

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

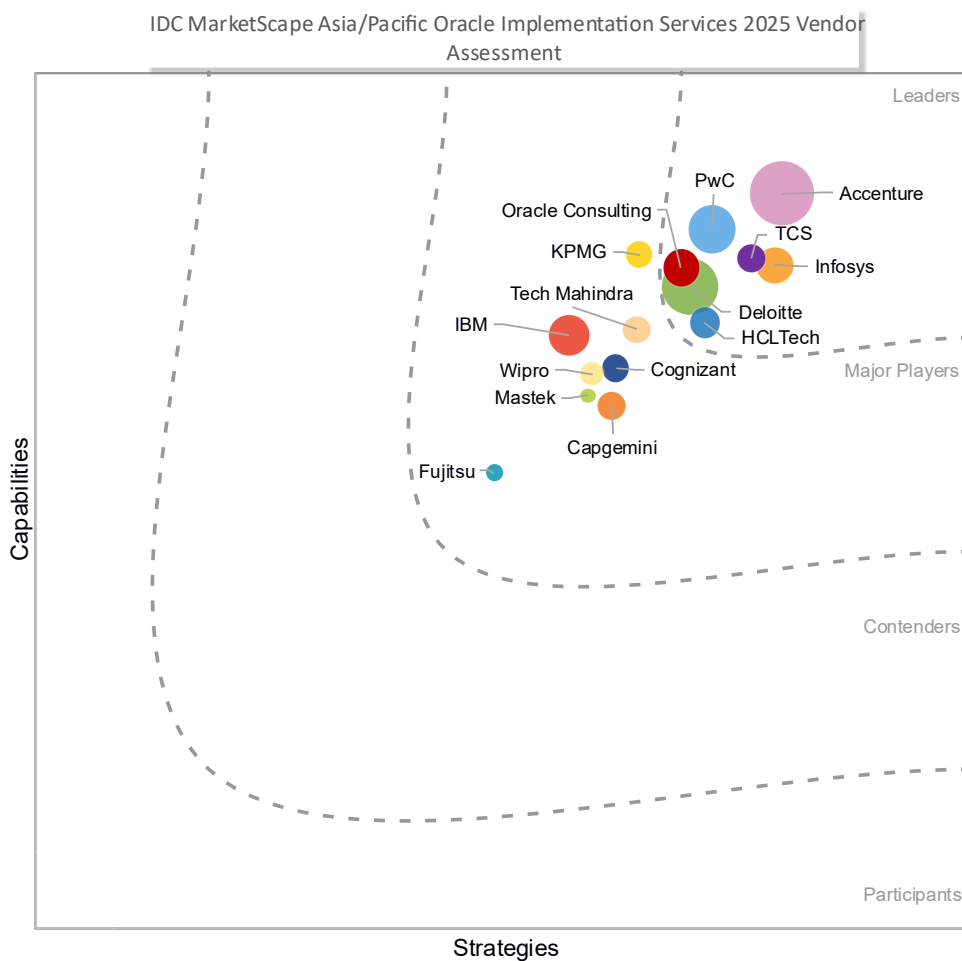
Rijo George Thomas

**THIS EXCERPT FEATURES PWC 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.

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Oracle Implementation Services 2025 Vendor Assessment (Doc # AP52998925).

## IDC OPINION

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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

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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

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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

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. Although every vendor is evaluated against each of the criteria

outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

## PricewaterhouseCoopers

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

PwC is a global professional service firm that provides end-to-end business and technology transformation services across the Asia/Pacific region. PwC provides implementation services across all Oracle Cloud applications, platform, and infrastructure solutions.

PwC continues to build on its global strategy called "The New Equation," which aims to bring together its trust and consulting solutions to help Asia/Pacific clients grappling with the urgency to successfully respond to change and build trust in an uncertain business environment. PwC hinges its GTM strategy on an industry-aligned approach to solutioning, bringing deep sector expertise to help clients redesign current business models and preconfigured model systems built on Oracle's technology stack to deliver tangible business outcomes. PwC has doubled down on its efforts to enhance its Oracle delivery experience, leveraging its Concourse delivery platform to mobilize, manage, execute, and monitor client engagements in Asia/Pacific. PwC's Asia/Pacific Oracle practice further builds on its cross-practice strategy with locally driven teams and integrated offerings for digital, ESG, tax, cyber, risk, regulatory, and deals to create strong business-level connections with client organizations.

At the time of this study, IDC estimates that PwC has a larger distribution of clients in India followed by GCR, ANZ, Japan, and Southeast Asia. The main verticals in PwC's Oracle implementation services are government, technology, and insurance. PwC 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 GCR, Southeast Asia, and ANZ.

## Strengths

- **Accelerated time to value.** PwC leverages its robust portfolio of 15 industry-specific model systems and over 250 solution intellectual properties (IPs) built on the Oracle SaaS application to bring standardization and simplification in solutioning, thereby accelerating time to value in the client's cloud transformation journey. Additionally, the standardized approach helps clients benchmark their current processes against industry best practices to unearth incremental business value from the technology investments.
- **Micro-vertical strategy.** PwC showcased strong industry alignment, especially for select industries, as part of its micro-vertical strategy. This



includes industrial products, utilities, healthcare, financial services, tech, media, telecom, consumer markets, and the public sector. PwC has enhanced its industry GTM strategy with preconfigured model systems and digital assets to guarantee tangible outcomes.

- **Agent-powered assets.** PwC has made considerable strides in its efforts to embed AI and agentic AI capabilities in its solutions. PwC's agent-powered performance solutions work on the sense, think, and act framework to enhance Oracle applications via agentic AI workflows to drive outcomes.

## Challenges

- Some clients indicated PwC needs to work on managing the churn in its implementation projects
- Currently, PwC's scale of business across Oracle's midmarket solutions, such as NetSuite and JD Edwards, is limited in APJ.

## Consider PwC When

PwC is a good fit for enterprises looking for an Oracle implementation partner with strong industry expertise and experience in delivering holistic business transformation programs with Oracle applications as the technology foundation. PwC's integrated solutions are key value-add in accelerating time to value.

## APPENDIX

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### 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

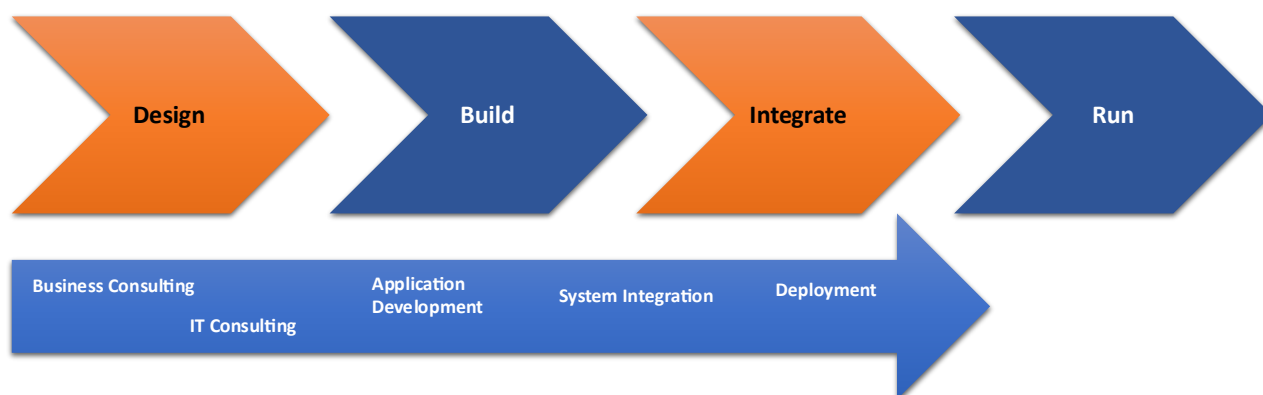
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders,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

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