

Oracle Cloud ERP Services 2021–2022 RadarView Report Excerpt

Facilitating the jump from
legacy systems to cloud ERP

December 2021

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1

Enterprises are adopting Oracle Cloud ERP to fulfill growing customer demands and consolidate business processes.

2

Avasant's ongoing interactions with enterprise digital leaders indicate that migration to Oracle Cloud ERP has accelerated since 2019. The migration is enabling end-to-end transformation with optimization of business processes.

3

This report is designed to help enterprises define their approach toward adopting Oracle Cloud ERP and identifying the right implementation partner to support them in this journey. It also assesses service providers based on their ability to offer implementation and managed services with minimal disruption.

4

Avasant evaluated 30 providers using a rigorous methodology across key dimensions of practice maturity, partnership ecosystem, and investments and innovation. Through its analysis, Avasant recognized 24 providers that brought the most value to the market over the last 12 months.

5

The report also highlights Avasant's recommendations and point of view on the road ahead for enterprises planning to adopt Oracle Cloud ERP in the next 12 to 18 months.



Executive summary

Defining Oracle Cloud ERP implementation and managed services



Key definitions

Oracle Cloud Enterprise Resource Planning (ERP)

A cloud application for integrating and automating cross-functional, back-office processes, providing a single source of truth.

Oracle Cloud ERP implementation services

The overall deployment of Oracle Cloud ERP, including requirements gathering, process design, road mapping, implementation, migration, data conversion, integration, training, and testing.

Oracle Cloud ERP managed services

The ongoing support and day-to-day administration of Oracle Cloud ERP, including application maintenance and support, service optimization, and application enhancements.

Oracle Cloud ERP managed services include:

Production support

- Break fix support, workflow management, and security administration

Functional support

- Application installation and support, configuration changes, testing services, incident management, network configuration and troubleshooting, and data quality management

Third-party application support

- Maintenance of interfaces among Oracle Cloud ERP, third-party applications, databases, and workflows

Update support

- Incremental interfaces/integration, patching, new feature testing, and rollout

Key enterprise Oracle Cloud ERP trends shaping the market



Two-fold approach to adoption of Oracle Cloud ERP

- Enterprises are transforming business processes by implementing Oracle Cloud ERP or migrating on-premises applications to Oracle Cloud Infrastructure (OCI).
- The accelerated transition to Oracle Cloud ERP is enabling enterprises to overcome business challenges that arose due to highly customized, disparate, and outdated systems and is resulting in business process consolidation with better internal controls.

Driving scalability and reducing cost of operations

- Enterprises are transitioning to Oracle Cloud ERP by leveraging providers' proprietary tools, accelerators, and customized methodologies for reducing total cost of ownership (TCO).
- The transition to Oracle Cloud ERP and OCI is helping enterprises achieve scalability to address growing customer needs. Increased integration is enabling organizations to reduce cycle time and complexity of business processes.

Increased adoption of AI/ML for accelerated transformation

- Organizations across multiple industry verticals, including retail, manufacturing, life sciences, and high-tech are incorporating AI-/ML-enabled bots and platforms for achieving accelerated migration to Oracle Cloud ERP through quicker data matching and reconciliation.
- The AI-/ML-powered tools are being used in integration with Oracle Cloud ERP for enabling enterprises to clear multiple invoices, eliminate payable errors, and provide real-time forecasting.

Increased focus on industry-specific solutions

- Service providers are developing a series of industry-specific solutions to address use cases around providing a unified view across business processes, synchronizing data across multiple parties and optimizing inventory to meet rising customer demand.
- There is an increasing need for optimizing inventory and adding visibility to the entire supply chain due to disruptions caused by the pandemic. Manufacturing leads the adoption trend, followed by high-tech and retail and CPG.

Recommendations for enterprises

Create an integrated business environment

- Oracle Cloud ERP enables enterprises to integrate reports across multiple systems. It also allows unification of controls with cloud ERP processes and third-party applications.
- This integration also helps automate data load processing and transaction matching, and it improves enterprise ability to handle more orders.

Achieve quicker business outcomes through agility

- The migration of applications, including Oracle Business Intelligence Enterprise Edition (OBIEE), Oracle E-Business Suite, and Oracle Hyperion Planning to OCI helps reduce downtime of business processes.
- Accelerated Cloud ERP adoption enables reduction of data processing time that leads to quicker report generation, making overall processes agile and improving time to market.

Automate redundant business processes

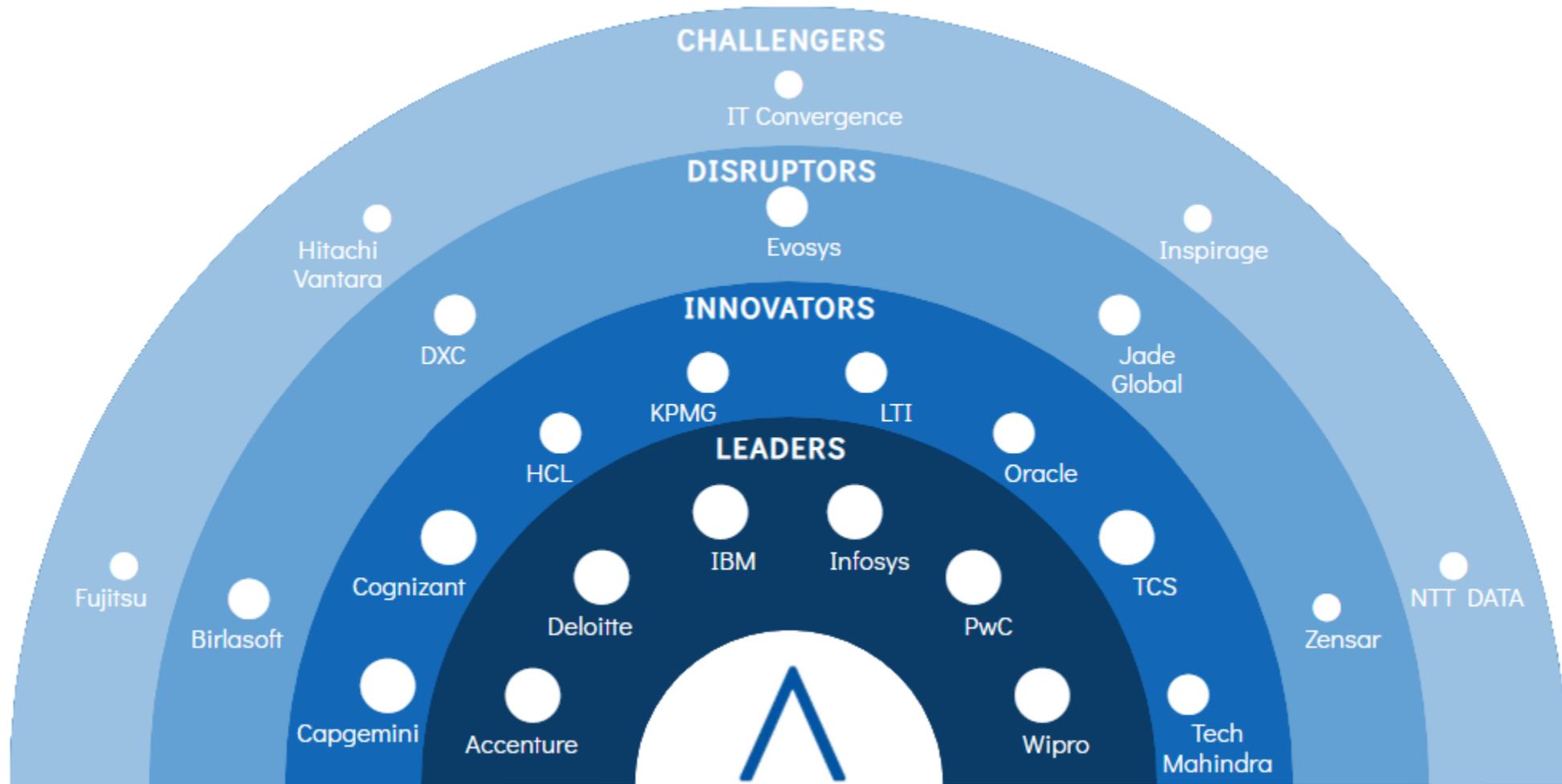
- Optimization of business processes can be achieved by detecting and eliminating redundant tasks. Automation of financial processes, like invoice payment and management of billing cycles, can lead to cash flow improvement.
- Automation also helps enterprises save costs and manage third-party relations and contracts.

Maintain data confidentiality and manage threats

- Creating a secured environment for managing threats and compliance post-cloud adoption is crucial. Security analytics platforms can help in threat detection and resolution.
- Service providers have introduced several tools, platforms, and accelerators to assess the Oracle environment and manage regulatory compliance.

Avasant recognizes 24 top-tier providers supporting the enterprise adoption of Oracle Cloud ERP

Practice maturity ○ ○ ○



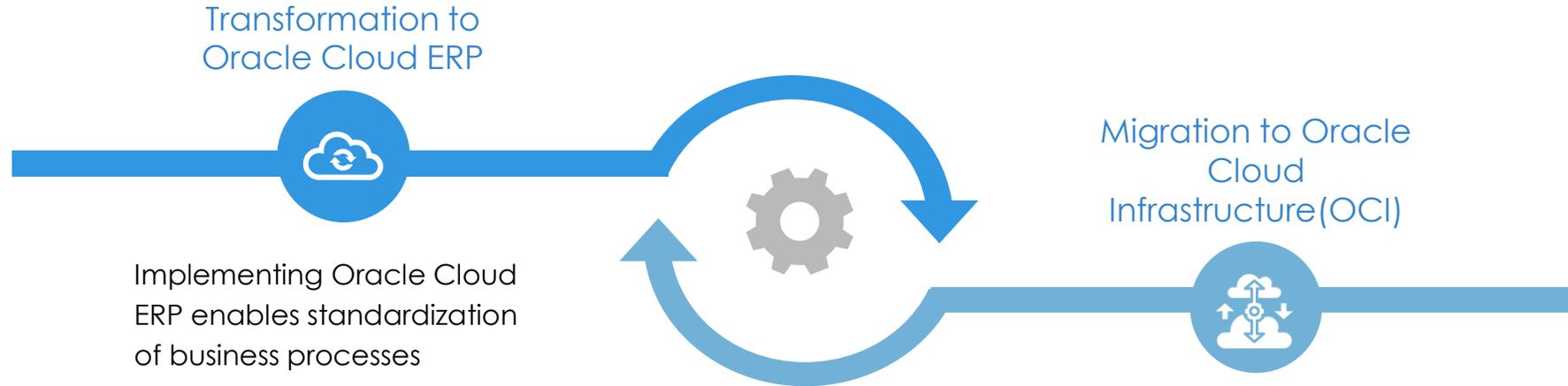
AVASANT

Lay of the land

Enterprises adopting Oracle for cloud transformation through Oracle Cloud ERP implementation and migration to OCI



Transitioning from multiple systems, including JD Edwards, EBS, and PeopleSoft, help in achieving business process standardization and a unified platform.



- Raymond Chabot Grant Thornton's legacy system was highly customized, requiring overnight use of legacy systems for processing data and refreshing reports. This led to lack of real-time information access.
- The company migrated its applications to Oracle Cloud ERP. The move improved project visibility, leading to efficient management of the billing cycle and quicker invoicing for cash flow improvement.

Migration of on-premises system to OCI to reduce TCO and add scalability

- UGN Automotive's multiple applications, including Oracle Business Intelligence Enterprise Edition (OBIEE), Oracle E-Business Suite, and Oracle Hyperion Planning, were hosted on a private cloud that had an outdated infrastructure. This led to increased downtime.
- The company migrated its applications to OCI, leading to about a 25% improvement in performance.

Raymond Chabot
Grant Thornton



Accelerated transition to Oracle Cloud ERP to tackle multiple business challenges

Adoption enables business process consolidation for achieving scalability and reducing TCO.

Multiple acquisitions can lead to disparate systems and the need for a unified platform.



Bpost has been using Oracle E-Business Suite (EBS) since 2000. It had acquired global companies with a strong focus on Belgium. Bringing all the acquired companies to Oracle EBS was challenging, and it required a standardized procure-to-pay process. The migration to Oracle Cloud ERP helped achieve standardization and decreased the total cost of ownership (TCO) by approximately 23%.

Enterprises using systems reaching end-of-life face numerous challenges. The systems are difficult to upgrade and are a hindrance to scalability.



Direct Line Group's ledger system was outdated with several manual processes. The system was difficult to upgrade. The transition to Oracle Cloud ERP led to better internal controls and compliance through process standardization.

Provide a unified system to support M&A

Transition from outdated systems

Replace highly customized systems

With an increase in the number of customizations in ERP systems, maintenance cost rises. Also, limited integration flexibility in customized systems adds complexity of business processes.



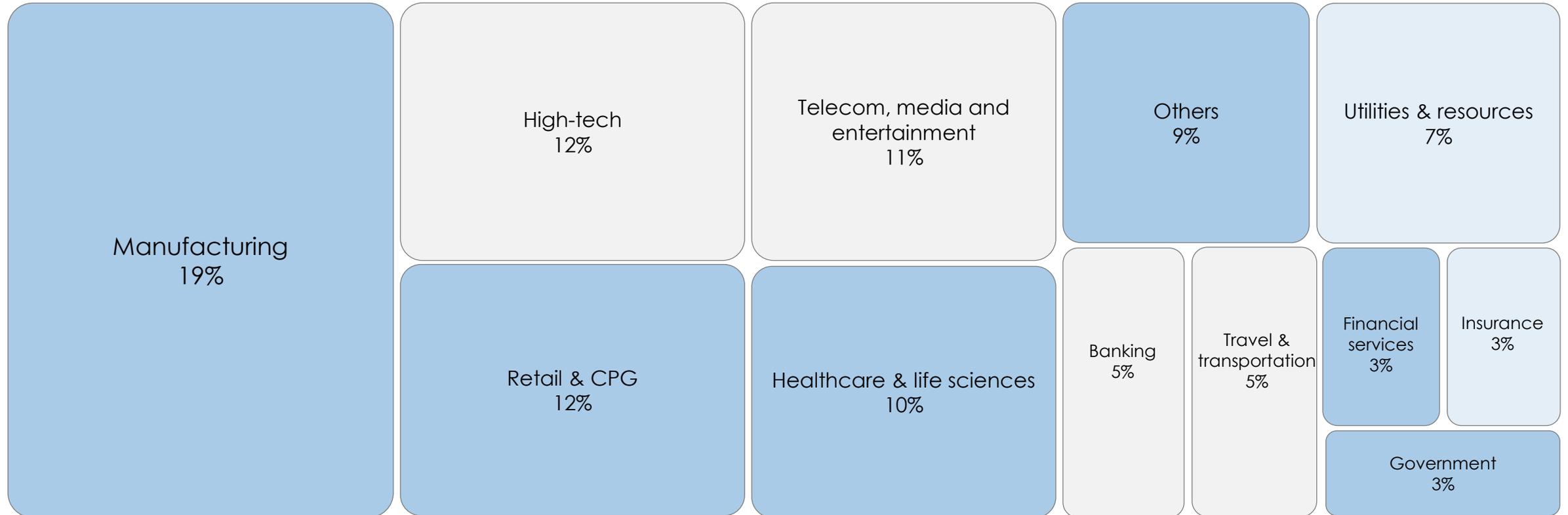
Scottish Water's ERP system was outdated and had too many customizations with no common data source. The need for integration and automation of processes led the company to migrate its system to Oracle Cloud ERP. The solution increased account closing speed by 40%.

Manufacturing industry leads the adoption trend, followed by high-tech, and retail and CPG



There is an increasing need for optimizing inventory and adding visibility to the entire supply chain process amid disruptions caused by the pandemic.

Percentage adoption of Oracle Cloud ERP by industry, July 2020–June 2021

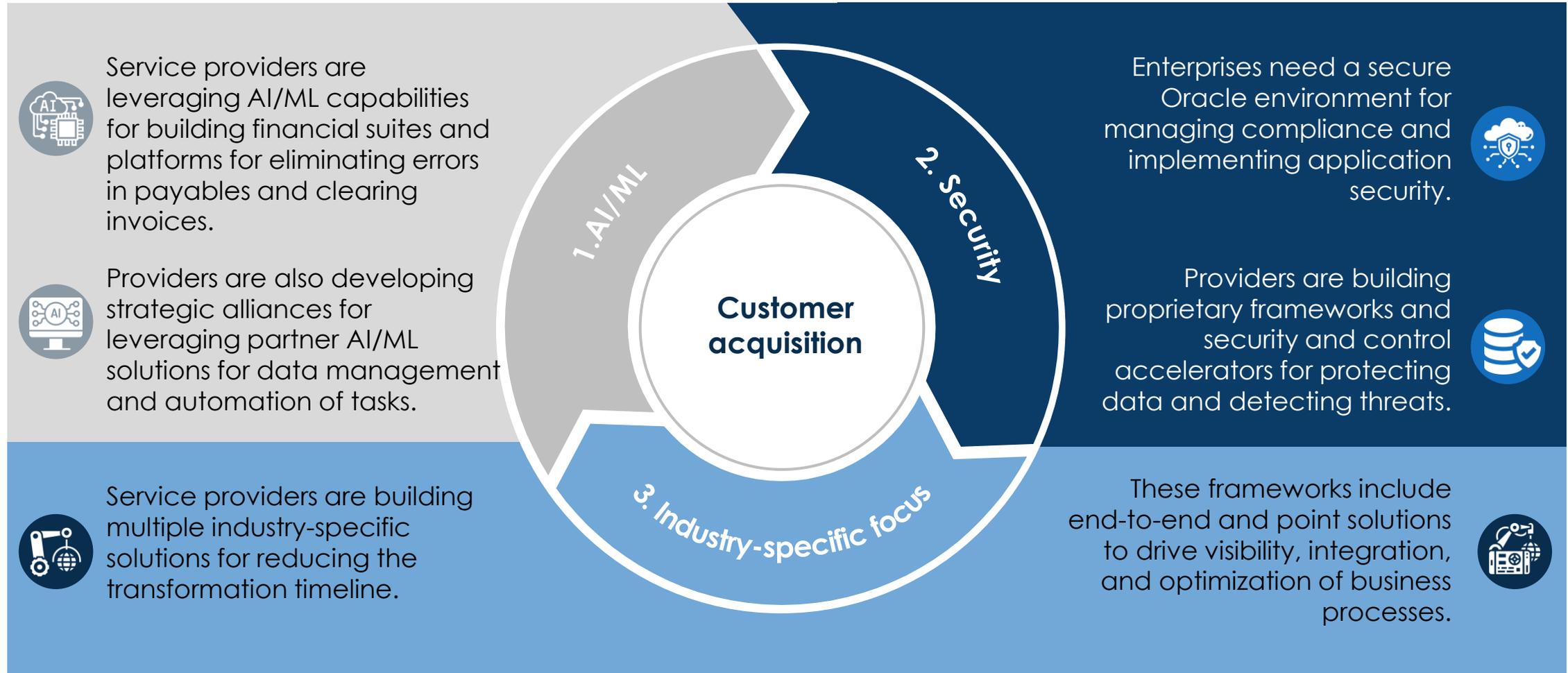


Note: The “Others” category includes aerospace and defense, education, nonprofit, sports, and professional services.

Source: Avasant Oracle Cloud ERP Services RadarView Survey, July–October 2021

Providers have increased their focus on three key areas to augment their capabilities and offerings

Oracle Cloud ERP service providers have identified AI/ML, security, and industry-specific approaches as major areas for enabling accelerated cloud transformation for enterprises.



Leveraging AI/ML-enabled solutions for accelerating Oracle Cloud ERP adoption and business process automation



Providers have increased their focus on AI/ML for augmenting their service offerings for Oracle Cloud ERP.

Automate invoice processing and real-time forecasting



Deloitte used an ML engine to build a touchless finance suite that was integrated with Oracle Cloud ERP. The integration enables automated processing of multiple invoices, real-time forecasting, elimination of errors related to payables, and clearance of invoice records.

Accelerate data matching and reconciliation



Wipro's QuMiC platform consists of Config Migrator and Data Migrator BOTs for automating and accelerating migration to Oracle Cloud ERP. Its AI-based IQNxt tool enables quicker data matching and reconciliation for reducing the timeline of cloud data migrations.

Manage third-party relations and contracts



KPMG has formed a strategic alliance with SirionLabs to leverage its AI-powered contract life cycle management (CLM) technology for managing third-party relations and contracts through critical data access and automation of redundant tasks.

Note: Examples from select Oracle Cloud ERP providers

Source: Avasant Research

Securing cloud by developing accelerators, frameworks, and platforms

Providers enable enterprises to identify security risks, assess the Oracle security environment, and protect confidential transactions.



Leveraging AI and ML for threat detection and timely remediation

HCL built the Cybersecurity Fusion Center integrated with a cloud ERP application. Its security analytics platform leverages AI and ML for detecting and solving threats.



Developing accelerators to manage compliances

PwC built security and control accelerators for identifying security risks and implementing application security. The accelerators assess Oracle's security environment and manage compliance.



Building frameworks to manage internal and external threats

KPMG's Securing the ERP framework helps manage internal and external threats by protecting confidential data and transactions. It enables integration of controls with cloud ERP processes.



Establishing security policies and DR setup reviews

Zensar currently has more than 30 security policies in place. It works with its Oracle Cloud team to review application security and disaster recovery setups for delivering client requirements during the configuration phase.

Service providers are customizing their offerings to address industry-specific challenges

Enterprises can manage changing demands, have a unified view across different verticals, and achieve data synchronization.



High-tech

Jade Global developed multiple solutions, including a pre-configured solution called Oracle Cloud Accelero, for the high-tech sector. The solution can be integrated with the standard Oracle Cloud ERP and helps invoice payment automation and integration with other applications and analytics platforms.



Life sciences

Birlasoft built a Unique Device Identification (UDI) solution for the life sciences industry based on Oracle Product hub and Oracle Integration Cloud (OIC). It also launched a Global Data Synchronization (GDSN) solution to enable sharing of synchronized product data among multiple parties.



Retail & CPG

Wipro introduced Zoom to Cloud for the retail and consumer industry. The solution offers a unified view across retail merchandise and financials and manages inventory to fulfill constantly changing demand.



Manufacturing

LTI collaborated with Samsung Electronics to develop manufacturing solutions based on the Oracle Cloud Platform. The solutions enable companies to digitally track outbound supply chain.

Service providers are incorporating change management practices as part of transformation strategy

Development of workshops, continuous update of training material, and establishment of a help desk enable accelerated transition to Oracle Cloud ERP.

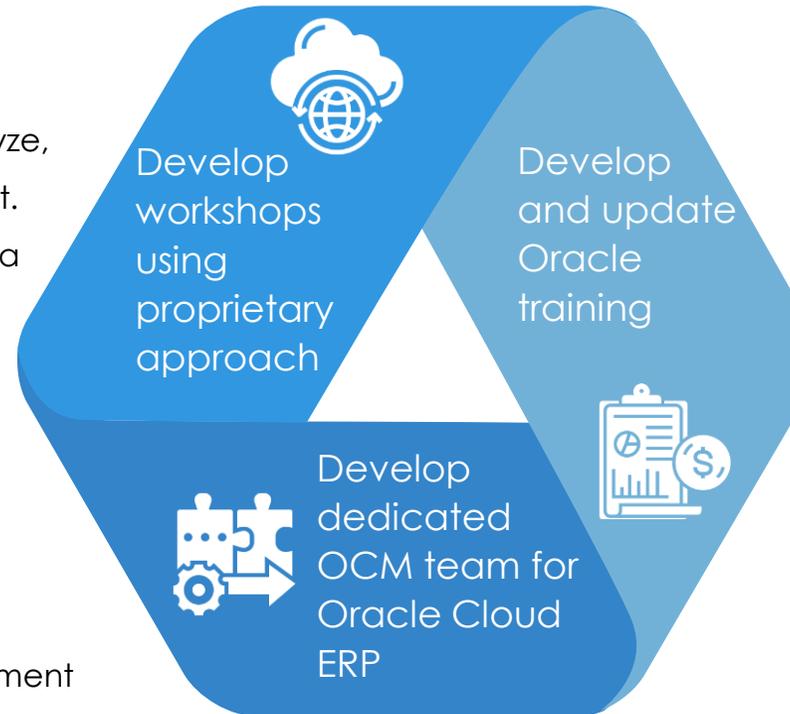
HCL

HCL has a proprietary Aware, Understand, Support, Involved, and Commit (AUSIC) approach and an Analyze, Act, Affirm (A3) methodology for change management. The affirm stage in the A3 methodology helps establish a help desk and tracks communication effectiveness.

LTI

Let's Solve

LTI built a dedicated team comprising more than 40 OCM professionals for Oracle Cloud ERP. About 15 members of the team are certified in change management methodology. LTI's OCM model is based on the Prosci Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR®) model that enables accelerated deployment and adoption of Oracle Cloud ERP.



wipro

Wipro is leveraging the Analysis, Design, Development, Implementation, and Evaluation (ADDIE) training development model for organizations using Oracle Cloud. It continuously updates its training material for Oracle engagements. This enables self-paced learning, including hands-on exercises and workshops.



RadarView overview

Avasant's Oracle Cloud ERP Services RadarView assesses service providers across three critical dimensions:



Practice maturity

- This dimension considers the current state of a provider's Oracle Cloud ERP practice in terms of its strategic importance for the provider, the maturity of their offerings and capabilities, and client engagement.
- The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.

Partnership ecosystem

- This dimension assesses the nature of the ecosystem partnerships of the provider, objectives of the partnerships (for example, codevelopment and co-innovation), and its engagement with solutions providers, startup communities, and industry associations.
- Vital aspects in this dimension are evaluation of joint development programs around offerings, go-to-market approaches, and the overall depth in partnerships.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

Avasant based its analysis on several sources:

Public disclosures Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements

Market interactions Discussions with enterprise executives leading digital initiatives and influencing service providers selection and engagement

Provider inputs Inputs collected in July 2021 through an online questionnaire and structured briefings from August–October 2021

Of the 30 service providers assessed, the final 24 featured in the Oracle Cloud ERP Services RadarView for 2021-2022 are:



Note: Assessments for Accenture, Capgemini, Deloitte, DXC, Evosys, Fujitsu, Hitachi Vantara, IBM, Inspirage, IT Convergence, KPMG, NTT DATA, Oracle, PwC, and TCS were conducted based on public disclosures and market interactions only.



Oracle Cloud ERP Services 2021–2022
RadarView

Reading the RadarView

Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partnership ecosystem, and investments and innovation) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest in the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



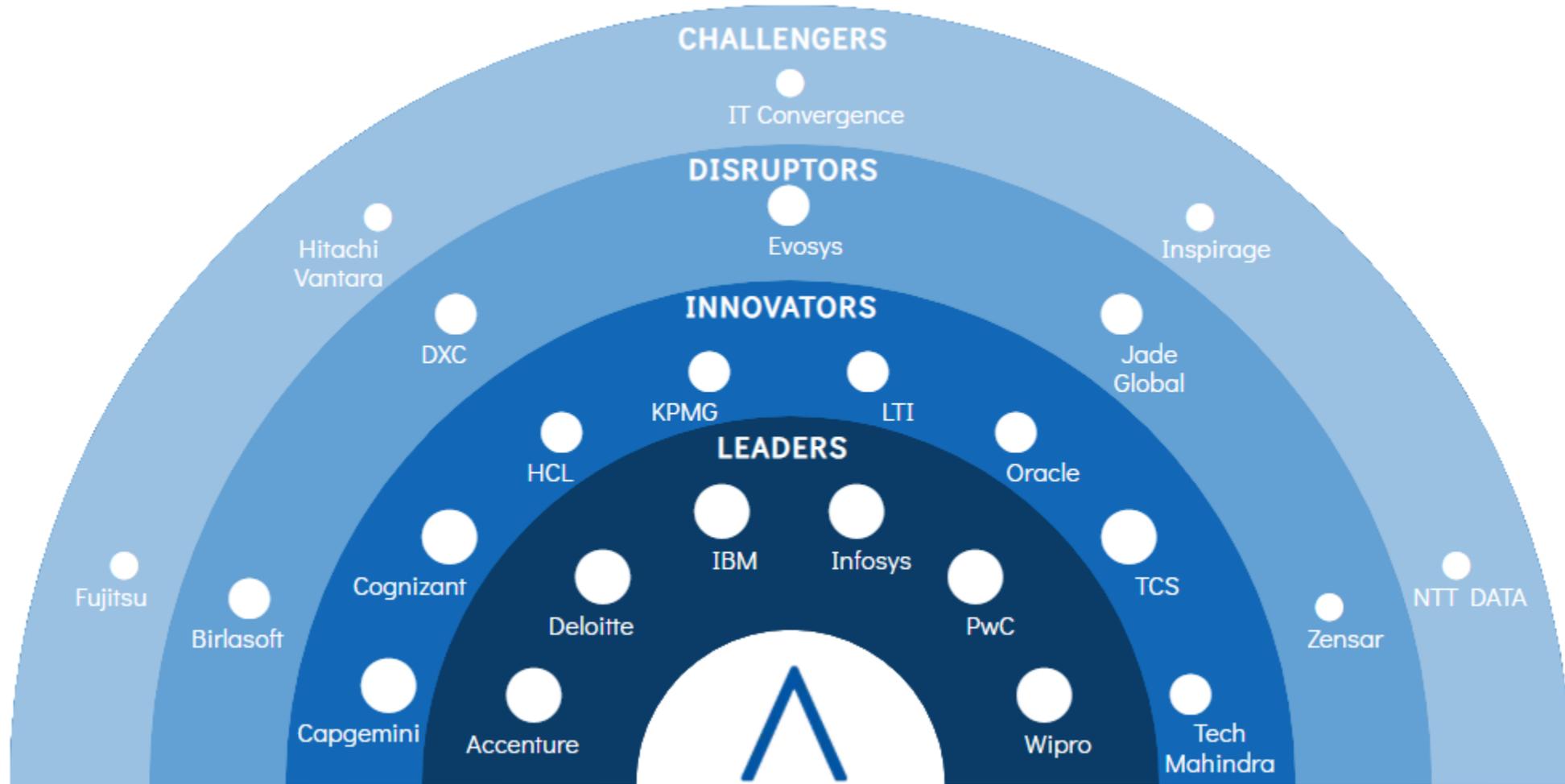
Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of providers in other categories.

Oracle Cloud ERP Services 2021–2022 RadarView

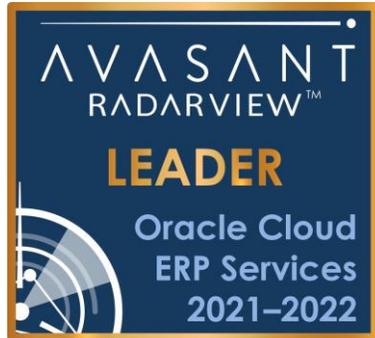
Practice maturity   



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Infosys profile

Infosys: RadarView profile



Practice overview

- Practice size: 3,000+
- Active clients: 160+
- Certified/trained resources: 2,400+
- Delivery highlights: Virtual living labs and global innovation centers

\$250–\$500M Oracle Cloud ERP Services revenue, 2021	30%–40% Oracle Cloud ERP Services YOY growth, 2021
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Client case studies

- Deployed Oracle ERP Cloud, SCM Cloud, and EPM Cloud for an automotive distributor and retail company as its legacy platform faced compliance issues. Improved operational efficiency by 15%, reduced month-end close time from 14 to three days, and improved inventory forecasting by 20%.
- Implemented Oracle ERP Cloud for an American print and media company as it needed a common platform for its separate ERPs to comply with ASC 606. This led to the streamlining of financial accounting and a reduction in maintenance costs.
- Deployed Oracle Cloud ERP & Supply Chain for 10 factories in six countries as Western Digital wanted to gain more visibility for its supply chain. This increased capacity utilization by 15%.
- Implemented Oracle Cloud ERP for an interconnect technology company within 20 weeks as its business processes and data were spread across different systems. This reduced manual work, processing time, and improved efficiency.

Key IP and assets

- Infosys Cloud Suite: A platform using built-in assets, like process flows and test scripts, to reduce implementation timeline by approximately 10%
- myEnterpriseSolution: A digital platform with ready to use 500+ API and 30+ cognitive services
- Accelerated Cloud Transformation (ACT): A methodology using five phases for all SaaS deployments

Key partnerships

Technology partners

Platform providers

Sample clients

- An American HVAC manufacturer
- An American print and media company
- An automotive distributor and retail company
- An interconnect technology company
- Brent Council
- Telecom service provider in Malaysia
- Western Digital

Industry coverage

Aerospace & defense
Banking
Financial services
Government
Healthcare & life sciences
High-tech
Insurance
Manufacturing
Nonprofits
Retail & CPG
Telecom, media & entertainment
Travel & transportation
Utilities & resources

- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments and innovation ★★★★★

Partnering with colleges to upskill its Oracle talent pool. Codeveloped solutions with partners for postal companies, third-party logistics, mining, and retail.

Darker color indicates higher industry coverage through digital services ●●●●

Analyst insights

Practice maturity



- Infosys helps enterprises achieve end-to-end business transformation, implementation of point solutions, and management of applications post-deployment. These services address numerous business challenges, such as providing standardization and automation, reducing cycle time for handling incidents, and eliminating recurring issues.
- It built many proprietary frameworks, solutions, and tools for providing transformation services that span the value chain, including assessment, design, migration, deployment, testing, and support services. Its automated tool Universal Data Validation Tool (UDVT) manages all import-related failures and reduces the number of rounds required for data cleansing.
- It also built industry-specific and point solutions for various industries, for example, manufacturing and professional services, by leveraging the Internet of Things (IoT), artificial intelligence (AI), and machine learning (ML). Its Contingent Worker Industry Solution app is a PaaS-based solution for the professional services industry. It reduces the time and complexity of workforce management.

Partner ecosystem



- Infosys organizes go-to-market activities, campaigns, and joint solutions with Oracle. It has developed more than 10 solutions with Oracle that address implementation gaps, industry requirements, and enhancements. Its Blackline to Account Reconciliation Cloud Service (ARCS) framework creates road maps for migration and addresses compliance risk.
- It also developed partnerships for codeveloping solutions and go-to-market activities with platform providers. It has codeveloped solutions with FarEye for verticals like postal companies, third-party logistics, mining, and retail. It partners with Zuora to implement go-to-market activities for its Billing and Revenue Management platform, a migration solution for clients in multiple locations, including the United States and Europe.

Investments and innovation



- Infosys adopted an inorganic growth strategy in 2018 to augment its digital transformation capabilities. In 2021, it acquired Carter Digital to enhance its human-centric design, digital transformation, and customer interaction capabilities. This acquisition will help establish the Wongdoody brand in the Australian market. In 2018, Infosys acquired Wongdoody to enhance its digital experience services.
- It is increasing and upskilling its Oracle talent pool by subscribing to Oracle's learning modules and partnering with universities. For refactoring, its personalized AI-powered learning assistant, Zoiee, is available 24X7. Its Digital Tag framework helps employees complete Oracle certification. It has partnered with institutes like RMIT and University of Melbourne to reskill candidates before onboarding them to the company.

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Authors



Frank Scavo

Partner and President
frank.scavo@avasant.com



Fred Pond

Fellow
fred.pond@avasant.com



Gaurav Dewan

Associate Research Director
gaurav.dewan@avasant.com



Larry Godec

Fellow
larry.godec@avasant.com



Nick Hann

Director
nick.hann@avasant.com



Sanchita Pati

Senior Analyst
sanchita.pati@avasant.com

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