Critical Capabilities for Oracle Cloud Application Services, Worldwide

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Initiatives: IT Services and Solutions; ERP

When implementing Oracle Cloud Applications, many enterprises struggle to select a service provider that can meet their unique business needs. Sourcing, procurement and vendor management leaders can use this research to quickly identify and down-select providers best suited to their requirements.

This Critical Capabilities is related to other research:

Magic Quadrant for Oracle Cloud Application Services, Worldwide

View All Magic Quadrants and Critical Capabilities

Overview

Key Findings

- Of all its Oracle Cloud Application (OCA) products, Oracle is getting the greatest traction with Oracle ERP Cloud, due to an accelerated focus on digital transformation during the pandemic. It continues to focus on growing its customers, revenue and market share for ERP, EPM, SCM and HCM applications.

- Collectively, the service providers in this research post $12.6 billion in revenue from OCA-related services. This figure represents 45% of the cohort's Oracle-related revenue and 31% more OCA revenue than last year's cohort ($9.6 billion, representing 36% of total Oracle-related revenue). Across the board, growth in their Oracle cloud business comes with a decline in their noncloud business.

- Enterprises transitioning to OCA are struggling to accept that SaaS does not allow for customization, only configuration. Clients need to work with service providers to adopt best practices and out-of-box concepts, rather than try to configure legacy process functionality.

Recommendations

Sourcing, procurement and vendor management (SPVM) leaders who execute on their IT service and solution strategy and selection to identify OCA service providers should:

- Identify providers that prioritize Oracle Cloud capabilities by assessing the growth of their OCA business, the number of certified Oracle resources, and the investments in their OCA product and
Service offerings.

- Select providers that have proven their ability to collaborate with internal business and IT resources, respond to changing business dynamics, and evolve the SaaS product within the client’s organization in a way that achieves demonstrable business outcomes.

- Prioritize providers that can help with adoption and process standardization by evaluating the providers’ industry knowledge and experience with business process reengineering and OCM in past Oracle Cloud initiatives.

Strategic Planning Assumptions

By year-end 2024, 75% of Oracle application services revenue will be cloud-related as enterprises accelerate their move to the cloud in response to the massive disruption of the COVID-19 pandemic.

By 2025, 85% of large organizations will have engaged external service providers to migrate applications to the cloud, up from 43% in 2019.

By 2025, the top four ERP vendors will rebrand themselves as business platform providers.

What You Need to Know

This Critical Capabilities research on Oracle Cloud Application (OCA) services assesses the provider cohort’s relative capability to successfully implement OCA and deliver continuous business value. Sourcing, procurement and vendor management (SPVM) leaders should use this research to identify and down-select relevant OCA service providers appropriate for their specific business, domain and technical requirements. To most effectively assess providers for down-selection, SPVM leaders are encouraged to use this Critical Capabilities research in tandem with the companion research Magic Quadrant for Oracle Cloud Application Services, Worldwide.

For the purposes of this analysis, OCA consists of five application areas:

- Customer experience (CX), as covered by Oracle CX Cloud Suite (CX Cloud)
- Enterprise performance management (EPM), as covered by Oracle EPM Cloud
- Enterprise resource planning (ERP), as covered by Oracle ERP Cloud
- Human capital management (HCM), as covered by Oracle HCM Cloud
- Supply chain management (SCM), as covered by Oracle SCM Cloud

It’s important to acknowledge that this market is rapidly evolving. Some providers are better at quickly ingesting and absorbing domain capabilities and operational excellence while simultaneously meeting the growing market demands for updates and delivery management. Providers are moving at varying
rates, with some treading water while others race ahead. Merely being in this space does not guarantee a forward progression or an equal pace.

This Critical Capabilities research provides an additional and in-depth view of the service providers, beyond the core strengths, cautions and relative positions included in the Magic Quadrant. All service providers have been scored against nine critical capabilities that Gartner deems leading factors that sourcing executives need to consider when evaluating service providers for the use cases identified. For additional insight on using Critical Capabilities research to strengthen understanding of service providers and improve selection, see Toolkit: How to Use Critical Capabilities Research When Selecting an Application Services Provider for Cloud ERP.

The nine capabilities listed below, along with the reasons for their inclusion, are described in detail in the Critical Capabilities Definition section in this document:

- BizDevOps
- Impact Assessment
- Industry and Process Expertise
- Operational Excellence
- Organizational Change Management (OCM)
- SaaS Product Expertise
- Technology Enablement
- Updates Management
- Midsize Enterprise Engagement

Each service provider is scored against these capabilities based on the following:

- The information it provided as part of the Critical Capabilities research process
- Client feedback in Gartner Peer Insights
- Gartner analyst interactions with the service provider and its clients
- Gartner analyst opinion based on market knowledge

The capability scores are then used to position the service providers for five use cases. This year, we expanded the use cases, because we found that client requirements are evolving. The five use cases are defined in more detail in the Use Cases section below, but are listed here for reference:
Each of the critical capabilities has been weighted separately for each of the use cases. The weightings are listed in the Inclusion Criteria section. The weightings reflect Gartner’s analytical position of the relative importance of each critical capability per the respective use case. Users of this research can change the weightings of the criteria to match their individual situation. They can also use the criteria and weightings to evaluate other providers (not included in this research) that may align better in terms of culture, geography, industry experience or other niche criteria. This document provides details on three salient use cases for each service provider, describing how the provider is a good fit for them.

Analysis

Critical Capabilities Use-Case Graphics
Vendors’ Product Scores for Advisory Use Case

Product or Service Scores for Advisory

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As of 7 March 2021

Source: Gartner (May 2021)
Vendors’ Product Scores for Global Business-Led Transformation Use Case

Product or Service Scores for Global Business-Led Transformation

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As of 7 March 2021

Source: Gartner (May 2021)
Vendors’ Product Scores for Technical Migration Use Case

Product or Service Scores for Technical Migration

- Cognizant: 3.97
- Oracle: 3.83
- Inspirage: 3.74
- Accenture: 3.73
- Infosys: 3.70
- Wipro: 3.65
- Deloitte: 3.54
- LTI: 3.47
- IBM: 3.46
- TCS: 3.27
- PwC: 3.23
- Evosys: 3.04
- Huron: 3.00
- Capgemini: 2.75
- KPMG: 2.61
- DXC Technology: 2.50
- Tech Mahindra: 2.28
- EY: 2.18

As of 7 March 2021

Source: Gartner (May 2021)
### Vendors' Product Scores for Midsize Enterprise Transformation Use Case

#### Product or Service Scores for Midsize Enterprise Transformation

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As of 7 March 2021

Source: Gartner (May 2021)
Vendors’ Product Scores for Postimplementation Evolution Use Case

Source: Gartner (May 2021)

Vendors

Accenture

Accenture is a good fit for global enterprises engaged in multifunctional, multiservice, multiyear transformations and seeking advisory, global business-led transformation and postimplementation evolution services. Because technical migration and midsize enterprise transformation are more dependent upon technology expertise and smaller-scale clients, Accenture is less suited for those use cases. Almost two-thirds of its OCA revenue is from organizations with more than 10,000 employees.
Accenture has approximately 22,000 OCA FTEs, 58% more than last year. Forty-one percent of Accenture's OCA resources are located in APAC, with 31% in NA, 21% in EMEA, 4% in LATAM, and 3% in Japan. It has 50 delivery centers and 100 innovation centers around the world with Oracle capabilities. In the last year, it added 40 locations, with nearly 20 centers focused on analytics innovation for Oracle.

Advisory: This is one of the strongest use cases for Accenture. With very wide industry expertise and access to an extensive number of domain experts, Accenture is extremely well-placed to provide business-led advisory services for Oracle Cloud-based transformations. This expertise, combined with the technical ability to provide a roadmap to harvest the business opportunities, makes Accenture outstanding for this use case. To shape the roadmap recommendations, it uses tools in its proprietary myConcerto platform to extract and analyze information on customizations, configurations and system usage from the current ERP system.

Global Business-Led Transformation: Accenture is a good option for large organizations embarking on multinational transformation programs. Its broad global footprint (over 100 delivery centers worldwide with Oracle capability and over 6,600 OCA-certified staff) and best-in-class business consulting and OCM capability make it the leader for this use case. Accenture focuses on delivering value by aligning to business and industry objectives to maintain what it calls a “Living System.” Multiple clients appreciate their partnership with Accenture to support their fast-growing business. Clients cite price and contracting as the key issues when working with Accenture.

Postimplementation Evolution: Accenture understands how ongoing support for SaaS-based OCA installations differs from historical, dedicated on-premises support, and has evolved a very creditable offering. Using its myConcerto platform seamlessly from implementation, it takes a BizDevOps approach to provide continuous product-centric delivery, supporting and extending the technology platform with a business and UX focus. It uses the Accenture COE for Oracle Cloud to proactively drive the Oracle Cloud roadmap and monthly development interlocks with Oracle.

Capgemini

Capgemini is a good fit for large, product-centric global clients seeking technical migration, global business-led transformation and postimplementation evolution services. Capgemini clearly positions itself on the upper range of large customers, making midsize enterprise transformation not a good fit. Advisory services are available, but the cases evaluated show that this may not yet be a sweet spot for Capgemini, especially when business transformation is a target.

Capgemini has approximately 1,600 OCA FTEs, 7% more than last year. Thirty-eight percent of Capgemini’s OCA resources are located in APAC, with 35% in NA, 23% in EMEA and 4% in LATAM. It has a dedicated cloud-focused COE for cloud transformation, delivery centers and multiple innovation labs in different parts of the world. Its strategy is focused on four core regions — NA, U.K., France and the Netherlands.

Technical Migration: Through its rapid-implementation offers (RapidUpgrade2Cloud), Capgemini has created technical migration journeys from Oracle EBS and PeopleSoft. Existing test automation and
point-to-point integration assets, embedded with implementation services, are also part of this offering. Customers seeking a migration to SaaS that leverages most of their existing on-premises configurations and data may find this approach compelling. While this capability may present itself as an initial step toward cloud adoption, it is not a replacement for traditional business transformation engagements.

Global Business-Led Transformation: Capgemini’s past relationships with large customers position this use case as a natural focus for the company. Its Industry Advantage Solutions are multipillar, preconfigured, branded-OCA offerings that can help customers adopt best practices for the industries of focus. Public sector, life sciences and manufacturing are some examples of targeted industries. It is also important to note that, while Capgemini is a worldwide service provider, its references and experiences seem to be concentrated in NA and Europe. Customers seeking heavy OCA experience and references outside those regions may find that Capgemini is unable to demonstrate a big variety of cases. It is not a good fit for customers seeking full-scale digital transformation, given its focus on business optimization in target industries.

Postimplementation Evolution: Based on Capgemini customer feedback related to this use case, Capgemini’s automated testing capabilities (Rapid Testing on Cloud) and support methodologies (Oracle Intelligent Digital Aide) can benefit clients seeking Oracle Cloud support models focused on efficient “run the engine” approaches. It uses virtual assistants to address questions from the user community and RPA to automate manual processes. Customers seeking BizDevOps may be disappointed with the approach presented.

Cognizant

Cognizant is a good fit for large and midsize global enterprises seeking global business-led transformation, technical migration and postimplementation evolution services. Although it does a high number of assessments, Cognizant has less range with OCM and BizDevOps, accounting for its moderate placement in the advisory use case. And while Cognizant has the technical capabilities for midsize enterprise transformation, more than two-thirds of its clients have over 10,000 FTEs.

Cognizant has approximately 4,400 OCA FTEs, 16% more than last year. Seventy-five percent of Cognizant OCA resources are located in APAC, with 20% in NA and 5% in EMEA. Cognizant has 25 Oracle Cloud delivery centers across the globe and has done rollouts in more than 75 countries. The company has dedicated innovation centers focused on SaaS, ERP, Oracle NetSuite and Oracle’s Future of Work.

Global Business-Led Transformation: Sixty-seven percent of Cognizant’s clients have over 10,000 FTEs, making large-scale transformation a primary use-case target for the company. Cognizant’s global delivery capabilities, multi-SaaS breadth and industry expertise compensate for its uneven OCM and business consulting capabilities, and put it in the upper middle of the cohort for this use case. Good examples of Cognizant’s industry and process capabilities include 1,200 Level 1 through Level 4 industry process accelerators and templates; preconfigured tax setups for more than 75 countries; and industry-focused solution architects. Clients cited concerns with its limited capabilities for business and process consulting.
Technical Migration: Cognizant's strengths in technology enablement, SaaS product expertise and operational excellence place it at the top among the cohort in this use case. Cognizant has over 150 prebuilt integrators, more than 4,000 automated test scripts, and multiple tools, accelerators and reports that it leverages to make technical migration effective and efficient. Over 85% of Cognizant's resources are Oracle Cloud-certified. In addition, Cognizant has seven joint service offerings developed with Oracle. Some clients consistently endorse Cognizant's technology and SaaS expertise.

Postimplementation Evolution: Cognizant scores well in SaaS product expertise, operational excellence, and industry and process expertise, placing Cognizant in the upper middle of the cohort for this use case. Cognizant's more limited range in BizDevOps and its moderate scores in updates management impact its abilities for full evolutionary services. However, multiple clients cite that Cognizant's partnering approach, which puts customers' interests first, can compensate. Clients also cite Cognizant's accuracy of planning and ability to deliver on time and on budget.

Deloitte

Deloitte is a good fit for large and global clients seeking advisory, global business-led transformation and postimplementation evolution services. Midsize clients looking to "lift and shift" without identifying optimization opportunities do not completely fit into Deloitte's value proposition. Pure technical migrations are also not the primary focus for Deloitte, and this is reflected in its sales and marketing strategies.

Deloitte has approximately 16,000 OCA FTEs, 14% fewer than last year. Forty-nine percent of Deloitte's OCA resources are located in APAC, with 26% in NA, 15% in EMEA, 8% in LATAM and 2% in Japan. It has 26 delivery centers with Capability Maturity Model Integration (CMMI) Level 5 rankings.

Advisory: With industry-specific and cross-domain capabilities (such as tax and cybersecurity advisory), Deloitte is very well-placed to provide business-led advisory for OCA-based transformations. It provides a variety of assessments to support cloud migrations — business case and roadmap development, automated cloud migration diagnostics, and automation assessments. Deloitte reported 80% conversion of advisory engagements to implementation. Customers seeking a technical migration assessment may find these advisory services to be too complex or expensive for their needs.

Global Business-Led Transformation: Deloitte is a good option for large organizations embarking on multinational transformation programs. Deloitte combines an enterprise model (Kinetic Enterprise) with technology best practices and assets (Ascend) and OCM capabilities to deliver these services. With over 4,000 OCA-certified staff, as well as projects delivered in more than 150 countries, Deloitte is well-positioned to help global clients transform around OCA. It provides a full breadth and depth of OCA capabilities to advise, implement, operate and innovate for clients. Its value enablement program, Ascend platform and Momentum methodology enable consistent delivery across implementation and operate engagements. Multiple clients cite it as a knowledgeable and trusted partner for OCA transformation.
Postimplementation Evolution: This is one of the use cases where Deloitte stands out from its competitors, with a combination of technology and business consulting assets focused on continuous improvement and client enablement. It creates a comprehensive postimplementation evolution offering by leveraging methodologies focused on quarterly release enhancements (Ascend), capabilities such as digital FTEs, and automated testing as a service. Its unique release management approach allows it to tailor findings for each client, resulting in low-risk upgrades and a focus on new features.

**DXC Technology**

DXC Technology (DXC) is a good fit for clients looking for midsize enterprise transformation, technical migration and postimplementation evolution services. Because both global business-led transformation and advisory are heavily dependent upon business transformation and OCM expertise, DXC is a better fit for the other three use cases.

DXC has approximately 1,900 OCA FTEs, 13% fewer than last year. Eighty-six percent of DXC’s OCA resources are located in APAC, with 9% in EMEA, 4% in NA and 1% in LATAM. It has established several digital experience centers, digital transformation centers and digital innovation labs in NA, EMEA and APAC.

Midsize Enterprise Transformation: DXC is a reasonable fit for midsize enterprises looking for a technology-focused provider to implement a complex technology transformation across ERP, SCM, HCM and EPM pillars. It leverages technology-driven discovery of current-state processes. It organizes cloud workshops to quickly align business process expectations, identify potential gaps and solidify scope. It also leverages its M-Power Solutions and Luxoft acquisitions to add new solutions to its global offering portfolio. DXC’s limited focus on business transformation and OCM makes it a less suitable provider than others in this Critical Capabilities.

Technical Migration: DXC helps clients modernize applications and data through SaaS solutions for finance and supply chain. It has strong technical strength in IaaS and PaaS, and growing expertise in SaaS. DXC has aggregated its tools and accelerators for clients’ cloud journeys under the Cloudburst umbrella. This collection includes a set of scripts to capture a client’s IT environment landscape and application usage. Some clients appreciated use of best practices and automation for successful implementations.

Postimplementation Evolution: DXC’s second-highest-scoring use case is postimplementation evolution, reflecting its ability to evolve its support model to adapt to the differing requirements of cloud. It provides an end-to-end service for the maintenance, enhancement and management of applications running in hybrid environments, using globally consistent delivery models, processes, tools and metrics. DXC’s Cloud Care provides break/fix support, managed services, continued service delivery and advisory services. However, DXC is overly focused on technology, covering code update support with tools and environments. Clients should evaluate DXC’s ability to support the business optimization opportunity of each quarterly update and how it can do that with nondedicated, remote staff.
Evosys is a good fit for midsize enterprises seeking technical migration, midsize enterprise transformation and postimplementation evolution services. Because both global business-led transformation and advisory are heavily dependent upon business transformation and OCM expertise, Evosys does provide business value in such projects, but it’s a better fit for the other three use cases, given its scale and capabilities.

Evosys has approximately 1,100 OCA FTEs, 18% more than last year. Thirty-six percent of Evosys’ OCA resources are located in APAC, with 30% in NA, 27% in EMEA, 4% in Japan and 3% in LATAM. It is actively hiring new resources — adding 50 new resources every month — and aims to have 2,000 resources by next year. It plans to invest $2 million in expanding its innovation technology practice. It’s also planning further investments to grow its delivery presence in NA.

Midsize Enterprise Transformation: This is the sweet spot for Evosys. With many projects and three-fourths of its revenue coming from organizations with fewer than 10,000 employees, Evosys has created a good-value, repeatable offering for midsize enterprises in the industries it targets. Public sector, engineering and construction, manufacturing, healthcare, and hospitality are its focus areas, while retail and telecommunication are new growing areas for Evosys. It can support single-country or multinational projects using its remote delivery model, but is restricted to English-language projects. Multiple clients cite Evosys’ ability to deliver on time and on budget.

Technical Migration: Over 700 of Evosys’ 1,100 OCA staff are certified. It also has capabilities in test automation and third-party tools, plus access to new technology expertise as a result of the Mastek merger. Thus, Evosys scores well for SaaS expertise and technology enablement. For clients in the Evosys focus industries looking for a lower-cost platform migration first step to OCA with limited transformation, Evosys is a good choice. Evosys continues to invest in chatbots, RPA, IoT, AI/ML, and analytics and autonomous data warehouses to augment its technical delivery capabilities. Clients appreciate the technical and functional knowledge of its consultants.

Postimplementation Evolution: Evosys focuses on value-based delivery throughout its offerings, and has built its managed services to focus on making continuous business improvements instead of just keeping the lights on. This new end-to-end capability, combined with the additional technology capabilities gained with its Mastek merger, makes Evosys a good fit in this use case. This fit extends not only to clients it implemented OCA for, but also to clients seeking lower-cost support for platforms implemented by other service providers.

**EY**

EY is a good fit for large and midsize global enterprises seeking global business-led transformation, midsize enterprise transformation and advisory services. Because both technical migration and postimplementation evolution are heavily dependent upon technology expertise, EY is a better fit for the other three use cases.

EY has approximately 4,400 FTEs focused on OCA, 8% more than last year. Sixty-four percent of the resources focused on OCA are located in NA, with 21% in EMEA, 14% in APAC and 1% in LATAM. EY has
built a connected global network of 50 wavespace locations (COEs focusing on digital capabilities), 14 global delivery centers and five nearshore centers.

Global Business-Led Transformation: This is the strongest use case for EY, though it needs to show more proof points to establish itself as a major player. EY provides enterprisewide business transformation, leveraging its investment in tools, accelerators and processes. It utilizes its industry-specific solutions, along with its diverse professional services portfolio, to support transformation. It established a Transformation Management Office (TMO) that integrates strategy, delivery, risk management and change management expertise to help clients with cloud execution. Some clients appreciate its ability to work as a flexible and adaptive partner.

Midsize Enterprise Transformation: EY has 78% of its revenue coming from midsize enterprises. It has established 14 buyer-based Fields of Play (FOPs) covering the end-to-end business spectrum. It uses these FOPs to grow relationships and to establish a pipeline to a range of services. EY is making significant investments in tools and accelerators to enhance its technology consulting capabilities. It has launched the global NextWave Tech Career Framework to foster technology-oriented skill sets. It is further building its technology expertise by using EY Academy, EY Tech MBA and digital badges for global consulting staff. EY is not a good fit for clients looking for a low-cost cloud implementation with little to no transformation or innovation.

Advisory: EY notes that it executed 35 assessments in 2020. Although EY has good advisory capabilities, its number of assessments is considerably lower than that of other providers in this Critical Capabilities. It uses an interactive ERP assessment tool to highlight issues in an organization's major business areas, and delivers actionable KPI reporting for C-level executives, project sponsors and department leads. The tool has predefined high-level business requirements to help delineate an organization's functional and system needs. The KPI reports give each client a customized assessment addressing both business and transformational goals.

**Huron**

Huron is a good fit for midsize and some larger North American clients seeking advisory, midsize enterprise transformation and postimplementation evolution services. Huron's limited geographic presence and technology investments make it a more suitable provider for these three use cases.

Huron has approximately 610 OCA FTEs, 50% more than last year. Eighty-one percent of Huron's OCA resources are located in NA, and 19% are in APAC. It does not have a wide presence like other providers in EMEA and Latin America.

Advisory: Huron leverages its industry knowledge, management consulting expertise, continuous investments in innovation and industry accelerators, and automation capabilities to streamline business and IT processes for its clients. Huron's overall client engagement and stakeholder management during the preimplementation phase enables it to convert all of its Oracle assessments to implementation projects. It also has a lot of frameworks that clients in its core industries can leverage for their overall business transformation projects. Huron has specialized expertise in important areas of the core
industries it supports, including supply chain management, process improvement, research and grant management, and student administration.

Midsize Enterprise Transformation: This is one of the strongest use cases for Huron. Huron is a good fit for midsize enterprises looking for a provider to implement a complex technology transformation across ERP and EPM pillars focused in the higher education and banking industries. It does have the same level of competency as other providers for BizDevOps, industry and process expertise, and technology enablement, but its limited geographic presence restricts its capability to deliver in global regulated companies requiring multilingual skills. However, the company continues to make investments. It developed an implementation-as-a-service offering and utilized RPA technology to accelerate implementations, reduce risk and enable better regression testing.

Postimplementation Evolution: Huron’s approach to preimplementation, implementation advisory and post-go-live optimization helps its clients on their journey to Oracle Cloud. Huron’s dedicated Oracle Cloud business consultancy helps customers build a digital transformation roadmap, using its library of preconfigured templates, market understanding and deep industry expertise for its core industries of higher education, financial services and healthcare. Its post-go-live support focuses on health check assessment, stabilization services and solution sustainability.

IBM

IBM is a good fit for medium to large enterprises seeking global business-led transformation, advisory and postimplementation evolution services. IBM’s strengths across the range of critical capabilities show its suitability for all five use cases and not just the three featured below.

IBM has approximately 9,300 OCA FTEs, 30% more than last year. Forty-six percent of IBM’s OCA resources are located in APAC, with 24% in EMEA, 26% NA and 4% in Japan. IBM has 32 global delivery centers, eight Client Innovation Centers, two global service integration hubs and an Oracle Cloud Garage as part of its Oracle Cloud service delivery capability. IBM positions its services and offerings to maximize business performance by leveraging its cognitive enterprise platform.

Global Business-Led Transformation: With strong capabilities in BizDevOps and OCM, as well as solid industry and process expertise, IBM is a very good fit for this use case. IBM targets a predefined, industry-specific design that reflects leading practices. IBM’s approach is business-first and encompasses both upstream and downstream perspectives. Its ability to manage complexity is a plus for this use case. IBM’s Digital Change methodology delivers accelerated alignment.

Advisory: IBM’s approach to advisory is to focus on the compelling business need to move to the cloud. IBM’s Cloud Impact Assessment (CIA) is a data-driven analysis that produces the business case, a solution fitness assessment, an implementation roadmap, a change management impact plan, and prescriptive direction on the process change needed. This kind of efficient, effective and comprehensive offering for the cloud journey has made IBM a strong choice for the advisory use case. Clients call out partnering and collaboration skills as strengths.
Postimplementation Evolution: Combined with its platform offering, IBM’s standout capabilities in updates management and strong capabilities for operational excellence and BizDevOps place it near the top of the cohort for postimplementation evolution. IBM structures the quarterly SaaS product updates as miniprojects (innovation sprints) led foremost by business value improvement. IBM takes a “machine first” approach to prioritize automation, so that resources can focus on business optimization and value. IBM also offers flexible commercial models for postimplementation evolution, including a true consumption-based model for scaling up or down — or even turning the service on or off.

**Infosys**

Infosys is a good fit for large global companies seeking midsize enterprise transformation and technical migration services. Advisory is primarily business-consulting-led; although Infosys can provide roadmap information (especially if technically focused), advisory is not its strongest use case. For postimplementation evolution, Infosys has good experience in delivering Oracle-based managed services, but it has not yet evolved its service delivery to the BizDevOps model needed for ongoing SaaS support.

Infosys has approximately 5,500 OCA FTEs, 13% more than last year. Sixty-eight percent of Infosys’ OCA resources are located in APAC, with 28% in NA and 4% in EMEA. Infosys has considerable local presence in NA, and is setting up innovation hubs in Canada and Mexico as part of its nearshore delivery model. It is expanding in EMEA by leveraging delivery centers and living labs in Dusseldorf, Bucharest, London, Berlin and Amsterdam. It is also increasing presence in APAC by leveraging three innovation hubs in Australia.

Technical Migration: With over 2,500 of its 5,500 OCA staff certified, access to the greater Infosys technical capabilities and IP, and assets such as My Enterprise, Smart Implementation Suite and LEAP, Infosys is strong in this use case. For clients looking to evolve their systems and reduce technical debt by leveraging Oracle Cloud in conjunction with other next-generation technologies, Infosys is a good choice for a partner. In addition, Infosys offers creative commercial constructs to bundle assets and support with the migration deal, which can help the client journey to a “Live Enterprise,” as Infosys calls it.

Global Business-Led Transformation: With a very large global delivery operation and almost two-thirds of its OCA revenue coming from clients with more than 10,000 employees, Infosys can deliver for large multinational organizations. At this scale, the focus must be business transformation. Although stronger technically, Infosys can further improve business consulting skills to complement the clear technical strengths.

Midsize Enterprise Transformation: Given its strong technical abilities, Infosys has invested in a set of preconfigured midmarket offerings that can be quickly and economically implemented for small and midsize organizations. Currently, only 5% of revenue is from organizations with less than 1,000 employees. However, Infosys plans to grow its footprint of new clients for this use case, as well as support its large base of incumbent on-premises clients with their move to cloud. It anticipates that over 65% of its on-premises Oracle clients will have started an Oracle Cloud journey by the end of 2021.
**Inspirage**

Inspirage is primarily a good fit for midsize and some larger product-based organizations that are looking for global business-led transformation, midsize enterprise transformation and technical migration services with a supply chain management focus. Because both postimplementation evolution and advisory are heavily dependent upon broader industry consulting expertise, Inspirage is a better fit for the other three use cases.

Inspirage has approximately 570 OCA FTEs, 22% more than last year. Fifty percent of Inspirage’s OCA resources are located in APAC, with 42% in NA and 8% in EMEA. Although it has a small OCA practice compared with other providers in this research, Inspirage is investing in accelerators, tools and reusable assets for impact assessment and planning. Inspirage has invested $2 million in its In2Cloud platform automation tool, which extracts information from EBS and maps it to OCA with a list of customizations.

Global Business-Led Transformation: Although Inspirage has a small OCA practice compared with other providers in this research, it has invested in customizable rapid-assessment tools, automated testing and assurance tools. These tools help clients achieve a target operating model by engaging with them from the assessment stage itself and facilitating conversion into full-blown Oracle implementation projects. Inspirage has industry-specific process flows mapped to Oracle Cloud. Its OCM methodology engagements are focused on shared business objectives with clients.

Midsize Enterprise Transformation: Inspirage is an extremely good fit for midsize enterprises looking for end-to-end Oracle transformations, with a specific focus on the supply chain industry, as it uses a lot of accelerators, tools and reusable assets that concentrate on SCM. Inspirage has a lot of depth in SCM, and it relies heavily on big Oracle Cloud transformation projects in this industry. Inspirage continues to invest in its In2Cloud automation tools, and cited more than 75 PaaS-based industry assets available to customers interested in leveraging best practices to help speed up implementation initiatives.

Technical Migration: This is one of the strongest use cases for Inspirage. Inspirage has extensive experience in providing traditional managed services. It has invested heavily in proprietary integration solutions like iHub CS and In2Cloud. Inspirage’s strong technical hold of the Oracle products it offers enables it to leverage technological updates to overall business outcomes on projects. Inspirage’s PaaS capabilities also help clients develop strategic software extensions to deliver unique capabilities. It has set up a COE to evaluate product release changes based on development briefings, advanced training and release notes. It applies quarterly patches early in the cycle to both test and production environments, so that it experiences the change before customers do.

**KPMG**

KPMG is a good fit for large and midsize global enterprises seeking global business-led transformation, midsize enterprise transformation and advisory services. Because both technical migration and postimplementation evolution are heavily dependent upon technology expertise, KPMG is a better fit for the other three use cases.
KPMG has approximately 4,800 OCA FTEs, 64% more than last year. Sixty-five percent of KPMG’s OCA resources are located in NA, with 21% in APAC, 12% in EMEA and 2% in LATAM. It has set up 12 innovation labs, 13 insight centers and 20 ignition centers in over 50 locations.

Global Business-Led Transformation: This is one of the strongest use cases for KPMG. It works closely with customers to break down their digital and nondigital silos to build holistic customer experiences. It is moving away from front- and back-office transformation to enable enterprises’ digital transformation vision using its playbooks, value drivers, market analysis and business models. It further creates an execution strategy using maturity assessments, blueprints and diagnostics. Its “Future of” points of view provide industry-specific insights into focus industries, and its Change Frame framework helps guide customers through the transition.

Midsize Enterprise Transformation: KPMG is a good fit for midsize transformations, because it leverages its Powered Foundation solution for midsize companies. It uses practice processes, master data, reporting specifications and integration specifications maintained within its predesigned, industry-specific Target Operating Models (TOMs) and preconfigured Oracle Cloud Solution for its focus industries. It offers a quick migration to the cloud for Oracle Cloud products, with fixed-scope and fixed-fee arrangements. Given its concentration of resources in NA, it can present challenges for midsize enterprises looking for value for money.

Advisory: KPMG’s Powered Enterprise framework and methodology drive impact assessment and planning, focusing on helping the client establish a TOM and a strategy to achieve it. It helps redesign all back- and middle-office functions and migrate to Oracle Cloud platforms, leveraging Powered Enterprise solutions. It further provides a digital change journey for each impacted stakeholder by providing insights into organization readiness. The Powered Execution Suite delivers the tools to drive the journey to the cloud. It includes over 240 prebuilt integrations, 40 data conversions, and over 350 powered reports and dashboards, contributing to impact assessment being one of the provider’s highest-scoring critical capabilities.

LTI

LTI is a good fit for midsize global enterprises seeking technical migration, midsize enterprise transformation and postimplementation evolution services. Because both advisory and global business-led transformation are heavily dependent upon impact assessment, OCM and BizDevOps, LTI is a better fit for the other three use cases.

LTI has approximately 1,300 OCA FTEs, 78% more than last year. Eighty-four percent of LTI’s OCA resources are located in APAC and Japan, with 10% in NA and 6% in EMEA. It has built alliances with 25 partners to provide local and multilingual support. It is setting up more nearshore centers in Poland, the United Arab Emirates and Mexico, and is hiring skilled resources. It also uses 12 digital labs and innovation centers, and has a Shoshin program for training and talent management.

Technical Migration: This is the strongest use case for LTI. LTI has 35 prebuilt configurations, preconfigured instances and a repository of automated test cases for quick OCA deployments. LTI has
also set up experience centers for rapidly prototyping and demonstrating connected PaaS solutions. It continues to invest in upskilling its workforce and has a 60% cross-skilled pool of resources knowledgeable in Oracle legacy apps and OCA. It has developed a one-click migration toolkit for accurate data migration from legacy ERP applications (JD Edwards, EBS, PeopleSoft and Siebel) to OCA.

Midsize Enterprise Transformation: LTI provides single-pillar transformation for midsize enterprises by conducting design thinking workshops for value discovery, automation of processes through AI/ML bots, industry-specific PaaS solutions and accelerated implementation of localizations for global rollouts. It uses its experience centers and cloud-focused innovation centers for rapidly prototyping and demonstrating industry-specific business processes and connected PaaS solutions. LTI trails many of its peers in impact assessment, BizDevOps and OCM capabilities because of a limited ability to address business and function impacts and planning.

Postimplementation Evolution: LTI has extensive experience in providing traditional managed services, and has invested in providing postimplementation support for Oracle Cloud by leveraging its PaaS development factory, cloud enhancements, regression test frameworks and prebuilt report repository on Oracle Analytics Cloud. It has developed Cloud-crucible, a repository of regulatory compliance and localizations. LTI has strong capabilities in Oracle Analytics Cloud services and uses its knowledge of underlying SaaS data structure to provide faster insights. The quarterly updates are further supported through its Canvas Insights and PLATO tools for systematic release management. Some clients cited that LTI needs to focus more on UX and less on technology partnership.

Oracle

Oracle Consulting (OC) is a good fit for enterprises seeking technical migration, midsize enterprise transformation and postimplementation evolution services. OC’s limited range with impact assessment, OCM and BizDevOps makes it less suitable for the advisory and global business-led transformation use cases.

OC has approximately 6,400 OCA FTEs, 39% more than last year. Thirty-six percent of OC’s OCA resources are located in APAC, with 29% in EMEA, 27% in NA, 4% in LATAM and 4% in Japan. OC has multiple delivery and offshore centers across the globe. Its service offering is centered around Oracle SaaS product excellence.

Technical Migration: OC excels in the technical migration use case, where its strong SaaS product and technical enablement capabilities put it at the top end of the cohort. OC has been investing in global COEs across OCA areas, particularly in EMEA and India. By coupling these investments with the True Cloud Method (TCM) and Oracle Academy, OC has been able to rapidly upskill resources to keep pace with the evolving SaaS product and environment. Preconfigured solutions and investment in IP provide assets that ensure consistency and efficiency in technical migration.

Midsize Enterprise Transformation: OC’s sweet spot and focus are the “big middle,” making it a strong pick for the midsize enterprise transformation use case. OC has a substantial library of delivery assets,
including template solutions, prebuilt environments, extensions, integrations and reports. This asset library helps OC accelerate delivery. The work in this use case begins with a Cloud Culture Readiness Assessment that includes evaluating corporate culture to better guide and optimize the journey to the cloud. The Co-Solutioning Assessment produces a roadmap, solution architecture, system landscape, and data migration and integration strategy. TCM includes a set of over 2,500 assets, ranging from best-practice configurations and test scripts to preconfigured, industry-specific environments.

Postimplementation Evolution: OC’s strong product capabilities and expertise in updates management offset its limited abilities with BizDevOps, putting it toward the upper end of the cohort for the postimplementation evolution use case. Highly automated release testing is the foundation of OC’s service offering for postimplementation evolution. As both the product provider and the support organization, it is uniquely positioned to provide technical and functional insight into the upcoming changes. Some clients cite SaaS support as a strength, yet note variability of service quality, depending upon the resource deployed.

PwC

PwC is a good fit for large clients seeking advisory and global business-led transformation services. Postimplementation evolution is a maturing practice for PwC, and its vision, which is aligned with current capabilities, positions it as a good alternative. PwC’s restricted focus on the transformation associated with technical migration reduces its fitness as a recommended vendor for stand-alone technical migration.

PwC has approximately 4,000 OCA FTEs, 23% more than last year. Fifty percent of PwC’s OCA resources are located in NA, with 36% in APAC, 13% in EMEA and 1% in LATAM. PwC has seven technology delivery centers worldwide and 31 experience centers to support digital delivery. It now has four Oracle practice acceleration centers (Bangalore, India; Shanghai, China; Sri Lanka; and San Antonio, Texas).

Global Business-Led Transformation: PwC’s global business advisory capabilities (in areas such as tax and global trade), along with its team of OCA and industry experts, make it strong at providing business transformation to complex global enterprises. Its focus on “Oracle as an enabler” helps customers envision how much OCA fits into a broader business transformation journey, instead of just how to implement OCA as a tool. Technical capabilities integrated with horizontal solutions (such as tax, risk and management consulting), adjusted to multiple countries, enable PwC to successfully help customers with global-scale transformation.

Midsize Enterprise Transformation: PwC actively targets a range of microvertical industry segments, allowing it to deliver cost-effective industry PaaS-based assets linked to OCA. In addition to these assets, preconfigured models, business process maturity assets (LEAP) and digital business journey frameworks (BXT) enable midsize customers to adopt OCA through fit-for-purpose models. PwC is also investing in a self-service PaaS marketplace to allow customers to purchase individual new capabilities as those microvertical models evolve. Multiple clients cited it as being a strong partner, providing strategic advice and challenging the status quo by initiating new ideas.
Advisory: PwC leverages its strategy and consulting offerings to provide a comprehensive advisory proposition. Use-case-based offerings (integrated solutions) provide customers with a guided model for assessing how OCA and complementary technologies would fit into an M&A, digital or fit-for-growth transformation. Business-focused benchmarking and assessment tools are also used to complement the OCA technology-focused assessment. Clients appreciated the strategic advice and thought leadership PwC brought to the engagement.

TCS

TCS is primarily a good fit for large organizations seeking global business-led transformation, advisory and postimplementation evolution services. TCS gets 77% of its revenue from large enterprises; hence, midsize enterprise transformation is not a key focus area. TCS is a better fit for the use cases discussed below, though it is equally suitable for technical migration engagements.

TCS has approximately 6,500 OCA FTEs, 15% more than last year. Seventy-four percent of TCS’s OCA resources are located in APAC, with 13% in EMEA, 12% in NA and 1% in LATAM. It has a mature Global Network Delivery Model (GNDM) with 166 delivery centers and 30 global experience centers.

Global Business-Led Transformation: TCS led multiple transformation engagements, though it is not as focused on business transformation as other providers in this assessment. It uses industry expertise, operational excellence and SaaS product expertise to help deliver global transformation engagements. It leverages Crystallus for Oracle (industry focus), Change 4.0, FastForward, DataSure, RACE4Fin and other frameworks. The top six industries in which TCS has cloud projects are banking; telecommunications; engineering, construction and operations; insurance; retail; and utilities and energy. Some clients noted TCS’s flexibility and its ability to provide a good balance of creativity and iterative solution work.

Advisory: TCS reported doing 250 assessments with a 70% conversion rate. Assets that TCS has developed and leverages for assessment and planning include several from its Cloud Advisory practice. These assets include a capability framework, a change impact assessor tool, a value navigator tool, a cloud adoption toolkit and proofs of value for cloud product selection. It conducts workshops and collaborative sessions with clients to derive value drivers and discover business benefits using the TCS Business Case Development Framework. Some clients reported that they would have benefited by assessing ERP goals and risks early.

Postimplementation Evolution: TCS has extensive experience in providing managed services for on-premises support and is building on its “AMS reimagined” delivery model to provide OCA ongoing services. TCS’s approach to updates management tends to be technology- and process-focused. TCS has introduced automation to improve the ingestion of quarterly updates, and is continuing to evolve its services to incorporate the changes needed in the delivery model for SaaS products. Its vision of application support has a good foundation and can further evolve to provide continuous improvement.

Tech Mahindra
Tech Mahindra is primarily a good fit for clients seeking technical migration and midsize enterprise transformation services. Gartner was unable to validate customer feedback on these use cases due to the lack of consistent customer-provided data for this vendor. Global business-led transformation and advisory are not sweet spots, because Tech Mahindra lacks consistent business consulting capabilities and the ability to support non-English-speaking client operations. Postimplementation evolution is interpreted as optimized application management, mostly associated with cost reduction throughout the life cycle, as opposed to business-driven continuous improvement.

Tech Mahindra has approximately 3,100 OCA FTEs, 169% more than last year. Sixty-eight percent of Tech Mahindra's OCA resources are located in APAC, with 23% in NA, 6% in EMEA and 3% in LATAM. Tech Mahindra does not have a wide geographic reach, limiting its fit for clients in continental Europe, Australia and New Zealand, or Latin America.

Technical Migration: Tech Mahindra uses a collection of tactical technology assets that enable clients with minor transformation needs to migrate from existing on-premises Oracle applications to OCA. ERP-EDGE Plus is its cloud migration framework, which leverages its EPSELON tool for automated assessment of the current on-premises application; its RACE solution for data migration; and its proprietary MAGiX tool for automated functional and regression testing. It has had around 40 projects associated with this specific use case in the last year.

Midsize Enterprise Transformation: This is Tech Mahindra's strongest use case. Tech Mahindra's acquisition of TransSys has improved its capability to deliver midsize enterprise transformation, by bringing a group of technical assets along with human resources to serve such enterprises. Rapid-deployment models (RADICS), along with technical migration tools prepared to handle EBS, PeopleSoft and JD Edwards workloads (RACE), were part of its capability to deliver around 25 projects in this space last year.

Advisory: Tech Mahindra's advisory capabilities are limited by its heavy focus on technology enablement and lack of a consistent business consulting practice. Customers seeking an impact assessment for a technical, nontransformational OCA migration may be well-served by Tech Mahindra's existing analysis assets. Clients in industries where Tech Mahindra has a significant track record, such as travel and transportation, may also be able to leverage its Digital Maturity Assessment Framework to evaluate current strengths and cautions. Such assessment could highlight their need for more disruptive transformation.

**Wipro**

Wipro is a good fit for global business-led transformation, midsize enterprise transformation and postimplementation evolution services. Wipro states that it typically will not do a pure technical migration, and in the cases where it does take them on, it will approach them as a "business-led technology reimplementation.” Wipro doesn't offer stand-alone business consulting services, and its advisory services are tightly integrated with Oracle implementation.
Wipro has approximately 4,300 OCA FTEs, 55% more than last year. Fifty-four percent of Wipro's OCA resources are located in APAC, with 28% in NA, 14% in EMEA, 3% in LATAM and 1% in Japan. Across all OCA modules, Wipro has over 2970 certifications, 16 global delivery centers and four Oracle Innovation Hubs.

Global Business-Led Transformation: Wipro lands in the middle of the cohort for the global business-led transformation use case. It approaches these engagements with a focus on the value to be delivered, such as a consistent and standard process or cycle time reduction, and then drives the transformation toward those operational goals. Solid technology enablement capabilities facilitate a consistent and more predictable transformation. Such capabilities include Jumpstart Kit for chosen functions and industries (such as transportation); preconfigured cloud instances; and its proprietary Zoom to Cloud framework. These also compensate for Wipro's limited range of business consulting capability.

Midsize Enterprise Transformation: Wipro's strong SaaS product capabilities, solid industry expertise and solid technology enablement place it in the middle of the cohort for this use case, despite only about a third of its clients having fewer than 10,000 FTEs. Leveraging its proprietary Ignite for Cloud, Wipro's offering is positioned to promote cloud uptake and adoption. Included in this offering are cloud solution roadmaps, total cost of ownership (TCO) analysis and business cases. The approach includes Jumpstart Kit, interactive tools that ensure faster process standardization, and OCM to ease adoption. Multiple clients note Wipro's technical capabilities as strengths.

Postimplementation Evolution: Wipro brings solid capabilities to the postimplementation evolution use case, including its WiSTA pack of cloud test cases and its EasyAutomate regression testing asset, which are organized under its Thrive in the Cloud framework. Wipro deploys a single-team approach to cover applications, technology, infrastructure and business operations. Baseline services include core support and quarterly innovation management. More advanced services available include IT landscape rationalization, UX improvement, and continuous business process improvement via the company's Business Command Center. Wipro's limited range for BizDevOps and OCM should be noted.

**Context**

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

- Global Business-Led Transformation
- Technical Migration
- Midsize Enterprise Transformation
- Advisory
- Postimplementation Evolution
This Critical Capabilities addresses the worldwide Oracle Cloud Application service capabilities of providers that meet our criteria for inclusion. The evaluation of providers 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 provider profiles reflecting the status as of December 2020. Quantitative data collected was for a 12-month period ending on 30 June 2020.

When considering Oracle implementation partners for an RFI or an RFP, clients are advised not to simply select providers at the top of the Critical Capabilities listing. A provider 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, providers positioned anywhere along the use cases may prove to be more appropriate for a particular engagement.

Additionally, because the inclusion criteria in this research result in the analysis of the largest providers in the OCA service market, clients should not disqualify any potential competitors simply because they do not appear in this Critical Capabilities report. Other IT service providers 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 providers. However, do not discount a provider 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 Application services as only those services associated with the Oracle Cloud Application products. To qualify, each provider 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, the Oracle CEI program consists of cloud service modules that cover CX, EPM, ERP, HCM and SCM.

This Critical Capabilities evaluates the worldwide capabilities of providers. It provides metrics grouped within North America, Latin America, Asia/Pacific, 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 (for example, NetSuite is not included in this analysis)
- All activities relating to business process outsourcing (BPO)
- All ongoing infrastructure and hosting-only services
The lists of industries included in this research can be found in Note 1.

Critical Capabilities Definition

**BizDevOps**

This critical capability focuses on the provider's ability to harmonize technology and business, respond to changing business dynamics, and evolve the SaaS product within the client's organization in a way that achieves demonstrable business outcomes.

BizDevOps is not about technology by itself. It's about enabling an organization to handle transformational and execution-focused demand within teams, where internal business and IT resources collaborate with external service provider resources to ensure that technology — including products and services — continuously aligns to business objectives.

BizDevOps capabilities are measured against:

- What business offerings and options are provided as part of the advisory, implementation and postdeployment processes
- How ongoing client business requests and proposals are effectively, efficiently and rapidly delivered within the SaaS environment or via communication with Oracle
- How business and client knowledge is captured, actioned and maintained within the ongoing delivery organization

**Impact Assessment**

This critical capability focuses on the provider's ability to help clients assess the impact of moving to an OCA product. The 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 product.

Impact assessment capabilities are measured against:

- The number of assessments undertaken and the conversion of those to implementation projects
- The provider's investments in accelerators, tools and reusable assets to provide a customized assessment

**Industry and Process Expertise**
This critical capability focuses on the provider’s ability to implement solutions embedded with intellectual capital and knowledge of the client’s industry, as well as business process reengineering focused on process excellence.

Industry and process expertise capabilities are measured against:

- The provider’s investments in industry and process assets — such as preconfigured processes and industry-specific enhancements
- The provider’s experience with and approach to business process reengineering
- The way that business knowledge is captured and maintained within the Oracle implementation delivery organization
- The clients’ access to industry-specific functional experts

**Operational Excellence**

This critical capability focuses on the provider’s ability to orchestrate the necessary people, tools and methodologies to efficiently deliver OCA solutions globally.

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.
- The investment in, and delivery against, standardized measures.
- The ability to attract and grow talent to deliver OCA solutions.

**Organizational Change Management**

This critical capability focuses on the provider’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
- A track record of helping stakeholders from both IT and the business agree on a set of business objectives and standard processes
- Track record of successfully designing and implementing OCM that results in documented, value-oriented organizational change (for example, faster adoption, process rationalization, efficiency and/or productivity gains)
**SaaS Product Expertise**

This critical capability focuses on the provider'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 expertise capabilities are measured against:

- Knowledge of best practices and requirements common within each OCA product area (that is, 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

**Technology Enablement**

This critical capability focuses on the provider's ability to implement the OCA product to enable business benefits. Providers with more experience and expertise in Oracle Cloud Applications will be better able to address this criterion.

Technology enablement capabilities are measured against:

- The provider's investments in new technology, tools and reusable assets
- The provider's aptitude in implementation solutions and delivery
- Client examples of the solutions delivered across multiple regions and industries

**Updates Management**

This critical capability focuses on the provider's ability to introduce and realize support for the client in an ongoing manner that continuously improves and delivers value.

Capabilities in updates management are measured against:

- Ability to support the frequent upgrades of the SaaS products by Oracle
- Investments in automation across the Oracle management service stack, including industry-specific automation investments
- Investments in optimizing the service delivery organization, processes and procedures; the documentation (for example, operation manuals and service delivery plans); and the way in which improvements are prioritized
Midsize Enterprise Engagement

This critical capability focuses on the provider’s ability and desire to engage with midsize enterprises.

Capabilities in midsize enterprise engagement are measured against:

- Proportion of business done with organizations that have between 1,000 and 10,000 employees

Use Cases

Global Business-Led Transformation

Global business-led transformations engage business, functional and IT groups. They reshape business functions to deliver higher value with demonstrable business outcomes.

Global business-led transformations can involve multiple OCA products (CX, EPM, ERP, HCM and SCM). They can potentially be executed in a phased rollout across multiple geographies.

This use case includes all services contracted as part of the OCA implementation and focuses on business outcomes.

Technical Migration

Technical migrations are driven by IT and technical decision makers. They typically center on a single OCA product (CX, EPM, ERP, HCM or SCM) and focus on technology outcomes.

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

This use case includes all services contracted as part of the OCA implementation and focuses on successful project implementation.

Midsize Enterprise Transformation

Midsize enterprise transformations are driven by IT and business leaders in midsize organizations. They can involve one or multiple OCA products (CX, EPM, ERP, HCM and SCM).

Midsize enterprise transformations are discrete, project-based deployments of OCA products. They can be based in a single country or have a wider regional scope. They focus on a fast and lower-cost business outcome, often evolving into an ongoing optimization and support contract.

This use case includes all services contracted as part of the move to OCA products.

Advisory
Advisory refers to discrete, project-based services that 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 proofs of concept (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.

Advisory services include:

- Impact assessment for both the business process and the technical environment
- Roadmap and business case development

**Postimplementation Evolution**

Postimplementation evolution comprises the ongoing services, optimization and management provided in support of an implemented OCA product.

It is important to distinguish postimplementation evolution services for SaaS products from application management services (AMS). The SaaS product environment is very different from a traditional AMS environment. Unlike the AMS environment, the SaaS environment is regularly updated and regenerated with new features and functionality.

Postimplementation evolution 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.

**Vendors Added and Dropped**

We review and adjust our inclusion criteria for Critical Capabilities as markets change. As a result of these adjustments, the mix of providers in any Critical Capabilities may change over time. A provider’s appearance in a Critical Capabilities one year and not the next does not necessarily indicate that we have changed our opinion of that provider. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that provider.

**Added**
- Huron
- LTI

**Dropped**
- Birlasoft
Inclusion Criteria

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

The criteria for inclusion of service providers 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

Service vendors included in this Critical Capabilities must satisfy all three of the following quantitative criteria:

- A minimum of 10 implementation projects started since 1 July 2019 in each of at least two Oracle Cloud Application products
- A minimum of two of five geographies (NA, LATAM, EMEA, APAC and Japan) with new implementation customers
- A minimum of $40 million annual worldwide revenue during the period of 1 July 2019 through 30 June 2020 for Oracle Cloud Application services

Qualitative Criteria

- Overall market interest in and visibility of the service provider as determined by serious consideration for selection from enterprise clients
- Gartner analysts’ interactions with enterprise buyers, which reveal interest in specific Oracle Cloud Application service providers
- Broad capabilities and technical/package expertise in combination with domain and process knowledge of the Oracle Cloud Application suite
This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighted 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

Enlarged table in Appendix

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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.

Source: Gartner (May 2021)
Table 3: Product Score in Use Cases

Enlarged table in Appendix

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.

Acronym Key and Glossary Terms

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<th>Acronym</th>
<th>Description</th>
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<tr>
<td>APAC</td>
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<td>center of excellence</td>
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<tr>
<td>EMEA</td>
<td>Europe, the Middle East and Africa</td>
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<td>FTE</td>
<td>full-time equivalent</td>
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<td>IoT</td>
<td>Internet of Things</td>
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Source: Gartner (May 2021)
Evidence

Evaluation in this Critical Capabilities is informed by:

- Gartner client interactions — Gartner inquiries between user organization clients and sourcing, procurement and vendor management analysts on service vendors relating to Oracle services and products and Oracle implementations over the 13 months (January 2020 through January 2021).

- Gartner client interactions — In the same period, more than 40% of Gartner's inquiries discussing cloud ERP were considering Oracle.

- Primary research — Feedback from 180 Peer Insights submissions.

- Primary research — A 60-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 for each vendor in the cohort and over 19,000 data points for the entire cohort.

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

- Other Gartner analysts — Peer review by eight Gartner analysts. Their views and comments were considered. In addition, this research was reviewed at internal research community sessions.

- Gartner Peer Insights and inquiries — Gartner's analysis in this Critical Capabilities is also based on customer responses, Gartner Peer Insights reviews (at the time of writing) and inquiry interactions. We considered reviews from Gartner Peer Insights Oracle Cloud Application Services, Worldwide posted from February 2020 through January 2021.

Note 1: Industries
This Critical Capabilities addresses the capabilities of the included providers in the following 27 industries:

- Aerospace and Defense
- Agriculture
- Automotive
- Banking
- Chemicals
- Consumer Products
- Defense and Security
- Engineering, Construction and Operations
- Healthcare (Providers)
- 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
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.

Document Revision History
Critical Capabilities for Oracle Cloud Applications Services, Worldwide - 26 May 2020
Critical Capabilities for Oracle Cloud Applications Services, Worldwide - 29 May 2019

Recommended by the Authors
Magic Quadrant for Oracle Cloud Application Services, Worldwide
How Products and Services Are Evaluated in Gartner Critical Capabilities
Validate Oracle Cloud Implementation Service Proposals
Use Smart Filtering to Accelerate Outsourcing Service Provider Evaluation and Selection

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### Table 1: Weighting for Critical Capabilities in Use Cases

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As of 7 March 2021

Source: Gartner (May 2021)
# Table 2: Product/Service Rating on Critical Capabilities

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Source: Gartner (May 2021)
Table 3: Product Score in Use Cases

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