

## IDC MarketScape

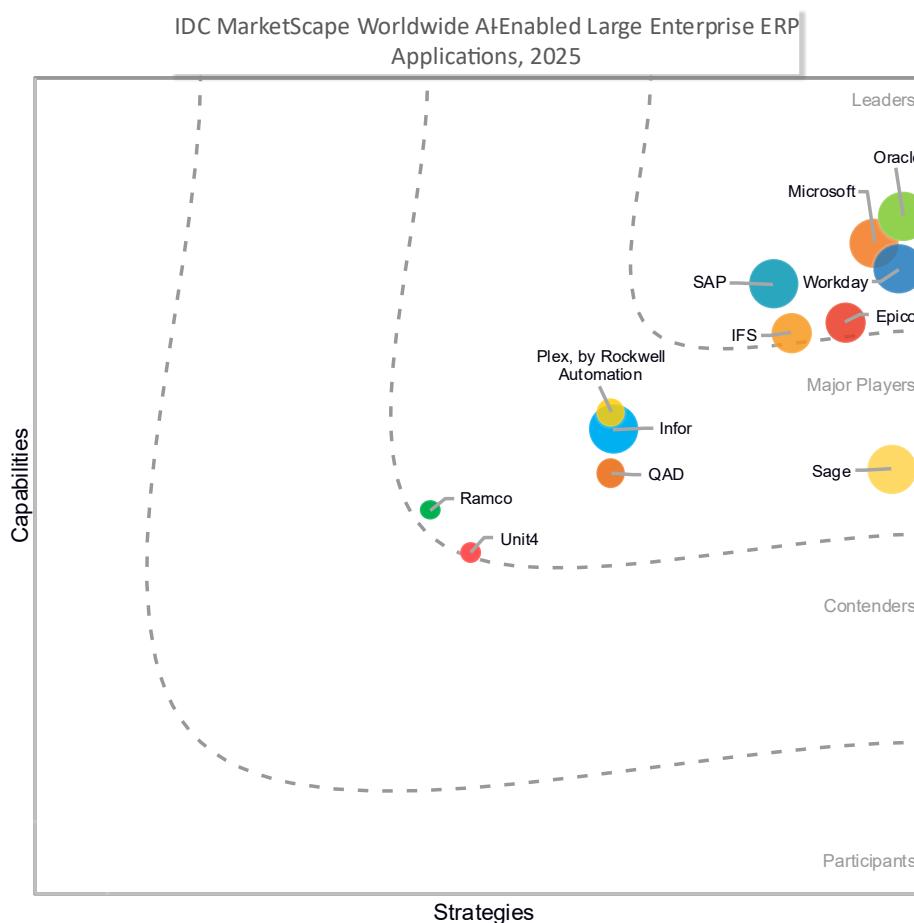
# IDC MarketScape: Worldwide AI-Enabled Large Enterprise ERP Applications 2025 Vendor Assessment

Mickey North Rizza

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide AI-Enabled Large Enterprise ERP Applications Vendor Assessment



Source: IDC, 2025

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

## IDC OPINION

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ERP software is now at a pivot point as AI brings more capabilities and functionality into the systems. Organizations recognize they need AI-enabled ERP to improve their decision-making velocity while enhancing productivity and becoming more efficient. IDC's May 2025 *SaaSPath Survey* finds 44% of organizations plan to invest in AI-powered ERP applications, while 22% plan to replace their current applications if generative AI (GenAI) is not included in the next release. And 28% of respondents believe AI-driven capabilities are an important ERP attribute. These facts are quickly reshaping large enterprise expectations and shifting many of their ERP investment strategies to those with AI-enabled ERP offerings.

Underscoring this need for AI-enabled ERP offerings is *Worldwide Artificial Intelligence IT Spending Forecast, 2025–2029* (IDC #US53688725, August 2025), which finds spending on AI-enabled applications (29.9% of 2029 AI spending) will increase the fastest of any AI segment at a CAGR of 56.5%. This will be driven by AI from assistants and advisors to an infusion of agents into a wide range of application portfolios, including ERP. Over the next three to four years, generative and agentic AI advancements will push applications to a state where the majority of offerings will be significantly enhanced and augmented by agent-driven capabilities. Considering AI-enabled ERP has a core set of business capabilities, IDC finds most of the AI expansion will be in the form of assistants, advisors, and agents. This expansion will close many gaps in workflows, enable the opportunity to eliminate manual and semi-manual workflows, and completely reshape business processes for the foreseeable future. IDC's May 2025 *Future Enterprise Resiliency and Spending Survey (FERS), Wave 4*, supports this as 80.1% of organizations believe investing in agentic AI investments will eliminate manual and semi-manual workflows and business processes. This fact underscores how AI will add more into ERP current workflows while eliminating the need for additional manual and semi-manual workflows.

To understand the need for this research, IDC looked at the progression of AI in a variety of forms. One out of a multitude of avenues was the method by which ERP providers bring AI into the workflows — such as an assistant, advisor, and agent. IDC defines AI assistants, advisors, and agents as follows:

- **AI assistant:** An application that assists, augments tasks, and finds and collects structured and unstructured information within or across data sets

- **AI advisor:** An application that is designed to provide advice, recommendations, and next best actions (It synthesizes data to create insights, dynamically creates baselines, and compares usage and interaction and engagement.)
- **AI agent:** An application that understands by detecting and responding to information autonomously, plans by detecting and correcting information autonomously, and takes action by detecting, responding, correcting, predicting and acting autonomously

We have assessed the functional capabilities of the AI-enabled ERP systems across these AI elements. We have also reviewed machine learning (ML), natural language interfaces, predictive aspects, generative AI, and AI capabilities and strategies now, in the immediate future, and into early 2027. All of this has been taken into consideration to assist the enterprise as it moves toward AI-enabled ERP applications. It is imperative for organizations to understand as they make their selections for AI-enabled ERP applications, the infusion of AI will create agents of the future. In addition, it is important to recognize every AI-enabled ERP provider is on a different journey. The vendors' technology journeys are based upon where they are in their maturity of their offerings in SaaS and cloud, their investments in AI, and the complexity of their products, as well as their vision and leadership positioning for AI-enabled ERP applications — and in their clients' willingness to invest and innovate with them into the AI world. Each vendor is different and that is detailed well in the ERP vendor profiles contained herein. This new IDC MarketScape about AI-enabled ERP is providing the foundational-level research as the shift to AI becomes apparent. IDC plans on updating this research on an ongoing basis as AI becomes the alignment factor for organizations in this AI world.

We have done this critical and necessary foundational research because the market is demanding it. IDC is finding higher switching rates than in years past, and in IDC's May 2025 *Future Enterprise Resiliency and Spending Survey, Wave 4*, 65%+ organizations told us they will use their enterprise application provider for embedded AI and also their AI agents across the main capabilities and functionality of ERP systems. It is quite apparent; AI is quickly moving from a differentiator in ERP systems to an essential capability within the ERP software market, which is a critical factor for IDC research on AI-enabled ERP systems.

Further, the extension of the ERP into additional applications as part of a suite of applications is quickly reshaping an organization, as well as the increase in employees' usage of and reliance on technology. Autonomous processes are removing the need for additional employee clicks and decision points, quickly transforming the business experience to something akin to consumer use of AI-enabled mobile applications. Whether the consumer or business process, the evolution and pace of advancement are continuously evolving from fewer software interaction and decision points to more

AI features, services, and insights delivered in real time to the employee, partner, and customers. This reduces the time to decisions and ultimately to fulfillment, bringing greater customer satisfaction. All of this has a profound impact on the large enterprise and its ability to reshape its commitment to business excellence from performance to resource optimization.

## Current Considerations in Large Enterprise ERP Systems

The shift to an AI-enabled world requires organizations to rethink their business models. IDC's 2025 *CEO Survey* finds 55% of CEOs believe AI offers a chance to reinvent their business model. And AI-enabled ERP systems are at the heart of this business model change. By 2028, leveraging GenAI, 45% of the G2000 will consolidate lines of business into fewer functions and optimize their processes, data, and resources — building a new resource-savvy business. Because of growing need for AI, organizations need to consider some of the following as they move toward new AI-enabled ERP systems:

- **Legacy systems are not versed in AI.** From the outdated architecture to data quality issues that include data inconsistency, fragmentation, and inaccessible formats, using AI on the legacy systems can be expensive to maintain. Add to it the high costs to customize or replace these systems, lack of interoperability between other systems, and the many security vulnerabilities — the expenses and risks continue to add up.
- **Moving to AI-enabled systems requires a strategy.** While AI-enabled workflows and agents completely reshape and improve automation for business processes, it also requires greater computational power, more storage for the data, and a scalable infrastructure. In addition, cloud providers are currently enhancing their offerings with AI services, which can bring more cost-effective methods to deployment as well as use.
- **AI-enabled ERP systems are changing processes overall.** AI-enabled ERP systems are removing the need for employees to organize tasks into synchronous processes to complete work faster than the rise in complexity, using tools to simplify complex tasks. With AI, employees can create automations to perform these synchronous tasks, while they work asynchronously or on an "as needed" basis to deal with the complexity. As AI continues to fuel more into the ERP system, the automation within it acts and reacts both synchronously and as needed within the digital environment such that employees asynchronously define the desired outcome and correct mistakes. This later aspect represents the AI agents. At this juncture, advanced AI agents are able to do the following:
  - Plan and sequence actions to achieve specific goals.

- Use various tools, such as code execution, search, and computation capabilities to perform tasks effectively.
- Perceive and process information from their environment, to make them more interactive and context aware.
- Remember past interactions (tool usage and perception) and behaviors (tool usage and planning). The agents can store these experiences and even perform self-reflection to inform future actions. The agents become the 'users of the tools.
- **ERP customers are also on their own AI journey.** While the many AI-enabled ERP systems are on different maturity levels as they move toward the advanced AI agents, it is critical to point out that ERP system customers are also on their own journey. Investing in the right system requires the buying organization to look at its own AI journey as well as its overall business strategy and requirements. In IDC's May 2025 *Future Enterprise Resiliency and Spending Survey, Wave 4*, organizations told IDC the most important attributes when selecting and evaluating vendors of AI-infused applications are (in order of most importance): trusted brand, robust data security model, ease of implementation, user experience, pricing transparency, availability of training, and product road map visibility. It is clear AI innovation can move mountains but it goes a long way when coupled with the selection and evaluation attributes.

## Current Trends in Large Enterprise ERP Systems

Current ERP system trends include:

- **More demand for AI.** Demand has increased for predictive and prescriptive analytics and AI-enabled workflows for payment management, inventory management, profit and loss, financial close, treasury management, procure to pay, working capital, manufacturing operations, budget to plan, plan to perform, and the balance sheet. All of these are critical to AI-enabled ERP systems in 2025 and 2026, according IDC's 2025 *SaaSPath Survey*. Investment strategies vary based on the AI-enabled ERP workflows organizations wish to invest in for this year and next year.
- **Conversational AI critical.** Our references of AI-enabled ERP systems find conversational AI is critical to workstreams. The ability to understand, process, and respond to human language in a realistic and natural human way is critical. The use of natural language processing and machine learning enables virtual assistants and chatbots an ability to make the employee-to-software interaction much more intuitive and efficient.
- **The move to the cloud bringing advanced AI enablement.** Organizations are making moves to the cloud now to advance their AI enablement within their ERP

systems. Agentic AI systems, capable of independent decision-making and continuous learning, are set to revolutionize ERP software. The intelligent agents will move beyond simple automation to autonomously manage tasks and processes across finance, order-to-cash, plan to perform, procure to pay, manufacturing operations, services, inventory management, risk assessment/compliance, fraud detection, and the broader strategic decision-making. This shift brings significant efficiency gains, reduced human error, and the ability to adapt to market changes with unprecedented speed, fundamentally altering how finance and operations overall are conducted.

- **GenAI enables more.** GenAI is rapidly moving beyond basic automation in ERP software. It's now enabling intelligent assistance for complex tasks like automatically drafting finance and business performance reports and statements, performing advanced variance analysis, identifying anomalies for fraud and risk detection, and even generating preliminary audit reports. GenAI promises a substantial leap in efficiency and accuracy while enabling the employee to focus on strategic insights rather than manual processes.
- **AI "black box" concern for auditors and regulators.** As AI takes on more complex accounting, financial, and operational tasks, the "black box" problem becomes a significant concern for auditors and regulators. The past 18 months have seen a growing emphasis on "explainable AI" (XAI) within ERP software. This means developing AI models that can clearly articulate how they arrived at a particular conclusion or flagged an anomaly, ensuring transparency, accountability, and regulatory compliance.
- **Competitive differentiation gaining a huge boost with AI-enabled systems in general.** With real-time insights and AI-enabled processes, organizations can quickly navigate around a business disruption, changing performance expectations overall.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The vendor inclusion list for this evaluation was selected to accurately depict the vendors that are most representative of any given ERP system on a buyer's selection list based on the following:

- Vendors must have an AI-enabled ERP system.
- Vendor inclusion will also be based on market presence, with at least 33% of the vendor's revenue coming from large enterprises. A large enterprise is defined by IDC as more than 1,000 employees. The vendor must have won recent deals within the relevant customer segments. The vendor needs to provide support

globally and have clients in at least two major geographic regions (North America, Latin America, EMEA, and APAC).

- Vendor inclusion criteria also includes market presence and information the vendors provide us with and IDC's market share and forecast efforts in the ERP applications.
- Vendors will be included based on their meeting IDC's functionality requirements for ERP, including a general ledger as part of the system and AI enablement.

## ADVICE FOR TECHNOLOGY BUYERS

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The ERP market is shifting quickly to technology that enables an organization to compete and succeed in the digital world. These areas are focal points of consideration as your organization moves forward. Furthermore:

- **Look internally and think about your current processes.** Ask yourselves these questions:
  - What are some issues we must resolve with a new AI-enabled ERP system? Are they technology related? Are they related to efficiency and productivity of our current resource structure?
  - What are the current internal resources and capabilities? How might this change in the future with our investment plans for AI enablement? What does the resource shift timeline look like?
  - How do we define a successful AI-enabled ERP implementation?
  - What internal stakeholders should we include in the process?
  - How will the new system change my organization? Will we improve our decision velocity with faster and real-time insights, making us more competitive? Will our employees bring more to us with AI enablement? How will our KPIs change?
  - Are there industry aspects we could tie in better from the front end to the fulfillment of our products and services?
- **Select the right partners.** The first step to implementing an AI-enabled ERP system is to develop the right strategy and plan for implementation. Second, select the right services partners that can assist you with your choice of technology partner. Ask yourself these questions:
  - Can we move faster to a new system by using AI-enabled partners to move us? Will we benefit from their lessons learned?
  - Does the partner have the type of products and services we need and also meet the requirements for our company size?

- Can the vendor show me a hands-on experience AI demo with my organization's live and real data to show the benefits to the business? And also show me how the workflows will change and impact the employee?
- Does the vendor understand the regulations that will impact my business? How are these regulations reflected in my current product, and how will they change the future? And will these changes meet the digital sovereignty requirements I need across my business?
- What is the vendor's strategic AI investment outlook for the next three to five years? Why and how will it enhance my business?
- Is the vendor investing in AI now? How are they using it enhance their business in both services and products?
- **Consider the foundation.** There are many varieties of software architectural approaches. Ask your software vendors these questions:
  - What is the data flow design in the current AI-enabled solution?
  - What kind of APIs are available from this vendor? RESTful? SOAP? GraphQL?
  - What kind of developer tools does this vendor provide (e.g., sandbox, dedicated portal, low-code/no-code tools, database management tools, AI tools)?
- **Own the implementation.** Better results require an active role in implementation. The AI-enabled world brings an even greater reliance on technology than the beginning of this digital world, and getting it right the first time is a requirement. Ask yourselves these questions:
  - What levels of support are available, and are they geographically available for my business?
  - How should we set up the service-level agreement before signing any of the contracts?
  - Can the system integrate with my company's other IT systems and partners?
  - Which IT system needs to be integrated and to what degree?
  - How are you set up to deal with frequent updates? And how do we consume them faster and let the business learn as it goes?
- **Note that change management is critical.** Ask yourselves these questions as you get into the project so you can run efficiently and smoothly and move into the digital world quickly:
  - Do we have the right strategy to encourage rapid adoption with employees?
  - Do we have the right amount of training for employees to master the new features within the system?

- Are we communicating the purpose and benefits of the system change to the relevant employees?
- Have we aligned existing policies and procedures to enable the adoption of new workflows?

This IDC MarketScape assists in answering the aforementioned questions along with many others that may arise.

## **VENDOR SUMMARY PROFILES**

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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 and challenges.

### **Epicor**

After a thorough evaluation of Epicor's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Epicor has taken a Cognitive ERP approach with Prism agentic AI, enabling natural language conversations and automating and optimizing industrial processes. When coupled with Epicor Grow AI, Epicor's Cognitive ERP offering also brings in additional artificial intelligence and machine learning to harmonize the ERP insights into predictive insights, for each business.

Epicor focuses on "make, move, sell" industries — automotive, building supply, manufacturing, distribution, and retail — delivering ERP portfolios that map tightly to how those businesses actually run.

Epicor's AI strategy is straightforward and vertical. Epicor Prism launched with agentic AI in January 2025, delivering vertical AI agents embedded in daily workflows to answer questions and execute tasks via natural language. In May 2025, Epicor expanded these capabilities with the introduction of the Prism ECM Agent in Kinetic — enabling users to easily retrieve data from the enterprise content management system — and by extending Prism into Prophet 21. In addition, in September 2025, Epicor announced Epicor Prism Business Communication AI agent to automate request for quotation (RFQ) workflows and accelerate supplier communications by working with the user's email and recognizing key data points like "lead times," "cost," and "part ID" and translating it into the ERP system. Prism Business Communications is the industry's first ERP AI agent with outcomes-based pricing. Customers only pay when an RFQ successfully converts to a purchase order. Alongside the agents, Epicor Grow AI adds

predictive modeling on top of the Grow Data Platform to fuse ERP and third-party data for guided decisions around planning, inventory, and pricing. Epicor Prism was released to all Kinetic clients in January 2025 and Prophet 21 in May 2025. Grow AI is not yet available on Kinetic; related features like Slipstream and Item Advisor are planned for late 2025 and 1H26.

Quick facts include:

- **M&A:** Smart Software (AI-driven inventory planning and optimization, 2024); Solenium Group/Visual SKUS (product information management [PIM] and digital asset management [DAM] solutions, 2024); Acadia Software (frontline worker and AI software, 2024).
- **Industry focus:** Epicor is focused on automotive, building supply, distribution, manufacturing, and retail, underpinned by a vertical AI strategy.
- **Globalization:** Epicor offers its product in 18 languages including regional variations and 32 currencies and has deployments in 150 countries across 4 continents.
- **Cloud offering:** Epicor supports on-premises and cloud. Epicor Industry ERP Cloud is supported by third parties Microsoft and AWS. Epicor Prism and Epicor Grow AI are available only as cloud offerings.
- **AI assistants, advisors, and agents:** Currently available agents include a multimodal agent to analyze images of products, parts, and charts of data; ECM Agent to ask questions about documents in the content management system; Kinetic agents that allow an employee to ask Prism that includes a filter agent, list offering agent, and metric agent as well as a Knowledge agent for additional Prism questions. Epicor Prism Business Communication AI agent automates RFQ workflows and accelerates supplier communications by working with the user's email and recognizing key data points like "lead times," "cost," and "part ID" and translating it into the ERP system.

## Strengths

- **Utilizes AI internally:** Epicor utilizes its own AI to accelerate its product offerings into the market and to aid its on-premises clients to move to the cloud. For clients, the movement to the cloud is aided by advanced AI capabilities, best practice templates, and assets to speed the migration and is cost effective with a fixed-fee pricing program.
- **Vertical AI position:** Epicor's vertical AI position is enabling the make, move, sell concept across the industries the company serves. References note they like the ability to extract data across thousands of data points, built into a model that the human in the loop approves and moves forward into the right areas within their ERP.

- **Cloud migration:** Epicor introduced the "Ascend with Epicor program" in 2025. It is a proven methodology to migrate clients to the browser and cloud, accelerating time to value and use in the cloud, through a combination of advanced tools infused with AI, expert services, and a fixed-fee pricing model helping clients receive cost-effective predictable outcomes as they move to the cloud.

## Challenges

- **Epicor AI:** Epicor has AI enabled a significant portion of the vertical processes but is still working on increasing the AI enablement for some of the capabilities within the ERP system. These additional AI-enabled ERP advisor and agent capabilities will be available sometime from mid to late 2026.
- **Global expansion:** Epicor has been growing rapidly; however, its global expansion has lagged. Epicor has noted this is on its 2026 road map. Prism will be launching internationally in 2026.
- **Brand awareness:** Epicor has been steadily moving in the large enterprise market and as such needs to bring more brand awareness around its name and offerings.

## Consider Epicor When

Consider Epicor if you want an AI industry-tuned ERP for automotive, building supply, distribution, manufacturing, and retail — with embedded AI and predictive guidance that employees can adopt inside the systems they already use.

## IFS

After a thorough evaluation of IFS' strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

IFS Cloud is a SaaS-native ERP solution built on a single platform and data model, delivering ERP, EAM, and FSM capabilities for asset- and service-intensive industries. Its modular, industry-specific design supports core operations such as finance, HR, supply chain, manufacturing, and service management. It also includes advanced AI technologies, such as generative AI, machine learning, intelligent agents, and IoT, all embedded natively to enable automation and real-time insights.

Designed for industries such as aerospace and defense; construction and engineering; energy, utilities, and resources; manufacturing; telecommunications; and service, IFS Cloud delivers updates twice a year, enabling customers to stay current and continuously benefit from innovation. All customers benefit from the IFS Cloud life-

cycle experience, which ensures consistent functionality, security, and upgrade paths regardless of deployment model, whether public cloud, private cloud, or hybrid remote.

In addition, IFS.ai is built into the platform itself, enabling real-time insights, context-aware workflows, and outcomes such as predictive maintenance, optimized scheduling, and AI-assisted procurement. With a low-code extension framework and industry-specific depth, IFS Cloud allows customers to adapt and innovate quickly while maintaining security, compliance, and explainability in AI-driven decisions.

Quick facts include:

- **M&A:** Poka (connected worker, 2023), Copperleaf (asset investment planning, 2024), EmpowerMX (aviation maintenance, 2024), TheLoops (AI agents, 2025), and 7Bridges (AI-powered supply chain management, August 2025)
- **Industry focus:** IFS is focused on aerospace and defense, construction, energy, manufacturing, and service.
- **Globalization:** IFS supports 21 languages, 42 localizations, and 230 currencies, and the solution is deployed in over 80 countries.
- **Cloud offering:** IFS supports both public (Microsoft Azure) and private cloud offerings including AWS, Microsoft Azure, GCP, and Oracle.
- **AI assistants, advisors, and agents:** IFS has over 200 AI capabilities currently available. AI is utilized as assistants and with some advisors across most of the ERP capabilities. Agentic AI use cases include inventory replenisher, supplier order communicator, customer order communications coordinator, product management planner, work closer, trouble shooter, service agent, repair agent, parts planner, and data migration analysts. More agents are forthcoming in 2025 and the remaining majority from mid to late 2026.

## Strengths

- **End-to-end asset life cycle:** ERP, EAM, and field service operate on one platform, supporting planning, maintenance, and service handoffs with consistent data across teams and locations.
- **Industrial AI foundation:** AI capabilities are designed to assist operations under governance, supporting measurable improvements in maintenance, product, and service execution.
- **AI capabilities overall:** Besides the AI focus on assistants, advisors, and agents, IFS also has over 200 AI capabilities currently available as well as an additional set of agentic AI use cases. The agentic use cases continue to expand as many more will be available throughout 2026.

## Challenges

- **Predictive:** IFS is doing a great deal with predictive especially across its EAM and FSM solutions; however, it has not yet added it to its ERP portfolio. Once added, this will enable a complete offering.
- **Print agent difficulties:** References noted that early agents such as the print agent became stuck in remote waiting. However, these issues have been quickly resolved showcasing IFS exceptional customer support.
- **Response times:** References noted in the initial use of IFS they found slow response times, but as they gained experience and learned how to maneuver the work order area, this latency disappeared.

## Consider IFS When

Consider IFS if you are in one of six industries of aerospace and defense; construction and engineering; energy, utilities, and resources; manufacturing; service; and telco that needs end-to-end asset life-cycle and service execution, with a credible path to agentic AI in operations, and you're ready to govern scope, data, and TCO as the platform expands.

## Infor

After a thorough evaluation of Infor's strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Infor positions itself as "The Industry Cloud Company," selling industry-specific CloudSuite (ERP at the core plus adjacent apps) across discrete manufacturing (industrial manufacturing, automotive, and aerospace and defense contractors), process manufacturing and distribution (food and beverage, fashion, and distribution companies), healthcare, and public sector. The company is privately held by Koch Industries and runs its multitenant suites primarily on AWS, which Infor emphasizes for its global reach and access to generative AI services.

Infor CloudSuite is aligned to the industries Infor serves, down to the micro-vertical level — built on an industry-specific ERP at the core. Around this ERP core, Infor layers manufacturing execution system (MES); product life-cycle management (PLM); warehousing; planning; configure price quote (CPQ); and analytics, plus Infor Nexus — it's the multi-enterprise supply chain network inherited from GT Nexus — for visibility, finance, and now end-to-end traceability. Infor's industry-specific ERP solutions have been meeting the needs of enterprise-level and small and medium-sized businesses (SMBs) for 30+ years.

Infor's AI approach is embedded and industry specific with Infor AI within Infor OS. In addition, Infor is leveraging AWS Amazon Bedrock to bring more generative AI and Amazon SageMaker to embed machine learning capabilities across its CloudSuite ERP products.

Quick facts include:

- **M&A:** Acumen (revenue and pricing generation tool, 2024) and Albanero (data migration and data mastering, 2024)
- **Industry focus:** Infor's primary industries are discrete manufacturing (industrial manufacturing, automotive and aerospace, and defense contractors), process manufacturing and distribution (food and beverage, fashion, and distribution companies), public sector, and healthcare.
- **Globalization:** Infor supports over 30 languages, 80+ localizations, and all currencies across the globe that use 2 decimal places or less, and its solution is deployed in over 175 countries.
- **Cloud offering:** Infor supports both public and private cloud offerings, including government cloud, on AWS.
- **AI assistants, advisors, and agents:** Infor has aligned itself with AWS Bedrock to power generative AI solutions with the Infor CloudSuite ERP products. The partnership has yielded AI agents for orders, purchase orders, projects, inventory management, and work orders within the Infor CloudSuite. Infor is planning on over 300+ continuous AI and automation innovations embedded in its product from late 2025 through the end of 2026.

## Strengths

- **Embedded AI strategy :**
- Infor OS, AI, and automation features operate in context, using AWS services to support pragmatic decision-making with governance, scalability, and consistent security practices. Infor has integrated Amazon Bedrock's pretrained models to assist with embedded AI, particularly around industry use cases.
- **Infor portfolio advantage:** Infor's complete portfolio offering across the functional and industries it serves has enabled a foundation for the agentic AI world. From functional to operational, the agent opportunity is vast for Infor.
- **Infor pivoting to MCP:** As Infor progresses on the AI journey, it is embracing the MCP protocol for agents, which will help it bring even more to the enterprise.

## Challenges

- **Agent evolution:** With continued focus on business process mapping, large language models, GenAI, and MCP research and development, Infor is building

up and realizing its opportunity with agentic AI within business processes. The release of Infor Industry AI Agents later in 2025 will enable the underpinning of its broader agent offerings.

- **Moving beyond the current offering:** Infor's CloudSuite ERP offering and overall product set is vast, and embedded with AI, however, Infor must move beyond the typical SaaS and cloud-enabled ERP and enterprise application offerings to greater AI enablement and agents. Once it brings forward assistants, advisors, and agents within ERP, organizations will be able to quickly adopt the Infor solution.
- **UI navigation:** Some Infor references still struggle with the UI and navigation due to the depth and breadth in of Infor's industry-specific capabilities; however, with the broader rollout of conversational AI and agents, Infor can quickly move this behind it.

## Consider Infor When

Consider Infor if you're an enterprise in discrete manufacturing (industrial manufacturing, automotive, aerospace and defense, engineering and construction), process manufacturing and distribution (food and beverage, fashion/retail, distribution, chemicals), or the services (healthcare and public sector) industry with a regional or global footprint that requires a partner on the journey in the AI-enabled digital world.

## Microsoft

After a thorough evaluation of Microsoft's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Microsoft Dynamics 365 empowers organizations with a connected, cognitive, and composable cloud ERP solution that drives operational excellence and business agility. Microsoft's ERP suite seamlessly integrates finance, operations, sales, and service capabilities into a unified platform, leveraging advanced AI and machine learning to deliver predictive insights and enhance decision-making.

Microsoft AI strategy is one of the first announced in the industry. It is progressing with Microsoft Copilot, transitioning from an assistant and advisor to an agent. The agents are developing in Microsoft Dynamics as tasks and basic workflow agents, to more encompassing agents across larger business processes. In addition, Microsoft Copilot Studio lets teams design and govern agents, publish them into Microsoft 365 surfaces, and enforce data controls with Purview.

Quick facts include:

- **M&A:** Fungible (datacenter performance enhancement, 2023); Microsoft paid for a nonexclusive license of Inflection AI models and also hired most of the Inflection staff for the new Microsoft AI division in 2024.
- **Industry focus:** Microsoft Dynamics 365 targets upper midmarket to large global enterprise customers in key priority service-centric industries, including healthcare, architecture engineering and construction, professional services, financial services, public sector, telecommunications, aerospace and defense, energy, and utilities. The company also has a significant presence in the upper midmarket to large global enterprise segment, targeting product-centric industries such as retail, consumer goods and wholesale distribution, and manufacturing.
- **Globalization:** Microsoft Dynamics 365 runs in over 210 countries and 28 regions. The company has localized the solution for 57 countries and translated it into 74 languages out of the box. Microsoft is currently expanding the localizations to 59 countries and into 80 languages.
- **Cloud offering:** Microsoft Dynamics 365 has a multitenant architecture in the public cloud, providing a database for each customer for data isolation, security, and performance. Customers can extend the application to their unique needs.
- **AI assistants, advisors, and agents:** Microsoft Dynamics introduced its Copilot in early 2023. The company has been adding AI continuously since then, bringing forth assistants, advisors, and agents steadily in 2025. Agents to date include the variance analyst agent, time entry agent, expense entry agent, approvals agent, supplier communications agent, account reconciliation agent, financial reconciliation agent, and scheduling operation's agent.

## Strengths

- **AI vision:** Microsoft continues to bring forward its AI vision into general availability quickly as it moves the world toward AI agents. Microsoft Dynamics 365 brings its Copilot and AI agents to reduce manual interactions, improve decision-making, and increase speed, scale, and insights to action time.
- **Comprehensive stack:** Microsoft Dynamics 365 is designed for AI from the infrastructure through models, data, and orchestration to apps and extensibility layers. It is built for composability, extensibility, config, security, and global scale. References noted they like the full-stack approach.
- **Adaptability, extensibility, and improved KPIs:** References told us they love the capabilities they receive and the ability to make the product do what they need. These attributes have brought improvements in COGs, reduction in inventory, and faster bank reconciliations.

## Challenges

- **Licensing process:** References noted the renewal process is quite complicated, less than desirable, and causes much concern across their organizations. Recommendations were made of simplification, providing the right tools to manage the licenses and tools to see and evaluate their overall costs.
- **Client mixing AI functionality of M365 and D365:** We found many references that spoke about Dynamics 365 AI-enabled workflows but many of these clients also mixed up the AI use with deriving value from M365 emails that then pointed back into the Dynamics 365 processes for product availability, purchase orders, lead times, and invoices. While this was a challenge in differentiation for the client, it may be a point of differentiation for Microsoft.
- **Customer support:** References noted customer support is not always as helpful as one needs; however, it does get better once you put in a support contract.

## Consider Microsoft When

Consider Microsoft if you are an enterprise that needs to move to a dynamic, AI-led ERP system to bring significant benefits to your organization.

## Oracle

After a thorough evaluation of Oracle's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Oracle Fusion Cloud ERP is a broad and highly integrated public, native cloud application helping customers drive business transformation with the speed and innovation of best-of-breed cloud software in a complete, secure, and connected cloud suite. Driven by advanced AI/ML, generative AI, and agentic AI at its core, and enhanced by built-in social, mobile, and analytic capabilities, Oracle enables organizations to enhance productivity, reduce costs, and improve controls.

Oracle Fusion Cloud ERP is a widely used solution deployed by over 11,000 customers across the globe. Oracle focuses on what the customer needs by providing a complete suite of applications, built on world-class technology that is continuously innovating and extending. In addition, a low-code/no-code platform allows for further extensibility as needed. Oracle also provides innovation that matters, moving beyond just quarterly tactical features and capabilities to innovative strategic solutions including AI agents for finance, B2B cash, and payment services, as well as embedding AI throughout the solution. Oracle has pivoted to delivering customer success faster through its SaaS offerings while providing roles and services that support implementation and post-implementation to ensure customers succeed with Oracle's solutions at every step.

Oracle has adopted an AI-first strategy by embedding AI everywhere, whether predictive, generative, or agentic. Oracle has released 200 generative AI features and agents in the past 12 to 18 months, with more updates every quarter within Oracle Fusion Cloud ERP. In addition, Oracle has Oracle AI Agent Studio for Fusion Applications for organizations to use out-of-the-box agents or customize these agents further.

Quick facts include:

- **M&A:** Cerner (healthcare information technology, 2021) and NetSuite (cloud based ERP for small and midsize businesses, 2019)
- **Industry focus:** Oracle Fusion Cloud ERP is available for all organizations regardless of product or service focused, across 25+ industries.
- **Globalization:** Oracle Fusion Cloud ERP operates across five continents, in over 125 countries, over 180+ operating currencies, and hundreds of localizations.
- **Cloud offering:** Oracle Fusion Cloud ERP is part of the entire Oracle offering of Oracle Cloud, hosting, and infrastructure services.
- **AI assistants, advisors, and agents:** Oracle introduced AI assistants, advisors, and agents several years ago. Over time, these AI-embedded workflows have expanded in their capabilities and functionality, helping organizations become more touchless with their technology with over 200+ use cases in existence as of the time this document was published. Oracle agents to date include document IO agent, ledger agent, advanced prediction agent, shift scheduling agent, profitability and cost management agent, enterprise data matching agent, data visualization agent, contextual data exploration agent, accounts reconciliation agent, payments agent, expense policy agent, and project management agent. In addition, Oracle will announce new agentic AI agents across the Fusion Application Suite at Oracle AI World in October 2025.

## Strengths

- **Oracle embedded AI at no additional cost:** Oracle has embedded AI directly into Oracle Fusion Cloud ERP, providing native intelligence without additional cost or infrastructure or SKU and it is updated regularly.
- **Oracle touchless operations:** AI has enabled more touchless operations from invoice to pay, account reconciliation, forecast insights and predictive planning, and predictive cash planning.
- **Oracle continuous future proofing and transformational advantage:** Several references noted that Oracle continues to deliver transformational advantage by building its products for how organizations will operate three to five years into the future.

## Challenges

- **Customer support:** References noted the customer support is sometimes hit or miss, depending upon the subject and available information. Oracle's transition from a product company to a services company is helping address support. While some references noted variability, Oracle has significantly strengthened its customer support by investing in specialized expertise, AI-driven knowledge resources, and proactive service models — ensuring customers receive consistent, high-quality guidance regardless of the issue.
- **Oracle clients still on legacy systems:** Oracle still has clients on legacy applications that have not embraced the 21st century technology world of AI. A successful agent strategy across the entire Oracle customer base could make the shift more palatable and faster, eliminating technical debt while providing clients an AI pathway.
- **Integration issues:** Some references have expressed concerns about Oracle Fusion Cloud ERP integration with other software and also some Oracle applications. Oracle has noted Oracle Fusion Cloud ERP is designed with a modern API-first architecture, prebuilt connectors, and native integration across Oracle applications — capabilities that continue to expand and simplify interoperability with both Oracle and third-party solutions.

## Consider Oracle When

Consider Oracle if you are an enterprise that needs to move to an innovative AI-embedded cloud ERP system that brings tremendous benefits to your organization.

## Plex, by Rockwell Automation

After a thorough evaluation of Plex's, by Rockwell Automation, strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Plex ERP has always been a true version-less multitenant SaaS, accessible via a web browser. It is part of the Plex Smart Manufacturing Platform and represents an elastic approach, centered on MES and QMS, with real-time production monitoring, digital work instructions (connected worker), finite scheduling, and Plex ERP capabilities.

Plex, by Rockwell Automation, has been layering copilot-style AI across software; Plex content now references Microsoft Copilot AI in connected-worker scenarios (guidance, summaries, quality checks) and broader AI themes within its product set. Plex is embedding AI into a manufacturing-first ERP platform, with real-time data from edge to cloud. AI is utilized to automate tasks and enhance decision-making, such as predicting demand, optimizing production schedules, and identifying anomalies in real-time data.

Plex helps manufacturers get value quickly, scale at their own pace, and make better decisions with connected, AI-driven insights — because ERP, MES, and automation are working as one system.

Quick facts include:

- **M&A:** Verve Industrial Protection (industrial security management and monitoring platform, 2023), Clearpath Robotics (provider of autonomous robots, 2023), and Knowledge Lens (AI-powered data management platform, 2023)
- **Industry focus:** Plex, by Rockwell Automation, is focused on automotive/EV/battery/tier suppliers; food and beverages; plastics and rubber; precision metal forming (stamping, forming, forging); industrial manufacturing; electronics/high-tech; and aerospace.
- **Globalization:** Plex's, by Rockwell Automation, solution is available in 15 languages and operates across five continents, in 43+ countries globally.
- **Cloud offering:** Plex's, by Rockwell Automation, solution is multitenant and available as a private cloud or in the public cloud on Microsoft Azure.
- **AI assistants, advisors, and agents:** Plex's, by Rockwell Automation, AI strategy is augmented by third parties, such as Microsoft Copilot and Microsoft Copilot Studio as needed. Assistants and copilots are enabled as needed, but in most cases, advisors will not be available until 2026. As Plex and Rockwell Automation advance, we expect to see more agents changing up the complete package.

## Strengths

- **Data and manufacturing combined with AI:** With built-in MES and IIoT, Plex captures machine and operator data directly, providing AI with the context it needs to deliver more intelligent and faster insights across the business. References noted this brings together a very beneficial system that brings better decision-making and more value when coupled with Plex ERP.
- **Unlocking value:** Plex, by Rockwell Automation, continuously works to unlock value for its clients by simplifying the daily operations by automating repetitive tasks, surfacing insights from the customer's data, and moving the clients toward autonomous automation.
- **AI architecture value strategy:** Plex is building in value through a multitude of avenues to completely change its AI architecture and bring more interoperability in the future.

## Challenges

- **AI partnership:** Plex, by Rockwell Automation, has a great foundation of assistants and is tied to the Microsoft Copilot and Microsoft Copilot Studio for AI

agents. While this strategy helps clients with their usage of AI, it isn't tied into the Plex ERP platform. IDC expects to see this expand within the next year.

- **Road map execution:** References noted the road map brought forth isn't always what is delivered and in many instances updates are delayed.
- **Complex implementation:** Some organizations noted Plex implementations can be complex, requiring thoughtful integration, particularly as they connect deeply into the broader manufacturing environment.

## Consider Plex, by Rockwell Automation When

Consider Plex if you are in a complex manufacturing environment and need to bring together all aspects of manufacturing (both operationally and financially) into one complete view, leveraging AI, particularly in discrete manufacturing.

## QAD

After a thorough evaluation of QAD's strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

QAD Adaptive is ERP for manufacturers and their supply chains. The core application includes sales, field services, manufacturing, production scheduling, inventory management, barcode printing and scanning, quality and traceability, enterprise asset management, purchasing, financials, international reporting, electronic data interchange, embedded analytics, process intelligence, and a low-code extensibility platform. QAD Adaptive also seamlessly integrates with QAD Supply Chain Planning, Supplier Management, Transportation, Global Trade Compliance, Digital Commerce, and the Redzone Connected Workforce solution.

QAD's AI strategy includes Champion AI, which is available now for other QAD products and is expected to be released within ERP later in 2025. Champion AI is available on the web and can be called in from anywhere. It has implementation agents, optimizes material and costs, enables AI to enhance productivity, and brings more process intelligence. Champion AI Knowledge Assist helps employees with questions and answers to ensure they are using the key attributes of the system. In addition, Champion AI is set to reduce payment errors; stabilize and optimize cash flow; improve supplier relations, reducing processing costs and reducing shipping delays; reduce production scrap; and enable digital kaizen. There are many more AI-embedded workflows with Champion AI that will be released in November.

Quick facts include:

- **M&A:** Phenix Software (advanced scheduling, 2024) and Redzone (connected workforce platform, 2023)

- **Industry focus:** QAD focuses on the automotive, consumer products, food and beverage, high-tech, industrial, and life sciences industries.
- **Globalization:** QAD Adaptive supports 14 languages, 46 localizations, and is deployed in 100+ countries.
- **Cloud offering:** The current version of Adaptive ERP is managed by isolated virtual machines, with each system isolated via VLAN. QAD manages and owns some infrastructure in third-party hosting centers. The future QAD Adaptive is on AWS public cloud and leverages Kubernetes and containerization, as well as network isolation across each customer.
- **AI assistants, advisors, and agents:** QAD is in the early stages of AI but has a strategy with its Champion AI being released later in 2025. In addition, QAD leverages AWS Bedrock including its models, guardrails, and agent tooling.

## Strengths

- **Management changes:** QAD has brought forward a new management team including Sanjay Brahmawar as CEO; Robin Colman as COO; Amit Sharma, president of its newly established ERP business unit; and Ken Fisher, president of Redzone — QAD's connected workforce solution. These changes are readying QAD for the AI-enabled world.
- **ERP implementation agent:** QAD is bringing forward an ERP implementation agent later in 2025 that will assist with customized workflows, rationalization, and data movement.
- **AI strategy:** QAD's champion AI will be released later this fall, bringing a new pathway for clients to enable AI into their workflows.

## Challenges

- **User experience:** References noted they would like QAD to improve the user experience. With the new web UI coming out shortly, the references will get their wish.
- **Customer support:** References find there are lag times in support response.
- **Difficulty migrating services and data:** References find there are difficulties migrating the services and data during implementation. QAD's soon to be released ERP implementation agents should help this situation.

## Consider QAD When

Consider QAD if you are in the automotive, consumer products, food and beverage, high-tech, industrial, and life sciences industries or are a manufacturer with supply chains and have growing complex needs that need a secure and scalable cloud AI ERP solution.

## Ramco

After a thorough evaluation of Ramco's strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Built on Ramco VirtualWorks, an advanced and revolutionary enterprise application assembly and delivery platform, Ramco ERP on Cloud enables you to get a 360-degree view of your business, anytime, from anywhere by putting all your business functions on to one single platform on the cloud and automating and integrating them, end to end. With this unified view of business, you can drive innovation across the value chain, improve efficiency, and reduce costs and time to market. The entire suite of products is accessible over the internet, which gives you the freedom to access information from any part of the globe at the click of a browser button, whether from a laptop, mobile phone, or a tablet PC. The following modules are available part of the package: finance and accounting, sales and distribution, inventory and procurement, enterprise asset management, manufacturing, project management, facilities management, logistics management, payroll, and services resource planning.

Ramco's AI strategy includes AI/ML algorithms (for anomalies detection, defaulting values, or pre-populating of fields based on historical data); Talk IT, Ramco's interface of voice (users speak to their ERP solution); Zero UI for intuitive conversation-based transactions; and Ramco's proprietary AI chatbot (converses with the B2B users and deliver exactly the insight the user needs). Ramco's ERP also comes with an in-built analytics tool, BInGO, that can help users visualize insights and make data-driven decisions.

Ramco has leaned into "AI-first, zero-touch" operations. Ramco ERP embeds ML for compliance tracking and anomaly reduction and uses conversational help, extraction, and prescriptive nudges. Ramco's public case stories emphasize accuracy gains and cuts in "cycle time" rather than generic chatbots.

Quick facts include:

- **M&A:** Ramco does not have any mergers and acquisitions over the past few years. They are, however, focused on strategic partnerships and organic growth.
- **Industry focus:** Ramco ERP is focused on the industries of cement, textiles, manufacturing, ports, automotive parts, EPC (engineering, procurement, and construction), equipment rental, and power generation.
- **Globalization:** Ramco ERP supports one language (English), has 10 localizations, and is deployed across 10 countries.

- **Cloud offering:** Ramco ERP is a single-source product that can be deployed on either the public cloud or private cloud (with AWS or Microsoft Azure) or on premises.
- **AI assistants, advisors, and agents:** Ramco is bringing forward conversational AI with its conversational chatbot, embedded AI for transactions, and AI/ML algorithms for anomaly detection and pre-populating fields. These AI aspects are just the beginning of Ramco's AI journey.

## Strengths

- **KPI improvements:** References noted the system has improved their KPI performance by 10% so far and it is currently without AI. These customers also noted they are looking forward to the new AI-embedded workflows so they can improve their KPIs even more.
- **Accounts payable (AP) invoice automation:** Ramco uses AI and chatbots to streamline invoice processing and data entry. The CHIA Finance AP bot can scan physical invoices, extract data, and create digital records with a click or even a photo.
- **User-friendly mobile interface:** Ramco's references continue to discuss the great user-friendly mobile interface. The workflow approvals, inventory management, and service work reporting features are highlights.

## Challenges

- **AI strategy:** Ramco's complete AI strategy is developed and has the benefit of a great foundation; however, Ramco is still developing more AI solutions in accordance with market needs. As organizations take advantage of more capabilities and request more AI, Ramco will enable a new world for its clients.
- **Onboarding:** Ramco references find the solution is excellent except it takes a while to navigate, leverage the capabilities, and learn the system.
- **Agent vision:** Ramco is focused on AI assistance across its capabilities. Ramco has an agent vision as part of its overall AI strategy.

## Consider Ramco When

Consider Ramco if you are looking for a modern, flexible cloud solution that is in the early stages of building its AI foundation.

## Sage

After a thorough evaluation of Sage's strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Sage X3 is designed for customers working in product-centric environments, with 200 to 2,000 employees or for those with more complex and sophisticated operational needs. Sage X3 is uniquely designed to meet the needs of both industrial and process manufacturers. The modular approach enables companies to purchase what they need depending on their specific manufacturing environment (discrete, batch, mixed mode). Sage X3 helps optimize production processes, improve on-time order fill rates, ensure product quality and compliance, and control overall costs with capabilities that position both regional and global manufacturers to succeed.

In 2025, Sage AI strategy is to deliver productivity and insights driven by AI. Sage enables this strategy in 2025 with its Sage Copilot targeted in Sage X3 for in-workflow assistants for sales, fulfillment, and accounts payable tasks, which is alongside Sage AI-powered AP automation. Sage Copilot focuses on natural language processing that is used to automate and streamline transactions with users in a natural, human-like conversation and guided actions that can provide context-aware, personalized responses to user inquiries by leveraging historical data and user profiles. Sage AI strategy is extremely straightforward as it continues to enhance its offerings and capabilities throughout 2025 and into 2025.

Quick facts include:

- **M&A:** Fyle Software (AI-driven expense management solution, August 2025), ForceManager (cloud mobile sales management solution, 2024), Infineo (decision-making reporting and data visualization for software 2024), and Corecon (cloud-native pre-construction and project management solution, 2023)
- **Industry focus:** Sage is focused on agriculture, construction, distribution, retail, and manufacturing as well as any process manufacturing such as food and beverage and petrochemical.
- **Globalization:** Sage X3 is deployed in over 80 countries, with many customers operating across multiple continents. Sage X3 supports 11 languages, 12 localizations, and 182 currencies.
- **Cloud offering:** Sage X3 supports on-premises and cloud deployments. Sage X3 cloud is supported by AWS.
- **AI assistants, advisors, and agents:** Currently available assistants, advisors, and agents are helping clients follow the money from orders to payables. In addition, Sage X3 shop floor control copilot monitors customer and shop floor status, such that if a customer's credit limit is reached, the copilot manages downstream work orders, production shipments, and so forth so the shop floor stays optimized. Supply chain intelligent agents enhance insights while reducing supply chain inefficiencies including automating manual workflows, anticipating

delays, mitigating supply disruptions, and collaborating with suppliers in real time.

## Strengths

- **Sage AI capabilities and strategy:** Sage delivered AI within its payments, procurement, and receivables workflows. Sage's continued investment in its AI strategy promises to bring even more AI functionality into Sage X3 as of now and well into 2026.
- **Sage X3 modernization:** During 2025, Sage X3 is modernizing into an AI-enabled development-first SaaS ERP platform with its 2025 R2 release.
- **Sage X3 ecosystem:** Sage X3 ecosystem enables organizations of all sizes to utilize more AI and automation to customize and verticalize as needed. Sage has over 80,000 accountants, 13,000 value-added resellers, 1,000 independent software vendors and app developers who add functionality, and 1,700 extensions available in its marketplace.

## Challenges

- **Enterprise AI:** Sage is investing heavily into AI; however, AI capabilities around the general ledger, treasury and cash management, fixed asset management, and expense management won't be available until mid to late 2026. With the recent acquisition of Fyle software and Sage X3's new AI-enabled SaaS ERP platform, these capabilities may come faster.
- **Demanding learning curve:** The current Sage X3 is a feature-rich platform, but some references noted the interface and navigation are challenging, though training resources are available at all times. This is expected to disappear with the R2 2025 release of the Sage X3 AI-enabled SaaS ERP platform.
- **Customer support:** References told us the response time when needed isn't always as quick as they had hoped.

## Consider Sage When

Consider Sage if you need a product-centric ERP for agriculture, manufacturing, distribution, retail, and construction that offers a deployment choice of cloud or on premises and need a trusted advisor with a strategic and transformational AI methodology.

## SAP

After a thorough evaluation of SAP's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

SAP's SaaS ERP offering, known as SAP Cloud ERP, is a modern, enterprise-grade solution designed to support rapid business transformation and scalable growth. The solution provides pre-configured, AI-infused, and modular applications that accelerate time to value while maintaining integration and extensibility through the SAP Business Technology Platform (BTP) and SAP Business AI. It provides full ERP scope coverage across a wide range of both service-centric and product-centric customers. Scope coverage includes finance led (back-office ERP order-to-cash, procure to pay, record to report), product centric (adds manufacturing and supply chain), and service centric (adds customer projects and solution business coverage).

SAP's SaaS ERP is driving innovation and operational efficiency across industries, whether as SaaS ERP or private ERP. SAP offers SaaS ERP for net-new customers as well as to existing customers wanting to start fresh with a greenfield ERP implementation, or who need a rapidly deployed ERP for subsidiaries. In addition to offering SaaS ERP, SAP also offers a private ERP option in a managed services approach intended for existing on-premises customers to easily migrate their existing scope and innovations to a cloud ERP solution. With this approach, all SAP customers can adopt a clean core approach and move existing innovations to the cloud, without a full greenfield implementation.

SAP's AI strategy is critical to clients and multilevel. SAP Joule is an AI copilot designed to enhance productivity and streamline business processes within SAP and other applications. It leverages generative AI and collaborative AI agents to assist users with tasks, provide insights, and automate workflows. Joule is designed to integrate seamlessly with both SAP and non-SAP systems, providing proactive support and improving user efficiency. Joule is grounded in business data and infused with AI agents to proactively assist employees in every cloud application they use while automating complex processes. In addition, Joule for Developers helps develop on top of SAP Cloud ERP and Joule for Consultants assists in implementing SAP Cloud ERP. Joule is embedded in Cloud ERP to bring many enhancements including use cases such as monitor fulfillment risk, suggest price adjustments, create assets, analyze contracts, and assist cash management. In 2025, SAP began rolling out agentic capabilities (early agents in spend, with studio/tools to build custom skills) plus governance hooks via SAP's AI hub/BTP so models from Microsoft, Google, and others can be used with policy controls. SAP continues its AI progress with more agents scheduled in 2025 and 2026.

Quick facts include:

- **M&A:** SmartRecruiters (AI investment in human capital management), WalkMe (digital adoption platform to provide more intuitive AI-driven experiences on the digital transformation journey, 2024), and LeanIX (enterprise architecture management system for navigating and modernizing IT landscapes, 2023)

- **Industry focus:** SAP supports 26 industries globally.
- **Globalization:** SAP Cloud ERP is deployed in over 180 countries on 6 continents, across 26 different industries. SAP Cloud ERP supports 39 languages and 180+ currencies.
- **Cloud offering:** SAP Cloud ERP supports SaaS and private cloud. SAP Cloud ERP runs on SAP datacenters, Microsoft Azure, Google Cloud Platform, AWS, and AliCloud.
- **AI assistants, advisors, and agents:** Currently available assistants and advisors are helping clients across a large swath of ERP capabilities. Agents available in 2025 include inventory management delivery optimization, dispute resolution agent, production planning and operation's agent, production master data agent, project setup agent, receivables agent, accounting dispute agent, meeting location planner, expense validation agent, and a plethora of agents for treasury and cash management. SAP is enabling a fleet of agents across its entire portfolio throughout 2026.

## Strengths

- **Continuous AI strength:** References told IDC they selected SAP because of its continuous AI improvements, better embedded AI workflows and intelligence, a much better ROI, and speed of innovation, and also SAP supported their industry. In addition, one reference noted they received a >25% improvement with AI in cycle time, accuracy, and processing times.
- **Clean core ERP:** SAP is helping its customized clients understand that utilizing its Cloud ERP product as is, and tailoring workflows around it, will provide them more flexibility and agility, as well as greater control over their destiny in the AI world. This novel approach also brings the potential for agents as the tailors of the processes.
- **Global industry focus:** SAP focuses on 26 industries across the lines of business globally. References noted they love SAP because of its long-standing global industry-focused processes. Several told IDC its process depth bodes well for their organization as they move to agents.

## Challenges

- **SAP has two commercial AI approaches:** The core subscription provides base AI including SAP Joule, improved UX, and productivity improvements, and premium AI by lines of business provides additional improvements across the line of business and Joule agents. Both approaches assist clients on their journey; however, clients may not fully understand the differences in packages, especially on the journey to agents. SAP will need to simplify the client's agentic AI journey.

- **SAP continues to push for cloud migration:** SAP continues to pursue the movement of organizations off legacy applications so these organizations can maneuver easily in the 21st century technology world of AI. A successful agent strategy across the entire SAP customer base could make the shift more palatable and faster, eliminating technical debt while providing clients an AI pathway.
- **Complex workflows require AI simplicity:** While organizations are simplifying their journey with SAP Cloud ERP, they are still stuck in the legacy of complex processes. AI provides an opportunity for SAP to showcase its simplicity with agents.

## Consider SAP When

Consider SAP if you need a strong, scalable, and AI innovative Cloud ERP system to grow your business on a national and global scale.

## Unit4

After a thorough evaluation of Unit4's strategies and capabilities, IDC has positioned the company in the Major Players category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Unit4's ERPx is a multitenant SaaS offering based on a microservice architecture. ERPx is a cloud suite including finance and accounting, financial planning and analysis, procurement, project costing and billing, and human capital management (HCM). ERPx incorporates AI agents using LLM to help with approval tasks and utilizes a virtual assistant and advisor called Advanced Virtual Agent (Ava). ERPx offers clients best practice industry templates, prebuilt industry models that are designed to accelerate time to value.

Unit4's AI strategy is multilevel. ERPx is a multitenant SaaS ERP designed for service-centric organizations, bringing together finance and accounting, FP&A, procurement, project costing and billing, and HCM on a modern microservices cloud. AI is embedded across these domains — including Ava, which automates approvals and workflows, surfaces exception summaries, and provides auditable recommendations. AP is accelerated through AI-powered invoice capture and prediction services, and industry templates/prebuilt models help shorten time to value for professional services, public sector, higher education, and nonprofits.

Quick facts include:

- **M&A:** Scanmarket (sourcing and procurement software, 2022) and Compright (compensation planning capabilities, 2021)

- **Industry focus:** Unit4 ERPx is focused on people- and project-centric businesses including public sector, nonprofit, higher education, and professional services.
- **Globalization:** Unit4 supports 16 languages across 14 countries with unlimited currencies.
- **Cloud offering:** Unit4 SaaS/cloud-enabled ERPx operates on Microsoft Azure. The solution is provisioned from Unit4's own Microsoft Azure tenants and is architected as a multitenant environment; all hosting is through Microsoft Azure.
- **AI assistants, advisors, and agents:** Unit4's AI strategy includes a set of AI agents using LLM to help with approval tasks and alerting the user, all orchestrated through a virtual assistant within Microsoft Teams. This Advanced Virtual Agent is Unit4's Ava, which is designed to simplify collaboration, automate routine tasks, and provide deeper insights.

## Strengths

- **Human-centered AI and automation:** ERPx delivers practical, user-focused AI capabilities across finance, HR, and planning functions. Invoicing, expenses, payroll, and absence management are streamlined through intelligent automation, reducing manual effort and errors.
- **AI-powered assistant and advisor:** Unit4 receives much recognition from references for its Ava, which enhances productivity and streamlines tasks.
- **Low code/no code:** References noted they like ERPx low-code/no-code solution. ERPx is easily extendible via a low-code/no-code integration platform and contains a low-code app builder to create tailored screens, forms, and apps as required.

## Challenges

- **Customer support:** References cited issues with customer support follow-through and actions, as well as the length of time to respond to inquiries.
- **Challenging renewal process:** References noted it is a challenging renewal process, with little to no information on changes in the contract.
- **Embedded AI:** References told us they would like to see Unit4 embed AI into the ERPx workflows as it is too difficult to implement as is now. As Unit4 matures in its AI capabilities, we expect more embedded AI within the ERP process capabilities.

## Consider Unit4 When

Consider Unit4 if you need an ERP system, powered with an AI Advanced Virtual Agent, for your people-focused business in the midmarket and large organization industries of professional services, nonprofit, public sector, and higher education.

## Workday

After a thorough evaluation of Workday's strategies and capabilities, IDC has positioned the company in the Leaders category in this IDC MarketScape on worldwide AI-enabled large enterprise ERP applications.

Workday is the AI platform for managing people, money, and agents and is deployed in 175+ countries. The Workday platform with AI at the core helps customers elevate people, supercharge work, and move the business forever forward. Workday is used by more than 11,000 organizations around the world and across industries — including small and medium-sized businesses and more than 65% of the Fortune 500.

The Workday Suite is positioned as the vendor's ERP AI-first platform, integrating finance, HR, planning, and analytics into a unified system. Workday believes in enterprise performance management that combines operational efficiency with continuous innovation. This core platform includes Workday Financial Management with capabilities for accounting, payables, receivables, cash management, auditing, reporting, and analytics. Workday Human Capital Management (HCM) unifies core HR, global payroll, workforce management, talent acquisition and development, compensation and benefits, skills and mobility, employee experience, and workforce planning — with embedded analytics and continuous listening. On the planning side, Workday Adaptive Planning provides financial, workforce, sales, and operational planning for enterprise-wide forecasting. Spend and procurement are addressed through strategic sourcing, procure-to-pay, expenses, and inventory management capabilities provided with Workday Spend Management. Talent management adds recruiting, learning, and performance optimization, while payroll and workforce management cover scheduling, time tracking, absence, and payroll.

Workday Illuminate, Workday's AI foundation, is embedded across the entirety of the daily processes that managers and employees use in finance and HR. Illuminate encompasses agents, 85+ AI features, and an Agent System of Record. In finance, Workday is applying AI to identify anomalies in journals, match invoices to payments, and automate supplier invoice processing. For HR and talent, AI recommendations now influence career development, skills alignment, and workforce planning.

The Workday Agent System of Record is a governance layer designed to ensure accuracy, traceability, and compliance across agents. Illuminate AI agents are role based and able to tackle tasks and processes.

Quick facts include:

- **M&A:** Flowise (low-code platform for building agents, 2025), Evisort (AI-powered contract life-cycle management, 2024), HiredScored (application screener, 2024),

Paradox (an AI experience agent focused on candidate care, candidate conversion, and time to hire, 2025); and at the time this document was written, Workday has signed a definitive agreement to acquire Sana to power a new Workday experience — where knowledge, data, action, and learning come together as one and create the new front door to work.

- **Industry focus:** Workday's core industries are communication, energy and resources, financial services, government, healthcare, higher education, hospitality, insurance, K-12, life sciences, manufacturing, media and entertainment, nonprofit, professional and business services, retail, and technology.
- **Globalization:** Workday supports 35 languages and its solution is available in 175+ countries.
- **Cloud offering:** Workday is available in AWS and Google Cloud for public cloud, and Workday has colocated datacenters for private cloud.
- **AI assistants, advisors, and agents:** Workday's AI strategy includes an Agent System of Record, which is a unified platform for managing and governing all of an organization's AI agents, including Workday native agents and third-party agents. AI agents delivered to date by Workday include contract intelligence agent, contract negotiation agent, planning agent, recruiting agent, talent mobility agent. Workday has a release schedule for more agents in 2025 and in 2026.

## Strengths

- **AI strategy:** Workday's AI strategy includes assistants and advisors throughout their product's capabilities, AI agents and an Agent System of Record. References noted it is a great value set to future proof their organization.
- **Preconfigured tax and reporting templates:** Workday has preconfigured tax and reporting templates for 55 countries. References noted it has made a difference in the way they utilize the system.
- **Ease of use:** Organizations across the Workday industries find their user experience is exceptional as the system is "easy" to use and intuitive to what one needs.

## Challenges

- **Road map execution:** Customers noted the product road map execution hasn't been as advertised as some of the features and functionality didn't always show up as represented. However, these same references believe this is changing with Workday's new AI strategy and a focused delivery on meeting customer expectations.

- **Poor implementation experience:** References noted their implementation had not gone as indicated nor was it the easiest for their organization.
- **Data breach:** Workday confirmed a data breach that compromised personal information from a third-party CRM database, primarily affecting business contact data. Workday emphasized there was no indication that customer tenants or sensitive HR data within their systems was accessed. Workday has also implemented additional security measures and urged its customers and users to stay vigilant against phishing attempts.

## Consider Workday When

Consider Workday if you need an AI platform for managing people, money, and agents that helps customers elevate people, supercharge work, and move your business forever forward.

## 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 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 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.

## Market Definition

ERP is a packaged integrated suite of technology business applications with common data and process models that digitally support the administrative, financial, and operational business processes across different industries. These processes manage resources, including some or all of the following: people, finances, capital, materials, suppliers, manufacturing, supply chains, customers, products, projects, contracts, orders, and facilities.

Further, ERP suites and the associated applications are utilized to run the business and typically start with finance and include procurement and inventory/asset management and may also include HCM, order management, manufacturing, distribution, services, engineering, PLM, and supply chain. The software can be specific to an industry or designed to be more broadly applied to a group of industries.

Typically, ERP solutions are architected with an integrated set of business rules and metadata, accessing a common data set (logical or physical) from a single, consistent user interface. ERP solutions are available as on-premises, hybrid, and cloud SaaS deployments.

## Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability success measures, respectively, related to the market for worldwide AI-enabled large enterprise ERP applications.

**TABLE 1**

**Key Strategy Measures for Success: Worldwide AI-Enabled Large Enterprise ERP Applications**

Strategies Criteria	Definition	Weight (%)
R&D innovation	Vendor offers and is actively investing in leveraging predictive AI to support forecasting and other analytics-related activity.	25.00
	Vendor is investing in the ability to use natural language processing.	
	Vendor is actively investing in augmented or virtual assistants and chatbots technology to support its user experience.	
	Vendor is actively investing in AI/ML technology to support its user experience.	
	Vendor is actively investing in conversational AI to support its user experience.	
	Vendor is actively investing in generative AI technology to support its user experience.	
	Vendor is actively investing in agents.	
Customer satisfaction strategy	Vendor is able to keep the customer satisfied with the level of innovation offered.	19.00
	For the industry-specific reports, vendor is able to keep the customer satisfied with the industry expertise offered.	
	Vendor has future plans with respect to functionality/offering and alignment with current and future customer needs and industry trends.	
	Vendor is delivering an AI and agent orchestration experience.	
Delivery	Product road map is relevant to customers and communicated to customers.	9.00
	The vendor is providing customers with the necessary tools to lead for the foreseeable future in the digital economy.	
R&D pace/ productivity	Vendor continues to invest into product, innovation, and new opportunities to enhance offerings.	8.00
Growth	Vendor has planned for the solution's revenue growth and new customer acquisition.	12.00
	The vendor's partner network is expanding and/or maturing and is tied into agent strategy.	
	The vendor has programs in place to support ongoing customer success.	
	The vendor is actively expanding its customer base outside of its home market.	

**TABLE 1****Key Strategy Measures for Success: Worldwide AI-Enabled Large Enterprise ERP Applications**

Strategies Criteria	Definition	Weight (%)
Cloud strategy	Multitenancy is planned for at the application, database, and infrastructure layers, with a strong cloud road map planned.	3.00
Architecture strategy	Vendor has a strong strategy to improve its application's architecture, including its APIs, developer community, and integrations.	16.00
	Vendor has a strong strategy to bring forward agents within the next year.	
Functionality or offering strategy	The vendor demonstrates an AI strategy and road map to support the specific functional capabilities with AI.	8.00
Total		100.00

Source: IDC, 2025

**TABLE 2**

**Key Capability Measures for Success: Worldwide AI-Enabled Large Enterprise ERP Applications**

Capabilities Criteria	Definition	Weight (%)
Functionality or offering	The vendor demonstrates a set of capabilities to support a general ledger with AI.	56.00
	The vendor demonstrates a set of capabilities to support accounts payable with AI.	
	The vendor demonstrates a set of capabilities to support procure to pay with AI.	
	The vendor demonstrates a set of capabilities to support accounts receivable and billing with AI.	
	The vendor demonstrates a set of capabilities to support budgeting and forecasting with AI.	
	The vendor demonstrates a set of capabilities to support treasury and cash management with AI.	
	The vendor demonstrates a set of capabilities to support financial close management with AI.	
	The vendor demonstrates a set of capabilities to support fixed asset management with AI.	
	The vendor demonstrates a set of capabilities to support expense management with AI.	
	The vendor demonstrates a set of capabilities to support order management with AI.	
	The vendor demonstrates a set of capabilities to support inventory management with AI.	
	The vendor demonstrates a set of capabilities to ensure the user is meeting compliance mandates with AI.	
	The vendor demonstrates innovation such as AI, ML, Big Data/analytics, NLP, conversational AI, predictive analytics, virtual assistants/chatbots, generative AI, and agentic AI.	
	The vendor demonstrates the use of advanced technology to automate key/essential task/activities within the software workflow.	
	The vendor demonstrates the use of advanced technology to automate key/essential task/activities within the ERP use case workflows.	

**TABLE 2****Key Capability Measures for Success: Worldwide AI-Enabled Large Enterprise ERP Applications**

Capabilities Criteria	Definition	Weight (%)
Range of services	The offering is well supported and/or enhanced by a portfolio of complementary software.	8.00
	The offering supports customers and end users across the world.	
	The system provides low-code/no-code functionality.	
	The system has the ability to quickly connect and work with other systems.	
Pricing model	The pricing model structure will be assessed by evaluating pricing options and contract duration available to customers.	2.00
Architecture	The system has the ability to scale up to meet the demands of larger or more complex businesses.	2.00
Cloud capabilities	The vendor offers multitenancy at the application, database, and infrastructure layers.	4.00
	The vendor manages its cloud solution effectively with regular updates, flexibility, change management support, and meeting uptime/SLAs.	
Customer satisfaction	Customer receives good value relative to the price they pay for the application.	28.00
	Application is easy and intuitive to use.	
	Application is fast and responsive for end users.	
	Vendor is assessed for ease/difficulty of implementing the software.	
	It is easy to integrate the application with external systems, such as HR, financials, and CRM.	
	Vendor is able to solve customer service issues to the customer's satisfaction.	
	Vendor offers AI enablement within tasks, processes, workflows, or other mechanism.	
Total		100.00

Source: IDC, 2025

## LEARN MORE

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### Related Research

- *Worldwide Enterprise Resource Planning Applications Software Forecast, 2025-2029: AI Empowers the Future* (IDC #US53742525, September 2025)
- *The Agentic Evolution of Enterprise Applications — August 2025 Update* (IDC #US53701525, August 2025)
- *Worldwide Enterprise Resource Planning Applications Market Shares, 2024: Public Cloud Hitting Stride, Enabled by AI* (IDC #US53478726, July 2025)
- *IDC Market Glance: Enterprise Resource Planning Applications, 3Q25* (IDC #US52168225, July 2025)
- *ERP Components and AI: Investing Continues with Enterprise Applications Providers* (IDC #US53635625, June 2025)
- *IDC FutureScape: Worldwide Intelligent ERP 2025 Predictions* (IDC #US51078024, October 2024)
- *What Are the Finance Organization's Greatest Challenges and Benefits with Their ERP System?* (IDC #US52553324, September 2024)

### Synopsis

This IDC study provides a thorough assessment of market-leading AI-enabled large enterprise ERP applications and discusses the criteria that are most important for companies to consider when selecting a solution.

"Organizations are embracing the new AI-powered digital world with an extreme focus on speed, scale, and agility. This requires switching to new AI-enabled ERP technologies to reduce manual and semi-manual workflows, improve time to insights and action and, ultimately, deliver top business performance. AI-enabled ERP technology not only improves an organization's actions and resource management but also enables the organization to immediately pivot around disruptions as they deliver quality services and performance for their organization," said Mickey North Rizza, IDC Group VP, Enterprise Software.

## ABOUT IDC

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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.).

## Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
[blogs.idc.com](http://blogs.idc.com)  
[www.idc.com](http://www.idc.com)

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