

## IDC MarketScape

# IDC MarketScape: Asia/Pacific Oracle Implementation Services 2021 Vendor Assessment

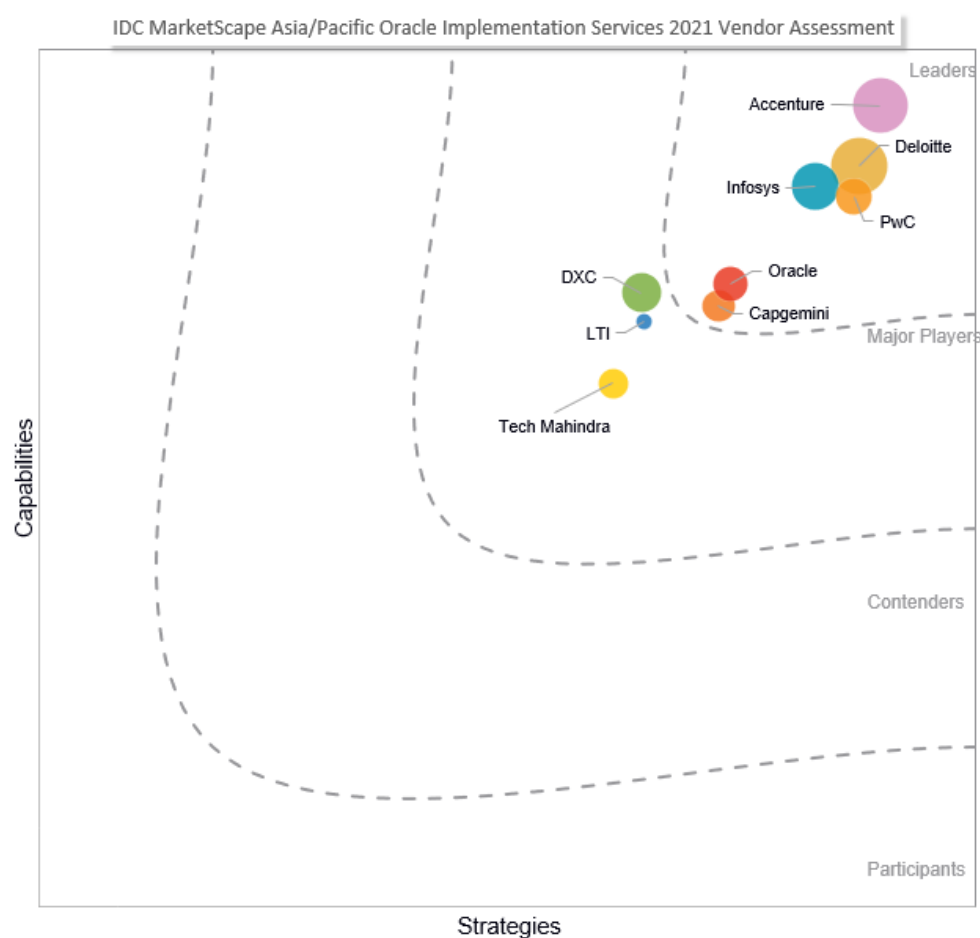
Rijo George Thomas

THIS IDC MARKETSCAPE EXCERPT FEATURES: INFOSYS

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape: Asia/Pacific Oracle Implementation Services 2021 Vendor Assessment



Source: IDC, 2021

Please see the Appendix for the 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: Asia/Pacific Oracle Implementation Services 2021 Vendor Assessment (Doc #AP47156121). 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 are Figure 1 and Figure 2.

## IDC OPINION

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Oracle applications have witnessed significant traction in the Asia/Pacific region as an enabler of digital transformation (DX), thanks to its continued investments in cloud products, focus on accelerating time to value for customers and, most importantly, joint partner innovations that helped bring transformational outcomes for customers. Over the years, Oracle's customers with large on-premises application footprint have embarked on a cloud migration journey not only to consolidate existing application landscapes but also to transform line-of-business (LOB) and industry operations that help remain agile and resilient during disruptions.

Oracle's SP ecosystem plays a pivotal role in helping enterprise customers reduce the complexity in implementing its application solutions by creating comprehensive road maps for implementation, providing local talent for support, managing the internal and external stakeholder experience, reducing risks, and ensuring the cost of implementation stays within budget and time. Customers migrating to Oracle software-as-a-service (SaaS) solutions also find the SP expertise in conducting cloud readiness assessments, enabling change management, agile implementation methodologies, and innovation focus extremely critical in maximizing the value from their Oracle investments.

This IDC study assesses Oracle application implementation vendors in the Asia/Pacific region on both the strength of their current implementation service capabilities and how well placed they are to grow the adoption of Oracle application solutions with their respective sound growth strategies. The key findings include:

- **A strong range of Oracle application service offered:** Among all the measurement criteria, Oracle implementation vendors performed well in terms of capabilities, suggesting that most participants had mature Oracle service practices and provided a broad range of application services. Some vendors differentiated their services through industry expertise, pricing strategy, unique delivery methods for SaaS implementations, and strong localization strategy for each region in Asia/Pacific.
- **The top 5 capabilities and strategies that vendors did well:** The top 5 capabilities that vendors did extremely well are the range of services offered around Oracle application implementation, customer satisfaction, cost competitiveness focus, current SaaS implementation capabilities, and marketing initiatives in Asia/Pacific. From the overall assessment of the strategy criteria of participating vendors, IDC observed that vendors strived to fine-tune regional strategies for the effective growth of Oracle services in Asia/Pacific. This was enabled mainly by the vendor's ability to map with customer's top business priorities, strengthen offerings across the entire life cycle of Oracle services, improve consulting offerings, ramp up regional marketing initiatives, and establish well-articulated plans for lowering client churn in the future.
- **The journey to cloud focus:** Application modernization is consistently rising in priority in IDC surveys, from 33% of respondents rating it "high" or "top priority" in 2015 to over 70% in 2020,

according to IDC's *2020 Application Services Survey*. With cloud increasingly becoming the preferred medium for modernizing core enterprise applications, Oracle SPs have placed "journey to cloud" as a key theme in their go-to-market (GTM) by packaging service offerings to help organizations progress in their modernization. This includes advisory services for business case, road map creation and change management, cloud readiness assessments, migration accelerators to expedite transition from on-premises Oracle deployments to SaaS solutions, out-of-the-box industry solutions designed to simplify adoption and scale of Oracle SaaS solutions, among others.

- **Oracle SaaS adoption in the Asia/Pacific region growing steadily:** Oracle SaaS solutions are continuing to mature in capability and use cases in Asia/Pacific, motivating the implementation vendors to channelize investments to pursue the growing opportunities in the region. Although, on average, the current SaaS implementation footprint of vendors stands below 40% of the overall Oracle services revenue, we are witnessing a steady increase in business growth especially for services around enterprise resource planning (ERP), human capital management (HCM), and enterprise performance management (EPM) solutions in the Asia/Pacific region.
- **Localization drives market success:** Vendors vary significantly in terms of regional delivery capabilities, local talent to support regional customers, and plans for future growth in the Asia/Pacific region. Successful vendors are ramping up their investments in Asia/Pacific, including investing in dedicated Oracle consultants for countries, local delivery centers to support regional implementations, acquisitions to build capabilities, and IPs to differentiate in solution delivery.
- **There is talent enablement across market units:** Among the vendors evaluated by IDC, India held the largest talent pool for Oracle resources in Asia/Pacific, followed by Greater China regional, Australia and New Zealand (ANZ), Southeast Asia, and Japan. All the vendors emphasized on the strong commitment to grow internal talent readiness to support the evolving Oracle technologies across solution areas, especially cloud.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This evaluation does not offer an exhaustive list of all the players in the Asia/Pacific Oracle application implementation SP ecosystem. IDC narrowed down the field of players based on the following criteria and subsequently collected and analyzed data on these nine implementation SPs for this IDC MarketScope:

- **Service capabilities:** The vendor should have demonstrated end-to-end service capabilities around Oracle application implementation, which includes consulting and advisory services, customization/development services, systems integration (SI) services, and SaaS migration services in Asia/Pacific.
- **Revenue:** Each SP was required to have a 2020 total revenue (from Oracle application implementation services) that exceeds US\$15 million from Asia/Pacific.
- **Geographic presence:** Each participating vendor was required to have implementation services capabilities in at least three sub-Asia/Pacific regions: ANZ, North Asia (South Korea), Greater China (China, Hong Kong, and Taiwan), Southeast Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and the Philippines), India, and Japan.
- **Products covered:** SPs should provide implementation services around Oracle SaaS applications (ERP, EPM, supply chain management [SCM], HCM, and customer experience

[CX]), any three on-premises Oracle applications (E-Business Suite, PeopleSoft, Hyperion, NetSuite, JD Edwards, Siebel, and Business Analytics), and any three of the industry applications/Oracle Global Business Unit Cloud Services offerings (communications, financial services, health sciences, hospitality, construction and engineering, retail, and utilities).

## ADVICE FOR TECHNOLOGY BUYERS

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This IDC study represents a vendor analysis and assessment of the 2021 Asia/Pacific Oracle implementation services market through the IDC MarketScape model. This research explains vendors' success in the Oracle implementation services marketplace and how well placed they are to grow in the Asia/Pacific region.

Based on this study, IDC recommends that buyers consider the following pieces of advice before starting new Oracle application implementations or while embarking on an application transformation journey:

- **Start with a comprehensive road map.** The road to implementation will have several unforeseen challenges. It is critical that organizations address concerns of LOB, such as security, cost, skills, time to market, customizations, talent, and so forth, before the implementation kickoff. Hence, it is necessary that enterprises create a holistic modernization road map before embarking on an implementation and SP selection journey.
- **Ensure leadership buy-in.** Ensuring leadership involvement in implementation projects means leadership is taking a hands-on approach in collecting the requirements from various business stakeholders and ensuring the change management and business process reengineering (BPR) required are met at each phase of the implementation cycle. Additionally, leadership engagement is instrumental in fostering a culture of innovation and ensuring the SP and the project team work toward a common goal.
- **Look beyond traditional service delivery key performance indicators (KPIs) for SP selection.** Selecting the right Oracle implementation SP is critical to ensure the success of the transformation journey. IDC recommends that enterprises evaluate the Oracle implementation SP on specific nuances beyond traditional service delivery KPIs. This includes the vendor's change management expertise, tools, and frameworks to enable faster time to value, alignment with the organization's top business priorities, industry expertise, and partnership maturity with Oracle.
- **Co-innovate for success.** In the wake of growing uncertainties impacting businesses across industries, there is a need for organizations to build capabilities that enable them to continuously innovate and adapt to market changes. Organizations should also work with SPs to jointly create solutions beyond technology implementation that addresses short-term and long-term business goals, and stimulate a culture that fosters innovations and drives pockets of sustainable transformation.

## FEATURED VENDOR PROFILE

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape and provides a summary of the vendor's strengths and opportunities.

## Infosys

According to IDC's analysis and buyer perception, Infosys is positioned as a Leader in the IDC MarketScape Asia/Pacific Oracle implementation services 2021 vendor assessment.

To ensure value is derived at every customer touch point, Infosys Oracle services are delivered under three main pillars, namely consulting and technology services, organization change management, and business process management (BPM) services. Currently, Infosys provides implementation services across all Oracle on-premises applications, cloud, and industry (GBU) solutions.

Infosys' differentiation in the implementation services market is underpinned by its efforts to incrementally move customers to a Live Enterprise with a suite of Oracle products. To facilitate this, Infosys strongly focuses on reinventing business models of customers enabled by an extensive roster of cloud offerings, local consulting expertise, and agile and automation-first Oracle service delivery. To accelerate the cloud-led transformations of enterprise clients, Infosys recently aggregated its cloud services under Infosys Cobalt, which also houses its Oracle Cloud offerings. The sharpened focus has helped Infosys channelize its enterprisewide cloud migration assets/IPs and industry cloud solutions to support complex Oracle cloud transformation projects.

Infosys has local implementation capabilities in all major market units in Asia/Pacific other than South Korea. Currently, Infosys has a higher distribution of Oracle resources in India due to its position as a global delivery hub, followed by ANZ, Greater China, Japan, and Southeast Asia. At the time of this study, the largest verticals in Infosys' Oracle services are financial services, public sector, manufacturing, and telecom.

## Strengths

- **Accelerating outcomes:** Infosys' drive to accelerate client outcomes stems from two key approaches. The first is underpinned by transforming client business landscapes with its proprietary prebuilt solutions and accelerators designed to improve time to value from the client's Oracle investments. The second is by packaging its Oracle engagements with diverse pricing models, such as bundling Oracle services with platforms or license fees or using skin in the game pricing models that ties Infosys' compensation to key client business outcomes.
- **Strong partner ecosystem:** To help clients progress in their transformation journey with Oracle solutions, Infosys leverages its strong partner ecosystem in Asia/Pacific (70+) to deliver end-to-end services leveraging best-of-breed products and solutions. The range of partners extends from design firms, boutique cloud SPs, advisory firms, start-up ecosystem, automation vendors, and solution accelerators.
- **Customer feedback:** Customers interviewed by IDC praised Infosys' quality of Oracle resources, project management skills, and ability to scale services to meet work demand in the implementations.

## Challenges

Clients will likely appreciate if Infosys enhanced its industry consulting competence in its Oracle services group especially when engaging with clients looking for deep industry expertise.

## Consider Infosys When

Infosys is a good fit for enterprises looking for an implementation partner with solid Oracle application service capabilities, partner network, and local delivery expertise in Asia/Pacific. Additionally, clients will also find Infosys' focus on client outcomes backed by its diverse engagement models attractive.

## 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 with 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 GTM plans for the next three to five years. The size of the individual vendor markers in the IDC MarketScape is a visual representation of the relative market shares of each individual vendor within the specific market segment being assessed but should not be taken to represent proportionate absolute market shares.

### IDC MarketScape Methodology

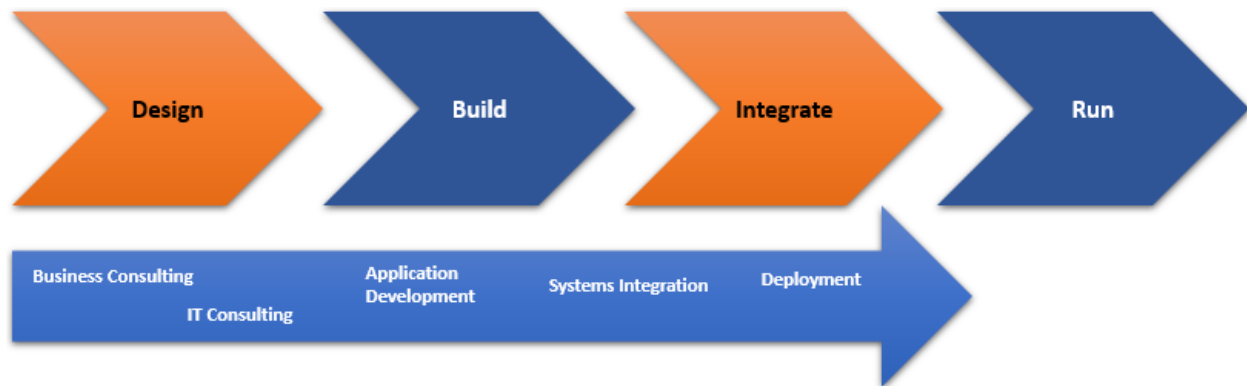
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, 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 to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

### Market Definition

The Oracle application implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see IDC's *Worldwide Services Taxonomy, 2021* (IDC #US47191221, May 2021).

**FIGURE 2**

**IDC's Design-Build-Run Function Chain**



Source: IDC, 2021

A significant component of this evaluation study is the inclusion of opinions from current Oracle application customers in Asia/Pacific. Some of the key capabilities that motivate customers to select Oracle applications are:

- Ability to scale
- Cost
- Available best practices for standardizing business processes
- Access to innovation enabled by SPs and Oracle Cloud

IDC believes that before potential buyers evaluate an Oracle implementation SP, it is important to understand the key value propositions that current customers in Asia/Pacific perceive in their Oracle implementation SPs. Buyers need to then correlate how well SPs can bring out these value propositions in their solutioning approach and implementation offering portfolio. Customers interviewed by IDC were generally satisfied with the services from their Oracle implementation SPs. Customers interviewed by IDC also identified five key capabilities that are perceived as differentiators before selecting an Oracle implementation SP. They are, in order of priority:

- Ability to deliver business outcomes
- Provide faster time to value: Focus on driving faster time to value by shortening implementation duration, and delivering value early in the implementation, among others
- Consulting and design capabilities: Strong consulting and design capabilities, providing comprehensive vision and road map for implementations
- Strong industry capabilities: Industry knowledge backed by IPs, ability to put the solution in context of our industry
- Technical talent and certified resource: Availability of skilled technical and certified Oracle resources capable of solving technical problems

Some of the potential areas of improvement for vendors pointed out by clients are (in order of priority):

- Subject matter expertise: Business and Oracle products
- Cost effectiveness
- Engagement and pricing models
- Automation for effort reduction
- Security posture

## LEARN MORE

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### Related Research

- *The Application Modernization Imperative in Asia/Pacific (Excluding Japan)* (IDC #AP46320121, March 2021)
- *Market Analysis Perspective: A Review of Asia/Pacific (Excluding Japan) IT Services Market, 2020* (IDC #AP45876020, March 2021)
- *Asia/Pacific (Excluding Japan) Application Management Service Market Forecast: 2020-2024* (IDC #AP47378921, February 2021)
- *What Are the Top Capabilities Enterprises Find as a Differentiator and as Essential in a Customer Relationship Management and Enterprise Resource Planning Implementation Partner?* (IDC #AP46758520, August 2020)

### Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of SPs participating in the Oracle implementation services market with specific offerings and capabilities in the segment. It discusses both the quantitative and qualitative characteristics that lead to success in the ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another and the criteria and highlights the factors expected to be the most influential for success in the market in both the short and the long term.

"Buyers in Asia/Pacific are gravitating toward Oracle software-as-a-service (SaaS) solutions because of their ability to scale, standardize business processes, and provide access to innovation at a competitive price point. Implementation SPs play a critical role in enabling these value proposition and, in most cases, maximizing value from the customer's existing Oracle application investments," says Rijo George Thomas, senior market analyst, Software and Services Research, IDC Asia/Pacific. "In this regard, buyers need to look beyond traditional service delivery key performance indicators (KPIs) for SP selection to include change management expertise, tools, and frameworks to enable faster time to value, alignment with the organization's top business priorities, industry expertise, and partnership maturity with Oracle," Thomas adds.



## 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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