

IDC MarketScape: Asia/Pacific Oracle Implementation Services 2025 Vendor Assessment

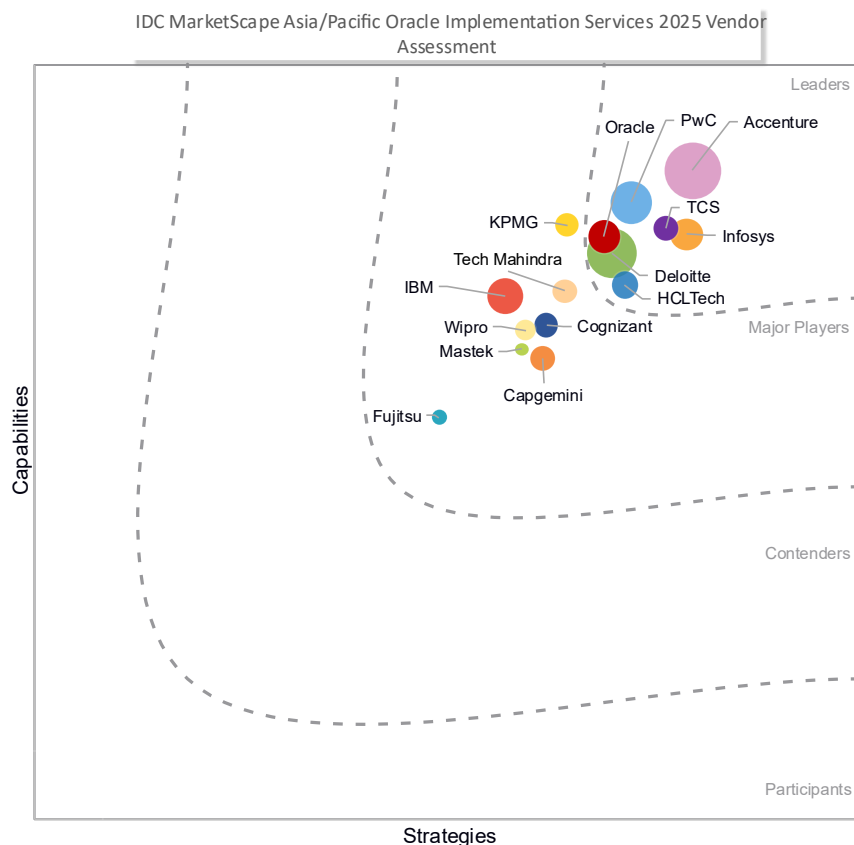
Rijo George Thomas

THIS MARKETSCAPE EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Asia/Pacific Oracle Implementation Services 2025 Vendor Assessment



Source: IDC, 2025

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: Aisa/Pacific Oracle Implementation Services 2025 Vendor Assessment (Doc #AP52998925).

IDC OPINION

Oracle has significant clientele in Asia/Pacific, with buyers leveraging Oracle for a wide range of use cases. As Oracle continues to invest in strengthening its infrastructure, applications, and platform suite of solutions, it further solidifies its value proposition as an enabler of digital transformation (DX). According to IDC's *2025 Asia/Pacific Enterprise Services Sourcing Survey*, 42% that currently use Oracle applications have moved to Oracle Cloud applications, and 43% said they plan to modernize in the next 24 months. Additionally, 39% said they will migrate Oracle-specific workloads, and 48% said they plan to migrate enterprise resource planning (ERP) workloads to Oracle Cloud Infrastructure (OCI), indicating a strong momentum in Oracle-related applications and infrastructure services in the Asia/Pacific region.

Oracle's SP ecosystem plays a pivotal role in helping enterprise customers reduce the complexity of implementing Oracle's new application solutions and risks in complex OCI modernization projects by leveraging expertise in conducting IT assessments, developing road maps, focusing on innovation, and providing local talent for support.

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

- **A strong range of Oracle services offered.** Among all the measurement criteria, Oracle application implementation vendors performed well in the "range of services" scoring criteria, suggesting that most participants had mature Oracle practices and provided a broad range of Oracle services. IDC also found that there were significant variations in the "essential capabilities" scoring criteria, highlighting differences in the ability to contextualize solutions for industry and line-of-business (LOB) use cases. Although most vendors provided a broad range of services across Oracle's application stack, some lacked the ability to provide services across the breadth of Oracle products, such as JD Edwards, NetSuite, and PeopleSoft.
- **Understanding why clients buy Oracle solutions.** From the overall assessment of the strategy criteria of the participating vendors, IDC observed that vendors did well in the regional growth strategy, indicating a growing focus on developing Oracle-led transformation opportunities in the Asia/Pacific region. Additionally, the vendors also did well in articulating their

plans to drive the adoption of OCI, not only for Oracle workloads but for all workloads.

- **Delivery and solution consistency with AI-enhanced assets.** Oracle implementation partners have embraced AI as a tool to differentiate solution delivery. In addition to integrating AI in implementation activities to ensure delivery consistency through automated documentation review, code migration, testing, and patching, implementation vendors are packaging Oracle technology stack with enhanced AI capabilities to create industry- and business-specific use cases. For instance, some vendors have packaged Oracle's application solutions to cater to clients in insurance, manufacturing, and healthcare, incorporating detailed process maps, automation, and customizations to quicken value generation. IDC analysis found the breadth of use cases to be a key differentiator in scaling AI innovations in the client organization. Additionally, implementation partners have also developed AI advisory and architecture building offerings on Oracle's technology stack to target new AI-led transformation opportunities.
- **Preparing for the new application architectures in the AI era.** According to IDC's study, agents are starting to replace entire applications. For instance, companies will have a customer relationship management (CRM) agent/agent fleet or a supply chain management (SCM) agent/agent fleet. As more enterprise business users move their interaction from applications to the agentic layer, SPs will also find that the area of differentiation will be at the agentic layer as well as in the ability for custom agents to orchestrate many systems for insight and action. As Oracle embeds AI across its solution stack, Oracle implementation partners have made considerable strides in integrating agentic AI workflows in solution building to drive outcomes.

IDC MARKETScape VENDOR INCLUSION CRITERIA

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

- **Featured global systems integrator partners.** All of Oracle's featured System Integrator partners have been included in the study.
- **Revenue.** Each implementation SP was required to have a 2024 total revenue (from Oracle implementation services) that exceeded US\$20 million from Asia/Pacific.
- **Geographic presence.** Each implementation SP was required to have service delivery capabilities in at least three subregions. This includes Australia and New Zealand (ANZ), the Greater China Region and South Korea (GCR + South Korea), Southeast Asia, India, and Japan.

- **Service capabilities.** The implementation SP should have demonstrated end-to-end service capabilities around Oracle implementation. This includes design/consulting, migration, upgrade, customizations, testing, and systems integration services.
- **Products covered.** The implementation SP should provide services around any three of the product categories:
 - Cloud applications (Oracle Fusion Applications being mandatory) — ERP, SCM, human capital management, and customer experience (CX)
 - Enterprise applications — NetSuite, EBS, PeopleSoft, JD Edwards, Hyperion, and Sibel
 - Industry applications
 - OCI (mandatory)
 - Platform-as-a-service (PaaS) solutions

The last iteration of the study focused on the implementation capabilities of vendors in Oracle's application offerings. This study focuses on the implementation capabilities of both applications and the technology stack.

ADVICE FOR TECHNOLOGY BUYERS

This IDC study represents a vendor analysis and assessment of the 2025 Asia/Pacific Oracle application implementation services market through the IDC MarketScape model. This research explains vendors' success in the Oracle implementation services marketplace and how well placed they are to grow in the Asia/Pacific region.

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

- **Oracle application product expertise.** IDC's analysis discovered that although vendors within the Oracle partner ecosystem demonstrated strong overall expertise in Oracle application products, there were instances in which the partner did not meet customer expectations in implementing specific modules of Oracle solutions (e.g., Enterprise Performance Management [EPM], NetSuite) in large application modernization and business transformation projects. When evaluating implementation partners, assess their proficiency in all the required modules and ability to tailor solutions to your business needs. Customers might be forced to consider other niche or third-party vendors to fill any gaps that may arise as the Oracle application implementation progresses, resulting in cost overruns.
- **Oracle infrastructure services capabilities.** According to IDC's *2024 Enterprise Services Sourcing Survey*, multiple public clouds are becoming increasingly common, and there is noticeable momentum for repatriation from public cloud to on-premises and private environments because of

various factors, such as cost, security, and AI experimentation. This indicates a growing enterprise maturity in deciding the complexity of workloads that need to be on different public clouds. Evaluate the vendor's ability to work across multiple public cloud platforms, migration assets to move Oracle and non-Oracle workloads to OCI, and cloud professional services capabilities to deliver the full breadth of cloud services during OCI migration projects.

- **Momentum in AI integration.** Oracle partners have made significant progress in leveraging AI as a tool to differentiate and accelerate implementation timelines. Consider the partner's ability to use AI for road map design, prototyping activities, testing and debugging, custom code development, support, data cleansing, and so on. Additionally, evaluate the vendor's willingness to pass on efficiency gains as cost savings or use them as a stepping stone for new transformation projects.
- **Agentic AI orchestration.** Oracle has enhanced its fusion application portfolio with agentic AI capabilities to automate several business-specific tasks. Look for the partner's ability to drive the adoption of native agentic AI features in Oracle applications and the ability to build workflows with agents that cut across the non-Oracle application landscape.
- **Change management and new ways of work.** The implementation of Oracle software-as-a-service (SaaS) solutions and integration of agentic AI will transform entire process workflows. Evaluating the vendor's ability to help business lines manage change and embrace new ways of working post-solution implementation is important.
- **In-country/regional presence.** Many implementation SPs with a significant customer base in the West have a limited presence in Asia/Pacific. Considering the partner's local presence, ability to deliver support with local consultants, and plans to scale in the region will be a good measure to assess the vendor's long-term commitment to the relationship and ability to provide scalable talent.
- **Competitive evaluation.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for Oracle application implementation projects but also evaluate a vendor's proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise (technical, industry-based, or otherwise).

VENDOR SUMMARY PROFILE

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

Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the leaders category in the 2025 IDC MarketScape for Asia/Pacific Oracle implementation services vendor assessment.

Accenture's Enterprise Platform division houses Accenture's Oracle Business Group, which spearheads Oracle-led transformations for clients in the Asia/Pacific region by bringing together its advisory, industry, and service delivery expertise. Accenture provides a full spectrum of implementation services across all Oracle application products and technology solutions.

Accenture's approach to its Oracle implementation service is hinged on its 360-Degree Value framework, which is built on the principle of partnering with clients to drive comprehensive value, including financial success, workforce transformation, achieving sustainability goals, and the creation of meaningful experiences for end customers. To facilitate this, Accenture draws on the strength of its five industry groups that covers 21 industry verticals and extended service lines: Accenture Technology, Accenture Song, Industry X, Strategy, and Consulting services. Accenture aims to leverage AI innovations to support the delivery of Oracle services through its Accenture AI Refinery platform, which is a suite of assets and solutions to help enterprises create agents, vectorize proprietary enterprise data, distill prebuilt AI models, and manage various components of AI. The AI Refinery platform is built on OCI, Nvidia AI Foundry, Nvidia AI Enterprise software, and Nvidia Omniverse, enabling Accenture to connect raw AI technologies provided by the varied technology platforms deployed within clients. Additionally, Accenture has also created SaaS adjacent AI solutions customized for business personas, such as Accenture's Oracle GenAI offering for CFOs, addressing complex use cases of the business.

At the time of this study, IDC estimates that Accenture has a larger distribution of clients in Japan, which is followed by ANZ and Southeast Asia. The major verticals in Accenture's Oracle implementation services are public services, utilities, and banking. Additionally, Accenture has local delivery capabilities and resources in all the major market units in Asia/Pacific, with a higher distribution of Oracle-skilled resources in India, followed by Southeast Asia, Japan, and ANZ.

Strengths

- **Strong local practice in Asia/Pacific.** Accenture has placed a strong emphasis in effectively utilizing its large Oracle applications talent base across the Asia/Pacific region. By combining its regional delivery strength with decades of industry and process expertise, Accenture can provide highly localized Oracle-led IT transformations for clients in the Asia/Pacific region.
- **Large transformation expertise.** Accenture showcased strong capabilities in delivering large Oracle-led transformation programs, supported by multipillar

services from business consulting to post-implementation support services. Additionally, Accenture continues to deliver new Oracle-enabled functional and industry reinvention projects for customers by combining the capabilities from its strategy, industry, and Oracle technology practices.

Challenges

- Accenture's Oracle practice currently has limited presence in South Korea.
- A client indicated Accenture needs to improve its project management capabilities in implementations.

Consider Accenture When

Accenture is an ideal partner for large and complex multigeography deployments of Oracle Cloud solutions in Asia/Pacific. Additionally, clients will find Accenture's depth of industry solutions and functional transformation experience a value-add when scaling Oracle-led modernizations.

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 with customers' needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

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

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

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants

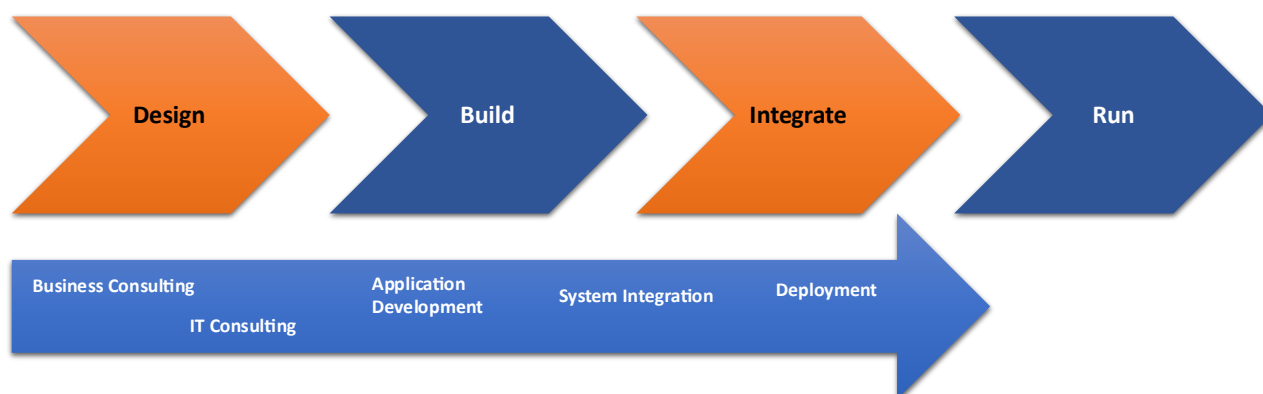
and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores and vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behaviors, and capabilities.

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, 2025* (IDC #US52282025, March 2025).

FIGURE 2

IDC's Design-Build-Run Function Chain



Source: IDC, 2025

LEARN MORE

Related Research

- *Asia/Pacific Services Forecast, 2025–2029* (IDC #AP53571225, June 2025)
- *Exploring the Role of External IT SPs in the Enterprise Agentic AI Journey in Asia/Pacific* (IDC #AP52292825, June 2025)
- *Asia/Pacific IT Consulting and Systems integration Services Market Shares, 2024: The Pivot to AI Era* (IDC #AP53511825, June 2025)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of SPs participating in the Oracle implementation services market with specific offerings

and capabilities in the segment. It discusses both the quantitative and qualitative characteristics that lead to success in the ecosystem.

The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to one another and highlights the factors expected to be the most influential for success in the market in both the short and long term.

"The Oracle implementation services market continues to grow steadily in the Asia/Pacific (including Japan) (APJ) region driven by enterprises' need to modernize legacy applications, make data-driven business decisions, and consume multiple public cloud solutions. Successful providers continue to enhance their offerings to support their clients' AI ambitions and unearth value from Oracle investments, " says Rijo George Thomas, senior research manager, IDC Asia/Pacific.

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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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