# Critical Capabilities for Oracle Cloud Applications Services, Worldwide

**Published:** 29 May 2019    **ID:** G00367269

**Analyst(s):** Katie Gove, Alan Stanley, Gunjan Gupta

Vendor capabilities for Oracle Cloud Applications services vary significantly, depending on business needs and scope. This report guides sourcing, procurement and vendor management leaders in selecting the right vendors to support their Oracle Cloud journey.

## Key Findings

- Not all vendors that provide Oracle on-premises services are transitioning their client base to Oracle Cloud Applications (OCA) or adding OCA clients at the same speed. Market share and service portfolios in Oracle Cloud do not necessarily map to the depth and breadth of the same vendors' on-premises business.

- OCA service offerings are different from on-premises installations in that OCM is a critical component not only for assessment, but also for implementation and ongoing management. The differentiator for success with OCA services is a holistic approach focused on achieving business outcomes and not merely on shifting technical platforms and delivery models.

- The model for management after implementation is evolving, changing from a traditional application management services (AMS) model. OCA management is true SaaS ERP management. Oracle manages some elements of support, while end users or their SIs manage others. This model is forcing a skills realignment on both the end-user and the vendor sides.

## Recommendations

Sourcing, procurement and vendor management leaders who execute on their IT services and solutions strategy and selection to identify OCA services vendors should:

- Identify vendors that prioritize OCA capabilities, by assessing the percentage of their entire Oracle business that is cloud, the year-over-year growth in their OCA business, and their documented investments in OCA product and service offerings.

- Make process re-engineering and OCM foundational elements of any Oracle Cloud initiative, and select vendors based on their abilities in these key areas. Focusing on these capabilities, along with requiring business outcomes, will help secure a successful OCA implementation.

- Prepare for a talent-reskilling effort to handle, and benefit from, the shift to agile and DevOps delivery models and quarterly release updates. Be proactive by including the time and resource investments required for talent reskilling in the business case.

## Strategic Planning Assumption(s)

By 2021, 55% of Oracle's on-premises customers will have moved 80% of their on-premises capabilities to Oracle Cloud Applications.

Through 2021, CIOs who take a business-strategy-first approach to ERP will deliver 60% increased business value over those who take a vendor-first approach.

## What You Need to Know

The use of cloud computing has reached mainstream. Most organizations (approximately 70%) now use cloud application services for a range of business systems. Of the organizations using cloud services, more than 75% indicate they have a cloud-first strategy.[1]

Gartner predicts demand to persist through 2022, during which time the cloud-related IT services market is expected to grow to more than $240 billion, representing a five-year compound annual growth rate of 20.5%. For Oracle, the growth will be more dramatic. Oracle is fully committed to the cloud, and it is no longer selling licenses for on-premises application software. In January 2019, Mark Hurd, the CEO of Oracle, said that only 5% to 10% of Oracle's application customers are truly SaaS. However, he expects them all to move in time, with 60% to 70% moving in the next four to five years.[2] This shift will require vendors to provide OCA services.

The vendors in this research are actively pivoting their application services to focus on cloud application services. The average year-over-year growth in OCA for the 18 vendors featured here was 66% and accelerating. This uptick has contributed to an 8% growth in overall Oracle services from the cohort in this research. It is relevant to note that the noncloud part of the overall Oracle services from this cohort shrank by 4% from $19.1 billion to $18.3 billion. This is clearly a substantial sum. However, the shrinkage rate isn't quite as fast as it needs to be to align with Oracle's expectations for the shift from on-premises to cloud.

In order to be successful with cloud application services, the vendors need to adapt their service offerings. Transitioning to cloud is often much more complex than a purely technical migration. Because the cloud application can only be configured and not customized, businesses needs to adopt the best-practice concepts built into the product rather than rebuild their historical processes for the cloud. Moreover, the opportunity to incorporate automation and other new technologies means that the journey to cloud should be seen as a multifunction business transformation project.

The best vendors engage both technology *and* business leaders at the client, so that the focus is on transforming the business by achieving business outcomes in functional areas. Value is based, for

instance, on creating new customers, driving new revenue streams or gaining operational efficiencies.

Technology excellence is still critical, and technologies such as Internet of Things (IoT), blockchain and mobile are increasingly leveraged into the Oracle Cloud solutions and services. In addition, vendors are focusing on automation, cognitive and robotic technologies. These technologies can increase efficiency and functionality, driving client interest. Vendors are building up capabilities to support these areas, as well as creating new solutions to complement Oracle's own product portfolio.

The shift to cloud represents a big disruption not only for end-user clients, but also for vendors. Vendor resources need to be trained on new technology platforms and be certified on Oracle Cloud to meet client demand. In some cases, these resources represent the entire workforce of the organization. Vendors need to be able to invest ahead, recruit and hire team members who are able to work with clients on cloud application projects. In addition to being proficient in the Oracle product portfolio, the vendors must understand the context of the client's business in order to recommend the correct solutions from a business value perspective. These modern skills are not easy to find, and vendors are often challenged to fill positions in time. At the same time, vendors must also retain enough expertise to support the clients that still remain on legacy Oracle applications.

Managed services and support in Oracle Cloud is not just "keeping the lights on." It is about driving ever-more business value through continuous updates. This DevOps service model can be challenging for many large vendors that have built a reputation on the "three in the box" model of technology, domain and industry capability. In Oracle Cloud, the successful vendor has to take this model one step further by adding value through business transformation and organizational change capabilities — services typically found in business consulting.

In addition to the change in services for support, models for support are changing too. Subscription-based and outcome-based pricing are replacing traditional time and materials (T&M) and fixed pricing models. These new pricing schemes are based on business value and serviced by pooled resources, akin to a shared services model. This change serves to further blur the lines between implementation and operational support with the shift to cloud.

Presently, it's too early to tell what the mature OCA support pricing model will be. The assumption is that, via the cloud, support will be cheaper, but the true outcome has yet to be revealed. In the short term, the expectation is that OCA support pricing models will mostly be consumption-based, since it's challenging to completely understand OCA support needs.

This "Critical Capabilities for Oracle Cloud Applications Services, Worldwide" is a companion report to "Magic Quadrant for Oracle Cloud Application Services, Worldwide." These two reports use the same vendor inclusion criteria. Thus, the vendors analyzed in this Critical Capabilities document are the same as those analyzed in the Magic Quadrant.

Where the Magic Quadrant provides a comparison of the included vendors against vision and ability to execute, the Critical Capabilities document analyzes the vendors against four use cases. The use cases are defined in a dedicated section further down, but in short are:

- **Assessment and strategy:** Discrete, project-based services to evaluate the impact of either a new OCA implementation or a migration from a legacy Oracle platform to an OCA product

- **Implementation — simple:** Discrete, project-based deployments of a single OCA product without ongoing OCA management responsibilities

- **Implementation — complex:** Discrete, project-based deployments of multiple OCA products without ongoing OCA management responsibilities

- **Management:** OCA management services

Since the Critical Capabilities and the Magic Quadrant analyze different vectors, there is no one-to-one relationship between a vendor's positioning in a Magic Quadrant and its positioning (or its product's positioning) in a Critical Capabilities report.

Critical Capabilities research further differentiates from Magic Quadrant research. While Magic Quadrant vendors are positioned relative to one another, Critical Capabilities vendors (or their products) are rated per criterion and positioned based on that scoring. This format enables you to use the Critical Capabilities research for market scan purposes. It allows you to identify more optimum vendors by capability and to fit vendors to your requirements. In addition, this research will speed up your down-selection process by ensuring that the vendors have an application services "sweet spot" aligned to your requirements. For example, you can ensure that the vendors have a good track record in:

- Implementing your required OCA components, such as:

    - Customer experience (CX) via Oracle CX Cloud Suite

    - Enterprise performance management (EPM) via Oracle EPM Cloud

    - ERP via Oracle ERP Cloud

    - Human capital management (HCM) via Oracle HCM Cloud

    - Supply chain management (SCM) via Oracle SCM Cloud

- Supporting deals of similar scale and complexity to yours

- Using repeatable implementation and delivery models in your industry

The critical capabilities included in this research are:

- Impact assessment and planning

- Technology enablement

- Industry and process expertise

- Organizational change management (OCM)

- SaaS product and domain expertise

- Operational excellence
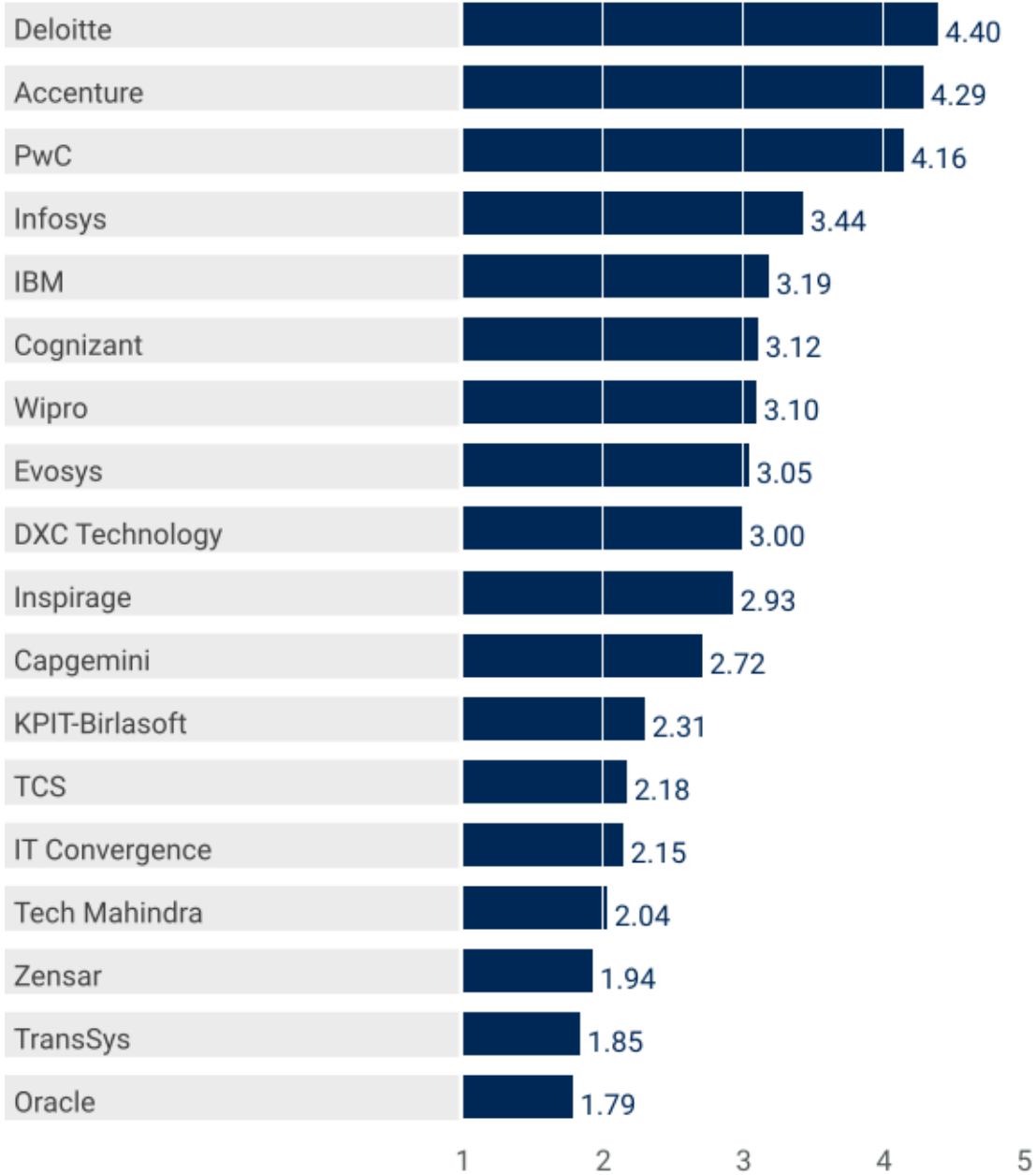
- Continuous improvement

- Responsiveness

Detailed descriptions of each of the critical capabilities can be found later in this research. For each of the eight critical capabilities, an assessment has been made. This assessment results in a categorization of a particular vendor's mastery of a particular critical capability. This assessment is based on data collected for this research, including reference client scores, input from vendor briefings for this research, and a combined analyst opinion. There are five assessment categories mapped to a sequential scale: poor, fair, good, excellent and outstanding.

## Analysis

### Critical Capabilities Use-Case Graphics

Figure 1. Vendors' Product Scores for the Assessment and Strategy Use Case

Product or Service Scores for Assessment and Strategy

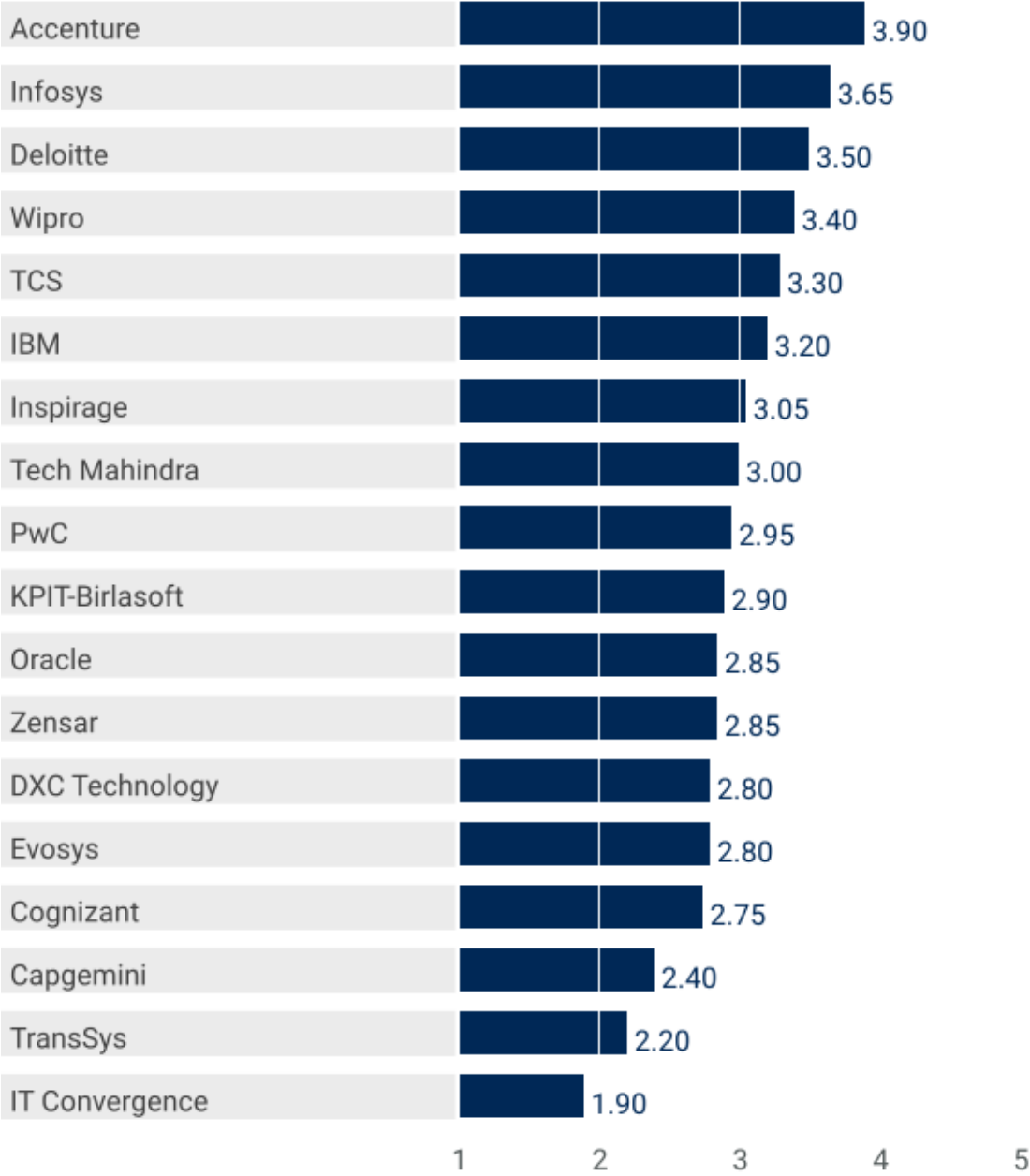| Vendor | Score |
|---|---|
| Deloitte | 4.40 |
| Accenture | 4.29 |
| PwC | 4.16 |
| Infosys | 3.44 |
| IBM | 3.19 |
| Cognizant | 3.12 |
| Wipro | 3.10 |
| Evosys | 3.05 |
| DXC Technology | 3.00 |
| Inspirage | 2.93 |
| Capgemini | 2.72 |
| KPIT-Birlasoft | 2.31 |
| TCS | 2.18 |
| IT Convergence | 2.15 |
| Tech Mahindra | 2.04 |
| Zensar | 1.94 |
| TransSys | 1.85 |
| Oracle | 1.79 |

As of 4 March 2019                                          © Gartner, Inc

Source: Gartner (May 2019)

Figure 2. Vendors' Product Scores for the Implementation — Simple Use Case

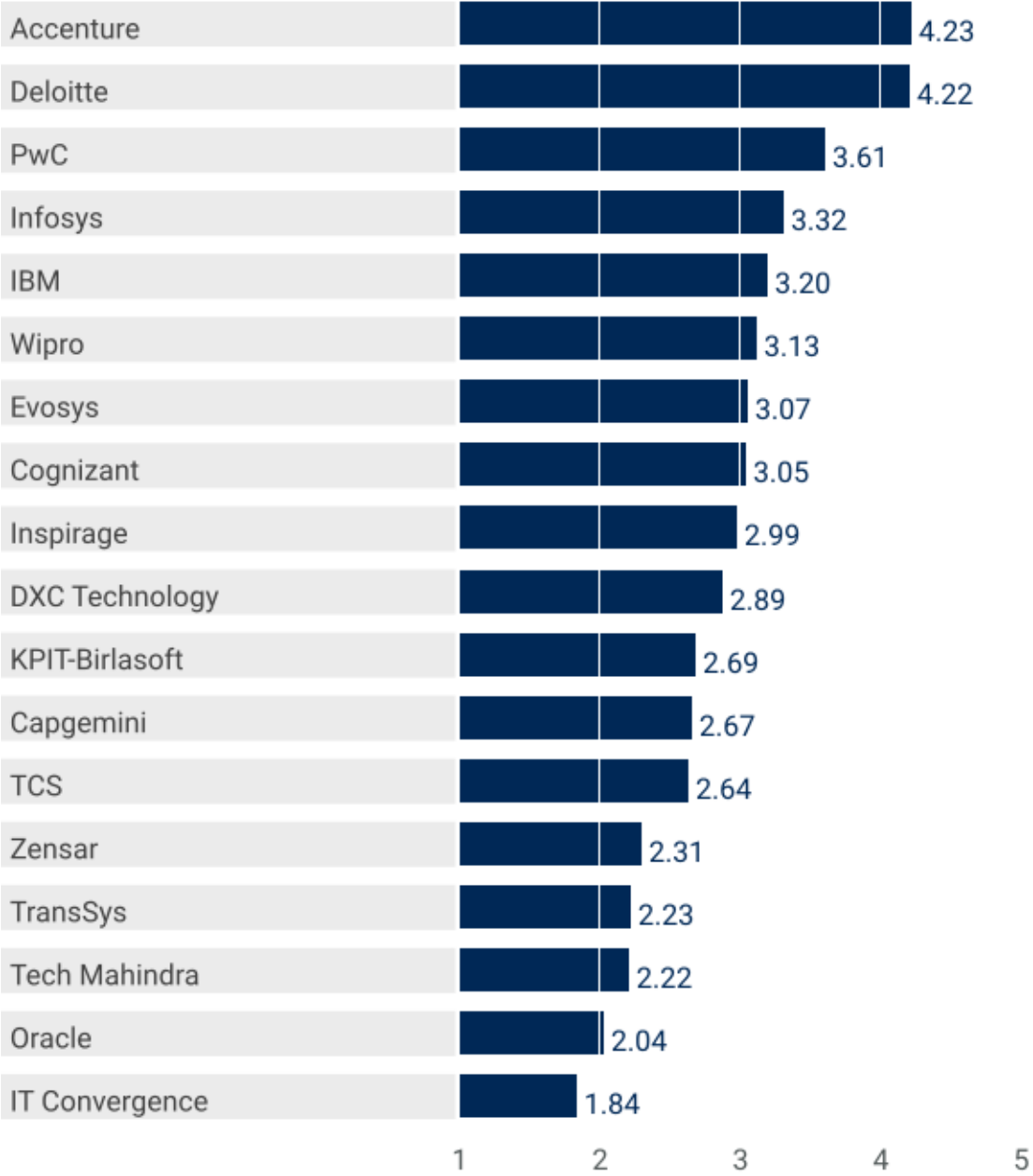Product or Service Scores for Implementation — Simple

| Vendor | Score |
|---|---|
| Accenture | 3.90 |
| Infosys | 3.65 |
| Deloitte | 3.50 |
| Wipro | 3.40 |
| TCS | 3.30 |
| IBM | 3.20 |
| Inspirage | 3.05 |
| Tech Mahindra | 3.00 |
| PwC | 2.95 |
| KPIT-Birlasoft | 2.90 |
| Oracle | 2.85 |
| Zensar | 2.85 |
| DXC Technology | 2.80 |
| Evosys | 2.80 |
| Cognizant | 2.75 |
| Capgemini | 2.40 |
| TransSys | 2.20 |
| IT Convergence | 1.90 |

As of 4 March 2019

© Gartner, Inc

Source: Gartner (May 2019)

Figure 3. Vendors' Product Scores for the Implementation — Complex Use Case

Product or Service Scores for Implementation — Complex

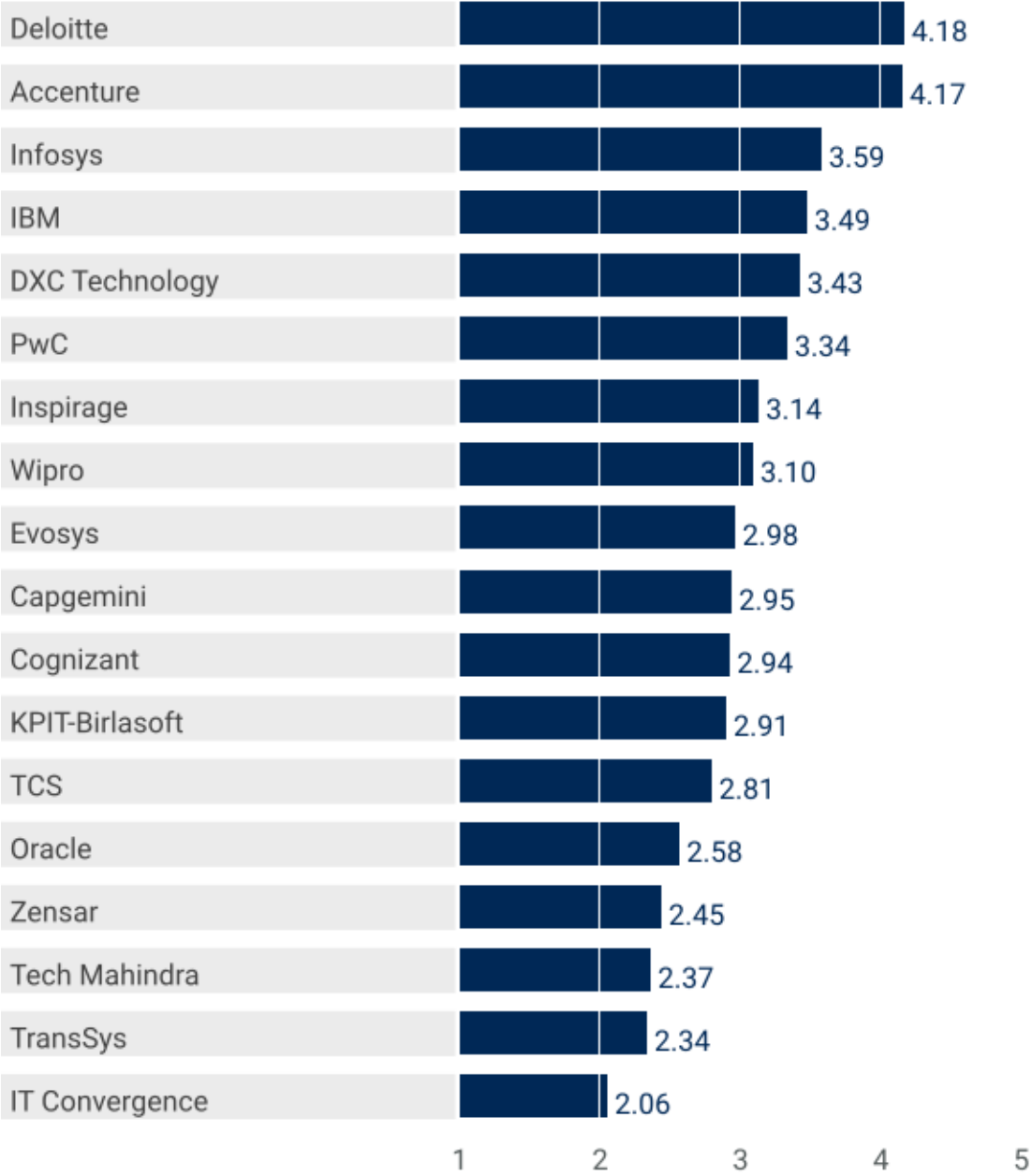| Vendor | Score |
|---|---|
| Accenture | 4.23 |
| Deloitte | 4.22 |
| PwC | 3.61 |
| Infosys | 3.32 |
| IBM | 3.20 |
| Wipro | 3.13 |
| Evosys | 3.07 |
| Cognizant | 3.05 |
| Inspirage | 2.99 |
| DXC Technology | 2.89 |
| KPIT-Birlasoft | 2.69 |
| Capgemini | 2.67 |
| TCS | 2.64 |
| Zensar | 2.31 |
| TransSys | 2.23 |
| Tech Mahindra | 2.22 |
| Oracle | 2.04 |
| IT Convergence | 1.84 |

As of 4 March 2019

© Gartner, Inc

Source: Gartner (May 2019)

Figure 4. Vendors' Product Scores for the Management Use Case

Product or Service Scores for Management

| Vendor | Score |
|---|---|
| Deloitte | 4.18 |
| Accenture | 4.17 |
| Infosys | 3.59 |
| IBM | 3.49 |
| DXC Technology | 3.43 |
| PwC | 3.34 |
| Inspirage | 3.14 |
| Wipro | 3.10 |
| Evosys | 2.98 |
| Capgemini | 2.95 |
| Cognizant | 2.94 |
| KPIT-Birlasoft | 2.91 |
| TCS | 2.81 |
| Oracle | 2.58 |
| Zensar | 2.45 |
| Tech Mahindra | 2.37 |
| TransSys | 2.34 |
| IT Convergence | 2.06 |

As of 4 March 2019

© Gartner, Inc

Source: Gartner (May 2019)

## Vendors

### Accenture

Accenture is primarily a good fit for global enterprises engaged in multifunctional, multiservice, multiyear transformations.

**Resources:** Accenture has an estimated 9,750 dedicated Oracle Cloud Applications services full-time equivalents (FTEs) worldwide. They are dedicated by product as follows: CX Cloud Suite — 1,169; EPM Cloud — 584; ERP Cloud — 3,316; HCM Cloud — 3,219; SCM Cloud — 487; and other OCA-related products — 975.

The geographic breakdown of these FTEs is: North America, 25%; Latin America, 7%; EMEA, 27%; and Asia/Pacific, 41%.

**Client Geography:** The geographic breakdown of Accenture's OCA services revenue is: North America, 50%; Latin America, 8%; EMEA, 34%; and Asia/Pacific, 8%.

**OCA Focus:** The OCA services engagements provide 12% of all Oracle revenue and utilize 18% of the Oracle practice FTEs for Accenture.

**Growth:** Gartner estimates that the year-over-year growth in Accenture's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 80%.

**Industry:** The top five industries where Accenture has cloud projects are consumer products, retail, utilities and energy, life sciences, and chemicals.

**Client Size:** Of Accenture's OCA services revenue, 35% originates from clients with 1,000 to 10,000 employees and 65% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by cloud product is: CX Cloud Suite, 15%; EPM Cloud, 4%; ERP Cloud, 25%; HCM Cloud, 22%; SCM Cloud, 6%; and other OCA-related services, 28%.

**Impact Assessment and Planning Capabilities:** Accenture has an iterative, prototype-driven process to help clients with impact assessment and planning. Accenture notes that it completed a couple of hundred assessments during the 12-month period from mid-2017 to mid-2018, leading to implementations for roughly 85% of them. In myConcerto, Accenture uses intelligent diagnostics, automated business case and roadmap tools to provide value realization and continuous recommendations. The result is highly personalized roadmaps for clients. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in impact assessment and planning.

**Technology Enablement Capabilities:** Accenture's myConcerto platform incorporates preconfigured industry and business function solutions to enable automated and agile delivery, provisioning and deployment. Examples of solutions in myConcerto include Accenture Rapid Prototype Builder, Accenture Cloud Connect for Oracle, Accenture Cloud Testing Suite, Robotic Process Automation Proof of Concept, myWizard for Oracle, and Integrated Analytics Innovation

Lab. Among the drivers for continued investment are further industry vertical extensions and automation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in technology enablement.

**Industry and Process Expertise Capabilities:** Accenture has developed several industry-specific platforms by working closely with Oracle and its partner ecosystem. These platforms leverage Accenture's Oracle vertical, horizontal and technology expertise. Accenture has created proprietary solutions for telecommunications, banking, life sciences, retail, and utilities and energy. Its myConcerto platform captures and maintains industry and process knowledge, in addition to expertise from Accenture's multiple businesses and industry groups. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in industry and process expertise.

**OCM Capabilities:** With extensive knowledge and experience in planning and executing transformational change programs, Accenture helps its clients with current and future business needs, and with challenges related to program delivery changes. It uses solutions such as Oracle Cloud Change Methodology Starter Kit, Accenture Change Capacity Diagnostic for Oracle Delivery and Accenture Oracle Cloud Change In-a-Box. These solutions help jump-start the change program and initiate a change management effort that encompasses processes, roles and systems. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Accenture has deep expertise in all OCA areas, including HCM, ERP, CX, EPM and SCM. It added 350 skilled Oracle ERP Cloud professionals to its Oracle Business Group with the acquisition of DAZ Systems. The company was the first to achieve Oracle's Diamond Partner status, and it is now recognized as a Global Cloud Elite and Platinum Partner on the Oracle PartnerNetwork. Accenture has incorporated a number of domain-specific assets into the myConcerto platform, including prebuilt conversions and integrations between Oracle legacy applications and their new cloud equivalents. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Accenture's entire Oracle practice has roughly 55,000 FTEs, of which approximately 9,750 work in OCA. Accenture's entire Oracle practice has 50 delivery centers and 100 innovation centers in every major geography in the world. Accenture leverages these centers for its work in Oracle Cloud. Accenture offers a variety of delivery support models, including end-to-end managed services with standard SLAs, cloud center of excellence (CCOE) support, staff augmentation, capacity services, co-sourced expert models and a minimum viable product (MVP). Each year, it makes significant investments in training, including providing unlimited access to Oracle University's digital training content and hosting over 300 high-touch virtual training events. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in operational excellence.

**Continuous Improvement Capabilities:** Accenture uses Capability Maturity Model Integration (CMMI)-compliant service delivery processes and a Six-Sigma-based continuous improvement program to drive down costs, improve quality, increase repeatability and enable high performance. It

continuously benchmarks all projects internally and externally to speed up issue resolution and to help ensure consistency by monitoring the health of projects and addressing issues early on. Accenture's Liquid Application Management offering helps monitor ROI against the business case, increases speed to market with agile and DevOps, and uses proactive application management with automation to reduce costs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Accenture's implementation and service delivery model helps establish and maintain resources with knowledge of the client's business, technology and development processes. This support model can also scale up or down to address burst capacity requirements or changes in the overall business and technology environment. Accenture's service support capabilities are further enhanced by:

- Accenture Global Delivery Network, which includes thousands of certified ITIL practitioners

- Accenture Smart Transition Suite, which helps jump-start and expedite the knowledge management process

Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in responsiveness.

## Capgemini

Capgemini is primarily a good fit for clients looking for complex, multi-OCA implementations with business transformation needs that can leverage its organizationwide OCM and business process services (BPS) capabilities.

**Resources:** Capgemini has an estimated 1,046 Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 169; EPM Cloud — 54; ERP Cloud — 589; HCM Cloud — 147; SCM Cloud — 80; and other OCA-related products — 7.

The geographic breakdown of these FTEs is: North America, 32%; Latin America, 5%; EMEA, 18%; and Asia/Pacific, 45%.

**Client Geography:** The breakdown of Capgemini's OCA services revenue is North America, 55%; Latin America, 5%; EMEA, 36%; and Asia/Pacific, 4%.

**OCA Focus:** The OCA services engagements provide 14% of all the Oracle revenue and utilize 7% of the Oracle practice FTEs for Capgemini.

**Growth:** Gartner estimates that the year-over-year growth in Capgemini's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 34%.

**Industry:** The top five industries where Capgemini has cloud projects are public sector, consumer products, retail, professional services and high tech.

**Client Size:** Of Capgemini's OCA services revenue, 75% originates from clients with 1,000 to 10,000 employees and 25% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by cloud product is: CX Cloud Suite, 15%; EPM Cloud, 6%; ERP Cloud, 50%; HCM Cloud, 11%; SCM Cloud, 17%; and other OCA-related products, 1%.

**Impact Assessment and Planning Capabilities:** Capgemini brands its Oracle Cloud services as CloudNow, and provides impact assessment and planning services using its CloudNow Advise methodology. This methodology consists of a cloud readiness assessment, but focuses on a "show and tell" cloud fitness analysis rather than on requirements gathering. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** Capgemini implements cloud through its CloudNow Align process, which is hybrid-agile. It employs iterations and sprints in the development phase, and uses the Oracle Unified Method (OUM). Reflecting a quickly adopted norm in this space, the company uses automation in both its delivery and its solutions. In Capgemini's case, such automation has been built via the company's organizationwide Automation Drive initiative. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in technology enablement.

**Industry and Process Expertise Capabilities:** Capgemini cloud projects are growing, with roughly 65 completed and 30 in progress at the time of writing. To date, Capgemini's focus is driven by client demand rather than by a particular strategy. The industries where Capgemini has had more cloud projects are public sector, consumer products, retail, professional services and high tech. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** Capgemini has organizationwide expertise in BPS and offers business-consulting services. Capgemini leverages this expertise for its Oracle Cloud practice, although this expertise is not solely focused on Oracle Cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Capgemini has completed projects in all five OCA product areas. Implementations have been predominantly ERP Cloud. Although overall numbers are low, there is a good spread, with over 10 implementations each of HCM Cloud and CX Cloud Suite. Capgemini has over 1,000 FTE dedicated to OCA projects. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Capgemini delivers OCA management through its CloudNow Animate product. Capgemini has a large Oracle services practice with almost 15,000 FTEs delivering Oracle services, a portion of which are focused on Oracle Cloud. Capgemini has a mature delivery model for supporting on-premises Oracle installations, but it understands that, for the cloud, the delivery model needs to be adjusted. The company has provided additional local, but mostly remote, resources through its Solution Design Center concept (one currently in Houston, Texas). This model complements the delivery centers that Capgemini has in France, the

Netherlands, India and Australia for Oracle Cloud delivery. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** Capgemini understands that cloud involves a continuous update cycle. Therefore, it has adapted its support model to cover cloud-managed services, service transition, service run and continual service improvements. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Capgemini received good feedback from reference clients for its willingness to go the "extra mile." The reference clients feel that Capgemini is listening to them in order to adapt their operations to make them cloud-relevant. Capgemini brings in capabilities from its business transformation services to actively focus on adapting to new business realities. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Cognizant

Cognizant is primarily a good fit for U.S.-based, nonfederal government organizations looking to move to a multi-OCA environment focused on ERP and HCM.

**Resources:** Cognizant has an estimated 552 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 35; EPM Cloud — 11; ERP Cloud — 136; HCM Cloud — 361; SCM Cloud — 9; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 37%; Latin America, 0%; EMEA, 5%; and Asia/Pacific, 58%.

**Client Geography:** The breakdown of Cognizant's OCA services revenue is: North America, 94%; Latin America, 0%; EMEA, 6%; and Asia/Pacific, 0%.

**OCA Focus:** The OCA services engagements provide 7% of all Oracle revenue and utilize 4% of the Oracle practice FTEs for Cognizant.

**Growth:** Gartner estimates that the year-over-year growth in Cognizant's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 25%.

**Industry:** The top five industries where Cognizant has cloud projects are high tech, banking, retail, healthcare and professional services.

**Client Size:** Of Cognizant's OCA services revenue, 10% originates from clients with fewer than 1,000 employees; 25% from clients with 1,000 to 10,000 employees; and 65% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by cloud product is: CX Cloud Suite, 3%; EPM Cloud, 2%; ERP Cloud, 22%; HCM Cloud, 71%; SCM Cloud, 2%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Cognizant's Cloud Map Advisory offering enables the cloud migration journey by helping clients effectively plan and prepare for Oracle Cloud implementation. Cognizant's CloudFit Advisory offering helps finalize the implementation roadmap by judging the client's cloud readiness in terms of business and technology. Cognizant's Cloud Central is an umbrella of solutions and services — from assessment and integration to support and management. Cloud OCM Strategy is an interconnected group of activities for transitioning a client from its current state to its desired future state. Cloud OCM Preliminary Assessment happens at the onset of every engagement.

Cognizant claims that its accelerator, Orcad, reduces the effort involved in an assessment by 70%. Implementations include day-to-day playbooks. Cognizant has developed a 1ClickDBUpgrade solution accelerator, which has reduced the production cutover time of Oracle Cloud migrations by 25%. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** Cognizant's Oracle Cloud practice leverages over 100 solution accelerators, including Cloud Central, and over 45 prebuilt integration tools. This toolset includes Digital HR Assistant, Cognizant's Oracle HCM Cloud enabler, which leverages automation and cognitive functionality in addition to simplifying traceability using the Oracle Blockchain Platform. Investments are intended to reduce the cost of engagements. In addition, Cognizant has two Oracle Cloud Studios for solutions and prototypes, along with a library of test scripts covering over 500 scenarios. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Cognizant's Oracle Cloud industry experience is in high tech, banking, retail, healthcare and professional services. The practice is organized by vertical to provide industry expertise to clients. Industry-specific solutions include:

- A business process maturity assessment framework, which is part of Cognizant's Oracle Cloud assessment and implementation process

- Blueprints and delivery solutions, such as invoice automation and touchless payments

Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** Cognizant has a consulting go-to-market strategy and a stand-alone OCM group. This group is staffed with senior associates and builds on Cognizant's earlier acquisition of KBACE Technologies. Cognizant notes that industry experience is mandatory for resources in this practice. A structured, systematic Cloud OCM Preliminary Assessment happens at the start of all Oracle Cloud engagements. Cognizant is focusing on staffing up in transformation and change. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Cognizant developed early expertise in HCM Cloud, which now accounts for 71% of its global OCA services revenue. Cognizant's second wave of focus for large clients has been on ERP Cloud and SCM Cloud, both of which are expected to

contribute to a more-balanced multi-OCA offering. The CX Cloud Suite is included as a part of the multi-OCA approach, but it isn't a focus as a single OCA product installation. Cognizant has received multiple awards for Oracle HCM Cloud and is also an early adopter for Oracle Analytics Cloud, Oracle Talent Management Cloud, and Oracle Learning products. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Cognizant's unified delivery model includes over 550 OCA associates within selected in-country delivery centers. Cognizant has developed a 31-day Skill-to-Cloud rapid certification program, and notes that 85% of its Oracle Cloud associates are OCA-certified. Cognizant is an Oracle Cloud managed services vendor. It offers subscription services, prebuilt dashboards, reporting and training. Cognizant cites a support program with zero maintenance as helping to optimize nondiscretionary spend and deliver business outcomes. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** Cognizant collaborates with Oracle for AI, blockchain and IoT solutions. The company actively leverages Grindstone, a crowdsourced integration platform focused on delivery management capabilities and innovation. Results of this work include documented cost reductions, performance improvements and cost avoidance. Cognizant has Oracle Cloud Studios in India and the U.S. for prototyping and product development. However, Cognizant has been slow to pivot to the cloud compared with others in the cohort. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** Cognizant has invested in digital offerings to respond to changing client needs, and cites its Oracle Run Solutions as key to helping clients accelerate their own digital transformations by an average of 40%. Cognizant's automation hub, HiveCenter, autodetects, corrects, tests and releases updates, increasing efficiency in operations. Cognizant cites that HiveCenter improves total cost of ownership (TCO) by as much as 50%. It will be interesting to see if this holds as the organization expands into ERP Cloud and SCM Cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average for responsiveness.

## Deloitte

Deloitte is primarily a good fit for any midsize or large organization that is looking to exit legacy platforms through a business transformation approach. Deloitte is able to do end-to-end, multipillar OCA engagements, including OCM and domain consultancy.

**Resources:** Deloitte has an estimated 13,751 dedicated Oracle Cloud Application services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 2,750; EPM Cloud — 1,238; ERP Cloud — 3,850; HCM Cloud — 5,088; SCM Cloud — 825; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 24%; Latin America, 11%; EMEA, 26%; and Asia/Pacific, 49%.

**Client Geography:** The breakdown of Deloitte's OCA services revenue is: North America, 59%; Latin America, 9%; EMEA, 21%; and Asia/Pacific, 11%.

**OCA Focus:** The OCA services engagements provide 55% of all the Oracle revenue and utilize 55% of the Oracle practice FTEs for Deloitte.

**Growth:** Gartner estimates that the year-over-year growth in Deloitte's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 50%.

**Industry:** The top five industries where Deloitte has cloud projects are public sector, banking, life sciences, high tech and insurance.

**Client size:** Of Deloitte's OCA services revenue, 1% originates from clients with fewer than 1,000 employees; 59% from clients with 1,000 to 10,000 employees; and 40% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by cloud product is: CX Cloud Suite, 20%; EPM Cloud, 9%; ERP Cloud, 28%; HCM Cloud, 37%; SCM Cloud, 6%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Deloitte approaches impact assessment and planning from a business point of view that is fundamentally rooted in transformation. Deloitte generally targets large-portfolio accounts and typically engages with C-level decision makers who are responsive to transformational thinking. The company provides an end-to-end offering — from assessment and automation-enabled migration to operation services. The offering is delivered from a single pool of resources with common management. Impact assessments run through Deloitte's Cloud Transition Lab to evaluate the technical and process implications. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in impact assessment and planning.

**Technology Enablement Capabilities:** Deloitte has developed proprietary technology to enable the end-to-end migration and operation of Oracle Cloud. Assessments use Deloitte's Cloud Transition Lab, Finance and Supply Chain Digital Innovation Labs, and ValuePrint (Deloitte's business case toolset). Implementations use Cloud SolutionPrints, Deloitte's preconfigured industry solutions. Management and operations use proprietary cognitive insights and analytical tools; XaaS platform offerings; and Cloud Sustainment Labs. Deloitte is actively leveraging automation and has 102 bots built on Oracle ERP Cloud across record to report (RTR), procure to pay (PTP) and quote to cash (QTC) process areas. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Deloitte goes to market through its industry practices. It has developed industry-focused branded offerings that integrate core Oracle suites with advanced digital propositions (robotic process automation [RPA], blockchain, IoT and artificial intelligence [AI]). The top five industries where Deloitte has cloud projects are public sector, banking, life sciences, high tech and insurance. Deloitte's industry expertise and PaaS industry-specific extensions in SolutionPrints are positioned to help the company "own the gap" between base OCA functionality and industry requirements. Based on data collected for this research and input from

reference clients, Gartner analysts rate this vendor as above average in industry and process expertise.

**OCM Capabilities:** Deloitte is a global leader in OCM, with over 8,000 professionals aligned across 27 industry sectors — which the Oracle Cloud practice is able to leverage. OCM capabilities include strategic change, culture, leadership services, organization design, talent strategies, adoption, communications, digital enablement and learning solutions. Deloitte has developed a dynamic, cloud-based change management platform, ChangeScout, which allows for real-time analytical insights on change adoption. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Deloitte has depth of experience and capability with all OCA suites and products. Particular focus is given to EPM Cloud, ERP Cloud, HCM Cloud and SCM Cloud. The company was the first certified Oracle Global Cloud Elite Partner, and it has more Oracle Cloud certifications than any other vendor. Deloitte has invested heavily in developing preconfigured industry solutions for OCA (e.g., its Oracle Cloud SolutionPrints). Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Deloitte has 25 delivery centers with CMMI Level 5 rankings. The company delivers end-to-end "advise, implement, operate" services from a single pool of resources with common management. The resources in the common management pool are deployed globally. This model is positioned to increase consistency of service delivery across geographies. Deloitte has a release management COE and automated regression testing to ensure successful quarterly Oracle Cloud updates. It has actively implemented RPA for IT service management (ITSM) processes, along with cognitive intelligence and service delivery analytical reporting tools. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in operational excellence.

**Continuous Improvement Capabilities:** Deloitte uses agile delivery methodologies, its proprietary Momentum methodology, and DevOps for management and continuous improvement of its Oracle Cloud services. Deloitte's AMAP Framework for cognitive, robotics and automation investments likewise supports its ongoing commitment to improvement. Also, Deloitte notes that it's actively looking to fill gaps in the OCA products where they exist (e.g., their PaaS engineering and construction solutions). Deloitte's PrecisionView product leverages predictive analytics and machine learning to improve planning accuracy. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Deloitte assigns a member of senior management to each Oracle Cloud engagement. Deloitte positions itself as a strategic partner to its clients. Deloitte's shift to a single, globally managed resource pool for Oracle Cloud enables flexible support and consistent release management. Operating models and tools have standard processes to handle requests, and Deloitte has clear escalation paths to expedite requests from its clients. Resources are cross-trained in relevant technologies, industries and processes, contributing to redundancy and continuity of service. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in responsiveness.

## DXC Technology

DXC Technology (DXC) is primarily a good fit for CIOs of midsize enterprises looking for a technology heavyweight to provide and implement a complex technology transformation that enables the business growth and change required. It offers hybrid cloud at the customer site, managed services bundling plays and RPA to evolve the client application platforms.

**Resources:** DXC has an estimated 2,278 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite —106; EPM Cloud — 557; ERP Cloud — 682; HCM Cloud — 356; SCM Cloud — 226; and other OCA-related products — 351.

The geographic breakdown of these FTEs is: North America, 6%; Latin America, 2%; EMEA, 10%; and Asia/Pacific, 82%.

**Client Geography:** The breakdown of DXC's OCA services revenue is as follows: North America, 7%; Latin America, 5%; EMEA, 43%; and Asia/Pacific, 45%.

**OCA Focus:** The OCA services engagements provide 30% of all Oracle revenue and utilize 29% of the Oracle practice FTEs for DXC.

**Growth:** Gartner estimates that the year-over-year growth in DXC's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 363%.

**Industry:** The top five industries where DXC has cloud projects are engineering, construction and operations; public sector; media; aerospace and defense; and utilities and energy.

**Client Size:** Of DXC's OCA services revenue, 4% originates from clients with fewer than 1,000 employees; 74% from clients with 1,000 to 10,000 employees; and 21% from clients with more than 10,000 employees. (Note: Percentages do not add up to 100% because of rounding.)

**Product Focus:** The breakdown for worldwide OCA services revenue by cloud product is: CX Cloud Suite, 6%; EPM Cloud, 14%; ERP Cloud, 25%; HCM Cloud, 9%; SCM Cloud, 9%; and other OCA-related products, 37%.

**Impact Assessment and Planning Capabilities:** DXC understands the value of assessments in generating ongoing cloud engagements. The company has invested in resources and tools in order to perform shorter RPA-enabled assessments. DXC states that it has a 75% conversion rate (from assessment to implementation). It provides automated tools to interrogate existing Oracle technologies (applications, databases and hardware), and it provides Oracle Cloud IaaS "shapes" for migration planning and pricing. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** In addition to the assessment and implementation tools it has built and gained through acquisitions, DXC has developed capability around AI adoption, Oracle predictive analysis, and quick and effective response using autobots. DXC is technology-agnostic, and its experience in leveraging third-party products has led to engagements. For example, with one European client, DXC developed a solution to automate supply chain key functions using Oracle ERP Cloud in conjunction with Blue Prism. Based on data collected for this research and

input from reference clients, Gartner analysts rate this vendor as below average in technology enablement.

**Industry and Process Expertise Capabilities:** With the acquisition of Red Rock in 2016, DXC also acquired the Red Solutions cloud methodology and the beverage, higher education, construction and retail industry preconfigurations. Similarly, the Tribridge acquisition added experience and assets for healthcare. DXC claims that its accelerator, Red Solutions, provides a 50% reduction in time and cost compared with a traditional cloud implementation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** DXC has developed an OCM methodology that specifically integrates with Oracle. It connects with Oracle Enterprise Manager to envelope testing practices and integrate with configuration management. The methodology contains specific innovations like early adoption acceleration, which involves business resources early on in the testing process to facilitate faster system adoption. DXC understands the need to manage the organizational change resulting from a cloud implementation, but its OCM focus is still from a technology implementation point of view rather than a business transformation starting point. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** DXC has completed a relatively low number of OCA engagements, with most being for the ERP Cloud and EPM Cloud products. It has strong numbers of certifications on the engagements carried out, but it needs to increase the breadth of products covered and the overall certification density within the cloud organization. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** DXC has a global ability to deliver Oracle Cloud at the client's location of choice, because it has many global and regional delivery centers. DXC has a large and mature Oracle practice with roughly 8,000 FTEs, 2278 of which are working with OCA. DXC has opened Digital Transformation Centers in Newcastle, U.K.; London, U.K., Canberra, Australia; Melbourne, Australia; New Orleans, Louisiana; and Dusseldorf, Germany. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in operational excellence.

**Continuous Improvement Capabilities:** DXC is evolving its support model. It is leveraging its automation frameworks and assets to improve its own Oracle support capabilities as well the clients' workflows. In addition, DXC is incorporating cloud-specific implementation best practices and tools that have been harvested from acquisitions. Although these acquired assets are helping with innovation, they are also making standardization more difficult. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** DXC provides a range of flexible service delivery, pricing and support models. It is one of two global Oracle Cloud Managed Service Provider (MSP) partners and can offer the Oracle product subscriptions bundled with its different service offerings. DXC

understands that client needs for cloud implementation and Oracle Cloud AMS are evolving. Thus, it is responding with new service and pricing options. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Evosys

Evosys is primarily a good fit for small to midsize enterprises with single or multiple ERP, HCM and/or SCM installations looking for an innovative approach to transitioning from on-premises to cloud within its key focus industries.

**Resources:** Evosys has an estimated 464 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 30; EPM Cloud — 84; ERP Cloud — 98; HCM Cloud — 114; SCM Cloud — 73; and other OCA-related products — 65.

The geographic breakdown of these FTEs is: North America, 3%; Latin America, 0%; EMEA, 49%; and Asia/Pacific, 48%.

**Client Geography:** The breakdown of Evosys' OCA services revenue is: North America, 39%; Latin America, 0%; EMEA, 52%; and Asia/Pacific, 9%.

**OCA Focus:** The OCA services engagements provide 47% of all Oracle revenue and utilize 46% of the Oracle practice FTEs for Evosys.

**Growth:** Gartner estimates that the year-over-year growth in Evosys' OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 159%.

**Industry:** The top five industries where Evosys has cloud projects are professional services, travel and transportation, banking, engineering and construction, and healthcare.

**Client Size:** Of Evosys' OCA services revenue, 61% originates from clients with fewer than 1,000 employees; 33% from clients with 1,000 to 10,000 employees; and 6% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 1%; EPM Cloud, 6%; ERP Cloud, 35%; HCM Cloud, 40%; SCM Cloud, 16%; and other OCA-related products, 2%.

**Impact Assessment and Planning Capabilities:** Evosys provides impact assessment and planning services using its Evosys Glide and Evosys Insights tools. It uses these tools to conduct detailed presales activities, such as creating business process mapping, creating financial mapping, and providing visibility into product cost and profitability for clients. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** Evosys' Glide includes advisory services and transformation accelerators. Glide provides assessment of existing configurations and customizations, insights to build the expected ROI, and application and decision support services. The tool helps customers

migrate from on-premises to cloud, and covers ERP Cloud, EPM Cloud and HCM Cloud. Other accelerators to help with migration include a data migration tool and Evosys-branded products, such as Insights Tracker, Project Sites and Easy Interface. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Evosys is focused on verticalization and recognizes it as a clear differentiator for clients. The company has a repository of reusable industry assets to help clients with cloud adoption. The top five industries where Evosys has cloud projects are professional services, travel and transportation, banking, engineering and construction, and healthcare. Evosys has preconfigured solutions for the public sector, travel and transportation, and engineering and construction industries. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** Evosys lacks OCM capabilities. To bridge this gap, Evosys employs a different approach than some others in the cohort. The company focuses on equipping its resources with a hybrid skill set covering both domain and technology expertise. Evosys says that this hybrid skill set is as an important aspect for success. Such skills focus on identifying the impact of process change during initial assessment, creating a mitigation plan and implementing that plan before go-live. Evosys also works with third-party change management vendors, depending on client preference. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Evosys focuses on all OCA products and has prioritized Oracle certifications. A high proportion of its staff is Oracle-certified. Evosys acquired Newbury Taleo Group in the U.S., which enhanced Evosys' North American presence and expanded its Oracle HCM Cloud practice. The company uses the Evosys Insights tool for OCA implementations to identify critical success factors and to conduct solution benchmarking. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Evosys was recognized as an Oracle Specialized Partner of the Year in 2018. It has two COEs in Pune and Ahmedabad, India. The company plans to further invest in Europe and Asia/Pacific, and it is actively hiring in all regions to grow local resources for project management, sales and development. Evosys provides product-training programs for qualified, industry-experienced resources in order to grow Oracle Cloud talent. It uses an implementation methodology focused on continuous improvement for efficient delivery to clients. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in operational excellence.

**Continuous Improvement Capabilities:** Evosys has a knowledge and standardization repository with over 300 prebuilt reports, and the company uses it to track all changes and configuration during implementation for clients. Evosys' data migration tool helps with quick migration to cloud. Evosys is making joint investments with customers in new technologies, such as RPA, IoT and AI, to build futuristic solution footprints for clients. Evosys also provides Cloud Application Managed Services (CAMS), which is a bundled offering for cloud implementation, training, upgrade and

support, based on a monthly subscription fee. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Evosys uses a number of approaches to help clients with their evolving business needs. It provides structured root cause analysis to reduce ticket count, creates a knowledge base of changes and configurations, and provides an online support manual. Evosys uses the Oracle Cloud Excellence Implementer (CEI) program to capture customer feedback. It also employs a customer success team that works closely with customers — from the presales stage to the execution and support stages. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## IBM

IBM is primarily a good fit for large, end-to-end, complex, multi-OCA implementations, especially if the organization is already an IBM customer. IBM's multigeography, multi-industry offering can provide hybrid infrastructure and leverages cognitive capabilities throughout.

**Resources:** IBM has an estimated 3,800 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 360; EPM Cloud — 300; ERP Cloud — 1,300; HCM Cloud — 1,140; SCM Cloud — 700; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 30%; Latin America, 3%; EMEA, 27%; and Asia/Pacific, 40%.

**Client Geography:** The breakdown of IBM's OCA services revenue is: North America, 57%; Latin America, 0%; EMEA, 32%; and Asia/Pacific, 11%.

**OCA Focus:** The OCA services engagements provide 19% of all Oracle revenue and utilize 22% of the Oracle practice FTEs for IBM.

**Growth:** Gartner estimates that the year-over-year growth in IBM's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 138%.

**Industry:** The top five industries where IBM has cloud projects are banking, professional services, public sector, retail and high tech.

**Client Size:** Of IBM's OCA services revenue, 10% originates from clients with fewer than 1,000 employees; 75% from clients with 1,000 to 10,000 employees; and 15% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 3%; EPM Cloud, 5%; ERP Cloud, 46%; HCM Cloud, 25%; SCM Cloud, 21%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** IBM provides Cloud Impact Assessment (CIA) for Oracle — an automated analysis for Oracle EPM, ERP, HCM and SCM on-premises customers

transitioning to the cloud. IBM states that this assessment helps clients address questions on why, when and how to move to cloud. IBM further helps clients create a detailed strategy and plan for the cloud, once they get their executive buy-in. IBM conducted over 40 assessments across North America and Europe, leading to phase-zero planning, upgrade and implementation work. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** IBM provides several technology tools and reusable assets for Oracle, such as:

- Automated diagnostic tools for evaluating Oracle E-Business Suite (EBS) and PeopleSoft

- Automated setup and configuration from Oracle EBS to ERP Cloud

- An automated payroll compare tool for HCM Cloud

- The IBM IGNITE automated testing tool for ERP Cloud and HCM Cloud

IBM also leverages its more than 30 intelligent or automation assets for its Oracle Cloud engagements. These tools enable IBM to deliver many go-lives — with over 50 countries live — especially for Oracle HCM Cloud and Talent Management Cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** IBM has made investments in industry and process assets, such as the IBM Benchmark Wizard and the IBM Blueworks Live process modeler. IBM Benchmark Wizard provides process improvement targets by industry as part of the functional analysis and CIA. The top five industries where IBM has cloud projects are banking, professional services, public sector, retail and high tech. It aligns Oracle Cloud practitioners to industries to develop subject matter experts who can consult and advise on industry-specific requirements. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** IBM uses a variety of approaches for OCM, including Envision Studios, Co-Creation Studios, Guidance and Performance Hubs, and IBM Change Insights Dashboard powered by Watson. IBM Change Insights Dashboard connects workforce engagement to business results using its intelligent assets. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** IBM has expertise in developing solutions and delivering large, global, complex and multidimensional projects. It has over 1,600 Oracle Cloud certifications and uses design workbooks for each OCA area. Most of the cloud engagements are complex multi-OCA engagements. It uses Blueworks Live for key processes in ERP Cloud and HCM Cloud to drive business process standardization inherent to SaaS. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** IBM has 33 Oracle global delivery centers and innovation centers. It opened Oracle Cloud Garage in Bangalore, India, to create assets and accelerators from

cloud projects, and it plans to open another Oracle Cloud Garage in North America. It has globally integrated delivery leveraging consistent solutions, estimating methods, delivery methods, program management and tools. To train its resources, IBM provides an Oracle virtual learning program with 24/7 access to Oracle University online training. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational expertise.

**Continuous Improvement Capabilities:** IBM focuses on continuous cloud innovation by using its cognitive and automation assets, such as intelligent ticket analytics, intelligent field requisitions, multilingual catalog translation, automated accounting and automated test scripts for regression testing. It is constantly investing in new offerings, such as blockchain use cases for supply chain, industry offerings for ERP Cloud and HCM Cloud, and process automation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** IBM constantly gathers feedback from clients. It also enables easier access to IBM associates in order to provide adequate client support. IBM uses Medallia, a SaaS company, to improve how it manages client experience feedback. IBM offers clients the agility to start small and then scale up to full enterprise deployment on the cloud, based on changes in their business priorities and direction. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Infosys

Infosys is primarily a good fit for large global companies looking for a cloud engagement partner with a wide product coverage that executes strongly and takes responsibility for the outcome.

**Resources:** Infosys has an estimated 3,317 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 935; EPM Cloud — 344; ERP Cloud — 572; HCM Cloud — 1,022; SCM Cloud — 444; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 32%; Latin America, 0%; EMEA, 4%; and Asia/Pacific, 64%.

**Client Geography:** The breakdown of Infosys' OCA services revenue is: North America, 73%; Latin America, 0%; EMEA, 17%; and Asia/Pacific, 10%.

**OCA Focus:** The OCA services engagements provide 26% of all Oracle revenue and utilize 22% of the Oracle practice FTEs for Infosys.

**Growth:** Gartner estimates that the year-over-year growth in Infosys' OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 115%.

**Industry:** The top five industries where Infosys has cloud projects are banking, retail, automotive, high tech and industrial machinery.

**Client Size:** Of Infosys' OCA services revenue, 4% originates from clients with fewer than 1,000 employees; 24% from clients with 1,000 to 10,000 employees; and 72% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 28%; EPM Cloud, 9%; ERP Cloud, 17%; HCM Cloud, 31%; SCM Cloud, 15%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Infosys' value realization methodology approaches the decision to migrate to Oracle Cloud as a business decision, not a technical one. Impact assessment and planning utilize a workshop-based approach that is customized to the client and focused on a future-state ideation. Infosys' cloud assessment methodology is embedded with accelerators to help outline cloud strategy, help navigate along the implementation path, and assist clients with training and change management. This assessment covers both business process and technical impact. At the time of writing, Infosys had performed over 70 assessments and had converted 73% of them to implementations. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** Infosys' investments in technology include:

- 10 COEs for next-generation technologies (e.g., IoT, blockchain, augmented reality and virtual reality)

- Over 10 Digital Studios and Infosys Labs

- Oracle Cloud Experience centers in Shanghai, China, and Bangalore, India

Infosys is an Oracle Cloud Elite Partner and is the first system integrator (SI) to be Oracle Cloud MSP-certified. It is the first partner to get advanced specialization in all three OCA versions of the Oracle Fusion Applications.

Infosys has made significant investments in its Oracle Cloud toolset, which includes an extensive collection of libraries, tools and accelerators. The company notes 50 accelerators for various AMS and development life cycle activities; over 25 automation use cases; and over 20 Oracle Cloud-specific tools. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Infosys has dedicated Oracle Cloud sales teams organized by industry segments, consulting groups organized around domains and a delivery organization structured around industries. In addition to pursuing in-house development (e.g., preconfigured industry solutions for automated SCM), Infosys partners for some specific industry solutions and delivery. Infosys has worked with Oracle to develop joint cloud solutions for the following sectors: automotive; industrial machinery and components; engineering, construction and operations; high tech; and higher education and research.

In addition to leveraging external certifications, Infosys has internal process domain certifications and training organized by industry. Specific focus is given to lateral hiring from industries to bring in domain knowledge. Via internal certification, Infosys has almost 2,500 certified industry vertical

experts. The top five industries where Infosys has cloud projects are banking, retail, automotive, high tech and industrial machinery. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** Infosys' IMPACT Framework has been developed to address the key challenges associated with business transformation and OCM. There are over 350 global experts across North America, Europe, the Middle East and Asia/Pacific. OCM is part of all phases of Infosys' Oracle Cloud services and includes change strategy, leadership development and readiness planning. An extensive library of tools, templates, gamification capabilities and learning content is leveraged to expedite deployment and acceptance. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Infosys offers multi-OCA expertise covering all products: CX Cloud Suite, EPM Cloud, ERP Cloud, HCM Cloud and SCM Cloud. The company has over 50 Oracle Cloud Marketplace solutions that have been approved by Oracle, 11 of which have been published to date. Infosys has won multiple Oracle awards, including Specialized Partner of the Year for HCM Cloud and CX Cloud (in 2018 and 2017, respectively). Infosys has invested in developing domain-specific solutions based on OCA products, such as:

- KREATE, Infosys' enablement services and solutions platform

- 60-day EPM Cloud implementation

- A pay-as-you-go SCM Cloud platform services offering

Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** In addition to its global delivery operations in India, Infosys is investing in country-specific delivery centers (e.g., Poland, Mexico, Brazil, Philippines, China and six in the U.S.). This model is designed to deliver more-agile local services for new technology initiatives, and to aid knowledge creation and job creation in local markets. Infosys has adopted a continuous delivery model that leverages automation to accelerate release cycles. Infosys has invested heavily in talent development and refactoring programs, such as its Lex learning platform and its digital learning platform for clients, Infosys Wingspan. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in operational excellence.

**Continuous Improvement Capabilities:** Infosys' approach to continuous improvement centers on driving improvements via an annual service innovation plan for support, implementation and upgrades (with quarterly targets). Infosys' Oracle Value Plus COE provides a comprehensive stack of tools for various Oracle applications and is continually updated. Standard operating procedures (SOPs) for service delivery include improvements and upgrades. DevOps and agile approaches drive application and process improvement in an ongoing manner. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness:** Infosys' move to a DevOps and agile model for operations and continuous improvement extends to developing new business models, such as a shared services model for support, a factory model for development and outcome-based pricing models. The company cites comprehensive flexibility to accommodate the client's desired delivery methodology and pricing methodology (e.g., fixed-price, T&M- or ticket-based pricing). All Oracle Cloud contracts allow flexibility to change or rescale support over time, amenable to a pay-as-you-go model. Business key performance indicators (KPIs) are tracked and provide direct input to support teams toward proactively resolving and improving service delivery. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Inspirage

Inspirage is primarily a good fit for midsize and some larger product-based organizations that are upgrading their ERP to Oracle Cloud with a supply chain management focus.

**Resources:** Inspirage has an estimated 402 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 15; EPM Cloud — 15; ERP Cloud — 145; HCM Cloud — 5; SCM Cloud — 222; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 62%; Latin America, 0%; EMEA, 28%; and Asia/Pacific, 10%.

**Client Geography:** The breakdown of Inspirage's OCA services revenue is: North America, 71%; Latin America, 0%; EMEA, 24%; and Asia/Pacific, 5%.

**OCA Focus:** The OCA services engagements provide 50% of all Oracle revenue and utilize 73% of the Oracle practice FTEs for Inspirage.

**Growth:** Gartner estimates that the year-over-year growth in Inspirage's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 75%.

**Industry:** The top five industries where Inspirage has cloud projects are high tech, consumer products, industrial machinery, automotive and life sciences.

**Client Size:** Of Inspirage's OCA services revenue, 0% originates from clients with fewer than 1,000 employees; 76% is from clients with 1,000 to 10,000 employees; and 24% is from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 4%; EPM Cloud, 4%; ERP Cloud, 32%; HCM Cloud, 1%; SCM Cloud, 58%; and other OCA-related products, 1%.

**Impact Assessment and Planning Capabilities:** Inspirage's Oracle Cloud offering, in2Cloud, is end-to-end and focused on accelerating Oracle Cloud adoption. Assessment includes insight and benchmarking relative to the industry as a basis for decision making and planning. Migration leverages Inspirage's iHub Cloud Service, a subscription-based platform composed of reusable integration assets and out-of-the-box functionality. This service is intended to make implementations faster, minimize risk and lower integration costs. Inspirage cites a 50% conversion

rate for assessments completed. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** Inspirage's iHub CS cloud service is the company's cloud platform for all application integration, including both hybrid and on-premises integration. In addition, Inspirage has developed multiple apps, accelerators, tools and solutions. The company prioritizes reusable, automated solutions that support migration and managed services. Inspirage has developed prepackaged, integrated supply chain dashboards, self-service, and visualization, which are intended to give clients more insight and control. inCOM is the company's cloud orchestration manager of enterprise application workflows. The Inspirage 24x7 app, which is downloadable and secure, is a key tool for responsive managed services postimplementation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** The top five industries where Inspirage has cloud projects are high tech, consumer products, industrial machinery, automotive and life sciences. Sixty percent of Inspirage's consultants were former Oracle product development consultants and industry practitioners. This dual, hybrid model of industry and technology capabilities is Inspirage's approach to Oracle Cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** Inspirage's approach to OCM work leverages hybrid experts with both technology and domain knowledge. OCM is included with assessments, where the focus is on process/design impacts, readiness and communication. After go-live, ongoing OCM includes role-based training. Inspirage's experience reflects over 100 projects, and its practice includes SCM experts, Oracle-certified resources and virtual training assistants. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in organizational change management.

**SaaS Product and Domain Expertise:** All 402 OCA practitioners are Oracle Cloud-certified. Inspirage has a large installed base of on-premises Oracle clients that have not yet migrated to Oracle Cloud solutions. Inspirage has been an OCA co-development partner in SCM since 2012. It has won Oracle awards, including Specialized Partner of the Year in 2018 for SCM Cloud. It is accredited through the Oracle CEI program. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Inspirage has 12 offices around the world and provides support via cross-functional and cross-regional teams. The approach uses COEs plus a shared resources model. Support models are flexible in various combinations of locations — on-site, offshore and remote — tailored to client needs. Inspirage also offers several operational business models (e.g., SLA-based shared services, XaaS, ticket-based models or metered models) — all from a pool of shared resources. Most of its clients are headquartered in North America, with several headquartered in EMEA and Asia/Pacific. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** Inspirage has a tech-heavy approach to continuous improvement. It leverages technology to measure and monitor, opening the way to improvement. Automated regression testing is a part of ongoing updates and optimization. Inspirage cites its efforts to continually refresh its technology toolkit, and prioritizes incremental improvements to minimize disruptions. This approach is enabled with periodic project reviews and feedback mechanisms. The company has an internal goal of 100% customer satisfaction and believes that increased training and enhanced user experience are central to achieving that objective. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Given its geographic spread and lean resource allocation, Inspirage's responsiveness relies heavily on technology. The company cites its 24/7 managed services capabilities, which leverage its Inspirage 24x7 app, as central to increased responsiveness to clients. Subscription-based XaaS models are intended to provide flexibility and to allow for tailoring to clients' needs. Dedicated, focused resources provide critical technical and functional support to business users. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## IT Convergence

*Note: Due to the low survey response rate of IT Convergence (ITC) reference clients, we do not have a representative sample for this research. As a result, client reference data is not included in the ratings for this vendor.*

IT Convergence is primarily a good fit for midsize organizations in the U.S. and multinationals with Latin America and Asia/Pacific operations that are looking to technically migrate their ERP to Oracle Cloud in a cost-effective way.

**Resources:** IT Convergence has an estimated 316 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 0; EPM Cloud — 23; ERP Cloud — 240; HCM Cloud — 11; SCM Cloud — 42; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 43%; Latin America, 22%; EMEA, 1%; and Asia/Pacific, 34%.

**Client Geography:** The breakdown of IT Convergence's OCA services revenue is: North America, 61%; Latin America, 20%; EMEA, 8%; and Asia/Pacific, 11%.

**OCA Focus:** The OCA services engagements provide 12% of all Oracle revenue and utilize 44% of the Oracle practice FTEs for IT Convergence.

**Growth:** Gartner estimates that the year-over-year growth in IT Convergence's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 67%.

**Industry:** The top five industries where IT Convergence has cloud projects are industrial machinery, insurance, consumer products, professional services and banking.

**Client Size:** Of IT Convergence's OCA services revenue, 54% originates from clients with fewer than 1,000 employees; 43% from clients with 1,000 to 10,000 employees; and 3% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 0%; EPM Cloud, 5%; ERP Cloud, 83%; HCM Cloud, 2%; SCM Cloud, 9%; and other OCA-related products, 1%.

**Impact Assessment and Planning Capabilities:** IT Convergence is primarily an Oracle-focused services vendor. It notes over 1,000 clients and engagements in 60 countries for the Oracle practice as a whole. IT Convergence understands that cloud is a natural step for evolving or expanding from the traditional ERP paradigm, and is building on its base. It has completed almost 50 assessments, converting roughly 20% to implementation projects. The company has some analysis, data conversion, accelerator and testing tools, but investment is limited given the scale of the organization. Based on data collected for this research, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** IT Convergence harvests the assets from each Oracle Cloud engagement into its implementation toolbox, but has additionally invested in configuration assets, data conversion tools and testing accelerators. On multiple projects, it has also developed PaaS assets as part of the solution. Based on data collected for this research, Gartner analysts rate this vendor as below average in technology enablement.

**Industry and Process Expertise Capabilities:** For Oracle Cloud implementations, IT Convergence has only one industry sector with more than five clients. Although it is growing the numbers of implementations, IT Convergence is not focusing on any particular sector. Rather, it is servicing its current client base. As a result, the company does not have specialized knowledge in any particular industry. Instead, its experience is based on deep Oracle technical knowledge gleaned from certified consultants with over 10 years of expertise in Latin America, Brazil and China. Based on data collected for this research, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** As a boutique technology service vendor with a primary focus on Oracle, IT Convergence does not provide OCM consulting services. Its focus is on the implementation of the technology. IT Convergence's experienced staff is able to highlight the functional differences between the on-premises and cloud products. However, for some large-scale change management projects, clients need to manage the internal change themselves or engage an additional third party. To bridge this gap, IT Convergence has partnered with other third parties for OCM capability. Based on data collected for this research, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** At the time of writing, IT Convergence said that roughly a third of its consultants were certified in Oracle Cloud products, and that it was expecting that number to reach 50% by the end of 2018 and 100% in 2020. IT Convergence understands that the pivot to cloud is vital for its organization. The company's expertise lies almost entirely in ERP Cloud. Some consultants can work in SCM Cloud and EPM Cloud, but currently, the company's

focus is on enabling its Oracle EBS clients to transition to ERP Cloud. Based on data collected for this research, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** IT Convergence has been in the Oracle EBS implementation and application management business for over 20 years. In that time, it has built up a unique offering that supports the Oracle EBS needs of U.S.-based global companies operating in Latin America, Brazil and China. Delivery is through the Oracle Unified Method (OUM) for Cloud Applications Services, which IT Convergence has integrated into its own project management toolkit. IT Convergence has five offices in the U.S., Canada and Mexico, and three offices in Central America and South America. It also has three offices in Hyderabad, India; Shanghai, China; and Manila, Philippines. Based on data collected for this research, Gartner analysts rate this vendor as below average in operational excellence.

**Continuous Improvement Capabilities:** IT Convergence has worked closely with Oracle product management on Latin America-specific functionality. It has contributed on Brazil tax solutions and on e-invoicing for Colombia and Mexico. The company is complementing its support model with OCA. It offers "hours per month" support contracts, with an option of either dedicated or nondedicated staff, as a direct follow-on to implementation. Based on data collected for this research, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** IT Convergence describes itself as flexible on the location mix and pricing model for its engagements. It offers resource staffing, T&M engagements with IT Convergence management, fixed pricing, a total-project approach, a phased approach, assessments and proofs of concept (POCs). Based on data collected for this research, Gartner analysts rate this vendor as below average in responsiveness.

## KPIT-Birlasoft

*Note: In January 2019, KPIT merged with Birlasoft, and the combined entity announced that it will later split into two public companies: KPIT Technologies (focused on automotive engineering and mobility solutions) and Birlasoft (focused on enterprise digital business IT services). The following analysis is based on KPIT prior to the merger.*

KPIT is primarily a good fit for any size company in the Americas, the Middle East or Asia looking for a single SCM Cloud or ERP Cloud implementation.

**Resources:** KPIT has an estimated 421 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 37; EPM Cloud — 30; ERP Cloud — 75; HCM Cloud — 34; SCM Cloud — 245; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 13%; Latin America, 4%; EMEA, 2%; and Asia/Pacific, 81%.

**Client Geography:** The breakdown of KPIT's OCA services revenue is: North America, 57%; Latin America, 5%; EMEA, 8%; and Asia/Pacific, 30%.

**OCA Focus:** The OCA services engagements provide 11% of all Oracle revenue and utilize 22% of the Oracle practice FTEs for KPIT.

**Growth:** Gartner estimates that the year-over-year growth in KPIT's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 10%.

**Industry:** The top five industries where KPIT has cloud projects are consumer products, high tech, life sciences, travel and transportation, and oil and gas.

**Client Size:** Of KPIT's OCA services revenue, 5% originates from clients with fewer than 1,000 employees; 69% from clients with 1,000 to 10,000 employees; and 26% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 10%; EPM Cloud, 4%; ERP Cloud, 22%; HCM Cloud, 6%; SCM Cloud, 58%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** KPIT has conducted over 40 assessments and uses its Path to Cloud tool to simplify analysis of on-premises ERP processes. The company says this analysis helps to fast-track migration to ERP Cloud. KPIT actively works with clients to conduct POCs and demos, helping them migrate to the cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** KPIT has developed a number of accelerators, such as integration adapters, data cleansing and migration tools, and "cloud plus" solutions using RPA, IoT and mobility. Examples of tools include:

- Path to Cloud toolkit and ROI calculator for assessment

- Controlling and Managing Projects and Services (COMPASS) methodology and cloud integrations for implementation

- Oracle Cloud Upgrade Safe Testing (OCUST) and SmartAMS for management

Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** KPIT has experience in a number of industries. The top five industries where KPIT has cloud projects are consumer products, high tech, life sciences, travel and transportation, and oil and gas. It has developed several industry-specific tools for automotive; travel and transportation; utilities and energy; oil and gas; consumer and industrial products; high tech; and life sciences. Examples include ViziTrans, a digital supply chain solution for the logistics industry, and kDash, a solution for inventory optimization. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** KPIT lacks strong organizational change management capabilities. It has, however, built the Ignite OCM Framework for organizational change management with a focus on people, process and technology. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** KPIT claims to have delivered over 100 cloud engagements for SCM Cloud, ERP Cloud, CX Cloud Suite, HCM Cloud and EPM Cloud. It has a dedicated cloud lab and invests in Oracle Cloud certifications for its staff. It provides a fixed service offering for a quick implementation of OCA products. The company is investing in developing IoT cloud applications for fleet, asset and shop floor management. However, more focus seems to be on maintaining existing business rather than on pivoting to cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** KPIT has seven global delivery centers in India, the U.S., Brazil and the U.K. It has also established three Oracle Cloud COE operations in Raleigh, North Caroline; Pune, India; and Brazil. The company uses a SmartAMS delivery framework for standardized service delivery, and has a framework of best practices called COMPASS. COMPASS supports the planning and execution of KPIT's client engagements using agile principles for cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** KPIT provides SmartAMS, which is a set of low-cost, shared support services for OCA modules. It also provides OCUST, which is a subscription service to test OCA upgrades. Its Q-Prism framework helps to monitor project delivery for effort, schedule, cost and quality. Ongoing improvement in data quality is a key focus area for continuous improvement. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** KPIT has limited capability in responding to the changing business requirements of its clients. However, it focuses on developing close relationships with its clients through dedicated account and practice managers who leverage technology creatively. KPIT uses a common cloud support team for shared AMS customers. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Oracle

With its Oracle Consulting (OC) services, Oracle is primarily a good fit for clients engaged in complex, multi-OCA, multicountry, technical implementations, where its strong product knowledge and advanced tools can greatly simplify the project or solve issues that others cannot.

**Resources:** Oracle has an estimated 7,953 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 2,557; EPM Cloud — 362; ERP Cloud — 2,970; HCM Cloud — 1,434; SCM Cloud — 516; and other OCA-related products — 114.

The geographic breakdown of these FTEs is: North America, 16%; Latin America, 3%; EMEA, 35%; and Asia/Pacific, 46%.

**Client Geography:** The breakdown of Oracle's OCA services revenue is: North America, 52%; Latin America, 3%; EMEA, 32%; and Asia/Pacific, 13%.

**OCA Focus:** The OCA services engagements provide 29% of all Oracle revenue and utilize 33% of the Oracle practice FTEs for Oracle.

**Growth:** Gartner estimates that the year-over-year growth in Oracle's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 41%.

**Industry:** The top five industries where Oracle has cloud projects are consumer products, high tech, professional services, wholesale distribution and retail.

**Client Size:** Of Oracle's OCA services revenue, 36% originates from clients with fewer than 1,000 employees; 21% from clients with 1,000 to 10,000 employees; and 43% from clients with more than 10,000 employees.

**Product Focus:** The worldwide breakdown for Oracle's OCA services revenue by cloud product is as follows: CX Cloud Suite, 41%; EPM Cloud, 4%; ERP Cloud, 34%; HCM Cloud, 16%; SCM Cloud, 5%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Oracle Consulting is the assessment and implementation arm of the Oracle organization. OC indicates that its goal is to work closely with customers for business impact assessment and stakeholder analysis. OC uses design thinking to help clients reinvent their future and transform in the cloud. OC's access to the Oracle product development team helps to create a roadmap for clients, with early visibility into the new updates. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** Oracle claims that clients get at an added advantage by working with Oracle Consulting. OC partners with Oracle product development and has access to the full suite of integrated applications. OC uses Oracle Soar — a package of automated tools, training and professional services — to help customers migrate from Oracle's on-premises applications to OCA. Oracle Soar includes a discovery assessment, a process analyzer, automated data migration, configuration utilities and rapid integration tools. OC appears to have limited investments in tools and accelerators, but, clearly, it is leveraging Oracle Soar and Oracle True Cloud Method. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Oracle Consulting has expertise in all major sectors. The top five industries where it has cloud projects are consumer products, high tech, professional services, wholesale distribution and retail. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** Oracle Consulting has limited capabilities in change management and is currently building an organizationwide change management practice. OC partners with consulting companies to provide change management services for Oracle Cloud engagements. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Oracle Consulting is putting particular focus on CX Cloud Suite, ERP Cloud and HCM Cloud, and it uses a common delivery method across all OCA products and technology. Direct access to the Oracle product development team gives OC an advantage in helping clients, as it allows OC to offer clients early visibility into upcoming OCA product upgrades. There is little evidence of OC's investment in developing tools specific to OCA. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Oracle Consulting provides a dedicated team focused on implementation and adoption success. It has delivery centers in Egypt, India, Philippines, Poland and Romania. It uses Oracle True Cloud Method, a proprietary implementation methodology with an iterative approach, to deliver OCA. OC has an integrated cloud-training curriculum offered through Oracle University. The curriculum provides hands-on labs for business stakeholders, technical teams and end users. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** Oracle Consulting's focus on continuous improvement is achieved by working closely with clients to define success, analyze progress, improve delivery and measure success. The process focuses on defining regular checkpoints, performing project risk analysis, checking in with executive sponsors, implementing customer feedback, and comparing metrics to drive customer satisfaction and loyalty. OC further provides customers with access to business innovation, including AI/machine learning, blockchain and IoT. It is adopting new outcome-based pricing models to align with go-live and user adoption of cloud services. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** Oracle Consulting collates metrics and compares their objectives to ensure customer satisfaction and overall performance satisfaction. OC's goal is to make the customer an advocate for Oracle and, in this way, build referral business. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## PwC

PwC is primarily a good fit for U.S.-based organizations that are looking to evolve their legacy ERP and HCM applications with a business focus.

**Resources:** PwC has an estimated 2,525 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 141; EPM Cloud — 230; ERP Cloud — 1,288; HCM Cloud — 518; SCM Cloud — 348; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 70%; Latin America, 1%; EMEA, 11%; and Asia/Pacific, 18%.

**Client Geography:** The breakdown of PwC's OCA services revenue is: North America, 77%; Latin America, 1%; EMEA, 12%; and Asia/Pacific, 10%.

**OCA Focus:** The OCA services engagements provide 45% of all Oracle revenue and utilize 40% of the Oracle practice FTEs for PwC.

**Growth:** Gartner estimates that the year-over-year growth in PwC's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 83%.

**Industry:** The top five industries where PwC has cloud projects are banking, utilities and energy, high tech, consumer products, and retail.

**Client Size:** Of PwC's OCA services revenue, 14% originates from clients with fewer than 1,000 employees; 78% from clients with 1,000 to 10,000 employees; and 8% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 4%; EPM Cloud, 12%; ERP Cloud, 49%; HCM Cloud, 24%; SCM Cloud, 11%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** PwC focuses its delivery on business, experience and then technology — aka BXT. It sees the assessment and planning phase as critical to its execution approach. PwC completes this phase in three to 12 weeks, depending on scope. The company completed over 200 assessments in an 18-month period, and 90% of these were converted to transformation programs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in impact assessment and planning.

**Technology Enablement Capabilities:** PwC has over 6,000 FTEs in its Oracle practice. Over 2,500 of these FTEs are involved in OCA engagements. PwC understands the need to focus on cloud, and is actively reskilling its workforce for digital proficiency. Because the workforce includes transformation and change management resources, the proportion of Oracle Cloud certifications is lower than in the purely technical-focused vendors. However, the certification numbers are still strong, especially in ERP Cloud and HCM Cloud. PwC harvests reusable intellectual property from projects, and its LEAP repository includes:

- Risk, compliance and tax capabilities

- Standard industry adapters for third-party products

- Use cases leveraging RPA, IoT, AI and blockchain

Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** PwC is known for the tax, risk, security and compliance capabilities that it brings alongside its technology services. Its LEAP repository defines Level 1 through 3 industry-leading processes, future-state digital organization design, industry benchmarks and target KPIs that are incorporated into 11 industry models as preconfigured Oracle systems. PwC provides OCA services across all industry verticals, but it has invested in several key industry sectors where it has built Oracle Cloud model systems. The top five industries where PwC has cloud projects are banking, utilities and energy, high tech, consumer products, and retail. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in industry and process expertise.

**OCM Capabilities:** OCM and PPM capabilities are embedded in the program delivery of PwC's integrated solutions. The PPM practice helps clients plan complex transformation programs. It assists with scope and benefits management, stakeholder alignment, program governance, delivery planning, financial management, risk and quality control, supplier management, and program assurance. PwC's people and organization practice offers organization design services, as well as sophisticated change management and communications. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as above average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** PwC has completed implementations in all five OCA products, but predominantly in EPM Cloud, ERP Cloud and HCM Cloud. In the financial and human resource domains, PwC has very strong expertise in each functional area, both within the Oracle Cloud practice and within the organization as a whole. There is room to increase technical certification levels within each OCA product. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** PwC has seven technology delivery centers worldwide and 31 experience centers to support digital delivery. However, the majority of cloud engagements have been centered on North America, and 70% of the cloud delivery staff have been based in North America. The Oracle practice is mature and has established processes and tools, such as Phoenix (global workflow platform) and XDP (data management platform). The PwC Digital Academy training programs are accelerating digital upskilling and citizen-led innovation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** The PwC cloud support model guides continuous innovation and adoption of new features. The global data platform (XDP) provides global access to new data technologies, storage mechanisms and automated preparation capabilities. Working with PwC's Emerging Technology Lab, the PwC Oracle practice develops innovative use cases with emerging technologies on the Oracle platform, helping clients extend the value of their Oracle investments.

Most engagements have been focused on assessment, implementation and change management, and only a small proportion of revenue has been through application management contracts. However, as overall cloud adoption increases, PwC is well-placed to deliver against this new

support model focused on continuous updates. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** PwC is committed to its cloud customers' success through its Cloud Care support model, where it helps clients evaluate and adopt new feature releases and drive continuous innovation on their Oracle platform. The one area of consistent feedback from references is the need to improve the total cost of services. All reference clients see value, but they are looking for better leverage of low-cost locations and more fixed-price projects to get to a lower "sticker price" without losing quality. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## TCS

TCS is primarily a good fit for large organizations looking for a reliable technology partner to support complex upgrades and evolution of their CX and HCM legacy platforms.

**Resources:** TCS has an estimated 931 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 219; EPM Cloud — 50; ERP Cloud — 166; HCM Cloud — 303; SCM Cloud — 193; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 14%; Latin America, 0%; EMEA, 12%; and Asia/Pacific, 74%.

**Client Geography:** The breakdown of TCS's OCA services revenue is: North America, 53%; Latin America, 0%; EMEA, 46%; and Asia/Pacific, 1%.

**OCA Focus:** The OCA services engagements provide 5% of all Oracle revenue and utilize 5% of the Oracle practice FTEs for TCS.

**Growth:** Gartner estimates that the year-over-year growth in TCS's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 52%.

**Industry:** The top five industries where TCS has cloud projects are telecommunications, industrial machinery, banking, engineering and construction, and travel and transportation.

**Client Size:** Of TCS's OCA services revenue, 1% originates from clients with fewer than 1,000 employees; 24% from clients with 1,000 to 10,000 employees; and 76% from clients with more than 10,000 employees. (Note: Percentages do not add up to 100% because of rounding.)

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 25%; EPM Cloud, 4%; ERP Cloud, 21%; HCM Cloud, 35%; SCM Cloud, 15%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Assessments employ TCS's OCM Impact Assessment Tool, which accelerates identification and analysis of change impacts for implementation. This capability includes readiness assessment, risk assessment and stakeholder management. Technical assessments focus on detecting impact, uncovering breaking points and

determining resolution. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** TCS is making substantial investments in new technologies focused on cloud (e.g., Digital RACE for faster cloud adoption, and Digital FAST for digitizing the finance office). As part of the TCS Integrated Cloud Solution for Oracle, TCS has developed multiple industry- and process-specific assets focused on a quick start, data migration and process solutions. TCS delivers prebuilt finance data models, dashboards and reports focusing on business functionalities. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** The top five industries where TCS has cloud projects are telecommunications, industrial machinery, banking, engineering and construction, and travel and transportation. Accelerators and tools are typically developed specific to industries. TCS collects KPIs and metrics across various types of Oracle engagements and industries. These KPIs and metrics serve as design input for configuring delivery teams in terms of skills, competencies, locations, tools and processes. TCS's global Oracle COE leads milestone reviews of projects and programs. It performs an independent audit of programs to ensure delivery consistency. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** TCS's OCM framework is a full life cycle approach that includes strategy, implementation, readiness, business impacts and communication. The global methodology is intended to bring a comprehensive and contextual alignment for the client. The COE is aligned to Oracle EBS. TCS has over 400 OCM architects and over 6,000 trained change and program managers. OCM tools include over 3,800 Change Impacts that accelerate the change journey, 40 intervention-based tools, 15 outcome-based accelerators and leadership diagnostics. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** TCS offers a full-stack Oracle Cloud service portfolio. The company has reorganized internally along functional OCA areas. This structure reinforces capabilities in single-OCA implementations but can present some challenges for multi-OCA ones. The Oracle Cloud-specific developments include 39 solutions, 22 tools, and five platforms. Cloud accelerators and integrators are industry-specific. Eight solutions are co-developed. Joint asset creation with Oracle is prioritized, as are POCs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** TCS has a mature Global Network Delivery Model (GNDM) staffed with 690 FTEs in Asia/Pacific, 108 in EMEA and 133 in Americas. This is a relatively modest amount for a company of TCS's size. The GNDM leverages standardized statements of work, along with standardized measures at operational and tactical levels. TCS uses its own metrics-driven quality management system, called integrated Quality Management System (iQMS). TCS's automated project procedures and quality control aid in tracking and reporting on project health and process compliance at different levels. TCS's Oracle practice continues to focus on skills development. It is investing in employee competency building, with a specific focus on cloud, digital

and agile skills. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** TCS's "AMS reimagined" delivery model has a built-in commitment to deliver approximately 5% year-over-year benefits through continuous improvement initiatives. TCS has made significant improvements in processes and tools to achieve this goal. Its proprietary iQMS has built-in processes and methods to ensure that project teams are constantly working on ideas that generate improvements for the customer. These include root cause analysis, repetitive defect analysis, performance improvements and improvements on business KPIs.

TCS's metrics program, which is part of iQMS, monitors continuous improvement metrics such as incident reduction and SLA improvement. In addition, TCS uses its proprietary Rigor in Operations (RiO) approach in all its AMS engagements. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** TCS has adjusted to be able to commit to business outcomes. TCS has also broadened its palette of pricing types (e.g., POC-based, self-finance-based and deferred-transition-based). Newer pricing models and engagement models also include offerings that incorporate consulting and system integration. TCS's Machine First Delivery Model (MFDM) goal is to enable service transformation through its "eliminate, automate and optimize" framework. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in responsiveness.

## Tech Mahindra

*Note: Due to the low survey response rate of Tech Mahindra reference clients, we do not have a representative sample for this research. As a result, client reference data is not included in the ratings for this vendor.*

Tech Mahindra is primarily a good fit for small and midsize businesses in select industries — such as telecommunications, high tech, banking and retail — moving from on-premises Oracle to Oracle Cloud.

**Resources:** Tech Mahindra has an estimated 1,063 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 266; EPM Cloud — 104; ERP Cloud — 173; HCM Cloud — 252; SCM Cloud — 121; and other OCA-related products — 147.

The geographic breakdown of these FTEs is: North America, 10%; Latin America, 1%; EMEA, 7%; and Asia/Pacific, 82%.

**Client Geography:** The breakdown of Tech Mahindra's OCA services revenue is: North America, 25%; Latin America, 2%; EMEA, 18%; and Asia/Pacific, 55%.

**OCA Focus:** The OCA services engagements provide 12% of all Oracle revenue and utilize 12% of the Oracle practice FTEs for Tech Mahindra.

**Growth:** Gartner estimates that the year-over-year growth in Tech Mahindra's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 150%.

**Industry:** The top five industries where Tech Mahindra has cloud projects are telecommunications, banking, media, retail and public sector.

**Client Size:** Of Tech Mahindra's OCA services revenue, 43% originates from clients with fewer than 1,000 employees; 38% from clients with 1,000 to 10,000 employees; and 19% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 27%; EPM Cloud, 10%; ERP Cloud, 16%; HCM Cloud, 25%; SCM Cloud, 14%; and other OCA-related products, 8%.

**Impact Assessment and Planning Capabilities:** The overall number of cloud engagements completed is low but growing. As a result, the number of assessments completed is also low. In addition, there isn't a focus on stand-alone assessments as a way to promote new engagements. Tech Mahindra targets its incumbent Oracle clients with its assessments as the first phase of the cloud implementation journey. Based on data collected for this research, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** Although not a large as some of the competitors in this analysis, Tech Mahindra does have enough scale to invest in organizationwide technologies, and to harvest tools and techniques from engagements. It has its own proprietary platforms for RPA (UNO) and AI/machine learning (TACTiX), which can be integrated with OCA. Tech Mahindra has also developed ERP-EDGE Plus as a challenger to the Oracle Soar transition automation tool. Based on data collected for this research, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** The entire Oracle practice at Tech Mahindra has grown to almost 9,000 FTEs by focusing on the telecommunications and high-tech industries. The cloud engagements have followed that profile, but with the addition of healthcare and banking, financial services and insurance (BFSI) business. Tech Mahindra has harvested more than 15 industry solutions, such as Sales, Rating & Operations (SRO); Apparel xPress; Motor Vehicle Enterprise Solution (MOVES); TRAC; MuCICX; CAB; and Service Knowledge Management Solution (SKMS). These solutions are jointly marketed and recommended by Oracle. Based on data collected for this research, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** Tech Mahindra does not currently have the capability for consulting-led business transformation deals, but it is building a consulting layer for digital supply chain transformation. It does partner, as needed, with consulting firms that provide the domain and transformation expertise required. Based on data collected for this research, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Tech Mahindra has a good proportion of its cloud staff certified on the five OCA products. Although the overall project numbers are low, Tech

Mahindra has completed projects in all five areas and has allocated strong technical depth on each of the product implementations completed. It is relatively strong in CX Cloud Suite and approaches the CX area through a product-agnostic group focused on CX. Based on data collected for this research, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Tech Mahindra is growing technology modernization capability through its Digital, Automation, Verticalization, Innovation and Disruption (DAVID) framework. It has lofty aspirations for how it can grow this part of the practice. It is targeting large, multi-OCA transformational deals. The company can support these deals if it partners with third parties for OCM capabilities. However, it does not have wide geographic spread and is not a good fit for continental Europe, Australia and New Zealand, or Latin America clients. Based on data collected for this research, Gartner analysts rate this vendor as below average in operational excellence.

**Continuous Improvement Capabilities:** Tech Mahindra has a mature Oracle practice that supports the on-premises products. It currently sees management of the cloud-based applications products in those terms. It is looking to optimize the operation of support through automation, improved knowledge management, ticket reduction, Six Sigma and other initiatives. However, it has not yet considered radical change to the overall support model to deal with the smaller support footprint and ongoing quarterly updates. Based on data collected for this research, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** Tech Mahindra has a loyal customer base and is client-focused. It is responsive to clients' needs and often goes "the extra mile" in terms of service. However, in the cloud space, it is behind its competitors in taking the lead with new engagement models, offering new delivery models and adjusting to cloud. Based on data collected for this research, Gartner analysts rate this vendor as below average in responsiveness.

## TransSys

TransSys is primarily a good fit for small and midsize businesses — especially in the Middle East and Africa — looking for single- or multi-OCA implementations across the full product set.

**Resources:** TransSys has an estimated 278 dedicated Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 39; EPM Cloud — 14; ERP Cloud — 74; HCM Cloud — 57; SCM Cloud — 22; and other OCA-related products — 72.

The geographic breakdown of these FTEs is: North America, 0%; Latin America, 0%; EMEA, 27%; and Asia/Pacific, 73%.

**Client Geography:** The breakdown of TransSys' OCA services revenue is: North America, 0%; Latin America, 0%; EMEA, 80%; and Asia/Pacific, 20%.

**OCA Focus:** The OCA services engagements provide 65% of all Oracle revenue and utilize 60% of the Oracle practice FTEs for TransSys.

**Growth:** Gartner estimates that the year-over-year growth in TransSys' OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 0%.

**Industry:** The top five industries where TransSys has cloud projects are banking, travel and transportation, public sector, retail, and professional services.

**Client Size:** Of TransSys OCA services revenue, 48% originates from clients with fewer than 1,000 employees; 52% from clients with 1,000 to 10,000 employees; and 0% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 18%; EPM Cloud, 5%; ERP Cloud, 34%; HCM Cloud, 27%; SCM Cloud, 16%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** In a departure from much of the rest of the market, TransSys does not offer assessment as a separate service offering. Rather, TransSys bundles assessment as part of its Adopt Cloud Effectively (ACE) offering for cloud user adoption and support. This offering's recent start includes assessment and planning tools specific to each Oracle Cloud product. The offering has a technology focus. It finds solution gaps, identifies knowledge gaps and tracks benchmarking utilization KPIs against similar regional deployment benchmarks. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** By harvesting and reusing knowledge from engagements, the company has developed the Rapidly Delivered Industry Cloud Solution (RaDICS) for select industries, such as airlines and telecommunications. According to the company, this framework can reduce implementation time by 34% to 40%. TransSys' technology enablement focus is on leveraging RPA to drive key repetitive and mundane tasks — such as self-service HR requests and customer service trouble tickets — to virtual assistants for handling. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in technology enablement.

**Industry and Process Expertise Capabilities:** The top five industries where TransSys has cloud projects are banking, travel and transportation, public sector, retail, and professional services. TransSys has developed rapid deployment accelerators by extending Oracle best-practice flows with industry process flows and relevant key configuration inputs. These include implementation accelerators and extensions to manage operations (e.g., iDeal for real estate property management, and REVAC for airlines). Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** TransSys has limited OCM capabilities compared with its peers, and approaches Oracle Cloud adoption change management with a partnering model. Rather than deploy TransSys OCM resources, this model employs either the client's own resources or a partner's expertise to deliver OCM. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** TransSys is an Oracle-only solutions and services vendor with its work evenly divided between on-premises and the cloud. The focus is on single-OCA implementations in selected industries and geographies (e.g., the Middle East, East Africa and Asia). The CX Cloud Suite, ERP Cloud and HCM Cloud practices can supplement resources as needed from the Infratech and PaaS teams. Each of these three OCA practice areas has roughly 20 Oracle Cloud-certified product experts and is posting certification growth of 10% per quarter. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** TransSys has invested in multilocation delivery centers in order to have both an accessible pool of consultants in close proximity to clients and a strong development center offshore. Cloud solutions are delivered from centers in Chennai, India; Hyderabad, India; and Malaysia. Chennai and Hyderabad also act as innovation centers. COE initiatives help manage both talent acquisition and talent retention.

A named delivery manager and project manager are assigned early in the engagement process, before the contract is signed. This helps with bench management, knowledge management, client satisfaction and stakeholder management. TransSys technology development uses a factory model, with a shared set of resources responsible for delivering objects based on functional specifications. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in operational excellence.

**Continuous Improvement Capabilities:** TransSys has a unified organizational structure. This model prioritizes bid-to-deliver resource management responsibility. The focus is on outcomes, and senior COE resources are activated to update teams on new features. COEs are responsible for building both delivery assets and internal knowledge assets. Senior leaders with delivery experience are assigned to ensure the assets are relevant to their objective and are readily usable by consultants on projects. The support services delivery organization reports into the global delivery leader, enabling a single point of control for consistent solution delivery and a pathway to continuous improvement. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** TransSys has developed multiple support models in order to respond to evolving regional customer needs. These include dedicated support models with named consultants that provide end-to-end support to customers addressing adoption issues, usage issues and version upgrades. This support can be delivered on-site, offshore or in a hybrid manner. There are also shared and ticket-based support offerings, both of which use various models of shared resources and metering, allowing for maximum flexibility to accommodate customers' changing needs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in responsiveness.

## Wipro

Wipro is primarily a good fit for large global companies looking for a long-term cloud engagement partner with cloud investments and digital solutions that can deliver business outcomes around new technologies.

**Resources:** Wipro has an estimated 1,477 dedicated services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 453; EPM Cloud — 71; ERP Cloud — 436; HCM Cloud — 420; SCM Cloud — 97; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 22%; Latin America, 3%; EMEA, 14%; and Asia/Pacific, 61%.

**Client Geography:** The breakdown of Wipro's OCA services revenue is: North America, 58%; Latin America, 4%; EMEA, 28%; and Asia/Pacific, 10%.

**OCA Focus:** The OCA services engagements provide 9% of all Oracle revenue and utilize 11% of the Oracle practice FTEs for Wipro.

**Growth:** Gartner estimates that the year-over-year growth in Wipro's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 66%.

**Industry:** The top five industries where Wipro has cloud projects are high tech, telecommunications, banking, industrial machinery and retail.

**Client Size:** Of Wipro's OCA services revenue, 7% originates from clients with fewer than 1,000 employees; 25% from clients with 1,000 to 10,000 employees; and 68% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 30%; EPM Cloud, 5%; ERP Cloud, 30%; HCM Cloud, 28%; SCM Cloud, 7%; and other OCA-related products, 0%.

**Impact Assessment and Planning Capabilities:** Wipro has executed over 70 cloud assessments, which have resulted in more than 40 implementations. Wipro uses its own Cloud Migration Assessment (CMA) methodology, which determines cloud readiness by assessing seven key parameters. In addition to technical assessment, Wipro can guide clients through business case creation and migration strategies. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in impact assessment and planning.

**Technology Enablement Capabilities:** Wipro has more than 350 cloud assets and has developed prebuilt accelerators for each stage of the cloud transformation cycle. It leverages its organizationwide AI and machine learning capabilities to develop smart processes for clients within each cloud implementation. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Wipro has a large Oracle practice of more than 13,000 FTEs, covering a wide variety of industries. Its Oracle Cloud practice is a subset of that overall Oracle capability. The cloud implementations mirror that with a significant client base in over 11 industries. Wipro's Jumpstart Kit for Oracle Cloud provides preconfigured Level 1 through Level 5 process maps for industries such as banking, utilities, telecommunications, retail and manufacturing. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in industry and process expertise.

**OCM Capabilities:** Wipro utilizes a Dynamic Change methodology for OCM, including the toolkits Change App and Knowledge Management (KM) Framework. It focuses on the change enablement, communication and adoption requirements resulting from the technology change. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** The Oracle service practice at Wipro understands the importance of cloud. It is actively moving the workforce to cloud skills through programs, such as Career2Oracle Cloud, and monitoring the workforce's cloud-readiness status (self-assessed at 43% at the time of this writing). Wipro has good engagement numbers (assessments, implementations and application management) across all five OCA products, and it is relatively very strong in CX Cloud Suite compared with the other vendors in this analysis. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Wipro as an organization is investing in localization to provide local resources for engagements. In North America and EMEA, it is increasing its local staff to support same-time-zone/real-time activities with clients in those locations. The company has a very mature Oracle services delivery organization and Wipro-level initiatives that can be leveraged for cloud. The cloud services are new though and require strong actions to pivot into those services, and those initiatives may not be aligned with the corporate initiatives. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in operational excellence.

**Continuous Improvement Capabilities:** The Wipro Oracle Cloud team understands how the cloud application upgrade cycle differs. Its EasyU.Cloud tool helps accelerate the update cycle, leading to a 30% reduction in effort to assess the impact of an update. Wipro is also harvesting best practices from its cloud-native acquisitions, such as Appirio, to optimize the delivery model for OCA management. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in continuous improvement.

**Responsiveness Capabilities:** Wipro is responding to clients' new needs (resulting from cloud transformations) with new engagement and delivery models. It offers:

- Business process as a service (BPaaS) bundled with cloud applications
- A multisupplier management framework (ServiceNXT)
- A business value meter for ongoing continuous updates
- An Oracle Cloud COE with rapid response teams and flexible delivery models

Included in these multiple models are shared services options with no dedicated FTEs, dedicated FTE-based delivery centers, crowdsourced delivery and hybrid combinations of these to suit client needs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in responsiveness.

## Zensar

Zensar is primarily a good fit for small and midsize enterprises looking for a single ERP Cloud implementation and for which remote delivery is a plus.

**Resources:** Zensar has an estimated 93 Oracle Cloud Applications services FTEs worldwide. They are dedicated by product as follows: CX Cloud Suite — 2; EPM Cloud — 12; ERP Cloud — 54; HCM Cloud — 14; SCM Cloud — 11; and other OCA-related products — 0.

The geographic breakdown of these FTEs is: North America, 38%; Latin America, 2%; EMEA, 11%; and Asia/Pacific, 49%.

**Client Geography:** The breakdown of Zensar's OCA services revenue is: North America, 77%; Latin America, 0%; EMEA, 23%; and Asia/Pacific, 0%.

**OCA Focus:** The OCA services engagements provide 4% of all Oracle revenue and utilize 3% of the Oracle practice FTEs for Zensar.

**Growth:** Gartner estimates that the year-over-year growth in Zensar's OCA services revenue from fiscal-year 2017 through fiscal-year 2018 was 23%.

**Industry:** The top five industries where Zensar has cloud projects are retail, public sector, professional services, life sciences and high tech.

**Client size:** Of Zensar's OCA services revenue, 7% originates from clients with fewer than 1,000 employees; 93% from clients with 1,000 to 10,000 employees; and 0% from clients with more than 10,000 employees.

**Product Focus:** The breakdown for worldwide OCA services revenue by product is: CX Cloud Suite, 0%; EPM Cloud, 18%; ERP Cloud, 63%; HCM Cloud, 19%; SCM Cloud, 0%; and other OCA-related, 0%.

**Impact Assessment and Planning Capabilities:** Zensar has limited capabilities in Oracle Cloud impact assessment and planning. It provides cloud readiness assessment, a ROI calculator, discovery and dependency mapping, and a customized roadmap using its Cruise to Cloud accelerator. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in impact assessment and planning.

**Technology Enablement Capabilities:** Zensar has Cruise to Cloud, an end-to-end cloud adoption platform that provides cloud assessment, data migration, an integration migrator and regression test scripts. It uses a number of OCA extensions covering both horizontal business processes and industry-specific processes to help clients migrate to the cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in technology enablement.

**Industry and Process Expertise Capabilities:** Zensar has limited cloud adoption in its focus industries, and is building domain expertise in financial, supply chain, manufacturing, human capital and CRM processes. It is focused on a limited set of industries and has developed industry templates for the hospitality, high-tech and medical-technology verticals. Based on data collected

for this research and input from reference clients, Gartner analysts rate this vendor as below average in industry and process expertise.

**OCM Capabilities:** Zensar has limited OCM capabilities. It has, however, change management templates for HCM and financial implementations. It focuses on providing cloud advocacy to its existing customers moving to Oracle Cloud. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in organizational change management.

**SaaS Product and Domain Expertise Capabilities:** Zensar has expertise in ERP Cloud, SCM Cloud and HCM Cloud. It uses preconfigured solutions, including enterprise structures; accounting standardization; reporting and consolidation; approvals and workflows; and KPIs and analytics for cloud migration. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as average in SaaS product and domain expertise.

**Operational Excellence Capabilities:** Zensar has 14 delivery centers in North America, Europe, the U.K., South Africa and Asia/Pacific, and over 300 certified cloud application experts. The company has partnered with key educational institutes in India, the U.S. and South Africa to hire and train Oracle Cloud experts. It has also established Zen Academy for knowledge acquisition and dissemination. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in operational excellence.

**Continuous Improvement Capabilities:** Zensar provides managed services using its ServiceEDGE tool, which helps drive service quality, efficiency, agility and business impact. It uses a testing as a service (TaaS) platform to help customers with regression testing for Oracle upgrades. Zensar is also providing RPA-based cloud solutions to automate tedious activities and drive efficiency. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in continuous improvement.

**Responsiveness Capabilities:** Zensar adopts a number of approaches, such as business KPI tracking, flexible commercial models and flexible resource models, to help customers respond to changing business needs. Based on data collected for this research and input from reference clients, Gartner analysts rate this vendor as below average in responsiveness.

## Context

This Critical Capabilities research is a companion note to "Magic Quadrant for Oracle Cloud Application Services, Worldwide." It focuses on eight critical capabilities for success across four use cases:

- Assessment and strategy

- Simple implementation (i.e., single-OCA)

- Complex implementation (i.e., multi-OCA)

- OCA management

This Critical Capabilities addresses the worldwide Oracle Cloud Applications services capabilities of vendors that meet our criteria for inclusion. The evaluation of vendors in this Critical Capabilities is based on factors determined by Gartner as being relevant to the market for OCA services. This Critical Capabilities is a point-in-time analysis, with all the vendor profiles reflecting the status as of December 2018. Quantitative data collected was for a 12-month period ending on 30 June 2018.

When considering Oracle implementation partners for an RFI or an RFP, clients are advised not to simply select vendors at the top of the Critical Capabilities listing. A vendor may appear in different positions for different use cases, based on Gartner's extensive analysis across the full-service life cycle in many industries and other criteria. However, for any given deal, a client company's selection criteria will be narrower and more specific. Consequently, vendors positioned anywhere along the use cases may prove to be more appropriate for a particular engagement.

Additionally, because the inclusion criteria in this research results in the analysis of the largest vendors in the OCA services market, clients should not disqualify any potential competitors simply because they do not appear in this Critical Capabilities report. Other IT services vendors not evaluated in this report may present better alternatives for your business requirements. A Gartner analyst can help with a shortlist of the most suitable candidates based on client requirements.

Use the Critical Capabilities report as a tool to help inform your shortlist and evaluation of vendors. However, do not discount a vendor simply because of its use-case placement, or because it does not appear in this research.

## Product/Service Class Definition

Gartner defines the Oracle Cloud Applications services as only those services associated with the Oracle Cloud Applications products. To qualify, each vendor project must have an "anchoring" OCA product from at least one of the products identified in the Oracle Cloud Excellence Implementer (CEI) program on the Oracle PartnerNetwork website. Currently, this is version 3787137 and consists of cloud service modules that cover CX, EPM, ERP, HCM and SCM.

This Critical Capabilities evaluates the worldwide capabilities of vendors. It provides metrics grouped within North America, Latin America, Asia/Pacific and Japan, and EMEA based on the Oracle CEI regional geographies.

This Critical Capabilities does not cover other Oracle services, such as:

- All application services related to Oracle products outside the Oracle Cloud Applications identified previously (e.g., NetSuite is not included in this analysis)

- All activities relating to business process outsourcing (BPO)

- All ongoing infrastructure and hosting-only services

- Any physical — on-premises and cloud — compute assets' associated revenue

- Product-only activities, such as from the resale of Oracle licenses or the vendor's third-party products

The lists of industries included in this research can be found in Note 1.

## Critical Capabilities Definition

### Impact Assessment and Planning

The vendor's ability to assist the client in assessing the impact of a move to an OCA product. This work covers both business process and technical impacts, resulting in a business case, a recommended implementation approach and a high-level plan for moving to the OCA product.

Impact assessment and planning capabilities are measured against:

- The number of assessments undertaken and the conversion of those to implementation projects

- The vendor's investments in accelerators, tools and reusable assets to provide a customized assessment

- The vendor's value-add in business process and IT assessment

### Technology Enablement

The vendor's ability to implement the OCA product to enable business benefits. Vendors with more experience and expertise in Oracle Cloud Applications will be better able to address this criterion.

Technology enablement capabilities are measured against:

- The vendor's investments in new technology, tools and reusable assets

- The vendor's aptitude in implementation solutions and delivery

- Client examples of the solutions delivered across multiple regions and industries

### Industry and Process Expertise

The vendor's ability to implement solutions embedded with intellectual capital and understanding of the client's industry.

Industry and process expertise capabilities are measured against:

- The vendor's investments in industry and process assets — such as preconfigured processes and industry-specific enhancements

- The way that business knowledge is captured and maintained within the Oracle implementation delivery organization

- The number of industry-specific Oracle Cloud Applications experts

## Organizational Change Management

The vendor's ability to manage the change (organizational and process) of the new solution within the client's organization.

Organizational change management capabilities are measured against:

- Investments in business OCM methodologies and resources

- Ability (and track record) to manage the project on time and on budget, to meet business objectives, and to enforce program governance

- Ability (and track record) to help different stakeholders agree on a set of business objectives and standard processes, and to successfully design and implement OCM

## SaaS Product and Domain Expertise

The vendor's ability to implement the specific domain solutions and to demonstrate a deep understanding of the processes and characteristics of the OCA product area.

SaaS product and domain expertise capabilities are measured against:

- Knowledge of best practices and requirements common within each OCA product area (i.e., CX, ERP, EPM, HCM and SCM)

- Preconfigured solutions for example problems found within implementations

- Method of capturing and maintaining domain knowledge within the Oracle Cloud implementation delivery organization

- Number of certified product-specific OCA experts

## Operational Excellence

The vendor's ability to efficiently operate the technology and to integrate the technology with its own ecosystem.

Operational excellence capabilities are measured against:

- The investments in resourcing globally, regionally and by country. These investments also subsume talent management, staff attraction and retention, knowledge management, partnerships with clients, and educational institutions to ensure continuity.

- The investment in, and delivery against, standardized measures at the following levels:

  - Operational (e.g., availability, response, resolution, transaction performance and productivity)

  - Tactical (e.g., business process performance, business outcome units and client satisfaction)

## Continuous Improvement

The vendor's ability to introduce and realize continuous improvement for the client.

Continuous improvement capabilities are measured against:

- The ability to support the frequent upgrades of the OCA products by Oracle.

- The investments in embedded mechanisms to continuously improve measures and performance against measures.

- The investments in automation across the Oracle management services stack. This criterion also implies industry-specific automation investments.

- The investments in optimizing the service delivery organization, processes and procedures, and documentation (like operation manuals and service delivery plans). This criterion also covers how improvement is identified and controlled.

## Responsiveness

The vendor's ability to respond to changing business dynamics and changing support needs within the client's organization and market.

Responsiveness capabilities are measured against:

- Which offerings and options are provided for the support delivery model

- How much flexibility there is to change and rescale support agreements over time

- How ongoing client requests are effectively, efficiently and rapidly delivered

- How business and client knowledge is captured and maintained within the ongoing OCA management delivery organization

## Use Cases

### Assessment and Strategy

Assessments are discrete, project-based services to evaluate the impact of either a new OCA implementation or a migration from a legacy Oracle platform to an OCA product.

These services include consulting and potentially POCs. They cover analysis of all products, applications, databases, analytics, middleware, mobile technologies and other technologies (on-premises and cloud-based) needed to understand what is required in order to transition to an OCA product.

Assessment services include:

- Impact assessment for both the business process and the technical environment

- Roadmap and business case development

## Implementation — Simple

Simple implementations involve a single OCA product, such as CX Cloud Suite, EPM Cloud, ERP Cloud, HCM Cloud or SCM Cloud.

Implementations are discrete, project-based deployments of OCA products without ongoing OCA management responsibilities.

These services include consulting, development and integration. They cover all services contracted as part of the OCA implementation.

## Implementation — Complex

Complex implementations involve two or more of the following OCA products: CX Cloud Suite, EPM Cloud, ERP Cloud, HCM Cloud and SCM Cloud.

Implementations are discrete, project-based deployments of OCA products without ongoing OCA management responsibilities.

These services include consulting, development and integration. They cover all services contracted as part of the OCA implementation.

## Management

Management, aka OCA management or Oracle Cloud AMS, comprises the ongoing services provided in support of an implemented OCA product.

These services may be provided as part of a multiyear agreement and managed against defined quality metrics. Alternatively, they may be part of a contracted arrangement to provide resources as needed to support and upgrade the implemented OCA product.

# Inclusion Criteria

The inclusion criteria for this Critical Capabilities research are the same as the inclusion criteria for the companion Magic Quadrant. The criteria for inclusion of service vendors for this Critical Capabilities are based on a combination of quantitative and qualitative measures.

The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

**Quantitative Criteria**

Vendors included in this Critical Capabilities must satisfy *all four* of the following quantitative criteria:

- A minimum of 20 staff certifications in each of at least two Oracle Cloud Applications products

- A minimum of 10 implementation projects completed in each of two Oracle Cloud Applications products

- A minimum of two of four geographies with customers that have had implementation projects completed

- A minimum of $10 million *annual* worldwide revenue for Oracle Cloud Applications services

**Qualitative Criteria**

- Overall market interest in and visibility of the vendor as determined by serious consideration for selection from enterprise clients

- Gartner analysts' interactions with enterprise buyers, which reveal interest in specific Oracle Cloud Applications vendors

- Broad capabilities and technical/package expertise in combination with domain and process knowledge of the Oracle Cloud Applications suite

Table 1. Weighting for Critical Capabilities in Use Cases

| Critical Capabilities | Assessment and Strategy | Implementation — Simple | Implementation — Complex | Management |
|---|---|---|---|---|
| Impact Assessment and Planning | 45% | 0% | 0% | 0% |
| Technology Enablement | 0% | 50% | 20% | 0% |
| Industry and Process Expertise | 20% | 0% | 30% | 0% |
| Organizational Change Management | 25% | 0% | 30% | 15% |
| SaaS Product and Domain Expertise | 10% | 50% | 20% | 10% |
| Operational Excellence | 0% | 0% | 0% | 35% |
| Continuous Improvement | 0% | 0% | 0% | 20% |
| Responsiveness | 0% | 0% | 0% | 20% |
| **Total** | **100%** | **100%** | **100%** | **100%** |

As of 4 March 2019

Source: Gartner (May 2019)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighed in terms of its relative importance for specific product/service use cases.

## Critical Capabilities Rating

Each of the products/services has been evaluated on the critical capabilities on a scale of 1 to 5; a score of 1 = poor (most or all defined requirements are not achieved), while 5 = outstanding (significantly exceeds requirements).

Table 2. Product/Service Rating on Critical Capabilities

| Critical Capabilities | Accenture | Capgemini | Cognizant | Deloitte | DXC Technology | Evosys | IBM | Infosys | Inspirage | IT Convergence | KPIT-Birlasoft | Oracle | PwC | TCS | Tech Mahindra | TransSys | Wipro | Zensar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Impact Assessment and Planning | 4.2 | 2.6 | 3.1 | 4.3 | 3.1 | 2.9 | 3.1 | 3.7 | 2.9 | 2.6 | 2.1 | 1.9 | 4.5 | 1.9 | 2.2 | 1.4 | 3.2 | 1.7 |
| Technology Enablement | 3.9 | 2.3 | 2.8 | 3.5 | 2.7 | 2.8 | 2.9 | 3.4 | 3.2 | 2.1 | 3.4 | 3.0 | 2.9 | 3.3 | 3.1 | 2.4 | 3.3 | 2.8 |
| Industry and Process Expertise | 4.4 | 2.6 | 3.4 | 4.7 | 3.2 | 3.2 | 3.1 | 3.3 | 2.8 | 1.8 | 3.0 | 1.7 | 3.8 | 2.1 | 1.8 | 2.1 | 3.4 | 1.9 |
| Organizational Change Management | 4.5 | 3.1 | 3.1 | 4.7 | 2.7 | 3.3 | 3.3 | 2.9 | 3.1 | 1.8 | 2.1 | 1.3 | 4.3 | 2.3 | 1.6 | 2.4 | 2.5 | 2.0 |
| SaaS Product and Domain Expertise | 3.9 | 2.5 | 2.7 | 3.5 | 2.9 | 2.8 | 3.5 | 3.9 | 2.9 | 1.7 | 2.4 | 2.7 | 3.0 | 3.3 | 2.9 | 2.0 | 3.5 | 2.9 |
| Operational Excellence | 4.3 | 2.9 | 2.8 | 4.3 | 3.8 | 2.7 | 3.5 | 4.0 | 3.1 | 2.0 | 3.0 | 2.9 | 3.3 | 2.9 | 2.4 | 2.1 | 3.3 | 2.4 |
| Continuous Improvement | 3.6 | 3.0 | 2.5 | 3.7 | 3.7 | 2.9 | 3.6 | 3.3 | 3.2 | 2.1 | 3.1 | 2.7 | 2.9 | 2.9 | 2.4 | 2.6 | 3.2 | 2.5 |
| Responsiveness | 4.4 | 3.1 | 3.6 | 4.4 | 3.3 | 3.4 | 3.5 | 3.5 | 3.3 | 2.5 | 3.4 | 2.8 | 3.3 | 2.7 | 2.6 | 2.6 | 2.9 | 2.6 |
| As of 4 March 2019 | | | | | | | | | | | | | | | | | | |

Source: Gartner (May 2019)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3. Product Score in Use Cases

| Use Cases | Accenture | Capgemini | Cognizant | Deloitte | DXC Technology | Evosys | IBM | Infosys | Inspirage | IT Convergence | KPIT-Birlasoft | Oracle | PwC | TCS | Tech Mahindra | TransSys | Wipro | Zensar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assessment and Strategy | 4.29 | 2.72 | 3.12 | 4.40 | 3.00 | 3.05 | 3.19 | 3.44 | 2.93 | 2.15 | 2.31 | 1.79 | 4.16 | 2.18 | 2.04 | 1.85 | 3.10 | 1.94 |
| Implementation — Simple | 3.90 | 2.40 | 2.75 | 3.50 | 2.80 | 2.80 | 3.20 | 3.65 | 3.05 | 1.90 | 2.90 | 2.85 | 2.95 | 3.30 | 3.00 | 2.20 | 3.40 | 2.85 |
| Implementation — Complex | 4.23 | 2.67 | 3.05 | 4.22 | 2.89 | 3.07 | 3.20 | 3.32 | 2.99 | 1.84 | 2.69 | 2.04 | 3.61 | 2.64 | 2.22 | 2.23 | 3.13 | 2.31 |
| Management | 4.17 | 2.95 | 2.94 | 4.18 | 3.43 | 2.98 | 3.49 | 3.59 | 3.14 | 2.06 | 2.91 | 2.58 | 3.34 | 2.81 | 2.37 | 2.34 | 3.10 | 2.45 |
| As of 4 March 2019 | | | | | | | | | | | | | | | | | | |

Source: Gartner (May 2019)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Magic Quadrant for Oracle Cloud Applications Services, Worldwide"

"How Products and Services Are Evaluated in Gartner Critical Capabilities"

"Toolkit: Vendor Identification for Oracle Application Services"

"Predicts 2019: Digital Drives a Paradigm Shift in Application Services"

"Finding the Right Consulting and Implementation Providers to Help Your Business Innovate and Go Digital"

### Evidence

[1] "Market Opportunity Map: Cloud Services, Worldwide"

[2] Oracle Cloud Day, 15 January 2019

Evaluation in this Critical Capabilities is informed by:

- Primary research — Gartner inquiries with user organization clients. Services and sourcing analysts collectively took almost 2,400 inquiries with end-user clients on service vendors relating to Oracle services and products over 13 months (January 2018 through February 2019). Of these, 35% were tagged explicitly as #Cloud.

- Primary research — In the 18 months prior to November 2018, Gartner analysts took more than 2,100 client inquiries on topics related to cloud ERP where Oracle was a noted vendor.

- Primary research — Feedback from 211 client references worldwide, submitted by the participating service vendors, using online surveys.

- Primary research — A 90-minute vendor briefing from each participating service vendor addressing capability proof points of each evaluation criterion in the Critical Capabilities.

- Primary research — A detailed vendor survey covering revenue, staffing, geographic capabilities, investments and other relevant information, totaling more than 1,000 data points.

- Secondary research — Press releases and publicly available information, including company websites and financial reports.

- Other Gartner analysts — Peer review by 11 other Gartner analysts. Their views and comments were taken into account. In addition, this research was reviewed at internal research community sessions.

## Note 1 Industries

This Critical Capabilities addresses the capabilities of the included vendors in the following 27 industries:

- Aerospace and Defense

- Agriculture

- Automotive

- Banking

- Chemicals

- Consumer Products

- Defense and Security

- Engineering, Construction and Operations

- Healthcare (Vendors)

- High Tech

- Higher Education and Research

- Industrial Machinery and Components

- Insurance

- Life Sciences

- Media

- Mill Products

- Mining

- Not-for-Profit

- Oil and Gas

- Professional Services

- Public Sector

- Retail

- Sports and Entertainment

- Telecommunications

- Travel and Transportation

- Utilities and Energy

- Wholesale Distribution

### Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation

or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

**GARTNER HEADQUARTERS**

**Corporate Headquarters**
56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

**Regional Headquarters**
AUSTRALIA
BRAZIL
JAPAN
UNITED KINGDOM

For a complete list of worldwide locations,
visit http://www.gartner.com/technology/about.jsp