first day an application is rolled out.
- **Clients have difficulty anticipating and articulating their requirements.** Our research shows that many business users have trouble verbalizing some business intelligence requirements. They need to see, touch, and feel an application, a report, or a dashboard before they can decide if it'll help them make strategic, tactical, and operational decisions. As a result, traditional waterfall software development life-cycle (SDLC) approaches with

requirements gathering and well-planned phased implementation cycles often do not work for BI. But how do you balance business users' desire to react to the constantly changing business and regulatory conditions on a moment's notice while still tasking IT with planning, standardization, and risk management?

- **BI is almost never plug-and-play.** A typical end-to-end BI environment often consists of as many as 30 or 40 different components, such as data integration, operational data stores, data warehouses, data marts, cubes, reports, dashboards, alerts, and many others. Furthermore, BI is heavily dependent on and has to be tightly integrated with other key platforms and applications, such as data quality, master data management (MDM), portals, security, mobile delivery, and others. Even if you get most of these components from a single vendor, chances are that the vendor's own product-to-product integration is an evolving process at best, as many of these vendors are constantly acquiring new products and need to balance innovation versus integration. Therefore, much of the work integrating BI components rests on your shoulders.

Clearly, ensuring BI success requires multiple best practices and even a larger accumulation of lessons learned and do's and don'ts. Having even a few successful BI projects under your belt is never enough. One needs to leverage experience accumulated from dozens or, ideally, from hundreds of successful and, equally importantly, unsuccessful initiatives. And who can afford to have such experience, background, and expertise other than professional full-time consultants whose job it is to strategize, architect, design, build, implement, and support BI solutions year after year, client after client.

Figure 1 Business Intelligence Adoption Across Firms



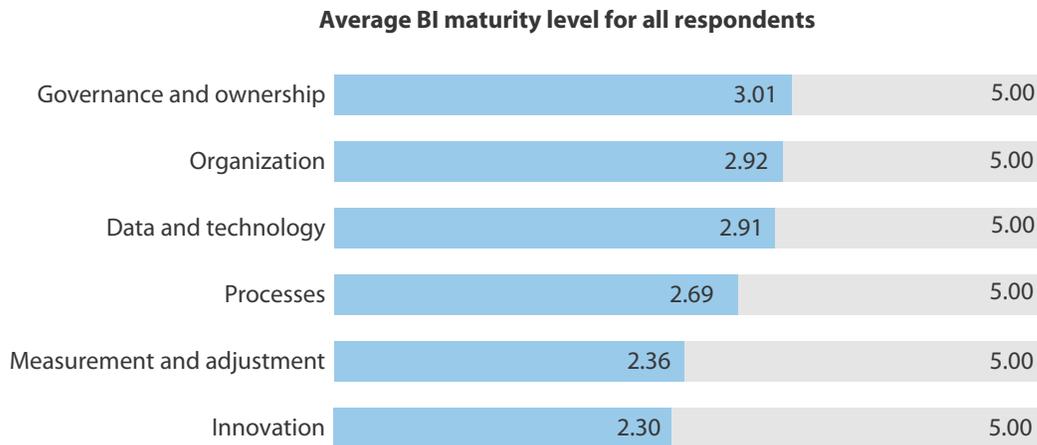
Base: 1,062 packaged-application decision-makers from firms with 20-plus employees
(percentages may not total 100 because of rounding)

Source: Forrsights Software Survey, Q4 2011

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Source: Forrester Research, Inc.

Figure 2 Business Intelligence Maturity Is Still Low Across Firms



Base: 129 professionals with knowledge of BI within their organizations

Source: Q2 2012 Global BI Maturity Online Survey

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Source: Forrester Research, Inc.

IT'S NOT BUSINESS AS USUAL IN THE BI SERVICES MARKET

Navigating the BI services landscape is not as straightforward as it was several years ago. One typically went to one of the Big Four firms for strategic advice and management consulting, to large systems integrators for app dev outsourcing deals, or to offshore firms to minimize the cost of commodity tasks such as testing and documentation. In the past few years, the business intelligence services market has undergone a dramatic shakeout, with new leaders emerging and old stalwarts crumbling. BearingPoint partially broke up in 2009, selling off major assets to both Deloitte and PwC (but retained significant assets and presence in Europe). PwC continued to beef up its talent and acquired Paragon Consulting Group in 2009 and Diamond Management & Technology Consultants in 2010, and in May 2012, Canadian CGI announced its intent to acquire UK-based Logica. This means that buyers have new options to consider and that options they may have known in the past may look significantly different or may no longer exist when they go to make buying decisions (see Figure 3). Key changes in the market include:

- Continued investment in technology skills by the former Big Four.** Deloitte, PwC, KPMG, and Ernst & Young (E&Y) continue to grow their technology consulting practice. Deloitte has made huge strides in global (especially India-based) delivery and application maintenance practices. PwC (following the expiration of its noncompete with IBM in 2007) has rapidly ramped up its technology skills through major acquisitions such as Diamond, PRTM, Paragon, and portions of BearingPoint. KPMG and E&Y have not been as aggressive in the technology marketplace — especially in the implementation space — but both have strong technology advisory practices.

- **Steady investment by India-based giants closing the gap with global leaders.** India-based giants continue to close the gap with multinational corporations (MNCs) in the advisory and process consulting realms. Leaders like Infosys, TCS, Wipro, and Cognizant continue to lure away talent from multinationals like Accenture, IBM, KPMG, Deloitte, PwC, BearingPoint, and others to grow their account management and consulting skills and industry focus. They also continue to globalize — expanding presence into geographies like continental Europe where they have been historically sparse. These firms are also hiring aggressively from the industry (including their clients) to deepen their vertical expertise and move up the value chain. The India-centric providers are strongest in technology areas (implementation and support) as well as productization of IP (solution creation). They still lag in advisory and process consulting, change management, program management, and governance versus the former Big Four, but they continue to narrow the gap.
- **Convergence of products and services.** Significant shakeout has changed traditionally product-focused companies into services-focused ones: IBM acquired PwC MCS (Management Consulting Services), HP acquired both EDS and Knightsbridge Solutions Holdings, SAS acquired Baseline Consulting, Xerox acquired Affiliated Computer Services (ACS), and Dell acquired Perot Systems. While in the services space, the reverse has happened, as consulting firms have bought up software: Deloitte acquired Oco and Accenture acquired CadenceQuest. Some consultants are building their own BI solutions based on open source software. This convergence also raises new questions related to conflicts of interest, security, and privacy as previously disparate hardware, software, and services organizations work together to mine for BI insights, differentiation, and advantages.

Figure 3 Business Intelligence Services Market Segmentation

Capabilities	Sample services
BI services types	<ul style="list-style-type: none"> • Strategic/advisory/management consulting • Data governance • Development/implementation/testing/systems integration • BI solution center setup and/or outsourcing • Application hosting • Business process outsourcing
BI stack services	<ul style="list-style-type: none"> • Reporting, query, dashboarding • Predictive analytics, data mining • Data integration, data quality • Data warehousing (DW) • Master data management (MDM) • Portal integration • Business process integration
BI vendor specialization	<ul style="list-style-type: none"> • BI vendors • DW vendors • Data integration vendors • MDM/data quality vendors
Geographical focus	Delivery capabilities in major geographical regions
Industry expertise	Vertical industry experience and expertise, including industry-specific packaged solutions
Domain expertise	Business domain (finance, HR, sales, marketing) experience and expertise, including domain-specific packaged solutions

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Source: Forrester Research, Inc.

MAKE THE BEST CHOICE BY FOLLOWING OUR BATTLE-TESTED APPROACH

To help you navigate this crowded and continuously evolving landscape, we recommend using the following four-step approach (see Figure 4):³

1. **Create your longlist/shortlist based on this Forrester Wave and the BI short-listing tool.** If you already have an initial longlist/shortlist in mind, great. If not, we recommend using this Forrester Wave and the BI Service Provider Short-Listing Tool to get started. The short-listing tool is a directory of nearly 100 BI services providers that we update once every 18 months. We do not evaluate vendors in this directory, so you'll only be creating the shortlist based on nonsubjective criteria such as company size, presence in a certain geographical region, and number of trained consultants in a particular BI tool.
2. **Adjust the initial list based on conflicts of interest or prior experience with the vendors.** Take a look at the resulting longlist/shortlist, and run it through a sanity check. For example, you may notice on the list an advisory firm that happens to be your auditor or a firm whose director is also

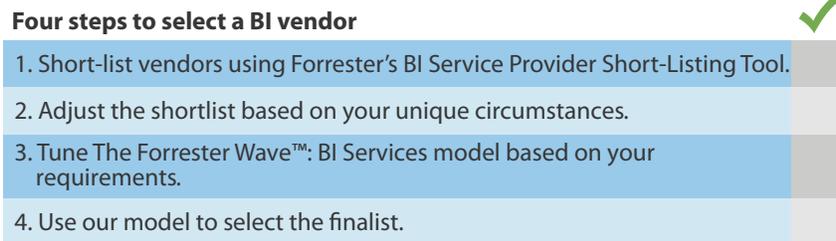
on your board. These vendors may not be able to bid on your projects. Conversely, you may want to give this opportunity to a firm that's not on the list but that has built a good reputation with you.

3. Tune the Forrester Wave model to your specific requirements and use it to build an RFI/RFP.

Each situation is different, so we recommend adjusting the model weights to fit your own requirements, corporate and IT culture, and industry and domain specifics. There are even a couple of nonscored placeholders in the Forrester Wave for you to indicate and score whether a vendor already has a purchasing relationship with your firm and whether there are other potential conflicts of interest (like working with your direct competitors). Once you are done adjusting the model, use it as an input to your broader and more detailed RFI or RFP documents.

4. Use the Forrester Wave model to further short-list and select the finalist. As you receive vendor proposals, map their responses to the Forrester Wave evaluation criteria. Even for vendors we've already evaluated in this Forrester Wave, we strongly recommend using our scores as just a guideline, methodology, and a starting point while mainly relying on your own evaluations.

Figure 4 Forrester's Four-Step Approach To Navigating The Complex BI Services Landscape



BUSINESS INTELLIGENCE SERVICES EVALUATION OVERVIEW

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

Evaluation Criteria Consider Client Ratings, Scale, And Scope Of BI Services

After examining client inquiries, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. Forrester then created two models to best reflect the market dynamics in BI services and common needs of BI services buyers. The first model weights the criteria toward buyers seeking process expertise, consulting, and industry best practices. The second model weights the criteria toward buyers seeking technical breadth and depth across a broad range of BI technologies, vendors, and BI project skills. We evaluated vendors against 53 criteria across the two models, which we grouped into three high-level buckets:

- **Current offering.** To analyze the providers' current offerings in the BI services space, we evaluated a range of elements in BI services practices, including technology expertise, methodology, culture, and people. We looked at real-world RFP examples and client feedback as well as provider-given information about their BI practices in areas such as business intelligence, analytics, MDM, and overall architecture design. We also looked at contractual and relationship elements around how providers ensure successful projects that meet client expectations and business goals.
- **Strategy.** To evaluate strategy, we interviewed executives at each firm and collected information to understand R&D, technology investments, future direction, and overall practice strategy. We also looked at specific elements such as the provider's own internal use of business intelligence and investments in industries.
- **Market presence.** To analyze market presence, we evaluated overall financial and customer metrics. This includes an analysis of total and business-intelligence-specific revenues and headcounts as well as customer bases and partner alliances.

Competition Is Healthy, And All BI Services Providers Offer Highly Competitive Choices

Forrester included 12 vendors in the assessment: Accenture, Capgemini, Cognizant, CSC, Deloitte, HP, IBM, Infosys, KPMG, PwC, TCS, and Wipro. Each of these vendors demonstrates (see Figure 5):

- **More than \$300 million in BI revenues and more than 100 customers.** All firms in this evaluation have earned their place among the top tier firms as demonstrated by their revenues, practice size, growth, and number of BI customers and projects.
- **Significant traction in the global BI services market.** All firms in this evaluation have significant presence in all major regions, and therefore they are a solid choice for your global BI initiatives.

Figure 5 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	# of customers; BI projects	BI-specific revenues	BI employees
Accenture	>1,400 customers and projects	>\$2B	9,500 FTEs
Capgemini	>800 customers; >1,400 BI projects	>\$758M	7,300 BI employees
Cognizant	Forrester estimates >710 customers; >5,500 BI projects	Forrester estimates \$1.17B	Forrester estimates 12,500 BI employees
CSC	Forrester estimates 100 customers; 500 BI projects	\$100M–\$500M	3,200 BI employees
Deloitte	~1,200 ongoing BI projects	\$1.2B	5,000 BI employees
HP	~600 customers	>\$500M	3,500 BI employees
IBM	>20,000 BI projects	Forrester estimates >\$2B	>9,000 BI practitioners; 4,000–5,000 Oracle and SAP BI consultants
Infosys	390 customers; >1,000 BI projects	\$560.8M	7,005 BI employees
KPMG	1,000 customers	>\$679M	2,200 BI employees
PwC	125–225 customers; 750–900 BI projects	\$500M–\$600M	2,000–3,000 BI-focused pros
TCS	>300 customers	\$1.02B	15,000 BIPM associates
Wipro	335 customers; >450 BI projects	\$790M	8,600 BI services employees

Vendor selection criteria

More than \$300 million in BI revenues and more than 100 customers. All firms in this evaluation have earned their place among the top tier firms as demonstrated by their revenues, practice size, growth, and number of BI customers and projects.

Significant traction in the global BI services market. All firms in this evaluation have significant presence in all major regions, and therefore they are a solid choice for global BI initiatives.

Source: Forrester Research, Inc.

BI SERVICES LEADERS DIFFER IN THEIR APPROACH TO CLIENTS AND SOLUTIONS

Today's BI services market is heavily fragmented on both the buyer and the supplier side. Some clients embark on enterprisewide CIO-led initiatives, whereas other BI services deals are line-of-business-driven in areas like supply chain, customer management, or web analytics. Some BI initiatives are relatively horizontal (such as financial analytics or master data management), and some are highly specialized for an industry (such as smart metering in the utilities industry). These demands drive different needs for services provider selection, and the BI Forrester Wave tool in this report shows two high-level scenarios: one for more strategic, consultative services deals and one focused more toward BI technology and outsourcing services.

BI Strategy And Consulting Services Buyers: Look To Local Consulting Talent Pools

Forrester's evaluation of BI strategy and consulting skills uncovered a market in which (see Figure 6):

- **IBM, Accenture, and Deloitte offer greatest depth and breadth of strategy consulting in BI.** These Leaders stand out from an elite pack, with deep process knowledge across a wide range of industries where they can provide consulting and advisory skills related to BI projects, helping clients navigate through the business challenges. These Leaders also have extremely deep pockets and investment in R&D and technology innovation — as well as R&D in understanding business issues. These firms have consultants located in all major markets, making them an especially strong fit for larger, complex multinational rollouts.
- **KPMG, CSC, Capgemini, HP, and PwC stand out in key industries and geographies.** From an advisory and consulting standpoint, the differences among key Leaders often show most strongly at the country or industry level. Capgemini stands out as a European-centric firm, with leading presence throughout much of Europe. CSC is particularly strong in industries like federal government, healthcare, nuclear, and financial services. HP excels in many consumer and retail sectors, especially in the enterprise resource planning (ERP) for IT segment. PwC and KPMG both have a solid presence in finance and risk cross sectors; PwC excels in human capital domains.
- **India-based providers, especially Wipro and Infosys, continue to close the gap with MNCs.** Large India-based providers continue to globalize as well as continue to move up the food chain in terms of high-value consulting. They are increasingly competing — and winning — against the former Big Four and other management consulting firms. Both Wipro and Infosys have invested substantially in dedicated local market consulting resources. This, coupled with significant amounts of industry-specific productized IP and platform BI solutions, gives clients a good mix of process consulting skills backed by leading technology. This trend is pervasive with Cognizant and TCS as well, who score just below the other vendors.

Figure 6 Forrester Wave™: BI Services, Q4 '12 Strategy Evaluation



Source: Forrester Research, Inc.

Figure 6 Forrester Wave™: BI Services, Q4 '12 Strategy Evaluation (Cont.)

	Forrester's Weighting	Accenture	Capgemini	Cognizant	CSC	Deloitte	HP	IBM	Infosys	KPMG	PwC	TCS	Wipro
CURRENT OFFERING	50%	4.84	4.23	3.38	3.94	4.67	3.26	4.85	4.00	4.33	4.45	4.06	4.01
Competency	60%	4.97	4.03	3.35	3.53	4.73	3.34	4.99	3.71	4.57	4.57	3.50	3.66
Relationship	20%	4.45	4.93	4.45	4.35	4.38	3.89	4.38	5.00	3.93	4.45	4.90	4.90
Results	20%	4.85	4.15	2.40	4.78	4.78	2.38	4.93	3.85	4.03	4.13	4.93	4.20
STRATEGY	50%	4.90	3.70	3.95	4.55	4.55	4.55	5.00	3.95	4.20	3.35	3.35	3.95
Non-client-facing R&D resources	60%	5.00	3.00	4.00	5.00	5.00	5.00	5.00	4.00	5.00	3.00	3.00	4.00
Level of importance	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Scope of offerings	35%	5.00	5.00	4.00	4.00	4.00	4.00	5.00	4.00	3.00	4.00	4.00	4.00
BI market knowledge	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Use of BI methodology within one's business	5%	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Knowledge of industry-vertical-specific business processes	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
MARKET PRESENCE	0%	4.60	3.60	3.80	3.00	3.80	3.80	4.60	3.60	3.60	3.00	3.60	3.20
Firm revenues and FTEs	20%	3.00	3.00	3.00	3.00	3.00	5.00	5.00	3.00	3.00	3.00	3.00	3.00
BI revenues and FTEs	20%	5.00	3.00	4.00	2.00	4.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00
BI customers and projects	20%	5.00	4.00	4.00	1.00	3.00	4.00	5.00	3.00	5.00	2.00	2.00	2.00
Global presence	20%	5.00	4.00	4.00	4.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00	5.00
Alliances	20%	5.00	4.00	4.00	5.00	4.00	3.00	3.00	4.00	2.00	2.00	3.00	3.00

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

Source: Forrester Research, Inc.

BI Technology Buyers: War For Talent Is Still A Factor, Especially For Specialized Skills

Forrester's evaluation of BI technology skills uncovered a market in which (see Figure 7):

- IBM and Accenture outpace the market in technology skills and resources.** IBM and Accenture dwarf their competition by most measures of breadth and depth of technology expertise they cover in their BI practices. For example, Accenture has 125 alliances and more than 500 commercial relationships with market leaders. A number of these are with major players in BI and analytics, including SAP, Oracle, Microsoft, Informatica, Avanade, SAS, IBM, MicroStrategy, Teradata, EMC, and HP. IBM has a substantial number of external alliances (with firms such as SAP, Oracle, and Teradata) as well as expertise on its own products such as InfoSphere, SPSS, and Cognos.

- **CSC and HP remain best suited toward outsourcing work.** While others (including Accenture, IBM, Capgemini, and Wipro) can perform outsourcing work, CSC and HP remain a best fit for clients that seek end-to-end, build-through-run outsourcing capability. Standalone consulting or implementation work is not as well suited to their model, although they do it in pockets. These two also have significant investments in cloud, which is one growing model for many of the outsourcing clients they support.
- **KPMG and PwC lag in low-cost and lower-level-of-the-stack (commodity) technology skills.** KPMG and PwC both have technology implementation pools — and strong thought leadership. But unlike any of the other competitors in this analysis, these two firms lack the size and scale of technical resources to do the type of technical work typically required of a large-scale global technology rollout; both of these firms typically partner for this work. Both have very limited global delivery pools that hurt their ability to be cost competitive for lower levels of technical work. This also limits the amount of support (application maintenance) work they would be suited to do.
- **Numerous other Leaders have a broad range of technology skills and global delivery.** The market starts to look fairly crowded in some ways, with companies like Deloitte rapidly building out global delivery skills and with Capgemini's Rightshore model driving substantial amounts of revenue from India and other global delivery locations. Vendors like Infosys, Wipro, TCS, and Cognizant have moved up the stack from doing lower-level support work to doing full-scale implementations where they prime and lead the project.

This evaluation of the BI 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 7 Forrester Wave™: BI Services, Q4 '12 Technology Evaluation



Source: Forrester Research, Inc.

Figure 7 Forrester Wave™: BI Services, Q4 '12 Technology Evaluation (Cont.)

	Forrester's Weighting	Accenture	Capgemini	Cognizant	CSC	Deloitte	HP	IBM	Infosys	KPMG	PwC	TCS	Wipro
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Relationship	20%	4.45	4.93	4.45	4.35	4.38	3.89	4.38	5.00	3.93	4.45	4.90	4.90
Results	20%	4.88	4.15	2.43	4.83	4.80	2.43	4.95	3.88	4.03	4.13	4.95	4.23
STRATEGY	50%	4.90	3.70	3.95	4.55	4.55	4.55	5.00	3.95	4.20	3.35	3.35	3.95
Non-client-facing R&D resources	60%	5.00	3.00	4.00	5.00	5.00	5.00	5.00	4.00	5.00	3.00	3.00	4.00
Level of importance	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Scope of offerings	35%	5.00	5.00	4.00	4.00	4.00	4.00	5.00	4.00	3.00	4.00	4.00	4.00
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Use of BI methodology within one's business	5%	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Knowledge of industry-vertical-specific business processes	0%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
MARKET PRESENCE	0%	4.60	3.60	3.80	3.00	3.80	3.80	4.60	3.60	3.60	3.00	3.60	3.20
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BI customers and projects	20%	5.00	4.00	4.00	1.00	3.00	4.00	5.00	3.00	5.00	2.00	2.00	2.00
Global presence	20%	5.00	4.00	4.00	4.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00	5.00
Alliances	20%	5.00	4.00	4.00	5.00	4.00	3.00	3.00	4.00	2.00	2.00	3.00	3.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

All Leaders Deserve A Shot To Be On Your Shortlist

The BI services vendors selected for this Forrester Wave report represent an elite group of global leaders at the top of a very crowded and fragmented market. We found that, unlike some Forrester Waves, all of these Leaders are global providers that have proved themselves capable of complex global projects. BI services vendors that made the cut include:

- Accenture.** Accenture is one of the largest global providers of BI services and is especially well suited for complex global transformational BI initiatives. Accenture has skills across all major elements of business intelligence services, from strategy to technology to outsourcing and cloud-based deployments. Key areas of strength include deep industry and process consulting;

project methodologies, governance, and change management to ensure client success; and a massive and growing library of accelerators to speed deployment and encapsulate knowledge where possible. Accenture invests significantly in innovation, R&D, and training and partners with more than 125 technology vendors relevant to BI solutions, including SAP, Oracle, Microsoft, Informatica, Avanade, SAS, IBM, MicroStrategy, Teradata, EMC, and HP.

- **Capgemini.** Capgemini is a global provider of business intelligence services, with strong offerings across all major areas of services, from advisory to technology implementation to outsourcing and managed services. Capgemini is a particularly strong choice for European-centric firms, with major presence throughout continental Europe including both in-country and nearshore locations such as Morocco and Eastern Europe. Capgemini's business information management (BIM) center of excellence in India serves as a central point of industry intelligence and solution development, servicing its clients worldwide as part of the Rightshore delivery model. Capgemini has been working on innovations in areas such as search analytics, cloud BI, mobile, and big data. Capgemini also offers numerous industry solutions, including, but not limited to, smart metering for the utilities industry.
- **Cognizant.** Cognizant is one of the leading India-centric providers of BI services across industry verticals including banking and financial services, insurance, life sciences, healthcare, manufacturing and logistics, energy and utilities, retail, consumer goods, travel and hospitality, technology, communication, information, and media and entertainment. Cognizant continues to grow its consulting and industry capabilities through both organic growth and acquisition. Currently, Cognizant supports clients through a three-in-a-box model that joins on-site resources, off-site resources, and consulting resources to round out a full team approach designed to service client needs. Cognizant invests significantly in R&D and innovation, especially targeting emerging areas of client demand such as social analytics or mobile analytics. Key areas of technology expertise include IBM, SAP, Microsoft, and Oracle as well as Informatica, MicroStrategy, SAS, Teradata, QlikTech, Oracle Endeca, Syncsort, Actuate, Synaptris, Infobright, and Kalido.
- **CSC.** CSC provides strategy and management consulting services, BI and data management technology services, and outsourcing, hosting, managed services, and cloud solutions. CSC's strategy and advisory services are strongest in industries such as financial services, life sciences/healthcare, energy, defense, retail, and automotive industries. Given its large global footprint of infrastructure, CSC is a strong choice for clients that want a partner that can run their infrastructure as well, including virtualized models and cloud and traditional hosting and managed services. Key areas of BI expertise for CSC include IBM, SAP, Oracle, Microsoft, and SAS as well as maturing and emerging technologies such as big data, Hadoop, SPSS, DataStage, and Exalead.

- **Deloitte.** Deloitte is a leading choice for BI services for complex global transformational projects in the areas of BI strategy, BI design, BI architecture development, and BI technology implementation services within BI engagements. Deloitte has technology alliances with a wide array of BI technology vendors, such as SAS, Oracle, SAP, IBM, MicroStrategy, Informatica, and QlikTech, that it can leverage to help clients in their technology solutions. Within Deloitte Analytics, Deloitte has formed the Deloitte Analytics Institute (DAI), which provides thought leadership, methods, tools, and solutions that it takes to the market. Deloitte's BI practice is able to combine its overall strengths in areas including program management, change management, and industry expertise with deep knowledge of analytics and BI best practices.
- **HP.** HP goes to market in the BI services space with a combined software and services play that brings the full gamut of HP resources to HP clients. This means that HP clients have access to its world-class global outsourcing services in addition to HP software such as Autonomy (meaning-based computing) and Vertica (analytics platform) as well as HP Labs for innovation. The HP portfolio includes many industry-specific solutions, such as a store operations management solution for retail, care management solution for healthcare, and digital oilfield intelligence for oil and gas. HP also has focused business domain solutions, including social intelligence for customer management, supply chain visibility, and risk management for financial services.
- **IBM.** IBM has one of the largest BI practices globally, with capabilities and presence in a broad range of industries, technologies, and geographies. IBM has skills in core BI areas (advisory, technology implementation, and outsourcing), and it has pioneered some of the most innovative research and offerings in the market today, such as the famous Watson, a cognitive computing system now being used in fields like healthcare (e.g., the IBM-GE partnership) and financial services (e.g., Wellpoint, Memorial Sloan-Kettering, and Citibank) and extends traditional technologies like big data, analytics, and cloud. IBM occupies a unique role in the BI space, given the competition situation in which IBM has many leading products itself (Cognos, SPSS, Netezza) as well as partnerships with third-party leaders such as SAP, Oracle, Teradata, SAS, and MicroStrategy.
- **Infosys.** Infosys is a leading India-based provider of BI services to clients worldwide across a broad mix of industries. Infosys is a good choice for a range of client needs, such as process consulting, technology implementation, and support services. Primary domain offerings include BI and analytics for supply chain, finance, customer, CIO, pricing, marketing, sales and operations (S&OP), risk, HR, and web/social media. Infosys' list of major BI alliances includes Oracle, SAP, SAS Silver Alliance, MicroStrategy, Teradata, Tibco Software, Actuate, and IBM.
- **KPMG.** KPMG's primary play in the BI space is around advisory and consulting services related to BI and analytics, where it is a global leader. It has a significant focus on analytics and decision support, performance and risk, and information management. The provider also has

technology implementation services, but not at the scale of other top tier global firms. KPMG minimally offers support or outsourcing or global delivery resources; usually it would use a partner in deals that require any of these services. Key alliances for KPMG in BI include IBM, Oracle, HP, and TCS.

- **PwC.** PwC is a strong fit for complex transformational projects in which it helps clients develop and align business strategy and technology implementation. PwC's advanced analytics center of excellence helps clients in areas such as applied analytics, statistics, advanced simulation, and business intelligence. PwC has information management competencies tied to BI that include enterprise data management, enterprise content management, and information strategy, architecture, and governance. Major verticals of focus for PwC's BI practice include health, financial services, products and services, and public sector. PwC has alliances with major BI vendors including Oracle, SAP, HP, and Microsoft.
- **TCS.** TCS is a leading India-based consultancy service serving global clients across industries including manufacturing, financial services, healthcare, and retail. TCS combines industry process consulting through its industry solution units with a substantial productized services approach; this lets clients jump-start their implementations using analytical templates built on industry-leading BI solutions such as Oracle BI Enterprise Edition (OBIEE), SAP BusinessObjects, IBM Cognos, Microsoft BI, MicroStrategy, and QlikTech. Examples of these solutions include mBIDS for manufacturing, tBIDS for telecom, bBIDS for banking, fBIDS for financial services, rBIDS for retail, iBIDS for insurance, hBIDS for healthcare, cBIDS for consumer packaged goods (CPG), aBIDS for airline, uBIDS for utilities, and lBIDS for logistics.
- **Wipro.** Wipro is a leading India-based provider of BI consulting, technology implementation, and outsourcing to a global client base. Key solution areas include customer analytics, supply chain, and risk and compliance. Wipro has also created numerous industry-specific solutions, such as marketing mix modeling, a "know your store" solution for retail, claims analytics for insurance, and a B2B MDM solution for hi-tech. Wipro has global alliances with BI vendors such as Oracle, SAP, HP, Teradata, SAS, and MicroStrategy.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figure 6 and Figure 7 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

Survey Methodology

Forrester's Forrsights Software Survey, Q4 2011 was fielded to 2,438 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during November 2011 and December 2011. LinkedIn Research Network fielded this survey online on behalf of Forrester.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and job function as a means of controlling the data distribution. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

Forrester's Q2 2012 Global BI Maturity Online Survey was fielded to 129 IT professionals familiar with their respective organization's BI efforts. These respondents were selected based on their readership of Forrester's BI-related research. Responses were collected via email over a period of a few weeks. Each participant was offered a complimentary copy of these data charts.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Sample RFP response.** Forrester asked each vendor for a sample RFP response outlining the services provider's capabilities. Forrester ranked vendors on the quality and relevancy of the RFP response with respect to the client's profile (e.g., industry, organization, and region).
- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Online customer reference survey.** To validate product and vendor qualifications, Forrester also conducted an online survey of each vendor's current customers.

The Forrester Wave Methodology

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

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

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave 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.

ENDNOTES

- ¹ Forrester surveyed 129 IT professionals familiar with their respective organization's BI efforts to contribute to this report. These respondents were selected based on their readership of Forrester's BI-related research. Responses were collected via email over a period of a few weeks. Each participant was offered a complimentary copy of these data charts. See the August 7, 2012, "[BI Maturity In The Enterprise: 2012 Update](#)" report.
- ² Forrester often hears complaints from enterprises in certain countries — like Brazil — where tax code often changes on a daily basis!
- ³ Create a shortlist using our tool to find the right set of providers based on your technology requirements, industry, project size, and geographic scope. Eliminate or add partners based on factors such as your current strategic supplier list or past partner success or failure (and therefore image and reputation internally), plus references from peers. See the January 10, 2012, "[Updated 2012: BI Service Provider Short-Listing Tool](#)" report.

About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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