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Everest Group PEAK Matrix® for Oracle Cloud Applications (OCA) Service Provider 2022 – Global

Focus on Infosys
April 2022

Everest Group
PEAK MATRIX®

Background of the research

- Organizations are increasingly adopting Oracle Cloud Applications (OCA) for various reasons, including legacy modernization, cost optimization, and improved stakeholder experience

- With industry-specific solutions, enterprise expectations have shifted beyond traditional back-office modernizations using ERP and SCM modules to innovations around customer and employee experience

- To help enterprises adopt OCA effectively, providers are skilling talent across products and forming partnerships with Oracle, leading cloud vendors, and specialist technology partners to develop innovative solutions

- In this research, we present an assessment of 15 service providers featured on the Oracle Cloud Applications (OCA) Services PEAK Matrix® Assessment 2022 – Global

- The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading services providers, client reference checks, and an ongoing analysis of the OCA services market

This report includes the profiles of the following 15 leading service providers featured on the OCA services PEAK Matrix:

- **Leaders:** Accenture, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Birlasoft, Capgemini, Cognizant, DXC Technology, Evosys, HCL Technologies, and Tech Mahindra
- **Aspirants:** 4i Apps Solutions, Inoapps, and Jade Global

Scope of this report

Geography
Global

Service providers
15

Services
Oracle Cloud Application services

OCA services PEAK Matrix® characteristics – global

Leaders:

Accenture, Infosys, TCS, and Wipro

- Leaders are characterized by their ability to successfully execute complex, multi-continent, multi-product, end-to-end OCA services, underpinned by their strong global delivery network
- These providers have strong partnerships with Oracle and all the leading cloud vendors and specialist technology partners to build and innovate client-specific solutions
- They have a strong focus on talent – heavily invested in upskilling and cross-skilling resources across multiple OCA certification streams/trails
- Leaders have a mature suite of horizontal and verticalized solutions to accelerate time-to-market for their clients

Major Contenders:

Atos, Birlasoft, Capgemini, Cognizant, DXC Technology, Evosys, HCL Technologies, and Tech Mahindra

- These players have built meaningful capabilities to deliver OCA services – implementation and management/run; however, their service portfolios are not as balanced and comprehensive as those of Leaders (in terms of coverage across OCA service segments, service type, geographies, or verticals)
- Also, Major Contenders are making continued investments in building horizontal proprietary tools, solutions, and accelerators that can be used across industries to enhance their services delivery capabilities
- Major Contenders take a balanced organic and inorganic approach to fill gaps across their OCA services portfolio and further improve their global footprint
- They bring in deep domain expertise in their focused verticals curating strong domain-specific solutions
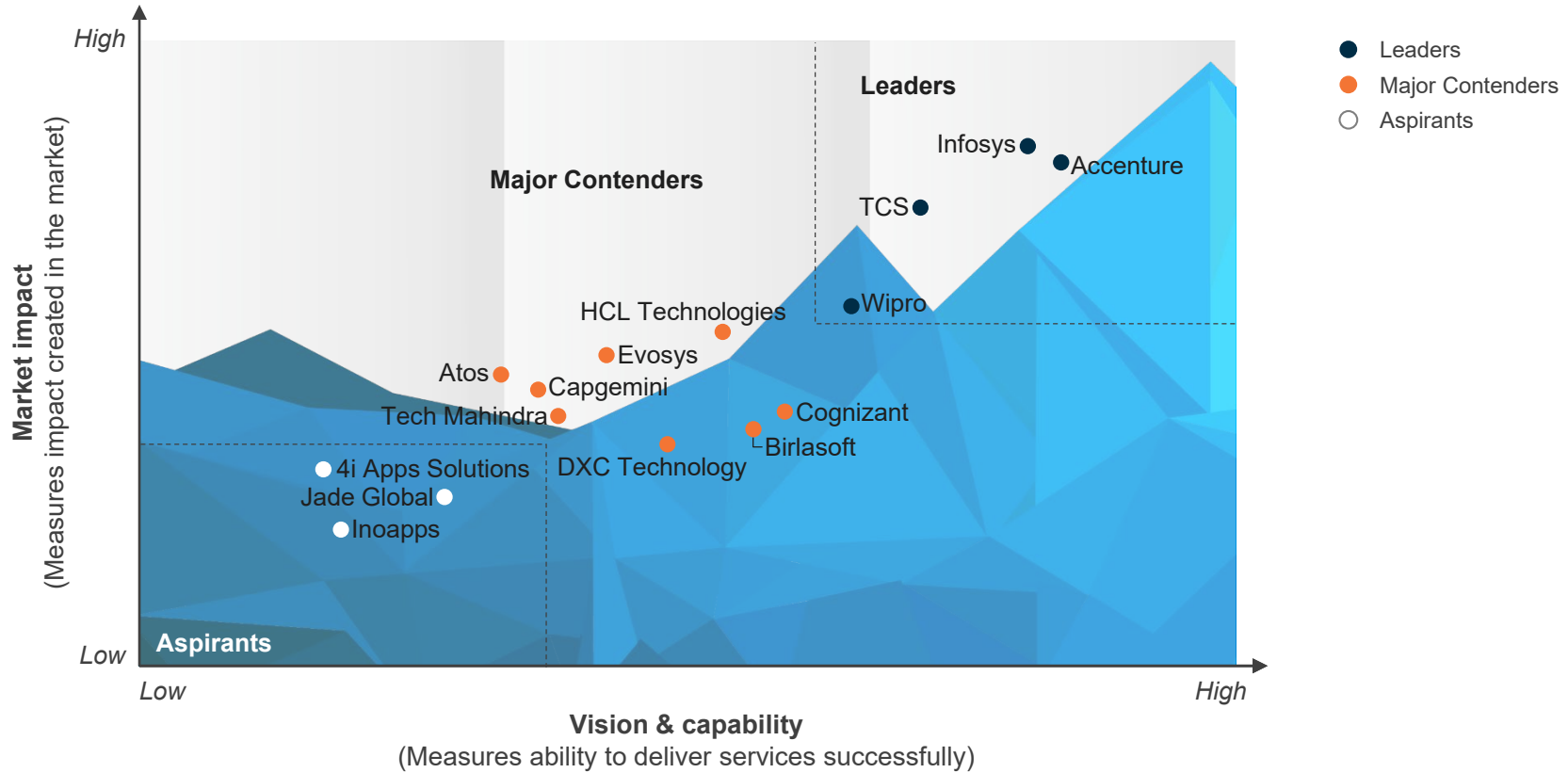
Aspirants:

4i Apps Solutions, Inoapps, and Jade Global

- Aspirants have good proof points in delivering low to medium complex implementation and maintenance OCA services for Small and Mid-sized Buyers (SMBs)
- They are either focused on a certain region(s) or vertical(s) or currently have a relatively small OCA practice
- Clients acknowledge Aspirants' client-centric approach, pricing, and commercial flexibility as well as account management flexibility as their key differentiators

Everest Group PEAK Matrix®

Oracle Cloud Applications (OCA) Services PEAK Matrix® Assessment 2022 – Global | Infosys positioned as a Leader

Everest Group Oracle Cloud Applications (OCA) Services PEAK Matrix® Assessment 2022 – Global[1]

Legend:
- ● Leaders
- ● Major Contenders
- ○ Aspirants

Leaders:
- Infosys
- Accenture
- TCS
- Wipro

Major Contenders:
- HCL Technologies
- Evosys
- Atos
- Capgemini
- Tech Mahindra
- Cognizant
- Birlasoft
- DXC Technology

Aspirants:
- 4i Apps Solutions
- Jade Global
- Inoapps

Y-axis: **Market impact** (Measures impact created in the market) — Low to High

X-axis: **Vision & capability** (Measures ability to deliver services successfully) — Low to High

[1] Assessments for Capgemini, Cognizant, Evosys, and Inoapps excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers.

Source: Everest Group (2022)

Infosys | OCA services profile (page 1 of 5)
Everest Group assessment – Leader

Measure of capability: ◔ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
◕	◕	◔	◕	●	◔	◔	◕	◕

Strengths

- Infosys has credible proof points in driving end-to-end implementations supporting multiple product capabilities; it is a fitting choice for enterprises looking for a transformational OCA partner in the banking, manufacturing, retail & CPG, and electronics & hi-tech verticals

- Clients can benefit from its strong investments in upskilling and cross-skilling initiatives to enhance resource quality and capabilities

- It has invested in building industry-specific solutions that can significantly reduce the time-to-market for enterprises, some of which include Infosys Stratos, Infosys Discrete Manufacturing Solution, and Retail Transformation Solution

- Clients can benefit from its acquisitions of boutique creative consultancies – Carter Digital, Blue Acorn iCi, and WongDoody – in delivering creative design services on the OCA

Limitations

- Some enterprise clients seeking forward-looking transformations find it lacking in credibility as a strategic partner with strong innovation themes

- While Infosys has rich experience in serving clients in North America, its client base in Europe (excluding the UK), MEA, and Latin America is relatively low

- The majority of Infosys' clients are large companies; SMBs and mid-market clients with smaller volume of transactions may not find its current approach best suited to their needs
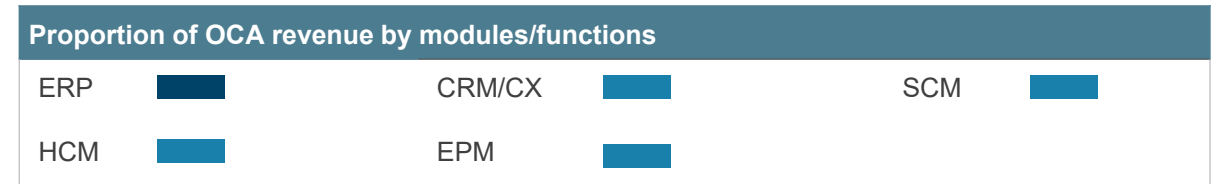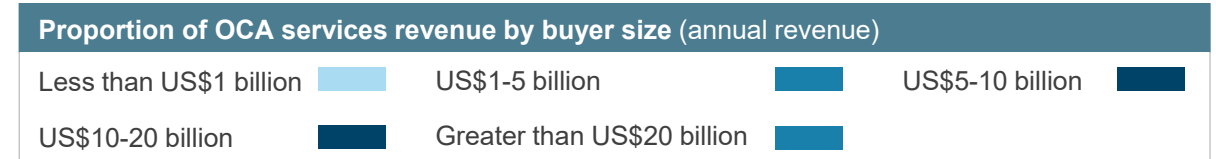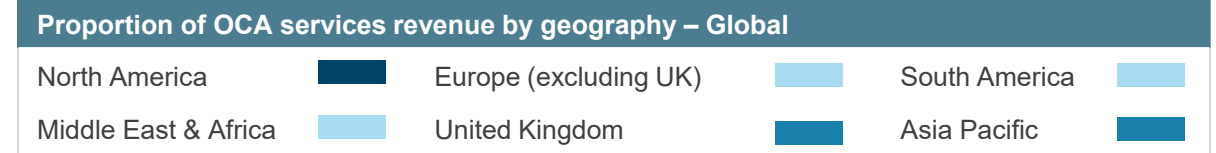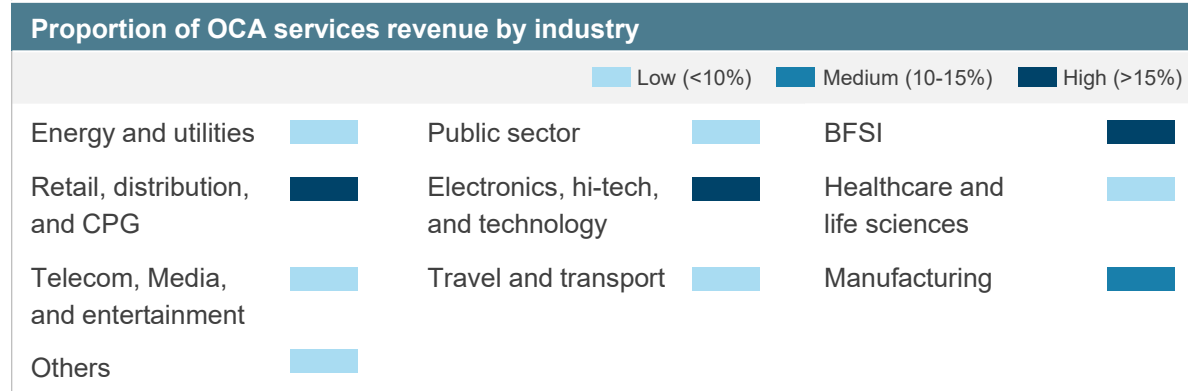
Infosys | OCA services profile (page 2 of 5)
Overview

Number of projects completed in 2020 and H1-2021: 650

Number of OCA experts: 6,612 total (4,810 certified)

Legend: ▢ Low (<10%)   ▢ Medium (10-25%)   ▢ High (>25%)

Proportion of OCA services revenue by industry

Legend: ▢ Low (<10%)   ▢ Medium (10-15%)   ▢ High (>15%)

Industry	Level	Industry	Level	Industry	Level
Energy and utilities	Low	Public sector	Low	BFSI	High
Retail, distribution, and CPG	High	Electronics, hi-tech, and technology	High	Healthcare and life sciences	Low
Telecom, Media, and entertainment	Low	Travel and transport	Low	Manufacturing	Medium
Others	Low				

Proportion of OCA services revenue by business function

Legend: ▢ Low (<15%)   ▢ Medium (15-30%)   ▢ High (>30%)

Function	Level	Function	Level	Function	Level
Consulting	Medium	Implementation	High	Maintenance and support	Medium

Proportion of OCA services revenue by geography – Global

Geography	Level	Geography	Level	Geography	Level
North America	High	Europe (excluding UK)	Low	South America	Low
Middle East & Africa	Low	United Kingdom	Medium	Asia Pacific	Medium

Proportion of OCA services revenue by geography – Europe

Geography	Level	Geography	Level	Geography	Level
UK and Ireland	High	Benelux	Low	DACH	Medium
Eastern Europe	Low	France	Medium	Nordics	Medium
Southern Europe	Low	Rest of Europe	Low		

Proportion of OCA services revenue by buyer size (annual revenue)

Buyer size	Level	Buyer size	Level	Buyer size	Level
Less than US$1 billion	Low	US$1-5 billion	Medium	US$5-10 billion	High
US$10-20 billion	High	Greater than US$20 billion	Medium		

Proportion of OCA revenue by modules/functions

Module	Level	Module	Level	Module	Level
ERP	High	CRM/CX	Medium	SCM	Medium
HCM	Medium	EPM	Medium		

Infosys | OCA services profile (page 3 of 5)
Key solutions

Proprietary solutions (representative list)			
Solution name	**Industry in focus**	**Focused OCA module**	**Details**
Council-in-a-Box	Public Services (Councils in UK)	EPM, ERP, SCM, and HCM	Council-in-a-Box is an integrated ERPM, SCM, and HCM solution that shifts the focus from "Operations" to "Innovation" to shape better outcomes for UK Councils.
Infosys Stratos – Hitech Industry Solution	Hitech Industry	EPM, ERP, SCM, CX, HCM	A holistic business capability platform that drives digital transformation and value realization from Oracle Cloud Enterprise Resource Planning (ERP) business systems.
Infosys Discrete Manufacturing Solution	Automotive, industrial manufacturing, and distribution industry	EPM, ERP, SCM, CX, HCM	Solution includes supply risk analyzer / simulator / automated sourcing switch tool and smart quote and subscription solution / GTM lite trade compliance solution.
Retail Transformation Solution	Retail apparel and groceries	Retail GBU ERP, SCM, CX, HCM	Merchandise operations transformation to answer scalability, adaptability, real-time visibility, and process integrity challenges in merchandising processes.

Oracle-certified solutions on Oracle marketplace compatible with OCA (representative list)			
Solution name	**Industry in focus**	**Focused OCA module**	**Details**
Contingent Worker Industry Solution App	EPC	ERP, SCM, and HCM	Streamlines progress billing, retainages, and rate card-based billing for suppliers.
Infosys Blackline to ARCS Migration Framework	Across all industries	EPM	Enabled faster deployment and improved accuracy for implementation.
Infosys SMART Asset Service on Service Cloud	Manufacturing and service	CX	Provides use cases such as remote monitoring of assets that helps clients with faster time to field, increase in up-time of asset, reduced maintenance costs, and increased overall equipment effectiveness.
Infosys Gamification Solution for Oracle Sales Cloud	Across all industries	CX	This solution automates virtually any operational decision – from assignments to eligibility checks, team building to resource validation. Helps the clients with scalable enterprise application and optimal Total Cost of Ownership (TCO).

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Infosys | OCA services profile (page 4 of 5)
Investments and partnerships

Key investments (representative list)		
Investment theme	**Focused OCA module**	**Details**
Learning and development	Across modules	• Created 70 Oracle internal certification learning paths in Lex, Infosys' learn anytime, anywhere platform • Meaningful investments in – Cloud Learning Subscriptions (CLS) and certification vouchers from Oracle • Increased cloud specialist number to 6,600+ in the last few years. Oracle practice is among the top three units at Infosys in terms of success • Invested in wingspan – a cloud-based and mobile-first corporate learning solution built on open-source technologies to provide interactive learnings
Emerging technologies – innovation using next-generation technologies	Across modules	• Blockchain – joint solutions using Oracle Blockchain Platform • AI and automation unit – for bot creation focused Oracle-specific use cases • Cloud unit – for emerging solutions/tools for infrastructure cloud migrations • Digital experience – partnering with Wongdoody, Simplus, and Brilliant basics for creation of digital studios specific to Oracle services and experience design elements for Oracle implementations. E.g., Digital Field Service (leveraging IoT, AR/VR, KM, and chatbot) • Cortex Contact Center Analytics solution from iCETS (leveraging AI/ML, NLP, and Speech to Text) • Digital CX Solution for Banking (leveraging AI/ML, Virtual Assistant, etc.)

Key partnerships (representative list)		
Partner ecosystem		
Whatfix	FarEye	Incorta
TalentAdore	Socitm Advisory	Zuora

Infosys | OCA services profile (page 5 of 5)
Case studies

Case study 1	A global leader in data storage solutions

Business challenge
- Five heavily customized ERPs with 3,000 point applications
- Complex supply chain with 100+ hubs and channels
- Lack of master data and standardized manufacturing/engineering processes

Solution
- Leveraged pre-configured Stratos Solution built for the hi-tech industry
- Established global master data processes and governance
- Transformed W/H processes leveraging OpenSource stack
- Implemented a circular, matrixed real-time supply chain
- Leveraged RPA/AI-based automation for subcon integration & sputtering workbench

Impact
- Reduced 15,000 cost centers down to 3,000 and 140 business units merged to 80
- Faster and agile innovation cycle (20% reduction in NPI cycle)
- Reduced inventory obsolescence
- Better negotiations with suppliers with increased self-service procurement

Case study 2	One of the largest private sector commercial banks in India

Business challenge
- Lack of omnichannel sales and service experience
- Higher service handling time, higher cost of service, and lower customer satisfaction
- Low customer acquisition rates

Solution
- Designed new CX experiences using the Oracle CX Cloud suite offerings integrated with core banking (Finacle), LMS, credit card, and other applications
- Delivered persona-based modern digital UX including 360º customer view and sales cockpit showing relevant metrics & actionable insights using Analytics and AI
- Leveraged conversational interfaces to efficiently manage Sales and Service operations

Impact
- Better understanding of customer behavior and engagement
- Improved sales productivity at branch by 15%
- Improved lead generation by 15%
- Reduced average call handling time by 20%
- Reduced inbound calls and emails volume by 10%

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix
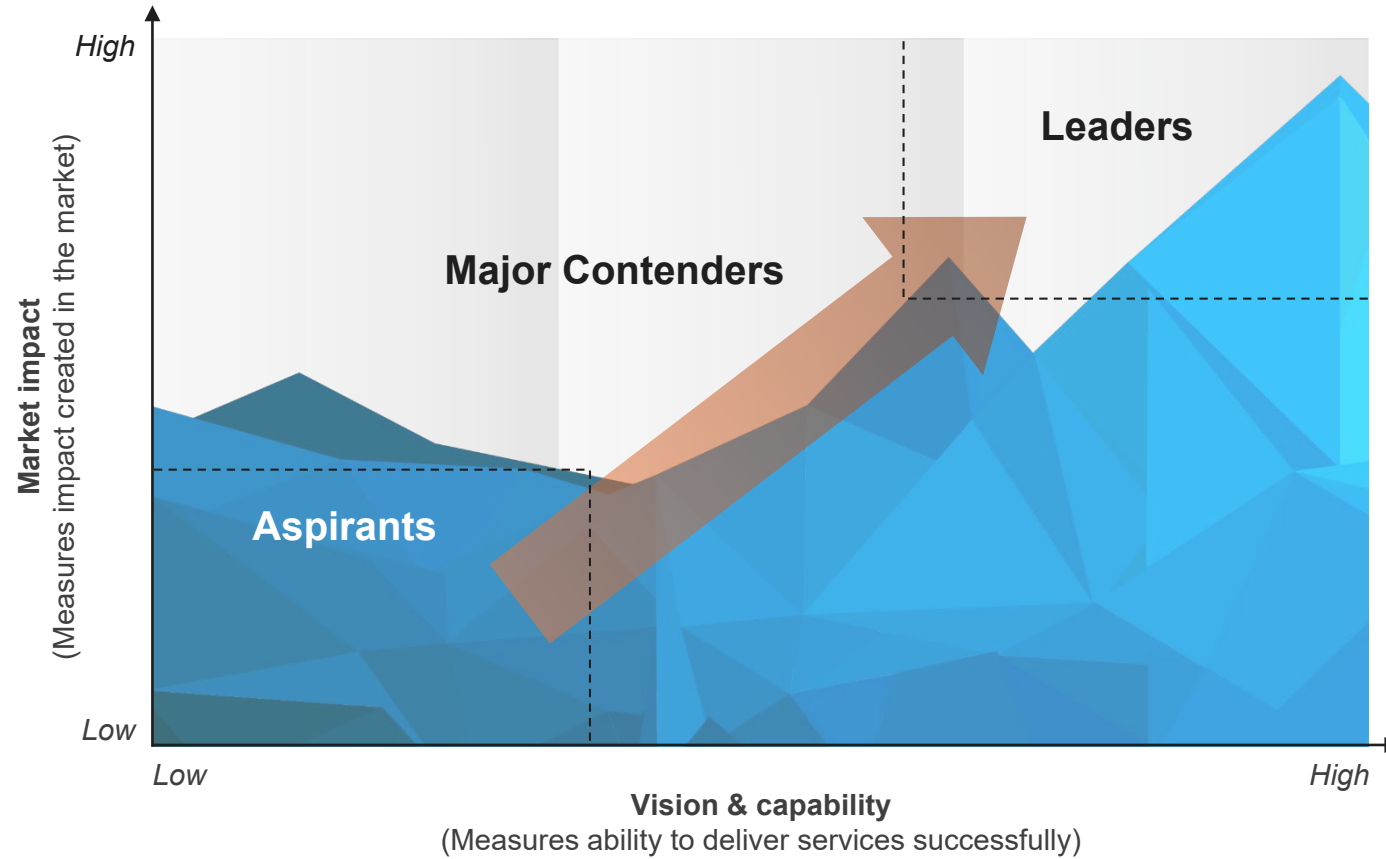
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability
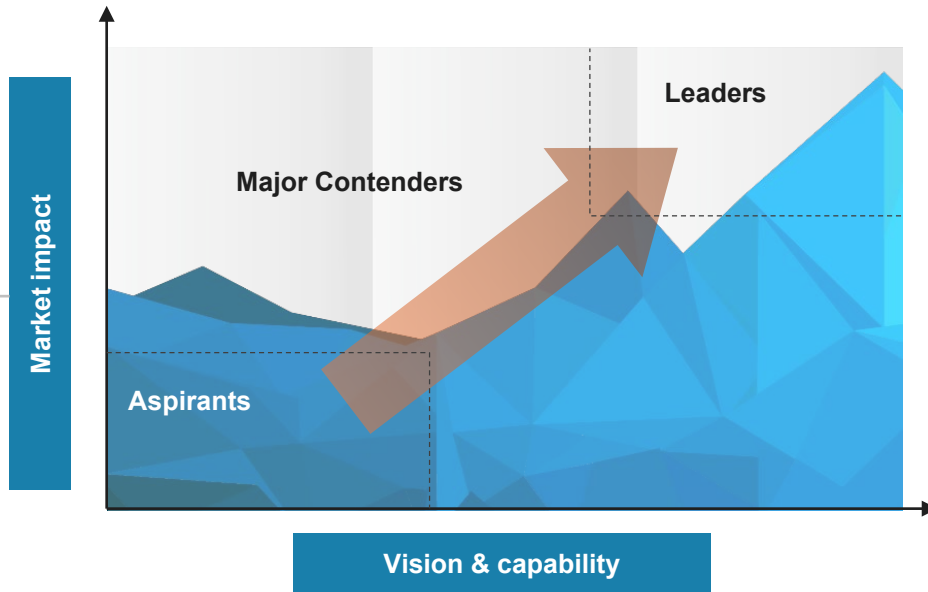
Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

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With you on the journey

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Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-647-557-3475