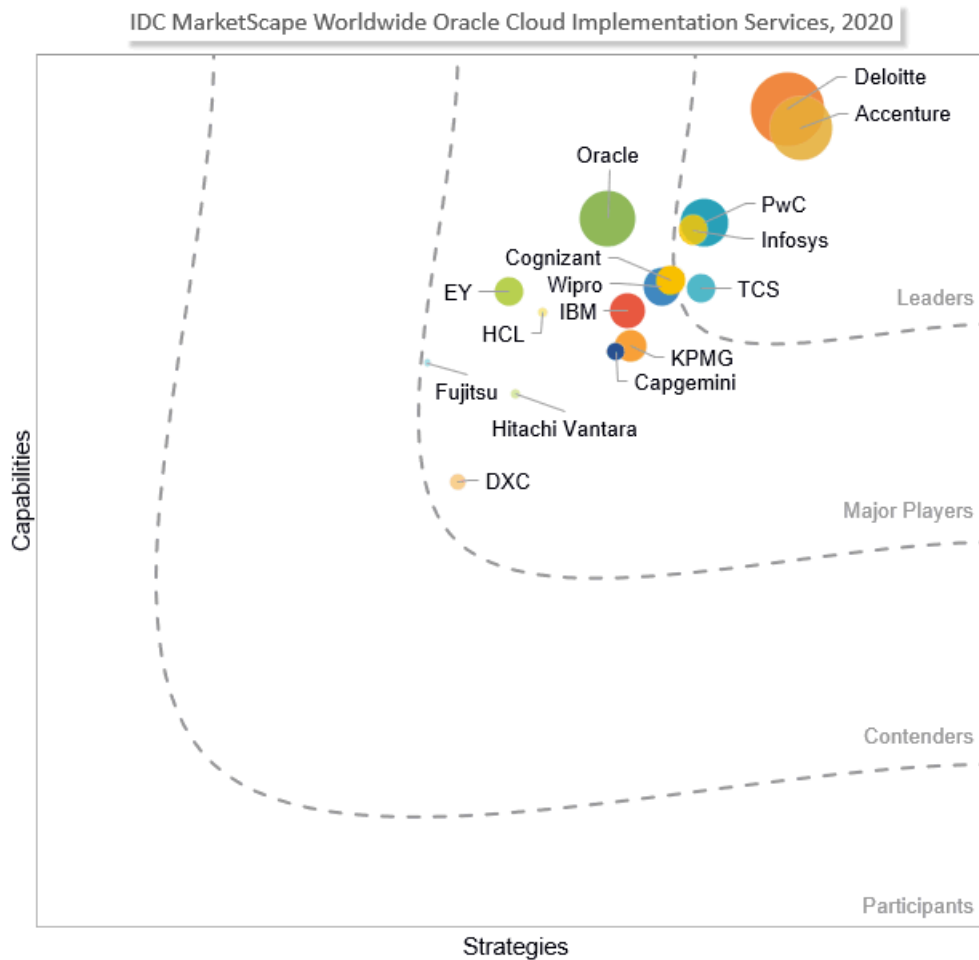IDC MarketScape

IDC MarketScape: Worldwide Oracle Cloud Implementation Services 2020 Vendor Assessment

Ali Zaidi

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Oracle Cloud Implementation Services Vendor Assessment

IDC MarketScape Worldwide Oracle Cloud Implementation Services, 2020

Source: IDC, 2020

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

IDC OPINION

This IDC study represents a vendor assessment of the 2020 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 cloud implementation services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing Oracle cloud implementation services in both the short term and the long term. Note that IDC has undertaken a comprehensive effort to assess the Oracle implementation services market. This IDC MarketScape evaluates participating firms for implementation services related to Oracle cloud products. The first document in this IDC MarketScape series focused on implementation services related to the entire Oracle product portfolio. 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 the following:

- Cloud adoption is on the rise, and all vendors have dedicated offerings and joint go-to-market strategies with Oracle in place to help enterprises transition to cloud. Adoption is highest around ERP, EPM, HCM, Oracle Cloud Infrastructure (OCI), and talent management cloud portfolio.

- Based on IDC's *Global Oracle Implementation Services Buyer Perception Survey* feedback from 91 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 implementation services was being "able to achieve desired business outcomes."

- Vendors are combining their Oracle-related technology and business capabilities with solutions from other cloud platforms to create solutions for their customers. Vendors are creating these solutions across both cloud application, such as integrating Salesforce, Workday, and SAP solutions with Oracle platform, and cloud infrastructure where, as an example, they are helping organizations run Oracle application on Microsoft Azure or an integrated cloud infrastructure comprising of Azure and OCI.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes an analysis of the 16 Oracle 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. The inclusion criteria also dictates at least $90 million in revenue coming from a vendor's Oracle cloud implementation services practice at a worldwide level as well as a minimum of 1,100 Oracle implementation-associated global resources, and at least 10% of the vendor's worldwide Oracle revenue and head count should come from each of IDC's macroregions.

ADVICE FOR TECHNOLOGY BUYERS

- **Integration with non-Oracle platforms.** Consider your entire application and infrastructure portfolio when selecting services partner for implementing Oracle solutions. Often your systems comprise of multivendor platforms and its important critical for these disparate platforms to integrate properly to drive the functionality and results you are looking for with your Oracle investment. Particularly, when it comes to cloud solutions, most enterprises have a best-of-breed approach where they may utilize Oracle's ERP solutions and go with different cloud platforms for CRM and HCM needs. According to IDC's *Global Oracle Implementation Services Buyer Perception Survey,* customers indicated that 39% of Oracle implementation services projects include integration work with non-Oracle platforms/solutions. Make sure to select services partners that have cloud implementation capabilities across a broad set of cloud platforms.

- **Customization of cloud.** Analyze each Oracle cloud software release update and decide which innovations are worth implementing and when. Pay attention/keep a tab on the timeline of new functionality coming from Oracle on future releases. This will guide you with respect to whether it makes sense to add functionality through customization of your cloud environment or to wait for the next release cycle to make use of the built-in functionality you are looking for. This approach will save time, effort, and money spent on any unnecessary customization.

- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short list vendors for Oracle cloud 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 PROFILES

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 here provides a summary of each vendor's strengths and challenges.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Accenture's Oracle Business Group helps customers unlock cloud potential. Accenture is focused on helping clients win today and own tomorrow — synchronizing innovation and growth to become an intelligent enterprise. With one of the largest practices in the Oracle implementation ecosystem in terms of both revenue and dedicated resources, Accenture brings industry knowledge, intelligent technologies, and innovation to help clients envision their future, lead the market, and accelerate digital transformation.

Strengths

Buyers rate Accenture highly for its services offerings around Oracle cloud products and for its ability to provide industry insights and competency related to Oracle implementation services. Similarly, IDC views Accenture highly in terms of its growth strategy and its client adoption strategy.

Challenges

IDC believes Accenture's IP monetization strategy could be improved by selling the company's Oracle-specific IP it creates on partner app stores. Also, Accenture would benefit from making its Oracle practice more prominent on the corporate website.

Capgemini

According to IDC analysis and buyer perception, Capgemini is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Capgemini Oracle services offerings and assets focus on cloud transformation for its clients. Capgemini engages clients globally looking for complex, multi pillar implementations with business transformation needs that leverage the whole breadth of Capgemini including business strategy, change management, and business processing services (BPS) capabilities. Capgemini combines strategy, technology, data science, and creative design to ensure identification of client value and a road map to implement at speed and scale. Capgemini helps customer with cloud transformation journey encompassing cloud assessment offerings, its cloud Fast Track implementation offerings, and end-to-end cloud transformations. Capgemini utilizes its CloudNow Transform methodology, industry advantage solutions, and cloud acceleration toolkit to help accelerate migration to the cloud while reducing IT costs and time to value and improve overall business performance for its clients.

Strengths

Buyers rate Capgemini highly for its ability to provide customer service, particularly onsite and for its ability to provide technical insights and competency related to Oracle implementation services. Similarly, IDC views Capgemini highly in terms of its sales enablement strategy and for developing future functionality and offering road maps.

Challenges

IDC believes Capgemini's client adoption strategy could be improved by increased accessibility for the clients to Oracle-focused labs and resources to co-innovate. Also, Capgemini would benefit from utilizing crowdsourcing to augment internal resources.

Cognizant

According to IDC analysis and buyer perception, Cognizant is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Cognizant provides an end-to-end life cycle of services and industry-specific solutions across the entire suite of Oracle products for Oracle. Cognizant's Oracle practice aims to transform customer's existing enterprise systems and infrastructure by helping them make smarter decisions and deliver better results through innovative solutions that meet modern business requirements, improve performance, enhance productivity, and drive growth initiatives. Cognizant's cloud-first strategy is key to the company's growth strategy to capitalize on the momentum behind Oracle's cloud growth and provides end-to-end cloud services across the full spectrum of Oracle products. Cognizant collaborates with Oracle to build niche industry-specific solutions that address white spaces in Oracle products and has formed a strategic go-to-market partnership with Oracle with the goal of increasing sales and distribution for both organizations.

Strengths

Buyers rate Cognizant highly for its ability to resolve problems/issues related to customer service and for the delivery models it utilizes for implementing Oracle cloud products. Similarly, IDC views Cognizant highly in terms of its financial/funding model strategy and its IP monetization strategy.

Challenges

IDC believes Cognizant's go-to-market strategy could be improved by collaborating more with customers and Oracle cloud product teams in go-to-market initiatives. Also, Cognizant would benefit from making its Oracle practice more prominent on the corporate website.

Deloitte

According to IDC analysis and buyer perception, Deloitte is positioned in the Leaders category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Deloitte is one of the largest SIs in the Oracle ecosystem and offers wide-ranging industry-specific Oracle solutions to customers that include both business and IT buyers. Deloitte's Oracle services are focused on cloud applications, digital transformation, and application management and are enabled by industry-specific assets and IP. Deloitte offers integrated business process and implementation solutions for Oracle customers and extends them with managed services for Oracle applications. Deloitte complements Oracle services with offerings in areas such as analytics, change management, security and controls, cyber-risk, and tax

Strengths

Buyers rate Deloitte highly for its ability to provide customer service, particularly onsite, and providing appropriate and high-quality resources for Oracle projects. Similarly, IDC views Deloitte highly in terms of its marketing strategy and for developing future functionality and offering road maps.

Challenges

IDC believes Deloitte's IP monetization strategy could be improved by selling the company's Oracle-specific IP it creates on partner app stores. Also, Deloitte would benefit from collaborating more with customers in go-to-market initiatives.

DXC

According to IDC analysis and buyer perception, DXC is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

DXC was formed in 2017 by combining CSC and HPE ES to create an independent IT services company that focuses on end-to-end transformations. The DXC Oracle practice is part of DXC's Enterprise and Cloud Applications offering and focuses on Oracle platform standardization, application simplification, automation, and enhanced customer engagement through increased digitization. DXC continues to expand its Oracle footprint outside the United States both organically and inorganically through acquisitions (e.g., Red Rock, the largest Oracle partner in Australia and New Zealand). Inside the United States, DXC acquired Tribridge in 2017 to expand its NetSuite capabilities and solutions. DXC also brings complementary offerings to its Oracle practice such as leveraging the Luxoft acquisition to drive opportunities in the 5G market and blockchain.

Strengths

Buyers rate DXC highly for its services offerings around Oracle cloud products and its ability to resolve problems/issues related to customer service. Similarly, IDC rates DXC highly in terms of its end-to-end life cycle of Oracle services offerings and its innovation/R&D strategy.

Challenges

IDC believes DXC's marketing strategy could be improved by increased marketing of the company's practice at key Oracle global customer events and producing more CXO-level thought leadership. Also, DXC would benefit from utilizing crowdsourcing to augment internal resources.

EY

According to IDC analysis and buyer perception, EY is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

EY generates business value for clients leveraging the latest cloud and on-premises technologies, including Oracle – founded on the strategic pillars of client centricity, its people, data and technology, and global integration and teaming. EY supports business transformation by combining industry expertise with an array of strategic services, tools, and accelerators and processes to support client's competitive advantage. EY leverages agile methods, a teaming approach, and a diverse professional services portfolio to support transformation. EY's client cloud transformation approach includes strategy, digitization, customer experience, change management, and risk mitigation. EY has made significant investment in tools, solutions, and accelerators to build its technology consulting capabilities for cloud-based solutions, including Oracle.

Strengths

Buyers rate EY highly for integrating its project team with customers' internal teams and for the complementary business consulting services it provides on Oracle implementation services projects. Similarly, IDC views EY highly in terms of its end-to-end life cycle of Oracle services offerings and its client adoption strategy.

Challenges

IDC believes EY's IP monetization strategy could be improved by selling the company's Oracle-specific IP it creates on partner app stores. Also, EY would benefit from making its Oracle practice more prominent on the corporate website. IDC notes that due to EY's status as Oracle's auditor, EY is not permitted to jointly go to market with Oracle such as promoting the company's consulting capabilities focused on Oracle at key Oracle customer events. This could be considered as a challenge for the firm, albeit one the company cannot influence.

Fujitsu

According to IDC analysis and buyer perception, Fujitsu is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

As an Oracle service provider and global systems integrator, Fujitsu supports and delivers the entire suite of Oracle application products. Fujitsu's core service offerings in the Oracle space include enterprise applications, both on premises and SaaS; managed services; and cloud infrastructure. Fujitsu's core regional areas for Oracle solutions include the United Kingdom and Ireland, Nordics, and

North America. Fujitsu's target global verticals for Oracle include public sector, automotive and suppliers, retail, finance, utilities, and manufacturing.

Strengths

Buyers rate Fujitsu highly for its ability to resolve problems/issues related to customer service and for its ability to provide technical insights and competency related to Oracle implementation services. Similarly, IDC views Fujitsu highly in terms of its sales-enabled strategy and its IP monetization strategy.

Challenges

IDC believes Fujitsu's functionality or offering strategy could be improved by better aligning the company's future Oracle offerings with customers' business priorities. Also, Fujitsu would benefit from collaborating more with customers and Oracle cloud product teams in go-to-market initiatives.

HCL

According to IDC analysis and buyer perception, HCL is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

HCL's Oracle practice has over two decades of experience in delivering end-to-end Oracle services across the globe. HCL enables digital transformation to its customers by reinventing the core for on-premises customers and reframing the future for cloud customers. Toward this, HCL's Oracle practice has built a framework, with a process that follows standardized methodology, tools enabled for automation, coupled by HCL's DRYiCE AI platform to deliver measurable outcomes. HCL has 3,500+ Oracle practice FTEs and 150+ active customer base. HCL's partnership with Oracle has evolved from being an "SI" to "global SI" and to a global platinum partner in the Oracle partner network. From a global SI partner of Oracle, HCL has transitioned in May 2020 to the modernized Oracle partner network program across all the tracks – cloud service, cloud build, cloud sell, and license and hardware. HCL had been accredited with 49 specializations, of which 17 are advanced specializations.

Strengths

Buyers rate HCL highly for its ability to help customers achieve desired business outcomes and for the value it provides for the fee charged. Similarly, IDC views HCL highly in terms of its sales enablement strategy and its employee management strategy.

Challenges

IDC believes HCL's delivery model strategy could be improved by utilizing data-based applied research and partner feedback to improve delivery tools and processes. Also, HCL would benefit from collaborating more with customers and Oracle cloud product teams in go-to-market initiatives.

Hitachi Vantara

According to IDC analysis and buyer perception, Hitachi Vantara is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Hitachi Vantara, a wholly owned subsidiary of Hitachi Ltd., guides customers solve their digital challenges. Hitachi Vantara has 20+ years of expertise in Oracle application implementation, modernization, and managed services. Hitachi Vantara offers Oracle cloud application offerings across

financials, supply chain, human capital management, and payroll to emerging technologies such as IoT, adaptive intelligence, and blockchain. Hitachi Vantara and Oracle have built an alliance that collaborates on projects for customers and also collaborates on Oracle technologies embedded into Hitachi solutions including Hitachi Smart Manufacturing and Hitachi Predictive Maintenance. Hitachi Vantara's alignment with Oracle includes global IoT initiatives; global service provider; provider of implementation, upgrade, resell, and application managed services; and specialized and certified approximately 1,100 Oracle delivery consultants.

Strengths

Buyers rate Hitachi Vantara highly for its ability to provide customer service, particularly onsite, and for its ability to meet the project timeline and handling changes in project scope. Similarly, IDC views Hitachi Vantara highly in terms of its sales enablement strategy and for developing future functionality and offering road maps.

Challenges

IDC believes Hitachi Vantara's growth strategy could be improved by focusing more on growing the company's Oracle services practice related to business processes and making strategic services skills or IP-related acquisitions in the Oracle cloud space. Also, Hitachi Vantara would benefit from further monetizing the Oracle-specific IP it creates by selling it as licensed software assets and by selling it on partner app stores.

IBM

According to IDC analysis and buyer perception, IBM is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

IBM provides end-to-end life cycle of services and industry-specific solutions across the entire suite of Oracle products. IBM's priority is centered around helping clients build a "Smarter Business" and competitive advantage by moving to the cloud and optimizing across hybrid IT estates. IBM does this through its "Cognitive Enterprise Platform for Oracle Cloud" that combines cloud, Oracle applications, and the emerging technologies of AI, RPA, and IoT to drive increased business maturity and continuous innovation. In addition, IBM delivers increased business agility through its "Microservices and DevOps Platform for Oracle Cloud" while also optimizing legacy applications through its comprehensive Oracle Cloud Infrastructure offering. Global financing is also available to align capital expenditures to the timing of business benefits.

Strengths

Buyers rate IBM highly for its ability to help customers achieve desired business outcomes and for its ability to meet the project timeline and handling changes in project scope. Similarly, IDC views IBM highly in terms of its innovation/R&D strategy and its employee management strategy.

Challenges

IDC believes IBM's marketing strategy could be improved by increased marketing of the company's practice at key Oracle global customer events and producing more CXO-level thought leadership. Also, IBM would benefit from making its Oracle practice more prominent on the corporate website.

Infosys

According to IDC analysis and buyer perception, Infosys is positioned in the Leaders category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Infosys delivers end-to-end Oracle strategy, consulting, and implementation services utilizing Infosys' technology and domain experience, partner ecosystem, and customer engagement models. Infosys helps organizations become resilient and undergo transformation with services covering areas such as business transformation, process/domain advisory, digital transformation and commerce, cloud implementation and support, infrastructure, application management services, big data, advanced analytics, and security. Infosys offers flexible pricing constructs (including bundling of product/software) and promotes transformation programs through outcome-based financial models. Infosys is helping convert existing on-premises clients to cloud leveraging its Oracle Cloud solutions and services so they can adopt newer business models focusing on accelerating digital transformation. Infosys helps clients migrate to cloud with its Oracle Cloud solutions, part of Infosys Cobalt services.

Strengths

Buyers rate Infosys highly for its ability to resolve problems/issues related to customer service and its ability to optimize the ratio of onshore-offshore efforts on a project. Similarly, IDC views Infosys highly in terms of its end-to-end life cycle of Oracle services offerings and for developing future functionality and offering road maps.

Challenges

IDC believes Infosys' marketing strategy could be improved by increased marketing of the company's practice at key Oracle global customer events and producing more CXO-level thought leadership. Also, Infosys would benefit from collaborating more with customers in go-to-market initiatives.

KPMG

According to IDC analysis and buyer perception, KPMG is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

KPMG is a prominent business integrator of Oracle Cloud solutions focused on large-scale front/middle/back-office (ERP/EPM, SCM, HCM, CX) business-led enterprise transformation initiatives. The firm brings a full range of KPMG capabilities to its Oracle engagements — audit, tax, innovation from KPMG Digital Lighthouse, change management, risk management, and cyber — that drive true business value for its clients across a wide range of businesses and organizations, globally. Customers select KPMG for its client experience-led design approach to transformation and deep industry expertise and insight, experienced and Oracle-certified professionals around the world, and longtime knowledge of Oracle and Oracle products.

Strengths

Buyers rate KPMG highly for its services offerings around Oracle cloud products and for integrating its project team with customers' internal teams. Similarly, IDC views KPMG highly in terms of its marketing strategy and its client adoption strategy.

Challenges

IDC believes KPMG's IP monetization strategy could be improved by selling the company's Oracle-specific IP it creates on partner app stores. Also, KPMG would benefit from setting up dedicated Oracle-specific innovation labs and bringing in customers and partners to co-innovate in these hubs.

Oracle

According to IDC analysis and buyer perception, Oracle is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Oracle Consulting is the professional services organization in the Oracle Corp. It provides implementation, migration, integration, development, training, and continuous innovation that act as the bridge between Oracle's on-premises and Cloud technology and the people who use it. The practice brings Oracle product expertise, direct connection to Oracle product development, and Oracle capabilities across business, process, technical, and post go-live skills for its customers' benefit. Oracle Consulting offers the entire product portfolio including Oracle Cloud Applications and Oracle Cloud Infrastructure with a focus on moving customers to Cloud through automation, driving down costs, improving performance, and enabling the autonomous enterprise of the future. Oracle Consulting has offices in all major geographies, with centers of excellence and offshore hubs to deliver cost-effective skills.

Strengths

Buyers rate Oracle highly for its ability to help customers achieve desired business outcomes and for its ability to offer flexible pricing models to meet their pricing needs. Similarly, IDC views Oracle highly in terms of its growth strategy and its financial/funding model strategy.

Challenges

IDC believes Oracle's IP monetization strategy could be improved by further monetizing the Oracle-specific IP the company creates (at the services practice level) by selling it as licensed software assets and by selling it on Oracle cloud marketplace. Also, Oracle would benefit from collaborating more with customers in go-to-market initiatives.

PwC

According to IDC analysis and buyer perception, PwC is positioned in the Leaders category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Different Delivered is how PwC opens the vast possibilities of Oracle Cloud, empowering clients to create a competitive advantage for what's ahead. Founded on its Business E(x)perience, Technology (BxT) user-centric design methods, PwC creates a unique experience for its clients where appropriate techniques are leveraged to solve complex problems with solutions that result in tangible and differentiated business outcomes. PwC incorporates its consulting, tax, and risk assurance services to holistically address the opportunities and impacts of Oracle-enabled transformation. PwC also leverages its industry thought leadership and preconfigured Oracle model systems to accelerate implementation. This allows PwC to focus on the opportunities to help its clients succeed by sharpening business models and introducing innovative digital capabilities that unlock sustainable value from their Oracle investments.

Strengths

Buyers rate PwC highly for the delivery models it utilizes for implementing Oracle cloud products and for its thought leadership around Oracle cloud solutions. Similarly, IDC views PwC highly in terms of its delivery model strategy and its growth strategy.

Challenges

IDC believes PwC's go-to-market strategy could be improved by collaborating more with customers in go-to-market initiatives. Also, PwC would benefit from making its Oracle practice more prominent on the corporate website.

TCS

According to IDC analysis and buyer perception, TCS is positioned in the Leaders category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Tata Consultancy Services (TCS) provides consulting-led transformational programs to its customers. TCS provides end-to-end Oracle applications services and has services offerings across Oracle Cloud Applications portfolio, including NetSuite, Oracle Infrastructure Cloud, PaaS, and integration. TCS is investing heavily to align its brand and service offerings across the C-suite with emphasis on customer experience and innovations powered by automation, artificial intelligence (AI), machine learning (ML), and analytics. TCS offers transformation initiatives to its clients using its TCS PERPETUITY framework, prebuilt industry-specific solutions, and its Machine First Delivery Model.

Strengths

Buyers rate TCS highly for the value it provides for the fee charged and for integrating its project team with customers' internal teams. Similarly, IDC views TCS highly in terms of its end-to-end life cycle of Oracle services offerings and its client adoption strategy.

Challenges

IDC believes TCS' marketing strategy could be improved by increased marketing of the company's practice at key Oracle global customer events. Also, TCS would benefit from collaborating more with customers in go-to-market initiatives.

Wipro

According to IDC analysis and buyer perception, Wipro is positioned in the Major Players category in the 2020 IDC MarketScape for Oracle cloud implementation services ecosystem worldwide.

Wipro offers an end-to-end life cycle of Oracle services across the Oracle stack on both cloud and on-premises applications, with a focus to modernize the core and drive the future for its clients. Wipro's Oracle services value proposition revolves around enabling modern customer experience for end users, accelerating customers' digital journey, and simplifying customers' business processes at the front end and back end. Wipro's Oracle cloud transformation approach is based on understanding of customer business priorities and focuses on solution alignment, velocity, and adoption, enabled by its industry domain expertise, partner ecosystem, and investments into IPs and assets such as Zoom to Cloud.

Strengths

Buyers rate Wipro highly for its services offerings around Oracle cloud products and providing appropriate and high-quality resources for Oracle projects. Similarly, IDC views Wipro highly in terms of its end-to-end life cycle of Oracle services offerings and its customer retention strategy.

Challenges

IDC believes Wipro's marketing strategy could be improved by increased marketing of the company's practice at key Oracle global customer events and producing more CXO-level thought leadership. Also, Wipro would benefit from utilizing data-based applied research and partner feedback to improve delivery tools and processes.

APPENDIX

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.

Market Definition

Oracle cloud implementation services are a subsegment of Oracle implementation services and include implementation services around Oracle cloud application and infrastructure products/solutions. The list includes products such as ERP Cloud, HCM Cloud, CRM Cloud, SCM and Manufacturing Cloud, Data Cloud, Analytics Cloud, EPM Cloud, Taleo/Talent Management, OCI, and NetSuite. Implementation services around Oracle on-premises solutions are not included under this IDC

MarketScape for cloud implementation services. The Oracle cloud implementation services ecosystem 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, 2019* (IDC #US44916019, March 2019).

FIGURE 2

IDC's Design-Build-Run Function Chain
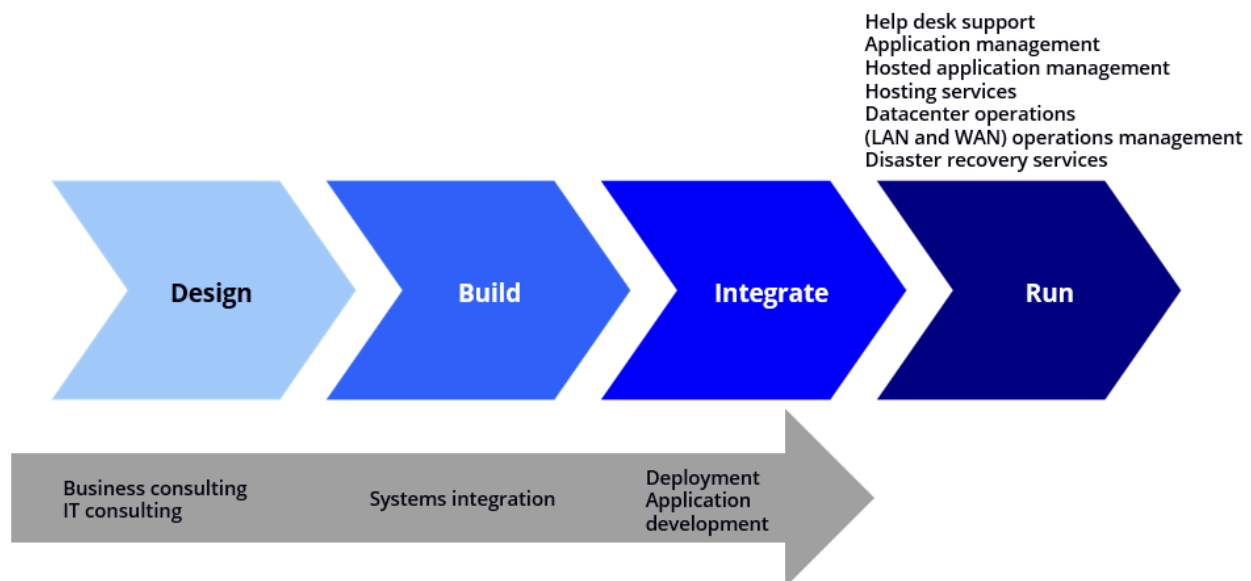
Source: IDC, 2020

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 2020. Customers sighted improving operational efficiency and reducing cost/improving profitability and/or cashflow as the top 2 business drivers for taking on Oracle implementation services.

FIGURE 3

Top 10 Business Drivers for Oracle Implementation Services Projects, 2020

Q.   How important a business priority do you believe each of the following is currently for your company?

n = 91
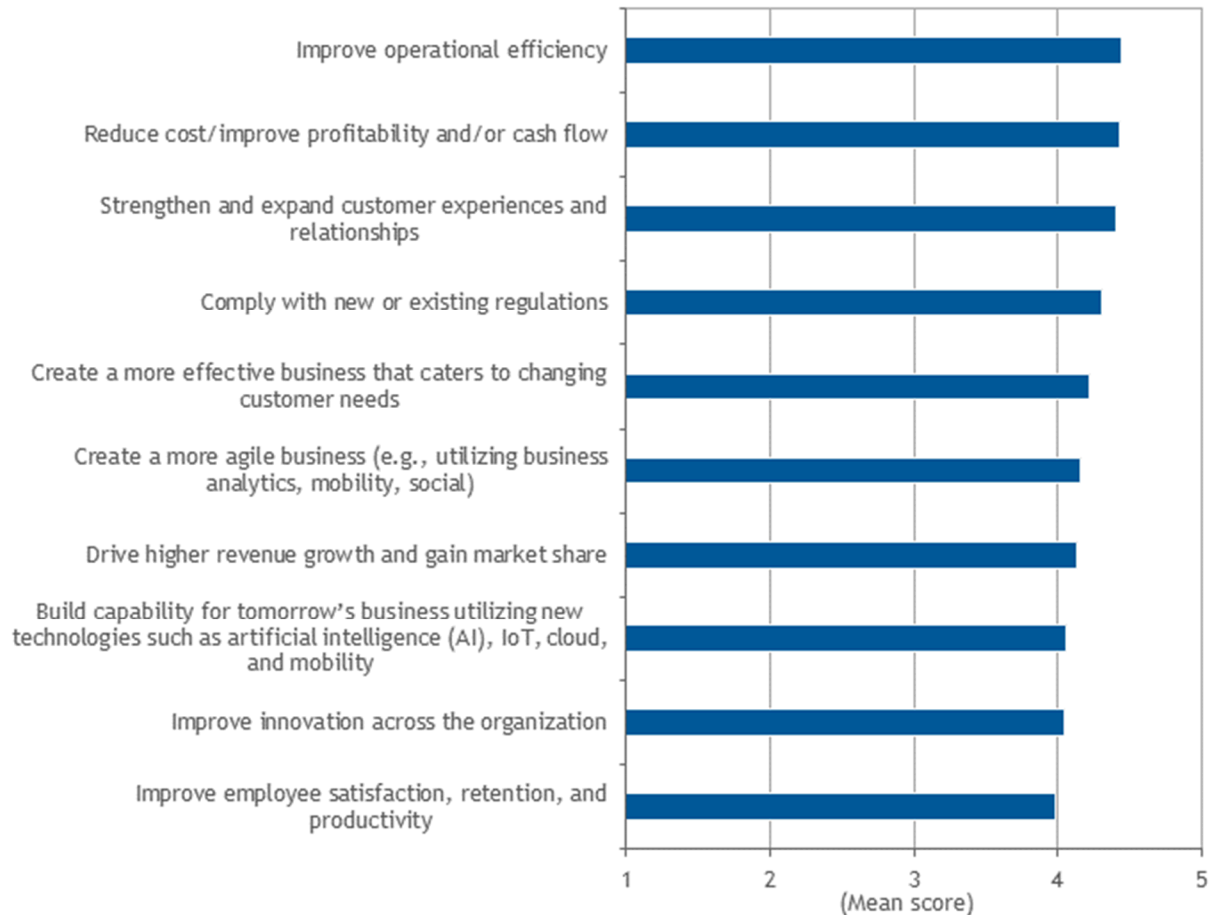
Note: Mean scores are based on a scale of 1-5, where 1 = not a priority and 5 = a critical business priority.
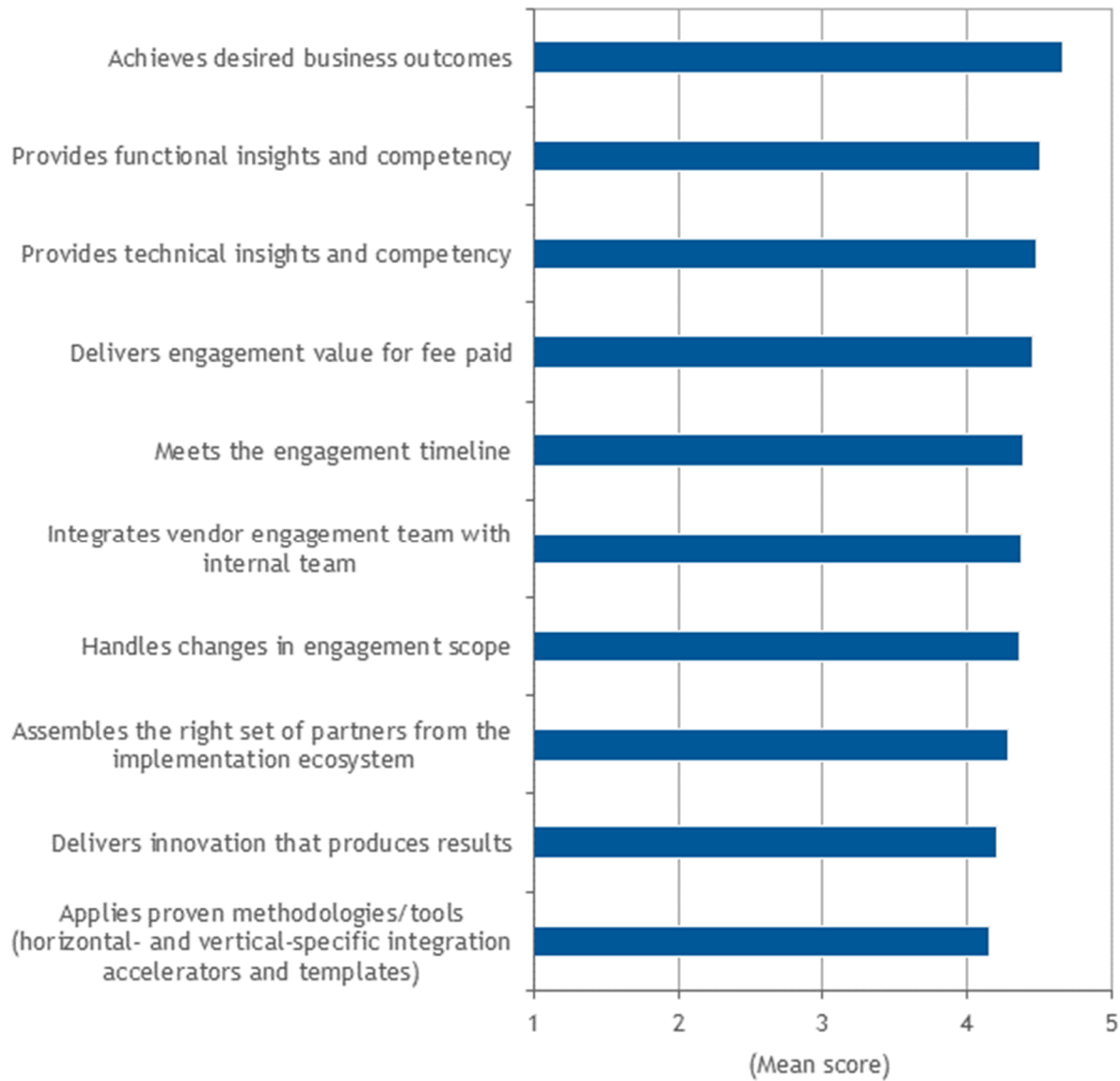
Source: IDC's Global Oracle Implementation Services Buyer Perception Survey, 2020

Figure 4 illustrates the rank order of factors that are important for a successful Oracle implementation services project for the Oracle services customers surveyed in 2020. Survey findings suggest that the ability to achieve desired business outcomes by the consultants working on an Oracle implementation services project is the most critical factor for the successful completion of the project. Customers also indicated a vendor's ability to provide the right functional competencies to be one of the most critical attributes for a project's success.

FIGURE 4

Top 10 Important Factors for Successful Oracle Implementation Services Projects, 2020

Q.   For an Oracle implementation services engagement to be successful, please indicate the importance of each of the following characteristics.

n = 91

Note: Mean scores are based on a scale of 1-5, where 1 = not essential to success and 5 = essential to success.

Source: IDC's *Global Oracle Implementation Services Buyer Perception Survey,* 2020

Strategies and Capabilities Criteria

This section includes an introduction of market-specific weighting definitions and weighting values.

IDC believes Oracle implementation services vendors must exhibit the characteristics shown in Tables 1 and 2 to be completely successful when crafting a future strategy and in leveraging existing capabilities to their best advantage. The factors were weighted because IDC believes that some factors are more important than others in maximizing market opportunity and realizing market success.

TABLE 1

Key Strategy Measures for Success: Worldwide Oracle Cloud Implementation Services

Strategies Criteria	Definition	Weight (%)
Client adoption strategy	Superior service calls for ways by which the vendor can help clients justify expenditures including ROI models and codeveloping use cases and by providing clear paths to enable the adoption of Oracle solutions.	8.5
Customer service strategy	Superior firms have a well-articulated plan for lowering client churn in the future.	6.3
Delivery model	Excellence is marked by plans to support consulting services utilizing more efficient tools, platforms, frameworks, and methodologies.	11.3
Employee strategy	Firms have solid plans for hiring and retaining top-performing employees.	7.2
Financial/funding model	Firms have a viable funding strategy for the next one to three years. Firms have solid plans for growing revenue per employee.	8.1
Functionality or offering strategy	Excellence is marked by the ability to map with the customer's top business priorities.	7.6
Growth strategy	Firms have strategic plans for both organic and inorganic growth and ones that align well with the overall IT trends in the next one to three years. Firms have strategic plans in place to monetize IP that is created by services vendors.	14.7
Innovation/R&D pace and productivity	Firms have strategic plans for attaining or retaining functional superiority over competitors by improving innovation in consulting offerings, delivery methodologies, and tools including co-innovation with ecosystem partners.	8.6
Marketing strategy	Successful firms have an eye toward a well-articulated plan for how they will market their capabilities in the future.	8.0
Other go-to-market strategies	It measures how well a vendor collaborates with partners to improve go to market. It measures how prominent the firm's Oracle services are featured on its website.	6.3
Portfolio strategy	A strong portfolio strategy dictates that well-thought-out plans are in place to ensure development of offerings across the entire life cycle of Oracle services.	5.2
Sales/distribution strategy	Excellence is demonstrated by plans to improve/enhance the sales teams/efforts.	8.2
Total		100.0

Source: IDC, 2020

TABLE 2

Key Capability Measures for Success: Worldwide Oracle Cloud Implementation Services

Capabilities Criteria	Definition	Weight (%)
Cost competitiveness	Cost competitiveness can best be measured by the ability to deliver an appropriate and sustainable return on investment for the client.	5.5
Customer service delivery	Analyst evaluation of the firm's ability to retain customers is considered. A firm's ability to provide service to a client is contingent on its ability to deploy local resources where appropriate to resolve problems/issues.	10.0
Delivery model appropriateness and execution	Analyst evaluation of the automation the firm brings in delivering Oracle cloud implementation services is considered. The delivery model must include an appropriate integration with the client team, be able to meet client-developed project timelines, be able to apply proven methodologies/tools, be able to integrate the Oracle solutions with the client's existing IT environment, and have the ability to handle changes in project scope.	13.0
Employee management	Success is measured, in part, by the head count associated with the practice. Success is also measured by how well an implementation services vendor manages its staff turnover during a project's lifetime based on client perception.	11.2
Functionality/offering delivered	Analyst evaluation of the firm's current Oracle cloud implementation services offerings covering ERP Cloud, HCM Cloud, CRM Cloud, SCM and Manufacturing Cloud, Data Cloud, Analytics Cloud, EPM Cloud, Taleo/Talent Management, OCI, and NetSuite is considered. Offering capability is a combination of functional (domain) knowledge, industry insights, and technical capabilities along the entire stack of Oracle implementation services (assessment, plan, design, build, implement, sustain, upgrade). It also includes the breadth and depth of vertical-specific solutions as well as the ability to achieve desired business outcomes for the clients.	13.9
Growth strategy execution	Analyst evaluation of revenue growth rates for Oracle C&SI services is considered. Essential to a consulting firm's growth is the firm's ability to develop "referenceable clients." Clients that strongly believe the firm will represent their best interests are most often referred.	13.2
Innovation/R&D productivity and pace	A firm's ability to be innovative can be showcased in the way the firm transfers this innovation to its clients via innovative service delivery.	8.2
Marketing	Analyst evaluation of the various marketing channels used related to C&SI services for Oracle is considered. A firm should be able to communicate the value of its services/solution and delivery methodologies/tools that are currently being consumed by the clients as well as those that are not being currently consumed.	8.0

TABLE 2

Key Capability Measures for Success: Worldwide Oracle Cloud Implementation Services

Capabilities Criteria	Definition	Weight (%)
Portfolio benefits delivered	Customer perception of a firm's abilities to provide a full spectrum of Oracle cloud services is considered.	3.0
Pricing model options and alignment	Analyst evaluation of the types of pricing models offered to clients is considered. The extent of flexible arrangements, such as the client choosing to be billed as the budget allows, is measured.	7.0
Sales/distribution structure and capabilities	Analyst evaluation of the size of the firm's sales professionals dedicated to selling C&SI-related services for Oracle ecosystem offers is considered. The firm's ability to optimize the ratio of onshore-offshore efforts on a project is considered.	7.0
Total		100.0

Source: IDC, 2020

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Oracle Implementation Services 2020 Vendor Assessment* (IDC #US45354320, forthcoming)
- *Worldwide and U.S. Systems Integration Services Forecast, 2020-2024* (IDC #US45198620, May 2020)
- *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019)
- *IDC MarketScape: Worldwide Oracle Implementation Services Ecosystem 2018 Vendor Assessment* (IDC #US44364618, October 2018)

Synopsis

This IDC study represents a vendor assessment of the Oracle cloud implementation services ecosystem through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the Oracle cloud implementation services market. This IDC MarketScape covers a variety of vendors participating in the Oracle cloud 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.

"Services providers that can bring end-to-end implementation services capabilities across Oracle's SaaS, PaaS, and IaaS portfolio along with functional competencies related to critical business processes such as CRM, HCM, finance, and supply chain will succeed in the Oracle cloud

implementation services market 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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