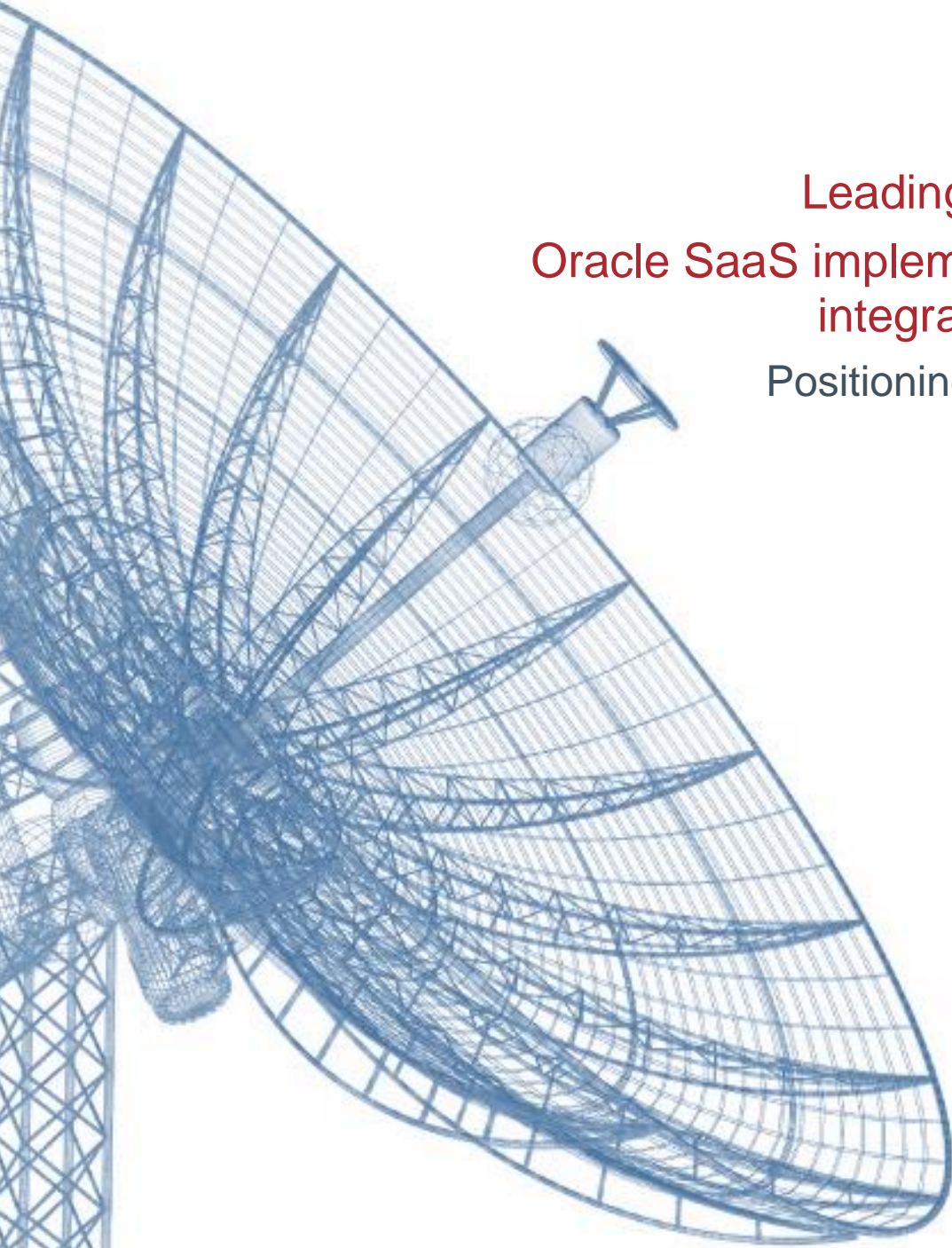


Cloud Computing, BAS Services | Europe | 2018

# Oracle SaaS Implementation and Integration Services in Europe 2018

SITSI | Vendor Analysis | PAC RADAR



Leading suppliers of  
Oracle SaaS implementation and  
integration services  
Positioning of Accenture



BARC · |e CXP · PAC



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## OBJECTIVE OF THIS REPORT

The purpose of the PAC RADAR from the market research and strategic consultancy Pierre Audoin Consultants (PAC) is to provide a holistic evaluation and visual positioning of leading IT providers within a defined service segment on a local market. Using predefined criteria, the providers' revenue volumes and development and market share are assessed and compared alongside their performance and specific competences in the relevant market segment.



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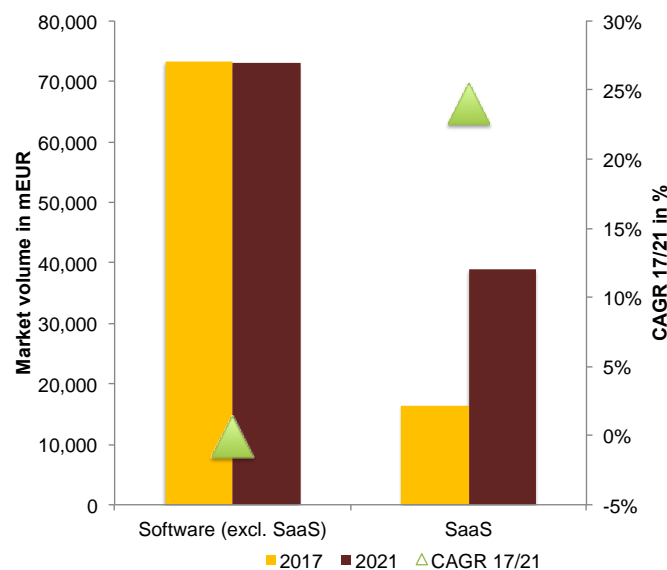
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## INTRODUCTION

Western European companies spend almost € 16.5 billion on software as a service (SaaS) subscriptions, which corresponds to 18% of the total spending on software products and solutions. And this share is expected to grow to 35% by 2021.

With an expected compound annual growth rate of 24% until 2021, the SaaS model will further gain in importance; the reason for this is both the shift from traditional software spending – which is expected to grow by less than 6% in the same period (including SaaS; the figure is stagnating when considering spending on traditional software only) – towards SaaS as well as the further increase in software penetration in companies of all sizes and sectors.



Software vs. SaaS expenditure in Western Europe 2017/2021

The by far biggest European SaaS markets are the UK (26% of total SaaS spending), Germany (20%) and France (15%).

The UK is also the most mature market in Europe when it comes to SaaS adoption, with the share of SaaS in total spending on software products and solutions amounting to 25%. In France and Germany, this share is still 19% and 15%, respectively, but is expected to rise to more than 33-35% by 2021.

In terms of revenue, the main SaaS platforms in Europe are Microsoft, Adobe Systems, Salesforce, IBM, Google, Oracle, SAP and ServiceNow. All of them grew their SaaS business by between 35% and almost 60% in 2016.

The success story of the SaaS model led to an ever-increasing demand for related services – which are the focus of this PAC RADAR analysis.

In 2017, Western European companies are expected to spend almost € 12 billion on SaaS-related consulting, systems integration and managed services, and PAC believes that this market will grow to more than € 25 billion by 2020.

Against this background, PAC has evaluated the providers of SaaS-related services in Europe in a total of nine different PAC RADAR analyses, with a focus on C&SI services for selected SaaS platforms or SaaS-related C&SI services for specific countries. Depending on the focus, the providers were positioned in all or only selected PAC RADAR analyses.

For our European platform-specific RADAR analyses, we focused on services for the major SaaS platforms with the most established services ecosystem, i.e. Microsoft, Oracle, SAP, Salesforce and ServiceNow. The considered SaaS platforms all rank among the top 10 in Europe in terms of revenue, with Microsoft leading the field, before Salesforce (#3), Oracle (#6), SAP (#7) and ServiceNow (#8).

Even if the SaaS market remains fragmented, these 5 SaaS vendors account for a combined market share of over 28% of the total SaaS market.

Besides these platform-specific RADAR analyses, we have published separate PAC RADARs for Germany, France and the UK – the by far biggest European markets for SaaS-related C&SI services, holding more than two thirds of the European market – as well as for Europe. In these regional cross-platform RADAR analyses, we focused on the above-mentioned SaaS platforms to a certain degree, but also took into account the breadth and variety of further SaaS solutions covered by the C&SI suppliers.

The RADAR analysis at hand focuses on the Oracle SaaS-related services supplier ecosystem in Europe.

## ORACLE SAAS – BACKGROUND AND SAAS OFFERING

Oracle's first relational database management system was released in 1979. Since then, Oracle has constantly enlarged its portfolio to cover databases, middleware, enterprise management, development software, server and storage hardware as well as cloud services.

Oracle applications include the Fusion Apps, PeopleSoft (acquired in 2005), Siebel CRM (acquired in 2005) and JD Edwards (acquired by Peoplesoft in 2003).

Cloud computing is one of the most strategic portfolio elements for Oracle, since it is the only portfolio element showing significant growth and having the potential to grow in the future. And as service revenues and total software license revenues are virtually flat and hardware revenues are declining, the revenues from cloud computing have to balance the revenue stream.

The Oracle cloud offering covers all flavors of cloud computing, i.e. IaaS, PaaS and SaaS, Data as a Service, Private Cloud and Managed Cloud as well as the flanking services. In addition, Oracle runs a Cloud Marketplace with over 4,700 apps, featuring nearly 200 service providers for consulting, integration and migration as well as managed services around the Oracle cloud offerings.

The offerings are strongly positioned around Oracle applications. What sets Oracle's cloud computing portfolio apart is the integration of different cloud computing variations. The company's cloud computing offerings are all integrated, i.e. a customer application running on IaaS can easily access SaaS solutions and their data; Oracle SaaS solutions can easily be enriched with apps from the Cloud Marketplace; and PaaS functionalities can easily be integrated with IaaS and SaaS applications.

Oracle strongly bets on the cloud to facilitate its clients' migration from Oracle legacy application software solutions to its cloud-based ones. Oracle's Data as a Service offering covers the company's data-based solution portfolio for marketing, sales and customer intelligence.

Oracle's cloud computing offering is still relatively small in terms of the company's total business. SaaS, i.e. mainly Oracle applications as a service and value-adding apps from the marketplace, accounts for about 70% of Oracle's cloud computing revenues.

With an estimated revenue of almost € 560 million, Oracle ranked 7th in the European SaaS market in 2016. At worldwide level, Oracle ranked 8th in terms of SaaS revenue, clearly behind Microsoft and Salesforce and slightly behind SAP.

## SAAS IMPLEMENTATION AND INTEGRATION SERVICES – DEFINITION

PAC evaluated the providers of **SaaS-related consulting, implementation & integration services in Europe** in different **PAC RADAR analyses**, each of which emphasizes a specific SaaS platform or cross-platform on the major European markets Germany, France and the UK. Depending on their focus, the providers will be positioned either in all or in selected PAC RADAR analyses.

Not the SaaS platforms were assessed, but the **ecosystem services** that provide support to corporate clients with the implementation of SaaS solutions, from the comprehensive development of a cloud strategy up to the implementation, integration and management of SaaS solutions.

**SaaS implementation and integration**, as considered in this PAC RADAR analysis, includes **Software-as-a-Service (SaaS)-related IT consulting services** (feasibility study, planning, specification and design), **IT-related process consulting** as part of a SaaS-related project (audit of system infrastructures, selecting technologies and solutions, business process reengineering [BPR] and change management) and **SaaS implementation and integration** (implementation services and data migration, integration of the SaaS solution in the existing software infrastructure and in other SaaS solutions where applicable, testing, training, etc.).

|                            |                                  | Cloud C&SI                              | Cloud Operations                       |
|----------------------------|----------------------------------|---|--|
| <b>Cloud Strategy</b>      | Overall Cloud Strategy           | <b>Cloud Adoption</b>                   | <b>Service Mgmt. &amp; Governance</b>  |
| <b>SaaS</b>                | Business Applications            | <b>Implementation &amp; Integration</b> | <b>Managed Services, Orchestration</b> |
| <b>PaaS</b>                | Middleware, Development Platform | <b>PaaS Adoption</b>                    | <b>Managed Services, Orchestration</b> |
| <b>Public IaaS</b>         | Server, Storage                  | <b>Migration &amp; Integration</b>      | <b>Managed Services, Brokerage</b>     |
| <b>Hybrid Architecture</b> | Hybrid Architecture              | <b>Implementation &amp; Integration</b> | <b>Managed Services</b>                |
| <b>Private IaaS</b>        | Server, Storage                  | <b>Transformation</b>                   | <b>Managed Services</b>                |

|   |  |
|---|--|
| <b>Core Services (focus of the RADAR)</b> | <b>Peripheral Services (related services that will be considered, but lower in weight)</b> |
|---|--|

The assessment takes into account, but does not focus on, "related services", such as comprehensive cloud strategy consulting or the operation of the SaaS solution (hosting/managed services).

Apart from the **cross-platform PAC RADARs about SaaS implementation in Germany, France and the UK**, PAC has compiled **RADARs dedicated to the implementation of leading platforms in Europe** such as Salesforce, Microsoft, Oracle, SAP and ServiceNow.



## PAC RADAR EVALUATION METHOD

### The PAC RADAR evaluation method

The PAC RADAR is a tool for the holistic evaluation of IT providers. PAC publishes the PAC RADAR two to four times per year for different segments. Every PAC RADAR targets a specific IT services sector. In this PAC RADAR the leading providers in a local market are evaluated.

In the PAC RADAR, the performance, competence and market position of the key providers in a services segment are assessed and compared using approx. 100 pre-defined criteria.

The criteria are classified by clusters (or categories) and can each be mapped to the “Competence” and “Relative Market Strength” main clusters. There is an overall rating from the evaluation of the criteria as well as sub-ratings per cluster.

From the weighted evaluation of all criteria and the resulting overall score, each provider receives their characteristic positioning in the PAC RADAR.

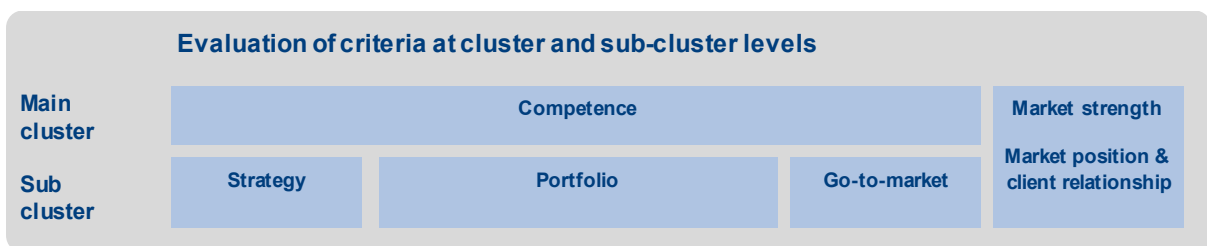
The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on

- The provider’s detailed self-disclosure about resources, distribution, delivery, portfolio, contract drafting, pricing, customer structure, references, investments, partnerships, certifications, etc.;
- An assessment of the provider by reference customers (to be obtained by the provider);
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

The provider data is verified by PAC and any omissions rectified based on estimates.

**For the PAC RADAR the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers’ requirements!**



Clusters of the PAC RADAR by which providers are evaluated

## Selection of providers

Providers are selected and invited according to the following criteria:

- Size of revenues in the segment to be analyzed in the specified region
- “Relevance”: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered, if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g. SMB).

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

Not considered in these PAC RADAR analyses were small or purely local platform specialists, as the prerequisite was either to cover services for one SaaS platform at multi-national level or to provide services for several SaaS platforms at local or regional level.

Moreover, the PAC RADAR analyses focus on the SaaS-related services ecosystem and exclude the platform operators themselves, even though some SaaS vendors, such as Salesforce or SAP, are among the top C&SI providers for their own solutions.

### Considered providers by platform

| Salesforce Implementation in Europe   | Microsoft SaaS Implementation in Europe  | Oracle SaaS Implementation in Europe   | ServiceNow Implementation in Europe   | SAP SaaS Implementation in Europe   |
|---|--|--|---|---|
| <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• BearingPoint</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• All for One Steeb</li> <li>• Atos</li> <li>• BearingPoint</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• Materna</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• Materna</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• All for One Steeb</li> <li>• Atos</li> <li>• BearingPoint</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> |

### Considered providers by geography

| SaaS Implementation in Germany   | SaaS Implementation in France   | SaaS Implementation in the UK   | SaaS Implementation in Europe   |
|--|---|---|---|
| <ul style="list-style-type: none"> <li>• Accenture</li> <li>• All for One Steeb</li> <li>• Atos</li> <li>• BearingPoint</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• Materna</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• Sopra Steria</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• TCS</li> <li>• Wipro</li> </ul> | <ul style="list-style-type: none"> <li>• Accenture</li> <li>• Atos</li> <li>• BearingPoint</li> <li>• Capgemini</li> <li>• CGI</li> <li>• Computacenter</li> <li>• Deloitte</li> <li>• DXC Technology</li> <li>• Fujitsu</li> <li>• IBM</li> <li>• Infosys</li> <li>• Materna</li> <li>• NTT Data</li> <li>• Sopra Steria</li> <li>• T-Systems</li> <li>• TCS</li> <li>• Wipro</li> </ul> |

**Evaluation criteria (most relevant)****General criteria (considered to varying extents for both individual SaaS platforms and regions)**

|   | General criteria<br>(considered to varying extents for both individual SaaS platforms and regions)   |
|---|--|
| Cluster "Competence"                        | <ul style="list-style-type: none"> <li>• Coverage of the SaaS C&amp;SI value chain</li> <li>• Corporate transparency</li> <li>• Ability to flexibly shift services to near-/offshore locations</li> <li>• Certifications (a.o. service quality, security)</li> <li>• Entrenchment of the SaaS-related consulting business within the organization</li> <li>• Level and mix of experience of SaaS services consultants</li> <li>• Experience with multi-national/international projects</li> <li>• Readiness to work on a fixed price basis</li> <li>• History – SaaS-related services</li> <li>• Coverage of application areas/processes</li> <li>• Supplementary portfolio element – SaaS managed services</li> <li>• Predefined services packages ("productized services")</li> <li>• Target group-specific offers (sectors, customer sizes, ...)</li> <li>• R&amp;D engagement &amp; investments</li> <li>• Share of SaaS C&amp;SI-related training and upskilling measures in total training budget</li> <li>• Further development of the SaaS services-related portfolio</li> <li>• Focus on large enterprises</li> <li>• Focus on small- to mid-sized clients</li> <li>• Experience with large, complex projects</li> <li>• Flexibility with regard to pricing models</li> <li>• Entrenchment of SaaS-related consulting sales within the sales organization</li> <li>• Focus on (stand-alone) SaaS C&amp;SI services</li> <li>• Focus on SaaS managed services</li> <li>• Focus on application-related C&amp;SI (share of total business)</li> <li>• Reference customer rating: evaluation of sales phase</li> <li>• Reference customer rating: evaluation of account management</li> <li>• Reference customer rating: assessment of quality in service provision</li> <li>• Acquisitions dedicated to SaaS-related services</li> </ul> |
| Cluster "Relative market strength"          | <ul style="list-style-type: none"> <li>• Reference customer rating: overall satisfaction</li> <li>• Balanced clientele</li> <li>• Acknowledgement by competitors (peer rating)</li> </ul>  |
| Criteria with particularly strong weighting | <ul style="list-style-type: none"> <li>• Coverage of the SaaS C&amp;SI value chain</li> </ul>  |

**Criteria mainly related to specific regions**

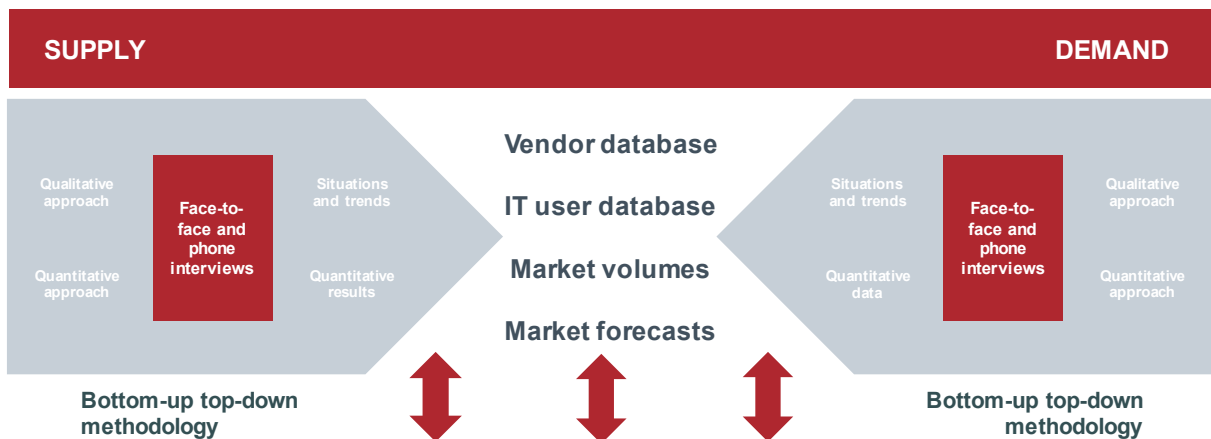
|   | Criteria mainly related to specific regions   |
|---|---|
| Cluster "Competence"                        | <ul style="list-style-type: none"> <li>• Coverage of application areas/processes</li> <li>• Realized SaaS projects (cross-platform)</li> <li>• Coverage of different industry sectors (resources &amp; projects)</li> <li>• Coverage of different SaaS platforms</li> </ul> |
| Cluster "Relative market strength"          | <ul style="list-style-type: none"> <li>• Company size/local presence</li> <li>• Focus on the local market</li> </ul>  |
| Criteria with particularly strong weighting | <ul style="list-style-type: none"> <li>• Company size/local presence</li> <li>• Focus on the local market</li> <li>• Coverage of application areas/processes</li> <li>• Realized SaaS projects (cross-platform)</li> <li>• Coverage of different SaaS platforms</li> </ul>  |

**Criteria mainly related to specific SaaS platforms**

|  | Criteria mainly related to specific SaaS platforms   |
|--|--|
| <b>Cluster “Competence”</b>                        | <ul style="list-style-type: none"> <li>• Acquisitions dedicated to SaaS-related services</li> <li>• Project experience – worldwide</li> <li>• Project experience – Europe</li> <li>• Coverage of solutions/use cases</li> <li>• Certifications</li> <li>• Vendor awards</li> </ul> |
| <b>Cluster “Relative market strength”</b>          | <ul style="list-style-type: none"> <li>• Consulting resources – worldwide</li> <li>• Consulting resources – Europe</li> <li>• Lighthouse projects</li> <li>• Acknowledgement by competitors (peer rating)</li> </ul>   |
| <b>Criteria with particularly strong weighting</b> | <ul style="list-style-type: none"> <li>• Project experience – Europe</li> <li>• Certifications</li> <li>• Consulting resources – Europe</li> <li>• Coverage of solutions/use cases</li> </ul>  |

**General PAC research method**

The following overview describes PAC’s research method for market analysis and key differentiation features.



Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC’s methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

## Positioning within the PAC RADAR

From the resulting overall score, each provider receives their characteristic positioning within a ring of the PAC RADAR. Here, the following applies: The closer a provider is to the upper right corner, the closer they are to meeting customers' requirements.

The "customer requirements" (in the upper right corner) represent a cross-section of the market; the position of the provider represents the completeness with which the provider's offerings and competence correspond with the requirements of all potential customers; i.e. purely local clients, international key accounts and SMEs alike.

The providers are positioned within ring 1 (innermost ring) to ring 4 (outermost ring), based on the total grade they achieved. The total grade is the average score of the two main clusters ("competence" & "market strength").

The rings of the PAC RADAR can be classified by the following attributes:

- Ring 1: "Best in Class" (total grade between 1 and 1.99)
- Ring 2: "Excellent" (total grade between 2 and 2.99 )
- Ring 3: "Strong" (total grade between 3 and 3.99 )
- Ring 4: "Solid" (total grade between 4 and 4.99)

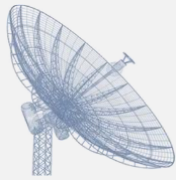
# PAC RADAR “ORACLE SAAS IMPLEMENTATION AND INTEGRATION SERVICES IN EUROPE 2018”



PAC RADAR Oracle SaaS Implementation and Integration Services in Europe 2018

## REVIEW OF TOP-SEEDED PROVIDER ACCENTURE

### Accenture



PAC RADAR "Oracle SaaS implementation and integration services in Europe 2018"

**Best in Class**

| Oracle SaaS Implementation in Europe |            |            |
|--------------------------------------|------------|------------|
| Cluster                              | Average    | Accenture  |
| 1. Relative market strength          | <b>2.5</b> | <b>1.7</b> |
| 2. Competence                        | <b>2.2</b> | <b>1.4</b> |
| <b>Total score</b>                   | <b>2.3</b> | <b>1.5</b> |

#### CRITERIA RATED AS SIGNIFICANTLY ABOVE AVERAGE (MORE THAN 0.75)

- Ability to flexibly shift services to near-/offshore locations
- Acknowledgement by competitors (peer rating)
- Acknowledgement by competitors (peer rating) – Oracle
- Acquisitions dedicated to SaaS-related services – Oracle
- Company size – worldwide
- Company size/regional presence – Europe
- Consulting resources – Europe – Oracle
- Consulting resources – worldwide – Oracle
- Coverage of application areas/processes
- Coverage of different industry sectors (resources & projects) – Europe
- Coverage of solutions/use cases – Oracle
- Entrenchment of SaaS-related consulting sales within the sales organization
- Entrenchment of the SaaS-related consulting business within the organization
- Experience with large, complex projects
- Experience with multi-national/international projects
- Focus on (stand-alone) SaaS C&SI services
- History – SaaS-related services
- Lighthouse projects – Oracle
- Predefined services packages ("productized services")
- Project experience – Europe – Oracle
- Project experience – worldwide – Oracle
- Realized SaaS projects (cross-platform) – Europe
- Vendor awards – Oracle

#### CRITERIA RATED AS SIGNIFICANTLY UNDER AVERAGE (MORE THAN 0.75)

- Corporate transparency
- Focus on small- to mid-sized clients



## ABOUT PAC – A CXP GROUP COMPANY

Founded in 1976, Pierre Audoin Consultants (PAC) is part of CXP Group, the leading independent European research and consulting firm for the software, IT services and digital transformation industry. CXP Group offers its customers comprehensive support services for the evaluation, selection and optimization of their software solutions and for the evaluation and selection of IT services providers, and accompanies them in optimizing their sourcing and investment strategies. As such, CXP Group supports ICT decision makers in their digital transformation journey.

Further, CXP Group assists software and IT services providers in optimizing their strategies and go-to-market approaches with quantitative and qualitative analyses as well as consulting services. Public organizations and institutions equally base the development of their IT policies on our reports.

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