# IDC MarketScape: Worldwide Oracle Implementation Services 2016 Vendor Assessment
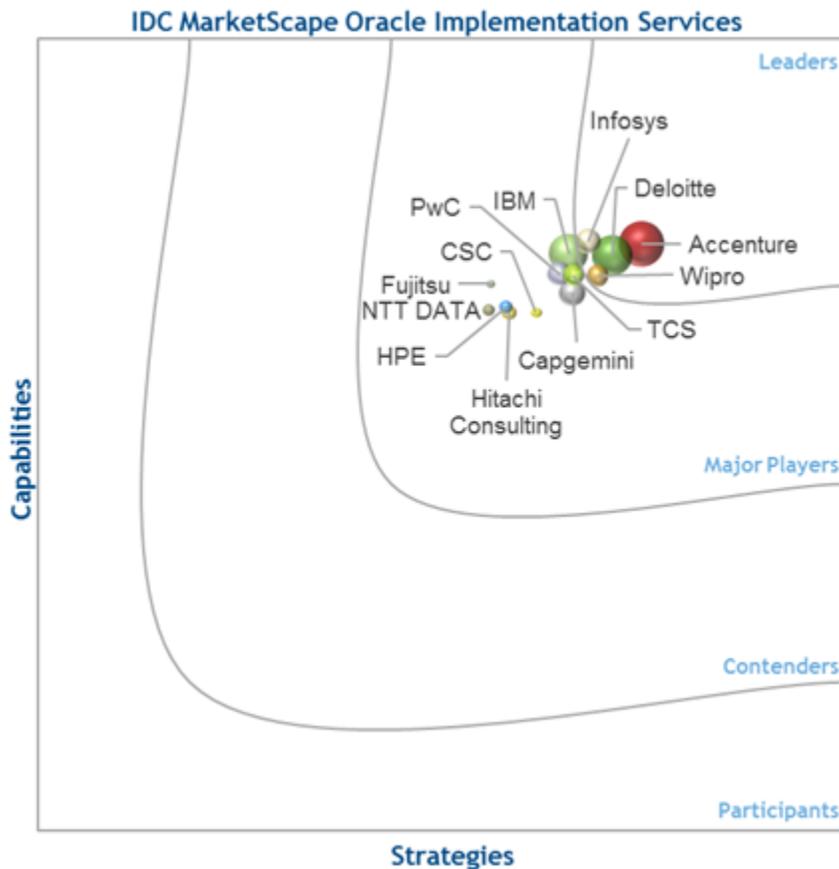
Gard Little                    Ali Zaidi

**THIS IDC MARKETSCAPE EXCERPT FEATURES: WIPRO**

## IDC MARKETSCAPE FIGURE

### FIGURE 1

**IDC MarketScape Worldwide Oracle Implementation Services Vendor Assessment**



Source: IDC, 2016

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

## IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Oracle Implementation Services 2016 Vendor Assessment (Doc #US40140016).  All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More.  Also included is Figure 1.

## IDC OPINION

This IDC study presents a vendor assessment of the 2016 Oracle implementation services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide Oracle implementation services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing Oracle implementation services in both the short term and the long term. A significant component of this evaluation is the inclusion of the perception of Oracle implementation services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings include:

- Across all 23 strategies and capabilities assessed, the three rated most highly on average across all Oracle implementation service providers were "functionality/offering road map," "sales/distribution strategy," and "financial/funding management." The strategy that received the lowest mean scores overall was "marketing strategy."

- Based on the survey feedback from 66 of the evaluated vendors' customers, the subcategories "delivery model appropriateness and execution" and "customer services" received the highest aggregate scores. The lowest aggregate score for any subcategory was for "employee management."

- When buyers were asked what characteristics were required for an Oracle implementation services project to be successful at a worldwide level, the top 2 characteristics were "able to achieve desired business outcome" and "able to meet project deadlines."

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of the 13 largest Oracle applications systems integrators (SIs) with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm — as opposed to its size or the breadth of its services. Given this approach, Lockheed Martin has been excluded even though it is among the top 5 systems integrators based on the worldwide revenue because the firm typically receives 84% of its revenue from the U.S. government. The inclusion criteria also dictate at least $175 million revenue coming from a vendor's Oracle implementation services practice at a worldwide level as well as a minimum of 1,200 Oracle implementation-associated global resources; furthermore, at least 10% of revenue and 10% of head count need to be located in each macroregion. In addition, it is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

## ESSENTIAL BUYER GUIDANCE

- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool not only to short list vendors for Oracle implementation services bids but also to evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, industry based or otherwise.

- **Delivery model appropriateness and customer service.** Include vendor performance on these factors among your highest selection criteria. These were the top 2 in terms of importance for project success as rated by customers that were surveyed for this IDC MarketScape.

- **Business outcome and project timeline.** Select services partners for your Oracle implementation services engagements that have strong project management and the ability to help businesses achieve the desired business outcome. Successful organizations carried out Oracle implementation services projects by partnering with Oracle implementation services providers that helped them achieve the desired business outcome they were looking for. It is essential that the investments you put in Oracle solutions drive the business outcomes they are planned to achieve and therefore it will be highly beneficial to partner with a provider that has a reputation to help you achieve these outcomes. Successful organizations also carried out Oracle implementation services projects by partnering with Oracle implementation services providers that were able to meet the project timelines. Having the ability and discipline to finish a project on time is critical for any successful project-based initiative. Select a partner that can showcase the ability to finish Oracle implementation services projects on time.

## VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths, challenges, and opportunities. IDC's assessment includes 13 vendors (in alphabetical order): Accenture, Capgemini, CSC, Deloitte, Fujitsu, Hitachi Consulting, Hewlett Packard Enterprise (HPE), IBM, Infosys, NTT DATA, PwC, TCS, and Wipro.

### Wipro

According to IDC analysis and buyer perception, Wipro is a Leader in the IDC MarketScape for Oracle implementation services worldwide.

Wipro offers end-to-end life cycle of Oracle services from consulting to implementation to application and infrastructure managed services. Wipro's strategy for the Oracle practice is to focus on cloud applications (SaaS, PaaS, BPaaS), digital transformation, IoT, integrated solutions across the Oracle ecosystem, industry IP and solutions, and rapid automation enabled by cognitive computing. In addition to creating its own IP and assets, Wipro strategically codevelops IP and solutions with Oracle and other ISV partners in the Oracle ecosystem to further accelerate the speed of solution creation for its customer.

#### *Strengths*

Buyers rate Wipro highly for integrating its project team with the client's internal team, leveraging resources globally, and integrating Oracle with clients' non-Oracle systems. IDC rates Wipro highly in terms of its cost management strategy and its growth strategy.

## Challenges

IDC believes Wipro's marketing strategy could be enhanced by sponsoring more of the company's own events focused on Oracle implementations. Wipro could also consider global financing as part of its pricing model.

## Opportunities

According to IDC's 2016 *Global Oracle Implementation Services Buyer Perception Survey,* Wipro can further enhance its position in future related IDC MarketScape evaluations by improving its client perception in the following areas:

- Providing access to local offices and local resources
- Providing breadth and depth of vertical-specific solutions
- Communicating the value of its services/solution and delivery methodologies/tools that clients are not currently consuming

## APPENDIX

### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

*Note: All numbers in this document may not be exact due to rounding.*

## Market Definition

The Oracle implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2016* (IDC #US41098116, April 2016).

### FIGURE 2

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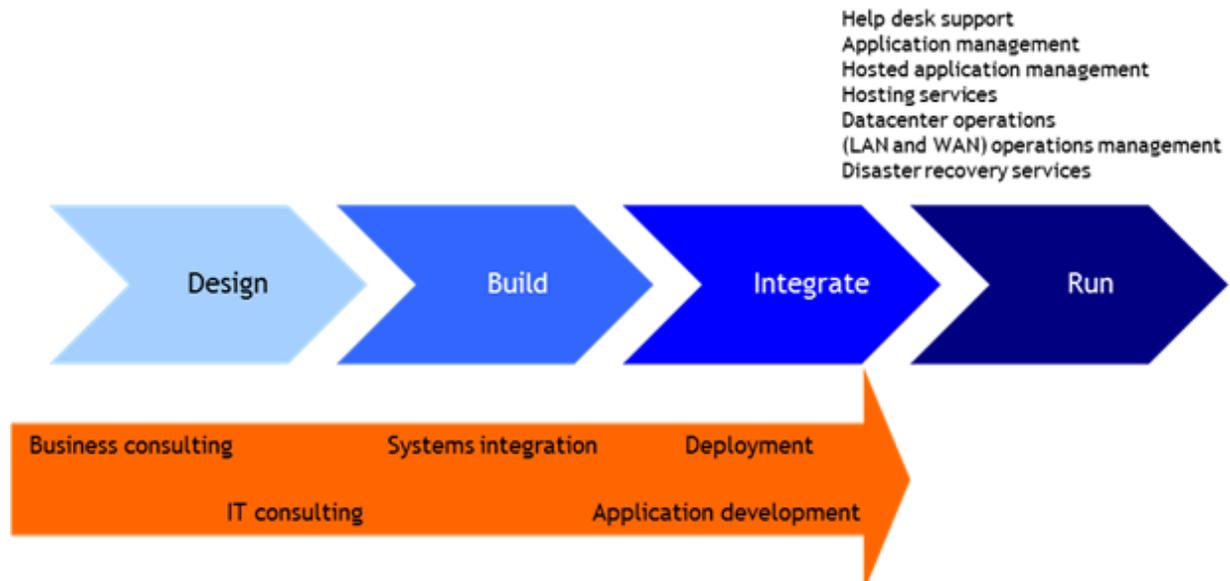


Source: IDC, 2016

## LEARN MORE

### Related Research

- *Worldwide and U.S. Systems Integration Services Forecast, 2016-2020* (IDC #US41209315, April 2016)
- *IDC MarketScape: Worldwide Oracle Implementation Services Ecosystem 2014 Vendor Assessment* (IDC #250296, August 2014)

### Synopsis

This IDC study presents a vendor assessment of the Oracle-based systems integration services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the Oracle implementation services market. This IDC MarketScape covers a variety of vendors participating in the Oracle implementation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"With Oracle pushing the cloud agenda to its clients, the Oracle implementation services market has evolved into a more cloud-centric and cloud-driven market since our last evaluation in 2014. SI vendors with a comprehensive implementation services portfolio across all major Oracle products and a cloud-first approach will be the dominant players in the Oracle implementation market going forward," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC. "When buyers were asked what characteristics were required for an Oracle implementation services project to be successful at a worldwide level, the top 2 characteristics were 'ability to achieve desired business outcome' and 'meet the project timeline,' both decidedly nontechnical factors," says Gard Little, research director, Digital Transformation at IDC.

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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