Vendor Landscape: Mid-Market ERP

New players are taking ERP from just transactions, to business actions.
Enterprise Resource Planning (ERP) is no longer just about financials. Clients now expect smarter tools for data management and integration.

This Research Is Designed For:

✓ Mid-market enterprises seeking to select a solution for enterprise resource planning. Their ERP use cases may include:
  • Geographically distributed organizations with complex resourcing.
  • Organizations that need to quickly gain control of their resourcing.
  • Organizations with volatile resources (i.e. perishable, difficult to move) that require specific analysis and planning of their production.

This Research Will Help You:

✓ Understand what's new in the ERP market.

✓ Evaluate ERP vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios.
Executive Summary

Info-Tech evaluated thirteen solutions from eight vendors in the Enterprise Resource Planning market, including the following notable performers:

**Champions:**
- **Sage ERP X3** is an easy to customize solution that has a history of excellent regional support and sales.
- **Oracle JDE EnterpriseOne** is a pioneer in this space. It still has many of the features that the mid-market needs.
- **Microsoft Dynamics NAV** is designed for ease of use and deployment with those channel partners which assist with extensive customizations.

**Innovation Award:**
- **UNIT4 Business Software** has superior data handling and analytics that allow casual users in multiple sites to accurately handle and analyze data.

*Info-Tech Insight*

1. **Focus on data management tools:**
   ERP, as a whole, has stayed static in the mid-market. The features offered have begun to change to allow for the automation of data management.

2. **Long-term value will be in the analytics:**
   ERP is moving beyond traditional recording of transactional data to include analytics and workflow automation.

3. **Ease of use is becoming important:**
   While recording and managing data is still the main use of ERP, usability and UI are becoming key differentiators.
Market Overview

How it got here

- ERP industries started in the sixties as a mainframe deployed tool to automate repetitive manufacturing schedules.
- SAP capitalized on innovations in client-server computing to become the leader in the ERP market.
- Rival offerings by JD Edwards and Oracle brought refinement and extended ERP as an underlying platform available to all mid and large enterprises.
- The standardization of databases by Oracle and Microsoft allowed for greater integration of enterprise modules, such as CRM and industry specific functionality. The key to success became the capabilities of the channel partners.
- Enterprises were presented with the challenge of managing and effectively using the resulting excess of data.
- The advent of web-based software offerings (SaaS) decreased the initial cost of deploying an ERP system, furthering SME market adoption. Integration and industry specialization remain a challenge.

Where it’s going

- ERP has become the latest enterprise application to be available as a cloud SaaS. SaaS has eased the adoption of ERP and the extensibility of existing deployments, but has not led to vendor churn.
- ERP is moving from merely a record of transactions, to the main support of the data management of the organization. The incorporation of analytics and workflow management is becoming a necessary module.
- Oracle and Microsoft’s move to build comprehensive platforms for enterprise applications to enable data management has led a variety of newer vendors to build their solutions on SOA and analytics platforms.
- Large vendors are easing user customization through SaaS and UI. This potentially diminishes the need for ISVs and VARs for large segments of the market.

As the market evolves, capabilities that were once considered new and innovative become defaults, and new functionality becomes differentiating. The presence of CRM and HRIS modules as part of the core ERP are now Table Stakes and should no longer be used to differentiate solutions. Instead, focus on industry fit and the implementer to get the best match for your requirements.
ERP Vendor Landscape selection / knock-out criteria: Market share, mind share, and market consolidation

- The ERP market is still dominated by large vendors, including SAP, Oracle, and Microsoft. The mid-market segment is starting to move towards lower CAPEX cloud SaaS vendors, such as UNIT4 Business Software, NetSuite, and Epicor.
- For this Vendor Landscape, Info-Tech focused on those vendors that have a strong market presence and/or reputational presence among small to mid-sized enterprises across at least three industry segments.

<table>
<thead>
<tr>
<th>Included in the Vendor Landscape:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sage</strong>: Provides two products for this space: 300 ERP (formerly ERP Accpac) for the small to mid segment, and ERP X3 for the mid to large segment.</td>
</tr>
<tr>
<td><strong>SAP</strong>: The gold standard in ERP, particularly for large enterprises. It offers two solutions in this landscape for the mid-market: Business One, and Business ByDesign, its new SaaS offering.</td>
</tr>
<tr>
<td><strong>Oracle</strong>: Provides the database architecture for many of these vendors. Info-Tech profiled two mid-market solutions: the elder statesman, JD Edwards EnterpriseOne, and the newest entrant, Fusion Applications.</td>
</tr>
<tr>
<td><strong>Microsoft Dynamics</strong>: The Dynamics line contains solutions that cover the whole of the mid-market space. Info-Tech reviewed GP, NAV, and AX.</td>
</tr>
<tr>
<td><strong>NetSuite</strong>: The most established SaaS offering.</td>
</tr>
<tr>
<td><strong>Epicor</strong>: A cloud SaaS vendor that primarily serves the manufacturing and retail markets.</td>
</tr>
<tr>
<td><strong>UNIT4 Business Software</strong>: Cloud SaaS vendor that is known for its post-implementation simplicity and flexibility.</td>
</tr>
<tr>
<td><strong>Openbravo</strong>: An open source ERP solution, Openbravo provides a customizable ERP solution for the mid-market.</td>
</tr>
</tbody>
</table>
# ERP Criteria & Weighting Factors

## Product Evaluation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features</td>
<td>The solution provides basic and advanced feature/functionality.</td>
</tr>
<tr>
<td>Usability</td>
<td>The solution’s dashboard and reporting tools are intuitive and easy to use.</td>
</tr>
<tr>
<td>Architecture</td>
<td>The delivery method of the solution aligns with what is expected within the space.</td>
</tr>
</tbody>
</table>

## Vendor Evaluation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viability</td>
<td>Vendor is profitable, knowledgeable, and will be around for the long-term.</td>
</tr>
<tr>
<td>Strategy</td>
<td>Vendor is committed to the space and has a future product and portfolio roadmap.</td>
</tr>
<tr>
<td>Reach</td>
<td>Vendor offers global coverage and is able to sell and provide post-sales support.</td>
</tr>
<tr>
<td>Channel</td>
<td>Vendor channel strategy is appropriate and the channels themselves are strong.</td>
</tr>
</tbody>
</table>
The Info-Tech ERP Vendor Landscape

**Champions** receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters of the industry.

**Innovators** have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

**Market Pillars** are established players with very strong vendor credentials, but with more average product scores.

**Emerging players** are newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

For an explanation of how the Info-Tech Vendor Landscape is created, please see the slide entitled [Vendor Evaluation Methodology](#) in the appendices.
Every vendor has its strengths & weaknesses; Pick the one that works best for you

<table>
<thead>
<tr>
<th>Product</th>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
<th>Affordability</th>
<th>Architecture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Epicor</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics AX</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics GP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics NAV</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>NetSuite ERP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Openbravo</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Oracle Fusion Applications</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Oracle JDE EnterpriseOne</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Sage 300 ERP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Sage ERP X3</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>SAP Business ByDesign</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>SAP Business One</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>UNIT4 Business Software</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Overall</th>
<th>Viability</th>
<th>Strategy</th>
<th>Reach</th>
<th>Channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Epicor</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics AX</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics GP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Microsoft Dynamics NAV</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>NetSuite ERP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Openbravo</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Oracle Fusion Applications</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Oracle JDE EnterpriseOne</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Sage 300 ERP</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>Sage ERP X3</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>SAP Business ByDesign</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>SAP Business One</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
<tr>
<td>UNIT4 Business Software</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
<td>✅️</td>
</tr>
</tbody>
</table>

Legend: ✅️ = Exemplary, ⬤ = Good, ⬤ = Adequate, ⬤ = Inadequate, ⬤ = Poor, * = Vendor declined to provide pricing

For an explanation of how the Info-Tech Harvey Balls are calculated, please see the slide entitled Vendor Evaluation Methodology in the appendices.
Table Stakes represent the minimum standard; without these, a product doesn’t even get reviewed

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconcile-to-Report</td>
<td>Financial management (general ledger, PO reconciliation, tax rationalization)</td>
</tr>
<tr>
<td>Order-to-Cash</td>
<td>Basic CRM and Order management.</td>
</tr>
<tr>
<td>Procure-to-Pay</td>
<td>Basic asset management and accounts payable.</td>
</tr>
<tr>
<td>Hire-to-Retire (HR)</td>
<td>Basic human resource information and management.</td>
</tr>
<tr>
<td>Technical Architecture</td>
<td>A technical architecture that supports add-ons and integration with common reporting tools.</td>
</tr>
</tbody>
</table>

What Does This Mean?

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products’ capabilities **in excess** of the criteria listed here.

If Table Stakes are all you need from your ERP solution, the only true differentiator for the organization is price. Otherwise, extend your search to find the best price and value for your needs.
**Advanced Data Management and Integration Features are the market differentiators that make or break a product(1 of 2)**

Info-Tech scored each vendor’s features offering as a summation of their individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale as defined in the appendix.

Modules and features that required additional purchases were given minimal credit.

<table>
<thead>
<tr>
<th>Scoring Methodology</th>
<th>Advanced Features</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data Integration</strong></td>
<td>Availability across ERP modules. Full points required integrated business process management.</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>Control mechanism for exception and audit processes. Full points awarded for graphical, user type defined templates.</td>
</tr>
<tr>
<td><strong>Financial Consolidation</strong></td>
<td>Automated collection of local financials to main ERP unit on a specified timeline. Full points awarded for integrated GAAP and IFRS rules.</td>
</tr>
<tr>
<td><strong>Budgeting</strong></td>
<td>Granular control of budget allocation with forecasting function. Full points awarded for integrated analytics for adaptive planning.</td>
</tr>
<tr>
<td><strong>Data Management</strong></td>
<td>Ability to monitor data modification and warehouse previous versions. Full points awarded for user defined automation of retirement or warehousing.</td>
</tr>
</tbody>
</table>

Info-Tech Research Group
Advanced Globalization and Compliance Features are the market differentiators that make or break a product (2 of 2)

<table>
<thead>
<tr>
<th>Scoring Methodology</th>
<th>Advanced Features</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Feature</td>
</tr>
<tr>
<td>Info-Tech scored each vendor’s features offering as a summation of their individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale as defined in the appendix. Modules and features that required additional purchase were given minimal credit.</td>
<td>Multi-Site Support</td>
</tr>
<tr>
<td></td>
<td>Internationalization</td>
</tr>
<tr>
<td></td>
<td>Mobile Support</td>
</tr>
<tr>
<td></td>
<td>Industry Modules</td>
</tr>
<tr>
<td></td>
<td>Delivery Models</td>
</tr>
<tr>
<td></td>
<td>ECM Integration</td>
</tr>
<tr>
<td></td>
<td>Development / Customize Ecosystem</td>
</tr>
</tbody>
</table>
Each vendor offers a different feature set; concentrate on what you need (1 of 2—Data management and integration)

<table>
<thead>
<tr>
<th>Data Integration</th>
<th>Workflow</th>
<th>Financial consolidation</th>
<th>Budget</th>
<th>Data management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Epicor</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Microsoft Dynamics AX</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Microsoft Dynamics GP</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Red" alt="Red" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Microsoft Dynamics NAV</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>NetSuite ERP</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Openbravo</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Red" alt="Red" /></td>
<td><img src="Red" alt="Red" /></td>
</tr>
<tr>
<td><strong>Oracle Fusion Applications</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Oracle JDE EnterpriseOne</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Sage 300 ERP</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Red" alt="Red" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>Sage ERP X3</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>SAP Business ByDesign</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Red" alt="Red" /></td>
</tr>
<tr>
<td><strong>SAP Business One</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Red" alt="Red" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
<tr>
<td><strong>UNIT4 Business Software</strong></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
<td><img src="Green" alt="Green" /></td>
</tr>
</tbody>
</table>

**Legend**
- ![Green](Green) = Feature fully present
- ![Yellow](Yellow) = Feature partially present / pending
- ![Red](Red) = Feature absent or requires add-on purchase

Info-Tech scored each vendor’s features offering. Vendors that received a full point received a green light.

Vendors receiving half points, or vendors that did not currently have the feature, but had acknowledged that they were planning to offer the feature in the near future, received a yellow light.

Where modules and features were absent or required additional purchase, vendors were given red lights.
Each vendor offers a different feature set; concentrate on what you need (2 of 2 - Globalization and compliance)

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Multi-site support</th>
<th>Internationalization</th>
<th>Mobile support</th>
<th>Industry modules</th>
<th>Delivery</th>
<th>ECM integration</th>
<th>Dev / Customize</th>
</tr>
</thead>
<tbody>
<tr>
<td>Epicor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft Dynamics AX</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft Dynamics GP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft Dynamics NAV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NetSuite ERP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Openbravo</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oracle Fusion Applications</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oracle JDE EnterpriseOne</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sage 300 ERP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sage ERP X3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP Business ByDesign</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP Business One</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNIT4 Business Software</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Legend:  
- = Feature fully present  
- = Feature partially present / pending  
- = Feature absent or requires add-on purchase
**JDE EnterpriseOne** is a stable and mature product that may be eclipsed by other Oracle products

**Champion**

<table>
<thead>
<tr>
<th>Product:</th>
<th>JDE EnterpriseOne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees:</td>
<td>108,000</td>
</tr>
<tr>
<td>Headquarters:</td>
<td>Redwood Shores, CA</td>
</tr>
<tr>
<td>Website:</td>
<td>Oracle.com</td>
</tr>
<tr>
<td>Founded:</td>
<td>1977</td>
</tr>
<tr>
<td>Presence:</td>
<td>NASDAQ: ORCL</td>
</tr>
<tr>
<td>FY10 Revenue:</td>
<td>$27.0bn</td>
</tr>
</tbody>
</table>

**Overview**

- JDE came into Oracle’s possession in 2005 as a part of their PeopleSoft acquisition.
- JDE EnterpriseOne is a solution best fit for upper mid-market enterprises.

**Strengths**

- JDE EnterpriseOne has the depth to serve the needs of even the most complex mid-market enterprises.
- JDE EnterpriseOne has configurations, including the choice of database, operating system, and hardware, providing extensive flexibility and scalability.

**Challenges**

- The UI and reporting features are lagging behind competitors, leading to end-user uncertainty.
- JDE EnterpriseOne is a mature product and has not seen its advanced features upgraded to compete with other vendors.
- Given Oracle’s release of Fusion Apps, JDE EnterpriseOne’s future is uncertain.

**Info-Tech Recommends:**

JDE EnterpriseOne has a broad range of application and industry modules that ensure a high market share. Significant lag in features, and the addition of Fusion, limits who can use and maintain it.
Sage ERP X3 is an adaptable product and provides multi-site data and workflow integration

**Champion**
- **Product:** ERP X3
- **Employees:** 13,600
- **Headquarters:** Newcastle, UK
- **Website:** Sage.com
- **Founded:** 1981
- **Presence:** LSE: SGE
- **FY10 Revenue:** £1.4bn

**Overview**
- Sage has 6.3 million customers globally, with Sage ERP X3 (formerly Adonix) deployed to 3,300 customers in 53 countries.
- Target placement: multi-site enterprises.

**Strengths**
- Strong adaptability allows enterprises to define workflows and information streams at a granular level.
- Web-native architecture allows for collaboration with partners, suppliers, and customers.
- Modern architecture facilitates multi-site, multi-country deployments with detailed configuration requirements.

**Challenges**
- Sage ERP X3’s client and consulting base is still primarily European. However, North American clients report no support or service concerns.
- Sage ERP X3 lacks information lifecycle management, leading clientele to potentially expensive, customized add-ons.

**Vendor declined to provide pricing.**

**Info-Tech Recommends:**
Sage ERP X3 addresses the needs of a flexible business. Its main limitation is the relatively small size of the North American reseller community, but it is seeing large growth in this area.
### There’s a Microsoft Dynamics NAV solution for every industry

| Champion |
|-------------------|-------------------|
| **Product:** | Dynamics NAV |
| **Employees:** | 89,000 |
| **Headquarters:** | Redmond, WA |
| **Website:** | Microsoft.com |
| **Founded:** | 1975 |
| **Presence:** | NASDAQ: MSFT |
| **FY10 Revenue:** | $62,484 million |

### Overview
- Dynamics NAV (formerly Navision) serves more than 82,000 mid-sized enterprises in 150 countries, and is available in a licensed or hosted deployment.

### Strengths
- Dynamics NAV has high flexibility to serve a broad array of enterprises.
- Dynamics NAV provides an office-like environment and allows for integration with other parts of the Microsoft stack.
- Dynamics NAV has a large array of channel partners, which provide templates for any industry.

### Challenges
- Dynamics NAV customization and development is difficult without highly skilled ISVs.
- Enterprises must consider the scalability of NAV. It is best for implementations with less than 400 users.
- For a Microsoft product, Dynamics NAV has limited out of the box SharePoint integration.

### Info-Tech Recommends:
Seamless integration with other key Microsoft products (i.e. Office and SQL) makes Dynamics NAV a familiar and cost effective solution for the mid-market.
Microsoft Dynamics AX is easy to use and has excellent core functionality

**Innovator**

- **Product:** Dynamics AX
- **Employees:** 89,000
- **Headquarters:** Redmond, WA
- **Website:** Microsoft.com
- **Founded:** 1975
- **Presence:** NASDAQ: MSFT
  FY10 Revenue: $62,484 million

---

**Overview**

- Dynamics AX (formerly Axapta) is a rich, forward-looking platform for upper mid-market enterprises, and is available in multiple deployments.

**Strengths**

- Dynamics AX integration with other parts of the Microsoft stack is rapidly expanding, providing users with a single view of multiple business functions (e.g. ERP, CRM, SSRS, etc.).
- The UI and role-based log-on simplify user workflow.
- It is a flexible and scalable platform for enterprises that must address multi-site/multi-language issues.

**Challenges**

- Some users report challenges with supporting and maintaining the diverse capabilities of Dynamics AX.
- Some users have had challenges finding skilled resources, or leveraging their own staff with traditional Microsoft development skills.

**Info-Tech Recommends:**

Beyond being a superior ERP product, Dynamics AX also acts as a development platform for the Partner Network to adapt and enhance industry specific modules.

Vendor declined to provide pricing.
Agresso Business World is built for ease and flexible use, with simple drag and drop tools

**Innovator**

<table>
<thead>
<tr>
<th>Product</th>
<th>Agresso Business World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>4,230</td>
</tr>
<tr>
<td>Headquarters</td>
<td>Sliedrecht, Netherlands</td>
</tr>
<tr>
<td>Website</td>
<td>Unit4.com</td>
</tr>
<tr>
<td>Founded</td>
<td>1980</td>
</tr>
<tr>
<td>Presence</td>
<td>NYSE Euronext Amsterdam: U4AGR</td>
</tr>
<tr>
<td></td>
<td>FY10 Revenue: €421.7 million</td>
</tr>
</tbody>
</table>

**Overview**

- Agresso Business World was designed for dynamic, service-centric organizations.
- UNIT4 Business Software merged with Agresso in 2000 to build an integrated ERP platform.

**Strengths**

- Changes to workflow are enabled by business users without IT assistance.
- The role-based features provide a simplified and highly customizable view to users while maintaining audit ability.
- Excellent control for budget monitoring and portioning across departments and physical units of the enterprise.

**Challenges**

- There is a lack of VARs and ISVs in many regions of North America and Asia.
- The relatively new emergence of UNIT4 Business Software internationally compared to competitors limits the support outside of the EU.

**Info-Tech Recommends:**

UNIT4 should be the top choice for service and knowledge based industries. Clients that rely on well orchestrated supply chains may find UNIT4 difficult to implement.
Epicor has a vision to build an integrated platform for sales and distribution business

**Innovator**

- **Product:** Epicor
- **Employees:** 4000
- **Headquarters:** Livermore, CA
- **Website:** Epicor.com
- **Founded:** 1972
- **Presence:** Privately held
- **FY10 Revenue:** $800 million

**Overview**

- Epicor is a comprehensive upper mid-market ERP platform, primarily for manufacturing, distribution, and retail.
- Epicor is innovative in their adoption of social tools for real business scenarios.

**Strengths**

- Flexible Service-Oriented Architecture (SOA) allows enterprises to model business rules, and minimizes customization.
- Strong and consistent UI for non-IT users.
- Has excellent integration for linking a wide range of content into the data warehouse.
- Embedded functionality reduces integration costs.

**Challenges**

- Early adopters reported some challenges with core modules. Request references from your specific industry use.
- Epicor’s channel of consultants and implementers is smaller than that of competitors.
- Epicor has limited industry modules and general budgeting features.

**Info-Tech Recommends:**

Epicor is an easy to use solution for manufacturing and distribution verticals. Particularly good for clients with a flat organizational structure.
Business One is built for integrating with SAP ERP, but can provide plenty of function for all

**Market Pillar**

- **Product:** SAP Business One
- **Employees:** 54,000
- **Headquarters:** Walldorf, DEU
- **Website:** Sap.com
- **Founded:** 1972
- **Presence:** NYSE: SAP

FY10 revenue: €12.46bn

**Overview**

- Business One was developed out of SAP’s TopManage acquisition, and is a distinct product from SAP ERP.

**Strengths**

- Business One offers strong mobile support with an iPhone app that helps sales teams stay connected and informed.
- Supports global operations with multi-language and multi-currency capabilities, country-specific allocation, and reporting requirements.
- Business One’s highly capable CRM is integral to its solution.

**Challenges**

- Business One is built on client/server architecture and is not browser-based, limiting the extensibility of the solution for fast growing enterprises.
- Business One relies on add-on modules to manage and consolidate financial data, limiting its use for mid-market multinationals.

**Info-Tech Recommends:**

Business One is primarily for independent subsidiaries of large multinationals that run SAP solutions.

Vendor declined to provide pricing.
Sage 300 ERP offers a simple solution that provides ERP essentials

**Market Pillar**

- **Product:** Sage 300 ERP
- **Employees:** 13,600
- **Headquarters:** Newcastle, UK
- **Website:** [Sage.com](http://Sage.com)
- **Founded:** 1981
- **Presence:** LSE: SGE
  - FY10 Revenue: £1.4bn

**Overview**

- Sage 300 ERP (formerly Sage ERP Accpac) is deployed to 45,000 customers, in 169 countries, and is available in licensed and hosted deployments.

**Strengths**

- Sage 300 ERP is brilliant in its simplicity. Knowledgeable VARs are available for support.
- Fully integrated out of the box with [Sage CRM](http://SageCRM.com)
- Sage 300 ERP makes upper mid-market financial and data integration modules available to lower mid-market clientele.
- Provides out of the box personalization based on user roles.

**Challenges**

- Sage 300 ERP’s primary challenges come from its relative lack of scalability. Enterprises with complicated multi-site requirements will quickly outgrow Sage 300 ERP.
- Users frequently report that they need to customize or add-on a wide range of functions (mobile, data archiving).
- Most customers will require industry specific modules.

**Info-Tech Recommends:**

Sage 300 ERP is a widely employed and feature-rich accounting package for the core mid-market.

Vendor declined to provide pricing.
Microsoft Dynamics GP provides basic functionality with a familiar, easy to use environment

<table>
<thead>
<tr>
<th>Market Pillar</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product:</strong> Dynamics GP</td>
</tr>
<tr>
<td><strong>Employees:</strong> 89,000</td>
</tr>
<tr>
<td><strong>Headquarters:</strong> Redmond, WA</td>
</tr>
<tr>
<td><strong>Website:</strong> Microsoft.com</td>
</tr>
<tr>
<td><strong>Founded:</strong> 1975</td>
</tr>
<tr>
<td><strong>Presence:</strong> NASDAQ: MSFT, FY10 Revenue: $62,484 million</td>
</tr>
</tbody>
</table>

Overview

- Dynamics GP (formerly Great Plains) is widely used as the financial add-on for many specialty products due to its modules specific to non-profit organizations.

Strengths

- The core ERP financial modules provide excellent functionality for the small to mid-market enterprises.
- Dynamics GP provides an office-like UI and integrates with Microsoft Office to enhance the efficiency of users.
- Dynamics GP has strong channel support and knowledgeable VARs, easing implementation for small and mid-market clients.

Challenges

- Dynamics GP lacks many features available in competitors’ offerings.
- The Great Plains architecture does not allow for much customization. This limits the extensibility and flexibility available for growing mid-market enterprises.

Info-Tech Recommends:

Dynamics GP is an excellent baseline product for small to mid-sized organizations. Dynamics GP provides all of the financial modules that a small to mid-sized organization will ever need.
Business ByDesign is an SaaS offering that brings SAP tools to the small to mid market

**Emerging Player**

- **Product:** [SAP Business ByDesign](https://www.sap.com)
- **Employees:** 54,000
- **Headquarters:** Walldorf, DEU
- **Website:** [Sap.com](https://www.sap.com)
- **Founded:** 1972
- **Presence:** NYSE: SAP
  - FY10 revenue: €12.46bn

---

**Overview**

- Business ByDesign is a relatively new product from SAP, released in 2010.
- Business ByDesign is SAP’s entry into SaaS and cloud-based solutions.

**Strengths**

- Highly customizable with built-in configuration tools, and able to re-configure without disrupting critical business processes.
- Business ByDesign integrates all key business functions with Microsoft Office.
- Budgeting solution allows for forecasting and includes embedded analytics for real-time insights.

**Challenges**

- Given their recent acquisition of SuccessFactors, the channel strategy for deploying Business ByDesign is unclear.
- The system does not include data warehousing or workflow automation.
- The number of industry modules currently available is limited, but this will likely be expanded in the future.

**Info-Tech Recommends:**

Business ByDesign is a simple to implement tool designed to bring SAP function and reliability to the lower mid-market.
NetSuite provides a basic core ERP function with SaaS deployment, which allows for low investment

**Emerging player**

- **Product:** NetSuite ERP
- **Employees:** 1,000+
- **Headquarters:** San Mateo, CA
- **Website:** NetSuite.com
- **Founded:** 1998
- **Presence:** NYSE: N
  
  FY10 revenue: $193.1 million

**Overview**

- NetSuite is the pioneer of SaaS and cloud ERP software applications.
- Grew out of NetLedger with the financial backing of Larry Ellison to fill the ERP need of small and mid-sized businesses.

**Strengths**

- NetSuite ERP prevents version-lock by enabling customizations to migrate with each new release.
- NetSuite ERP has strong global capabilities with multi-currency management for 190+ currencies, and comprehensive compliance with local accounting regulations.
- NetSuite offers a companion CRM.

**Challenges**

- Multi-subsidiary management and financial consolidation requires an upgrade to NetSuite OneWorld.
- NetSuite ERP does not offer data management or automated warehousing functionality.
- Access to many of the advanced features requires upgrading, or the purchase of additional modules.

**Info-Tech Recommends:**

NetSuite lacks many advanced features, but can provide a low CAPEX ERP solution for a mid-market enterprise.
Oracle Fusion Applications has tremendous potential, but clarification is still required.

**Emerging Player**

- **Product:** Fusion Applications
- **Employees:** 108,000
- **Headquarters:** Redwood Shores, CA
- **Website:** Oracle.com
- **Founded:** 1977
- **Presence:** NASDAQ: ORCL

FY10 Revenue: $27.0bn

**Overview**

- Oracle is aggressively pursuing its Fusion strategy. This approach will have an impact on the future roadmap.
- Fusion Applications is a SaaS solution.

**Strengths**

- Fusion Applications is a flexible product that integrates with other Oracle products, as well as with third-party solutions.
- Fusion Applications Business Intelligence and transactions are merged into one, providing efficient data integration.
- Fusion Applications is built as SaaS, bringing multi-site features and versioning controls into the core ERP solution.

**Challenges**

- Fusion Applications does not offer any industry specific solutions at this time.
- Although the solution is SaaS, it only offers mobile applications for its CRM module.
- Oracle’s plan for the entire Fusion Applications ecosystem remains unclear, reducing enthusiasm for the product.

**Info-Tech Recommends:**

Clients that already depend on Oracle products should watch closely for how Fusion Applications develops, but pass on it for now.

Vendor declined to provide pricing.
Openbravo provides ERP through a SaaS model with open source flexibility

**Emerging Player**

- **Product:** Openbravo
- **Employees:** 51-200
- **Headquarters:** Pamplona, Spain
- **Website:** Openbravo.com
- **Founded:** 2001
- **Presence:** Vendor declined

**Overview**

- Openbravo provides a web-based open source ERP dedicated to meeting the needs of small and medium sized enterprises.
- Openbravo has been downloaded almost 2,000,000 times.

**Strengths**

- Openbravo’s integrated authorization enables role-based access and features programmable alerts.
- The web-based interface simplifies access to the ERP system.
- Openbravo is highly customizable, tailoring or adding functionalities can be done without programming.
- Supports Oracle and PostgreSQL databases.

**Challenges**

- Requires Apache products to run.
- BPM and workflow currently do not exist, but are on their near-term roadmap.
- While mobility is lacking, Openbravo is building a full service mobile client.
- Lack of commercial support for the North American market.

**Info-Tech Recommends:**

Small to mid-sized enterprises with lean IT or horizontal organizational structures will find success with Openbravo.
Identify leading candidates with the *Mid-Market ERP Vendor Shortlist Tool*

The Info-Tech *Mid-Market ERP Vendor Shortlist Tool* is designed to generate a customized shortlist of vendors based on your key priorities.

This tool offers the ability to modify:

- Top-level weighting of product vs. vendor criteria.

- Individual product criteria weightings:
  - Features
  - Usability
  - Affordability
  - Architecture

- Individual vendor criteria weightings:
  - Viability
  - Strategy
  - Reach
  - Channel
Your organization’s growth pattern is a key consideration when selecting an ERP solution.

Scalability and ease of integration are important features for mid-market enterprises with large growth potential.

1. Enterprise Growth Pattern
2. Supply Chain Flexibility
3. Industry Specific Support
4. Cost of Acquisition

Growth of company through merger or acquisition
- ORACLE
- JD EDWARDS ENTERPRISEONE
- sage
- ERP X3
- Microsoft Dynamics AX

Internal addition of sites
- UNIT4
- ORACLE
- FUSION APPLICATIONS
- SAP
- BusinessByDesign

Limited growth potential
- openbravo
- EPICOR
- NETSUITE
- 300 ERP
- SAP BusinessOne
- Microsoft Dynamics GP
- Microsoft Dynamics NAV
Enterprises in highly volatile markets need an ERP that is flexible enough to meet varying supply chain requirements.

Choose an ERP solution that provides visibility into processes, as well as ease of integration and extension.

### 1. Enterprise Growth Pattern

- **SAP BusinessOne**

### 2. Supply Chain Flexibility

- **Sage ERP X3**

### 3. Industry Specific Support

- **Unit4**

### 4. Cost of Acquisition

- **Microsoft Dynamics AX**
- **Oracle JD Edwards EnterpriseOne**
- **Microsoft Dynamics NAV**
- **Oracle Fusion Applications**
- **SAP BusinessByDesign**
- **Microsoft Dynamics GP**
- **OpenBravo**
- **Epicor 300 ERP**
- **NetSuite**
Enterprises in specific industries rely on vendor experience and specialization

Getting the support you need is crucial to ERP success, particularly for smaller vertical like professional services and non-profit.

1. Enterprise Growth Pattern
2. Supply Chain Flexibility
3. Industry Specific Support
4. Cost of Acquisition

Professional services (consultants, real estate)

Non-profit organizations

Retail
Cost conscious organizations should consider the acquisition price

CAPEX expenditures often delay project start dates, whereas OPEX can be justified as a business cost.

Expensive (greater than 500K)
- Oracle
- SAP
- Sage
- Oracle

Average (between 499K and 100K)
- Microsoft Dynamics GP
- Sage
- Unit4
- Epicor

Low to no CAPEX (less than 50K)
- OpenBravo
- SAP
- NetSuite
- BusinessByDesign
Appendix

1. Vendor Evaluation Methodology
2. Vendor Evaluation Methodology-Partial scoring criteria for ERP
Vendor Evaluation Methodology

Info-Tech Research Group’s Vendor Landscape market evaluations are a part of a larger program of vendor evaluations, which includes Solution Sets that provide both Vendor Landscapes, and broader Selection Advice.

From the domain experience of our analysts, as well as through consultation with our clients, a vendor/product shortlist is established. Product briefings are requested from each of these vendors, asking for information on the company, products, technology, customers, partners, sales models and pricing.

Our analysts then score each vendor and product across a variety of categories, on a scale of zero to ten points. The raw scores for each vendor are then normalized to the other vendors’ scores to provide a sufficient degree of separation for a meaningful comparison. These scores are then weighted according to weighting factors that our analysts believe represent the weight that an average client should apply to each criteria. The weighted scores are then averaged for each of two high level categories: vendor score and product score. A plot of these two resulting scores is generated to place vendors in one of four categories: Champion, Innovator, Market Pillar, and Emerging Player.

For a more granular category by category comparison, analysts convert the individual scores (absolute, non-normalized) for each vendor/product in each evaluated category to a scale of zero to four, whereby exceptional performance receives a score of four, and poor performance receives a score of zero. These scores are represented with “Harvey Balls”, ranging from an open circle for a score of zero, to a filled in circle for a score of four. Harvey Ball scores are indicative of absolute performance by category, but are not an exact correlation to overall performance.

Individual scorecards are then sent to the vendors for factual review, and to ensure no information is under embargo. We will make corrections where factual errors exist (e.g. pricing, features, technical specifications). We will consider suggestions concerning benefits, functional quality, value, etc; however, these suggestions must be validated by feedback from our customers. We do not accept changes that are not corroborated by actual client experience, or wording changes that are purely part of a vendor’s market messaging or positioning. Any resulting changes to final scores are then made as needed, before publishing the results to Info-Tech clients.

Vendor Landscapes are refreshed every 12 to 24 months, depending upon the dynamics of each individual market.
Vendor Evaluation Methodology—Partial scoring criteria for ERP

Info-Tech Research Group’s Vendor Landscape market evaluations are a part of a larger program of vendor evaluations, which includes Solution Sets that provide both Vendor Landscapes and broader Selection Advice.

From the domain experience of our analysts, as well as through consultation with our clients, a vendor/product shortlist is established. Product briefings are requested from each of these vendors, asking for information on the company, products, technology, customers, partners, sales models and pricing.

Our analysts then score each vendor and product across a variety of categories, on a scale of zero to ten points. The raw scores for each vendor are then normalized to the other vendors’ scores to provide a sufficient degree of separation for a meaningful comparison. These scores are then weighted according to weighting factors that our analysts believe represent the weight that an average client should apply to each criteria. The weighted scores are then averaged for each of two high level categories: vendor score and product score. A plot of these two resulting scores is generated to place vendors in one of four categories: Champion, Innovator, Market Pillar, and Emerging Player.

For ERP, a more granular approach was required to account for differences in the nature of the advanced features from each vendor. Analysts then scored each advanced feature from zero to one. A score of one indicates that the feature fully met the scoring criteria as defined in the advanced feature slide, a score of 0.2 was awarded for advanced features that required purchase of additional modules. Features that had some, but not all of the criteria were given a score between 0.2 and one, based on secondary research and vendor briefings.