

IDC MarketScape

# IDC MarketScape: Worldwide Oracle Implementation Services Ecosystem 2018 Vendor Assessment

Gard Little

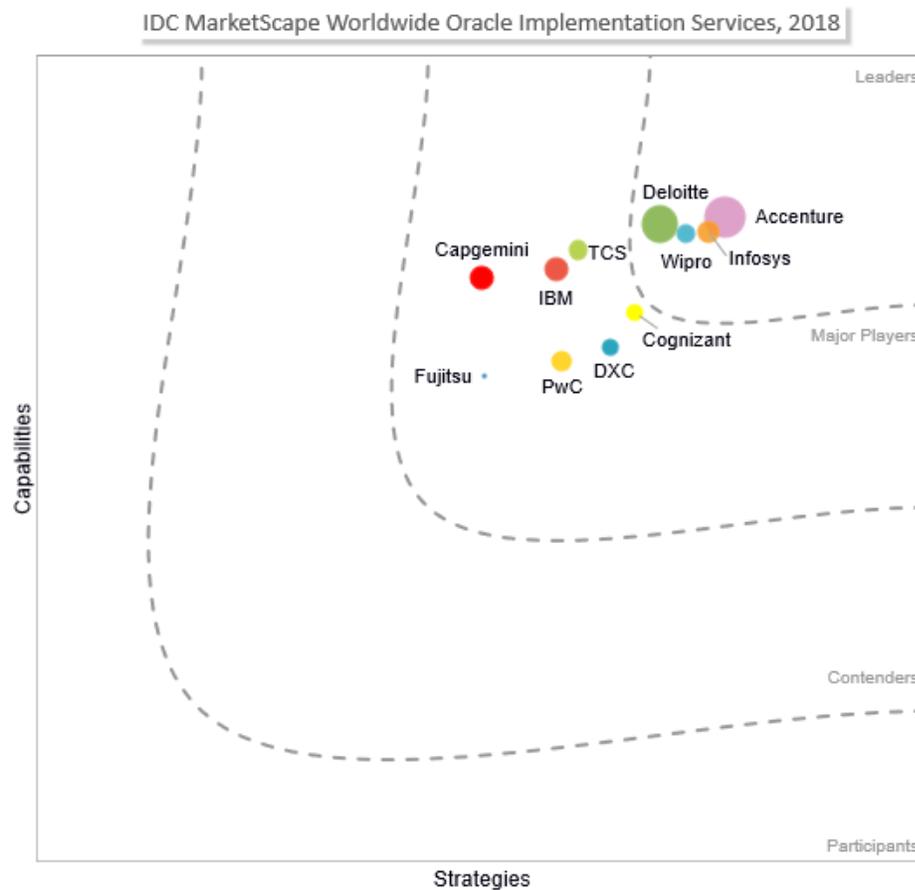
Ali Zaidi

THIS IDC MARKETSCAPE EXCERPT FEATURES INFOSYS

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Oracle Implementation Services Ecosystem Vendor Assessment



Source: IDC, 2018

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Oracle Implementation Services Ecosystem 2018 Vendor Assessment (Doc # US44364618). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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This IDC study represents a vendor assessment of the 2018 Oracle implementation services ecosystem market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide Oracle implementation services ecosystem market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing Oracle implementation services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of Oracle implementation services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings from the evaluation include:

- Across all 23 strategies and capabilities assessed, the three strategies rated most highly on average across all Oracle implementation service providers were "delivery consistency," "employee retention," and "profitability per employee." Likewise, the three capabilities rated most highly on average across all Oracle implementation service providers were "Oracle services life cycle," "offering breadth" as assessed by IDC, and "marketing channels."
- Based on survey feedback from 56 of the evaluated vendors' customers, the most critical business priority for them was to "improve operational efficiency," while the most critical vendor attribute for successful Oracle implementations was being "able to achieve desired business outcomes."
- CIOs/CTOs remain the largest key sponsor for Oracle implementation services, at just over 27%; however, this means most sponsors are found outside the information technology function. Not surprisingly, the most common service bundled with Oracle implementations was business oriented. 41% of respondents said they carry out business process changes (e.g., order to cash, procure to pay, talent management, and customer service) on most projects when they pursue Oracle implementation services.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This research includes analysis of the 11 Oracle applications systems integrators (SIs) with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. Given this approach, Leidos has been excluded, even though it is among the top 5 systems integrators based on worldwide revenue, because the firm typically receives over 80% of its revenue from the U.S. government. The inclusion criteria also dictate at least \$200 million revenue coming from a vendor's Oracle implementation services practice at a worldwide level as well as a minimum of 1,400 Oracle implementation-associated global resources; furthermore, at least 10% of revenue and 10% of head count need to be located in each macroregion. In addition, it is conceivable, and in fact the case, that

specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

## ADVICE FOR TECHNOLOGY BUYERS

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- **Accelerate adoption.** The case to wait or delay adoption has been overwhelmed by the fact that losing access to all of Oracle's innovative technologies outweighs the technical risks of adopting the cloud delivery model and in most cases the financial impacts as well (given better tools for managing your consumption of cloud services). Interestingly, the accumulated evidence from the past two years of cybersecurity attacks is that the public cloud model is likely more secure than its on-premise counterparts, which is ironic given that one of the early objections to cloud was it would be less secure. There is also a large enough body of cloud implementation best practices in place from early adopters to ease the transition.
- **Co-innovation.** One of the major hurdles in successfully adopting new technologies is formulating the appropriate use cases that will result in achieving the optimal benefits from the technologies. While adopting new technologies, select implementation partners that are willing to cocreate use cases that will map the technology benefits with your business outcomes and goals. The right uses cases will help get alignment with internal stakeholders' needs and will provide the maximum benefits from the technologies being consumed.
- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for Oracle implementation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, technical, industry based, or otherwise.

## VENDOR SUMMARY PROFILE

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description in this section provides a summary of the vendor's strengths and challenges.

### Infosys

According to IDC analysis and buyer perception, Infosys is a Leader in the 2018 IDC MarketScape for Oracle implementation services ecosystem worldwide.

Infosys has a new CEO, Salil Parekh, but its Oracle focus has not changed. It remains a global provider, delivering the full range of Oracle consulting and implementation services covering areas such as digital transformation and commerce, cloud implementation and support, Oracle GBU solutions implementation, and Big Data and advanced analytics. Infosys highlights four areas for differentiation. First, it uses pricing mechanisms to compete for more outcome-based deals where its certification as an Oracle Cloud Managed Service Provider creates a unified platform for services and software. Second, it engages with clients earlier in the services life cycle to envision better user and customer experiences. Third, it continues to innovate ahead of the curve on implementing Oracle products. And finally, it thinks ecosystemically to ensure the right partners, including APIs, are brought to bear to achieve business value for its clients.

## **Strengths**

Buyers rate Infosys highly for its ability to integrate its project team with their internal team and its technical competence and insights. Similarly, IDC rates Infosys highly in customer service strategy and its financial/funding model strategy for Oracle implementations.

## **Challenges**

IDC believes Infosys' pricing model strategy could be improved by offering pricing models that match with customer pricing scheme demands. Also, Infosys would benefit from making its Oracle practice more prominent on the corporate website.

## **Consider Infosys When**

You are looking for a vendor that can help you with the technical and functional aspects of your Oracle transformation journey, utilizing a mix of onshore and offshore delivery efforts. Infosys couples its Oracle offerings with homegrown artificial intelligence platform Nia to bring machine learning, knowledge management, and intelligent automation capabilities for the customers. This ability will help you drive Oracle product-enabled business transformation supported by intelligent platforms and global skill sets.

## **APPENDIX**

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### **Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

*Note: All numbers in this document may not be exact due to rounding.*

## **Market Definition**

The Oracle implementation services ecosystem market covers the design, build, and integrate functions of the design-build-run function chain. The design phase includes both IT and business consulting.

### ***Customer Perceptions of Oracle Implementation Services Vendors***

A significant and unique component of this evaluation is the inclusion of the perceptions of Oracle implementation services' buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's *Global Oracle Implementation Services Buyer Perception Survey* have partnered with at least one of the participating vendors directly on an Oracle implementation project within their company. The survey findings highlight key areas where buyers expect Oracle implementation services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for Oracle implementation services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

Figure 3 illustrates the top 10 business drivers for Oracle implementation services projects for the Oracle services customers surveyed in 2018. Customers sighted improving operational efficiency and building capabilities for future business requirements/needs as the top two business drivers for taking on Oracle implementation services.

## LEARN MORE

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### Related Research

- *Market Analysis Perspective: Worldwide and U.S. IT Consulting and Systems Integration Services, 2018* (IDC #US44283917, September 2018)
- *The DX World: SaaS and Cloud-Enabled Technology Bring Business Impact* (IDC #US43759218, May 2018)
- *The DX World: SaaS and Cloud-Enabled Technology Implementation Best Practices* (IDC #US43758318, May 2018)
- *The DX World: SaaS and Cloud-Enabled Technology Post Go-Live Best Practices* (IDC #US43759518, May 2018)
- *Worldwide and U.S. Systems Integration Services Forecast, 2018-2022* (IDC #US43753618, April 2018)
- *Worldwide and U.S. IT Consulting Services Forecast, 2018-2022* (IDC #US43748118, April 2018)
- *IDC FutureScape: Worldwide Intelligent ERP 2018 Predictions* (IDC #US43155917, October 2017)
- *IDC MarketScape: Worldwide Oracle Implementation Services 2016 Vendor Assessment* (IDC #US40140016, September 2016)

### Synopsis

This IDC study represents a vendor assessment of the Oracle implementation services ecosystem through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the Oracle implementation integration services market. This IDC MarketScape covers a variety of vendors participating in the Oracle implementation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"Customers are eager to utilize technologies such as those offered by Oracle to achieve desired business outcomes and build capabilities that will future ready their businesses. Services vendors that are invested heavily in Oracle cloud solutions, in particular SaaS solutions, that cater to customers customer experience and digital transformation needs will be successful in the Oracle ecosystem in the near future," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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