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RESEARCH

Enterprise ERP Technology Value Matrix 2025

ANALYST

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The Bottom Line

The enterprise ERP market is shaped by rising operational complexity and an apparent demand for more actionable, industry-specific platforms. Organizations are moving away from fragmented, generic systems in favor of consolidated solutions that reflect the realities of their verticals and enable faster data-driven decision-making. Vendors are responding by transforming ERP from a system of record to a system of action, embedding AI agents and automation directly into workflows. Success now depends on AI capabilities and delivering trusted, explainable intelligence aligned with enterprises' operations. The vendors that lead will be those who combine deep industry expertise with flexible platforms that help customers drive agility, resilience, and competitive advantage. The Enterprise ERP Technology Value Matrix leaders include IFS, Infor, Microsoft, and Oracle. Experts in the report are Deltek and SAP. Accelerators in the Value Matrix are Cegid and Epicor. Core Providers in the report are QAD, Ramco, and Workday.

Market Overview

Enterprise organizations are under immense pressure heading into 2025, and those challenges are reshaping how they engage with ERP systems. Amid persistent geopolitical uncertainty, regional trade restrictions, and supply chain disruption, many large enterprises are rethinking everything from sourcing strategies to operational planning. As a result, organizations are diversifying suppliers, investing in nearshoring, and building up inventory buffers. Simultaneously, enterprise organizations have stepped up AI investments, hiring domain-specific talent and initiating reskilling programs to drive more operational efficiency gains amidst labor shortages across all sectors. Yet many still face core barriers such as high integration complexity, fragmented architectures, and a lack of internal AI expertise.

These pressures have sparked a broader re-evaluation of ERP strategies, particularly verticalization and consolidation. Enterprise buyers increasingly favor industry-specific solutions where ERP systems can match the realities of their verticals. Also, many IT leaders are actively working to reduce vendor sprawl, recognizing that a room full of five vendors with equal voices leads to political complexity and finger-pointing, highlighting the value of partnering with fewer vendors.

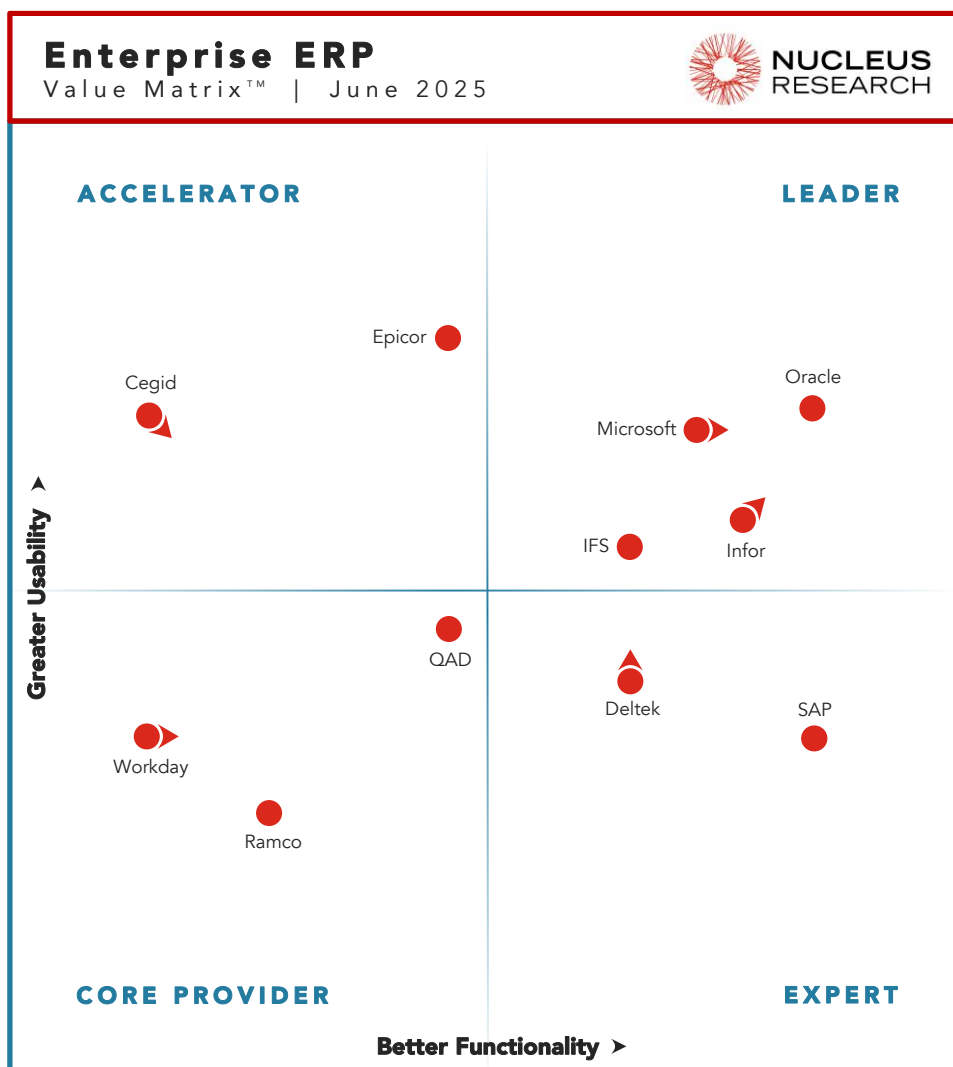
In response to these demands, ERP vendors are transforming their platforms from passive systems of record into active systems of action. The shift toward verticalization and consolidation is central to this evolution because organizations need ERP systems that can directly support the operational agility required to manage today's disruptions. Systems that reflect the unique processes of an industry and unify key functions on a single platform provide the consistency and context needed to drive intelligent automation in areas like sourcing, planning, and inventory management. Vendors with strong industry-specific solutions can embed AI tools into workflows that align with how users work, making recommendations more accurate, automations more trusted, and faster decision-making. Without that industry depth and platform coherence, attempts to build systems of action risk becoming fragmented or misaligned with business needs.

What began in 2024 as a wave of introducing generative AI capabilities and machine learning updates is now driving a new phase of ERP innovation in 2025: AI agents. While early generative AI use cases focused primarily on querying data and generating insights, this year's agent capabilities are moving further. AI agents are now being designed to perform actions within ERP workflows. They can guide

Enterprise buyers are driving the shift from system of record to system of action, seeking ERP platforms to help them navigate disruption, improve agility, and respond faster to operational demands.

users through multi-step processes, trigger transactions, and automate portions of workflows based on real-time data and predefined rules. Nearly every major ERP vendor has shown some form of agent on their roadmap, with some already bringing these capabilities to market. These agents are being embedded directly into ERP processes to make systems more actionable, allowing employees to execute tasks more efficiently with better information. Most current use cases for AI agents today are focused on “white collar” back office functions such as administration, finance, and accounting. Vendors are now expanding these capabilities into more complex, compute-intensive use cases in production scheduling and logistics management areas.

Vendors that pair vertical expertise with explainable, embedded AI will define the next generation of enterprise ERP leadership.



As AI tools become more embedded in ERP workflows, software vendors are also investing in the quality of the reasoning behind these models. It is no longer enough for an agent to surface an alert or recommendation; users need to understand why the suggestion was

made and what data it was based on. Enterprises are prioritizing explainability, feedback capture, and iterative tuning to ensure agents align with business context and user expectations. These efforts aim to increase trust in agent-driven outputs, reduce decision friction, and ultimately drive adoption.

Ultimately, the ERP landscape in 2025 is being reshaped by enterprise necessity, not vendor ambition. Organizations aren't just looking for better dashboards; they want platforms that drive faster action and align execution with business strategy. Vendors that succeed will enable this with AI education, provide verticalized capabilities, and support customers in understanding how ERP aligns with their future goals, not just their current state.

The Nucleus Research Enterprise ERP Technology Value Matrix provides an assessment of the market based on how vendors deliver value to customers through the usability and functionality of their solutions (Nucleus Research x222 – Understanding the Value Matrix, December 2023). The research is intended to deliver a relevant snapshot of the Marketing Automation technology market, rather than serve as an empirical ranking of the vendors. The arrows indicate each vendor's perceived momentum and are informed through conversations with end users, recently released capabilities, features, and other areas of investment.

Leaders

Leaders in the Enterprise ERP Value Matrix include IFS, Infor, Microsoft, and Oracle.

IFS

IFS is a leader in the 2025 Enterprise ERP Technology Value Matrix. IFS supports mid-sized to large global organizations within the Aerospace and Defense, Energy, Utilities, Telecommunications, Construction and Engineering, Manufacturing, and Service industries. IFS Cloud is the primary ERP offering from IFS, and it is recognized for its strengths in asset management, field service, and service- and asset-focused operations. It combines these areas on a unified platform with a shared system architecture. The platform's composable architecture and single data model improve usability and data consistency across business functions. The software supports various functions, including supply chain, manufacturing, project tracking, HR, quality control, and finance. Users can build task-specific applications or use data from the platform to support machine learning efforts without heavy coding. Built on REST

The Enterprise ERP Technology Value Matrix focuses on what matters most to customers: how well solutions deliver real-world usability, functional depth, and tangible business value.

IFS Cloud ERP is a product-centric ERP system built for industries like manufacturing, energy, and aerospace. It helps large companies manage everything from projects and service work to supply chain and finance

APIs, IFS Cloud is open and flexible, making it easy to connect with other systems. It can be deployed in different ways: on the public cloud, in a hosted environment, or on-premises. Backed by strong industry knowledge and a broad set of features, IFS is well-suited for large enterprise implementations.

IFS introduced IFS.ai Copilot, which helps users forecast demand, detect issues, and get quick answers.

Recent updates and announcements include:

► **IFS.ai Copilot.**

In the 2024R1, IFS.ai Copilot was introduced as an embedded AI assistant that improves decision-making and user engagement by delivering timely, contextual guidance within the application.

► **From Release R2 in 2024.**

From the 2024R2 updates, IFS.ai Copilot now supports more use cases in manufacturing and planning, giving users faster access to insights and reducing the time spent searching for answers. A new AI-powered demand forecasting model increases forecast accuracy and reduces the need for safety stock, allowing companies to free up working capital without sacrificing service levels. IFS Home provides users with a personalized, AI-powered homepage that surfaces project status, detects anomalies, and recommends actions to improve responsiveness and accuracy. IFS introduced automated purchase processing to streamline procurement workflows, reduce manual effort, and shorten lead times for improved operational efficiency.

IFS.ai Copilot now includes knowledge search with an AI prompt library, helping users find relevant answers quickly while saving frequently used queries for future reference. The IFS Lifecycle Experience Center offers a unified experience from implementation through usage, tailoring onboarding, and helping content to user roles to drive adoption and satisfaction. Entitlement Studio gives organizations visibility into how AI features are used across their business, supporting transparency and better AI governance.

A new Sustainability Management module supports CSRD compliance by streamlining the tracking and reporting of environmental impacts across global business units. The carbon emissions estimation tool enables organizations to track Scope 3 emissions, such as waste and transportation, helping them align with Net Zero goals and regulatory requirements. Expanded support for circular manufacturing improves transparency across the product

lifecycle, enabling more sustainable production processes and improved margins.

► **From Release R1 in 2024.**

The 2024R1 updates to transport loading allow for better shipment consolidation, enabling more efficient use of transport capacity while reducing emissions and fulfillment time. Enhancements to the CTO change management process help manufacturers reduce rework and cost by understanding how product configuration changes impact production in the 2024R1. IFS added support for handling multiple customer delivery schedules simultaneously, allowing planners to increase throughput and responsiveness to customer demand. IFS launched Analytics-as-a-Service to provide on-demand analytics without requiring customers to manage their data infrastructure, reducing IT overhead and accelerating time to value in the 2024R1.

Time zone localization features ensure that all users see accurate date and time formats based on location, reducing confusion and improving reporting accuracy. The new conditional editor simplifies writing business rules, allowing administrators to configure logic with less effort and fewer errors. Support for circular manufacturing introduces remanufacturing capabilities that help companies reduce material costs, improve sustainability, and create new revenue streams.

ESG Lobbies, now powered by Power BI, provide a central dashboard for sustainability metrics, enabling organizations to track and report ESG progress more effectively. Enhancements to the Emissions Tracker allow users to integrate utility data automatically and access up-to-date emissions factors from Climatiq, making carbon tracking more accurate and timely.

On the sustainability side, IFS added tools to estimate carbon emissions (including Scope 3) and track progress toward environmental goals.

Infor

Infor is a leader in the 2025 Enterprise ERP Technology Value Matrix. The software vendor serves various industries, including healthcare, industrial manufacturing, automotive, fashion, distribution, aerospace and defense, food and beverage, and the public sector. Infor CloudSuite is a set of composable industry-focused ERP solutions built with a modular structure. It includes capabilities for supply chain, CRM, HR, product lifecycle, warehouse, asset, and financial management. Each CloudSuite is embedded with proven best practices and processes tailored to specific industries out of the box, helping customers avoid heavy customization or third-party integrations. These capabilities are built on the Infor OS Platform and delivered on Amazon

Infor CloudSuite is a set of industry-specific ERP systems designed for manufacturing, healthcare, food and beverage, fashion, distribution, and public services industries.

Web Services (AWS). Infor serves both large enterprises and small to mid-sized companies with ERP systems that align closely with the needs of targeted verticals.

Recent updates and announcements include:

► **Infor Velocity Suite.**

Infor launched the Velocity Suite to help customers accelerate process innovation using process mining, robotic process automation, and generative AI to diagnose inefficiencies, automate improvements, and optimize operations through a robust library of pre-built industry-specific use cases. With Infor Process Mining integrated into the Velocity Suite, users can analyze operational workflows in real time, identify bottlenecks or deviations from standard processes, and uncover business improvement areas.

► **Infor GenAI Assistant.**

Infor introduced the GenAI Assistant to provide conversational, role-specific guidance that helps users manage tasks like manufacturing project updates, requisition analysis, and product tracking more efficiently. This enables faster decision-making directly within CloudSuite applications. The GenAI Assistant, available in limited release, is part of Infor's broader Industry AI strategy and is designed to enhance productivity by embedding intelligent, industry-aware support into users' daily workflows.

► **Infor Process Mining.**

The launch of Infor Process Mining in late 2024 gives users a built-in platform to visualize, analyze, and optimize their business processes. It delivers faster insights through simplified data access, loading, and analysis. With Infor Process Mining, organizations can gain end-to-end process visibility and rapidly identify inefficiencies or bottlenecks, improving operational agility and supporting data-driven decision-making.

► **April 2025 Product Updates.**

Customers can use Infor Value+ solutions to automate tasks identified during the process mining phase, leveraging generative AI and RPA to eliminate manual work, increase speed, and enable consistent execution. Infor continued to scale its Industry AI portfolio, embedding generative AI directly into applications like Process Mining, Document Processor, CloudSuite Distribution, and Infor M3 to deliver one-click insights and increased process efficiency.

Infor combines functions like finance, supply chain, HR, CRM, and asset management on a flexible platform that runs on AWS.

The Infor GenAI Assistant received a major enhancement with the launch of the Infor GenAI Knowledge Hub, which enables users to upload and query private documents for personalized, conversational support within their workflows. Infor expanded its Augmented Intelligence Service (AIS) with eight new AI use cases focused on predictive and prescriptive analytics, including capabilities for warehouse inventory management and ingredient optimization across industries such as distribution, food and beverage, and manufacturing.

Infor recently launched Infor Velocity Suite, combining AI, process mining, and automation to help companies find and fix process problems faster.

The April 2025 update made Infor GenAI generally available across multiple touchpoints, including Process Mining, Document Processor, CloudSuite Distribution, and Infor M3. This update embeds AI experiences directly into core business processes for faster decision-making. With the expansion of Infor GenAI, users can now experience more intelligent and context-aware automation throughout their daily tasks, enabling greater productivity without leaving the CloudSuite environment.

► **October 2024 Product Updates.**

The launch of Infor Process Mining gives users a built-in platform to visualize, analyze, and optimize their business processes. It delivers faster insights through simplified data access, loading, and analysis. With Infor Process Mining, organizations can gain end-to-end process visibility and rapidly identify inefficiencies or bottlenecks, improving operational agility and supporting data-driven decision-making.

Infor released a new ESG Strategy, Planning, and Execution module that allows organizations to set, monitor, and report on environmental, social, and governance goals, embedding ESG data and processes directly into business operations. The ESG module helps organizations meet their sustainability goals and emerging regulatory requirements while promoting continuous improvement by integrating sustainability efforts into everyday workflows. Infor added supply chain management enhancements specific to verticals like healthcare, embedding AI-driven tools that increase forecast accuracy, reduce manual interventions, and accelerate value realization from planning to distribution.

One notable supply chain update includes embedding procedure supply planning and distribution management in healthcare ERP, making Infor the only provider offering this natively within a CloudSuite. The release also introduced Infor Value+, a set of pre-

built tools and templates powered by Infor OS, designed to help customers configure CloudSuite solutions more quickly and realize business value faster. Infor Value+ enables users to automate routine processes, tailor workflows to specific roles, and surface high-impact opportunities for revenue growth and performance improvement in their industry. Through a central, role-based interface, Infor Value+ improves productivity by allowing users to view relevant insights and take action without switching between applications.

Infor's new GenAI Assistant gives users role-based help directly inside their ERP apps.

Microsoft

Microsoft Dynamics 365 has been recognized as a leader in this year's Enterprise ERP Technology Value Matrix. The suite includes Dynamics 365 Finance, Dynamics 365 Supply Chain, and Dynamics 365 Project Operations, all integrated within the Microsoft Azure Cloud Platform. Dynamics 365 Finance gives organizations tools for managing finances with real-time data and built-in analytics to help forecast payments, monitor global operations, and improve cash flow planning. Dynamics 365 Supply Chain Management supports end-to-end supply chain activities, including planning, forecasting, inventory control, procurement, manufacturing, order fulfillment, warehouse operations, and asset upkeep, designed to boost supply chain resilience. Dynamics 365 Project Operations helps businesses manage project-focused work more effectively, from handling deals and allocating resources to tracking time and expenses. These modules offer a connected platform especially suited for large enterprises looking to manage multiple business areas, such as HR, sales, marketing, customer service, field service, retail, and projects delivered through a unified system.

Microsoft Dynamics 365 is a connected business application suite built for large organizations. It combines tools for finance, supply chain, project operations, HR, sales, service, and more that runs on Azure.

Recent updates and announcements include:

► Wave 1 2025 Updates.

Microsoft officially launched 2025 Release Wave 1 at the Business Applications Launch Event, unveiling new features that will roll out from April through September 2025 across Dynamics 365 and Power Platform. Copilot and AI agents are central to this release wave, allowing organizations to automate operations, enhance employee productivity, and deliver more personalized customer experiences.

Microsoft Copilot Studio now supports building custom autonomous agents to execute processes across sales, service, finance, and supply chain functions using business-specific data and workflows. Dynamics 365 Sales introduces Copilot features to research inbound leads, prioritize opportunities, and initiate personalized engagements, helping sellers boost productivity and accelerate deal

cycles. Intralox uses the Dynamics 365 Sales Qualification Agent to automate lead qualification and build stronger customer relationships, allowing their sales team to close deals faster.

Dynamics 365 Customer Service and Dynamics 365 Contact Center include new Microsoft Teams phone integration, proactive conversational journeys, and three AI agents that automate intent detection, case management, and knowledge creation. Apollo Travel leverages Dynamics 365 and Power Platform to automate case summarization, generate hotel content, and proactively engage customers with personalized recommendations via SMS and calls.

Dynamics 365 Finance introduces a financial task workspace and an Account Reconciliation Agent to improve visibility and automate recurring financial processes like period close. Dynamics 365 Project Operations adds new features to simplify time entry and approvals, accelerate what-if planning scenarios, and improve project task accuracy. Dynamics 365 Human Resources enhances recruiting with AI-powered resume comparisons and a new onboarding agent that guides new hires through customized onboarding journeys within Microsoft Teams.

Dynamics 365 Supply Chain Management introduces intelligent manufacturing features, advanced supplier communication, and improved demand planning through AI, analytics, and automation. Dynamics 365 Commerce enhances pricing management by allowing organizations to centralize and optimize pricing across channels and customer segments.

Microsoft Copilot Studio expands agent development with capabilities like Agent Flows, Deep Reasoning, generative orchestration, diagnostics, testing tools, and performance analytics.

► Wave 2 2024 Updates.

Microsoft launched 2024 Release Wave 2 for Dynamics 365, Power Platform, and role-based Microsoft Copilot offerings, delivering new features across ERP, CRM, and AI-assisted business processes from October 2024 through March 2025. Copilot and AI agents are positioned as future enterprise systems' foundational components, enabling employees to automate workflows, execute tasks, and orchestrate complex processes using natural language commands.

New Dynamics 365 Customer Service and Sales capabilities include multilingual Copilot bots, in-line email functionality, and real-time

Microsoft expanded its use of AI across the platform. New Copilot tools and AI agents now help teams handle tasks like financial close, sales follow-up, lead qualification, order processing, and customer support automatically.

Copilot-generated prompts that personalize and streamline customer and sales team engagement.

Microsoft introduced five new autonomous ERP agents in Dynamics 365 to streamline core business processes and reduce manual effort, including an Account Reconciliation Agent for Finance that automatically identifies and resolves ledger discrepancies.

Lifetime Products leveraged the automated bank reconciliation features in Dynamics 365 Finance to accelerate the month-end close process and improve compliance across legal entities. Microsoft Power Platform expanded Copilot Studio capabilities to improve app generation, automate vendor invoice approvals, and simplify complex workflow configuration across Power Apps and Power Automate.

Applied Information Sciences (AIS) used Power Automate with Copilot to automate invoice routing and approvals, reduce manual onboarding work, and enhance IT Helpdesk functions with AI-generated workflows and analytics. Microsoft 365 Copilot enhancements across Finance, Sales, and Service introduced autonomous agents to automate research, payroll reconciliation, and lead prioritization, significantly reducing processing time and improving team efficiency.

Microsoft users can build their own AI agents using Copilot Studio, which now includes tools for testing and diagnostics.

Oracle

Oracle Fusion Cloud ERP is recognized as a leader in the 2025 Enterprise ERP Technology Value Matrix report. Oracle Fusion Cloud ERP is built to handle complex financial operations and high transaction volumes, offering robust database and financial management capabilities. The platform combines functions like finance, procurement, project management, compliance, enterprise performance management, subscription billing, supply chain, manufacturing, and embedded B2B capabilities within a no-code environment. The ERP solution is used by organizations in over 125 countries, across 23 industries, and supports around 30 languages. It is designed primarily for enterprises with more than \$250M in annual revenue. The vendor also offers industry-specific configurations for education, healthcare, technology, communications, retail, manufacturing, professional services, government, and consumer goods.

At the core of Oracle's Fusion ERP Application is its AI architecture that transforms traditional ERP functions through intelligent automation,

Oracle Fusion Cloud ERP is a comprehensive financial and operations system designed for large enterprises. It helps organizations manage finance, procurement, supply chain, manufacturing, and projects.

predictive analytics, and machine learning algorithms. The platform employs neural networks to process large quantities of enterprise data, identifying patterns and optimization opportunities. These AI capabilities extend across the entire Oracle ecosystem, from financial operations that self-correct inconsistencies to supply chain optimization that adjusts to changing market conditions. Oracle's AI framework includes specialized agents that handle domain-specific tasks with contextual awareness and natural language processing engines that transform queries into insights.

Oracle refers to its vision as AI-Driven Finance. It uses AI/ML, Agentic, and Generative AI technologies to enhance and automate financial processes, decision-making, and services. Oracle leverages the synergies of machine learning algorithms, natural language processing, predictive analytics, and automation tools to analyze large amounts of financial data, recognize patterns, make predictions, and execute tasks – all designed to deliver a step change in operational efficiency, enterprise effectiveness, and control, and reduced costs.

Recent updates and announcements include:

► **AI Agent Studio.**

In March 2025, Oracle introduced its AI Agent Studio for Fusion Applications. This integrated development environment enables organizations to configure, train, and deploy custom AI agents tailored to business processes and requirements.

► **Oracle AI Agents.**

Over the past 12 months, Oracle rolled out AI agents across multiple functional domains, including Document IO, Ledger, Payments, Expense Policy, Project Management, Account Reconciliation, Profitability and Cost Management, Advanced Prediction, Data Visualization, Contextual Data Exploration, Master Data Matching, and Procurement. Oracle positions these capabilities as table stakes for Fusion Applications and allows customers to leverage these agents without additional licenses.

► **Various 2025 ERP Updates.**

Oracle added support for interfacing recognized revenue adjustment records to Costing, enhancing the accuracy of Cost of Goods Sold (COGS) and gross margin calculations. This integration helps finance teams maintain alignment between revenue recognition and cost accounting, especially in scenarios involving revenue corrections or adjustments.

Oracle expanded its use of AI with AI agents that can automate tasks such as payments, procurement, account reconciliation, and project tracking.

The Adaptive Learning for Supplier Corrections allows IDR to learn from manual corrections by comparing invoice templates, supplier logos, and layout structure to improve supplier identification over time. This enhancement reduces manual invoice corrections, improves automation rates for emailed invoices, and supports more efficient AP operations for medium-volume suppliers.

Oracle also launched AI Agent Studio, giving teams tools to build their own process-specific bots.

New fields allow organizations to capture U.S. federal attributes on transactions, receipts, and customer records, supporting proper IPAC and Treasury reporting. This enhancement helps public sector and federal contractors automate compliance with U.S. Department of the Treasury requirements. Receivables – Transaction Review and Control: Organizations can now control the completion of third-party imported transactions by assigning transaction sources and types that require approval after creation but before posting. Approvers can review, withdraw, or push transactions to a future period and view payment schedules before finalizing them, giving finance teams greater control over billing accuracy and timing.

► **Various 2024 ERP Updates.**

Oracle introduced Automatic Funding of Expense Budgets from Revenue, allowing organizations to increase expense budgets as revenue is collected. Using the Create Budget Entry from Revenue process and revenue funding rules, budget allocations can be automatically tied to revenue sources, with options to set maximum funding caps and revenue thresholds. This capability improves agility in the public Oracle. Oracle added Exception-Based Approvals for Manual Subledger Entries, enabling organizations to implement granular approval workflows upstream in the subledger accounting process. Approvals can be configured based on subledger, journal source, ledger, and specific business attributes. New Time Zone-Based Date functionality ensures that date fields across Financials default to the legal entity's time zone or the user's preferred time zone, depending on context.

Oracle expanded its integration with J.P. Morgan, supporting positive pay functionality for in-house check printing. The integration enables automated onboarding, continuous bank statement synchronization, funds disbursement, and real-time reconciliation for customers in the U.S. and Canada.

Oracle introduced Multitier Intercompany Operations, allowing organizations to manage fund transfers and revenue or expense sharing across multiple clearing organizations and currencies. This

capability supports use cases like internal financing, currency exposure management, and tax optimization by routing intercompany flows through designated internal hubs. Oracle enhanced Tax Rapid Implementation, adding support for fields such as offset rate code, default recovery rate, and tax inclusion method within the Manage Rates worksheet. These fields help users configure complex tax structures faster, especially in countries with offset and recovery tax requirements or inclusive tax scenarios. IDR Invoice Proration Enhancements: Oracle added the ability to control the proration of freight and miscellaneous charges on IDR-imported invoices, allowing users to assign these charges to a designated freight account instead of spreading them across item lines.

► **Oracle Fusion Cloud Sustainability.**

In September 2024, Oracle rolled out Oracle Fusion Cloud Sustainability, a new application within the Oracle Fusion Cloud Applications Suite that helps organizations accelerate progress on environmental goals. The solution automates sustainability data capture, integrates emissions tracking, and provides audit-grade traceability all at no additional cost to existing customers.

In September 2024, Oracle rolled out Oracle Fusion Cloud Sustainability, a new application within the Oracle Fusion Cloud Applications Suite that helps organizations accelerate progress on environmental goals.

Experts

Experts in the Enterprise ERP Technology Value Matrix are Deltek and SAP.

Deltek

In the 2025 Enterprise ERP Technology Value Matrix report, Deltek is recognized as an expert for its range of project-based ERP solutions for a diverse clientele, including sectors like government contracting, aerospace and defense, architecture and engineering, management and IT consulting, accounting, construction, and marketing agencies. Its suite of products includes Costpoint, Vantagepoint, Ajera, Maconomy, ComputerEase, and WorkBook, each offering tailored functionalities to meet the specific needs of various industries.

Costpoint is built for government contractors in verticals like aerospace and defense, manufacturing, and IT consulting, covering everything from finding new opportunities to capture and contract management to billing. Vantagepoint supports architecture, engineering, and management consulting firms, while Maconomy serves larger professional services firms and marketing agencies. Ajera is geared toward small A&E companies, WorkBook focuses on mid-sized marketing agencies, and ComputerEase supports construction firms of

Deltek offers project-based ERP systems explicitly designed for industries such as government contracting, architecture and engineering, consulting, marketing, and construction.

all sizes. These platforms include features for CRM, project accounting, human resources, procurement, project and resource management, business intelligence, and financials. A scalable, modular architecture that supports low-code customization enhances Deltek's offerings.

Recent updates and announcements include:

► **FedRAMP Status.**

In April 2024, Deltek Costpoint GCCM achieved FedRAMP Moderate Ready status, confirming it supports DFARS 252.204-7012 as well as CMMC Level 2&3 compliance as a cloud service provider, and is now listed in the FedRAMP Marketplace. In April 2025, Deltek Costpoint GovCon Cloud Moderate (GCCM) completed its assessment for FedRAMP Moderate Equivalency - a key component to supporting cybersecurity compliance requirements for government contractors. Deltek's GCCM offering for Deltek Costpoint now meets the FedRAMP Moderate Equivalency standard set by the Department of Defense.

► **Dela.**

Deltek launched Dela, its AI-powered business companion, which helps users generate content, predict project outcomes, explore data, and automate tasks across the project lifecycle. Dela is now embedded across Deltek's product suite, delivering over 30 AI-powered features to identify best-fit opportunities, automate project summaries, optimize hiring, improve time and expense collection, and streamline back-office processes. In August 2024, Deltek expanded Dela's capabilities in Costpoint, added a Microsoft Teams integration, and redesigned time and expense entry for better accuracy and ease of use. Looking ahead, Deltek will continue expanding Dela's capabilities, including autonomous agents, predictive forecasting, complex data analysis, and contract automation to reduce manual effort across the business.

► **Deltek Harmony.**

In November 2024, Deltek introduced Deltek Harmony, a new unified user experience built on simplicity, context, versatility, and consistency. In July 2025, Costpoint will be the first Deltek product to leverage the new UI.

► **ERP Product Updates.**

Deltek added Smart Summaries in Vantagepoint and GovWin IQ, using generative AI to distill complex project data and opportunity research into concise, actionable insights. In 2024, ProPricer added

Deltek introduced Dela, its AI assistant, which now powers over 30 features to help with content creation, project summaries, hiring, and back-office tasks. Dela is being expanded across all products with tools for automation and forecasting.

direct integration with SAP S/4HANA, allowing users to import actuals directly from ERP systems for faster, more accurate estimates. In March 2025, Vantagepoint users gained the ability to embed insights from the Deltek Clarity A&E Study into dashboards, helping firms align operations with industry benchmarks (North America only).

Deltek unveiled Harmony, a new interface designed to make its products easier to use, starting with Costpoint.

SAP

SAP is recognized as an expert in this year's Enterprise ERP Technology Value Matrix. Its flagship ERP software, SAP S/4HANA, is designed to accommodate the intricate needs of large-scale organizations, typically those with annual revenues over \$500M. SAP S/4HANA allows for both on-premises and cloud-based deployments, providing versatility in its setup. The system includes industry-specific pre-set processes and best practices catering to service- and product-focused enterprises. Additionally, SAP S/4HANA incorporates advanced technologies such as integrated machine learning, robotic process automation (RPA), and automated workflows, which streamline repetitive tasks and enhance the platform's scalability.

Recent updates and announcements include:

► Joule.

SAP released Joule, its AI copilot, now fully integrated to help users navigate workflows, identify root causes, and receive actionable recommendations, enhancing productivity and decision-making. The AI copilot Joule supports natural language queries and provides guided navigation, role-based insights, and faster access to key business apps.

► Other ERP Updates.

The new SAP Green Ledger enables carbon tracking by automating emission data collection from material movements and integrating financial data, supporting sustainability goals. The vendor established a Microsoft Teams integration that lets users receive workflow notifications and take direct action, increasing responsiveness.

SAP Risk and Assurance Management now supports qualitative risk assessments and central control catalogs, improving risk transparency and reporting. A new retail, fashion, and vertical industry edition of S/4HANA Cloud helps unify merchandising, store operations, and supply chains. New manufacturing and logistics features support outbound delivery splits, streamlined

SAP S/4HANA Cloud is an enterprise ERP platform built for large, global organizations. It supports both product- and service-based businesses with tools for finance, supply chain, manufacturing, sales, and project management.

customer returns, and date-based product availability with CO2 visibility. For service-centric firms, Project and Resource Management enhancements support AI-assisted staffing, unified project control, and streamlined service contract management.

The My Home experience has been improved to deliver relevant workflow updates, app recommendations, and productivity shortcuts from a single dashboard. SAP Mobile Start now displays key performance indicators (KPIs) and to-do lists to support mobile decision-making. Finance teams benefit from new cost center and service profitability booklets, which provide more transparency and quicker analysis of key financial metrics.

The Manage Operating G/L Accounts app was redesigned with a modern interface to improve usability and speed in financial operations. A new shared-risk revenue recognition model supports professional services firms looking to align profit recognition with negotiated project terms. Sales order processing and solution bundling enhancements improve order flexibility and help businesses offer services and subscriptions more efficiently. Proof-of-service creation tools make it easier to manage unplanned services while staying compliant with contract-based buying policies.

For manufacturers, partial goods receipt posting and automated packaging item generation improve warehouse speed, accuracy, and inventory tracking. Advanced transportation and third-party order processing tools increase logistics flexibility and reduce fulfillment costs. Localization enhancements support compliance in new countries, including Germany, the UK, Canada, Australia, and the Netherlands. SAP also introduced purpose-based master data assignment and unified IAM documentation to help customers meet data security and privacy standards.

SAP rolled out Joule, its AI assistant, across the platform to help users find insights faster, streamline tasks, and boost productivity with natural language commands.

Accelerators

Accelerators in the Enterprise ERP Technology Value Matrix are Cegid and Epicor.

Cegid

Cegid is recognized as an accelerator in the 2025 Enterprise ERP Technology Value Matrix. The vendor's ERP platform, Cegid XRP Ultimate, is designed for midsized and large organizations, particularly within the HR and retail sectors. XRP Ultimate's functionality can

Cegid offers cloud-based ERP and retail solutions for midsized and large organizations, especially in HR and retail.

manage sales, supply chain planning and execution, inventory management, and human resources. For organizations in the retail industry, the vendor supports omnichannel supply and inventory management, order management through its web-based interface, and financial consolidation and reporting. Cegid Retail also provides a cloud-based point of sales (POS) and unified commerce platform that integrates real-time sales channel data, lending to more efficient inventory management and opportunities for store staff to offer personalized shopping experiences. Cegid supports omnichannel capabilities, including Click & Collect and Ship from Store. The vendor also provides a marketplace with more than 40 ISV solutions, enabling customers to take advantage of deep third-party integrations.

Recent updates and announcements include:

► **PHC Business Software Acquisition.**

Cegid acquired PHC Business Software in January 2025 to expand its SMB cloud offerings across Portugal, Portuguese-speaking African countries, and Spain. The company added 170,000 users and over 300 channel partners to its network.

► **Microdata Acquisition.**

Cegid announced the acquisition of Microdata in January 2025, strengthening its position in Spain's SME and accounting software market and expanding electronic invoicing and digital signature capabilities aligned with Verifactu compliance. The Microdata acquisition adds 2,000 clients, a team of 40, and modular software solutions for tax, labor, and management, further anchoring Cegid's Iberian footprint.

► **Sevdesk Acquisition.**

In January 2025, Cegid entered a definitive agreement to acquire sevdesk, a leading cloud-native accounting and tax software provider for micro and SMBs in the DACH region, expanding its European leadership. The sevdesk acquisition brings over 130,000 customers and a next-gen SaaS platform. Co-Founder Marco Reinbold appointed General Manager DACH to lead regional expansion and integration under Cegid's SMB strategy.

► **Cegid Pulse.**

At Cegid Connections Retail in June 2024, Cegid unveiled Cegid Pulse, a generative AI-powered assistant embedded into Cegid Retail's flagship solutions to enhance store operations, customer personalization, and decision-making. Cegid Pulse supports real-

Cegid expanded in Europe, acquiring PHC, Microdata, and sevdesk to grow its presence in Portugal, Spain, and the DACH region. These deals added tens of thousands of customers and boosted digital invoicing, tax software, and SMB accounting capabilities.

time translation, in-store customer profiling, intelligent product recommendations, and AI-assisted analytics for retail staff, helping brands elevate productivity and customer experience. Within Cegid Retail Store Excellence, Cegid Pulse helps store teams create engaging content, streamline communication across languages, and boost operational efficiency through intelligent task management. In Cegid Retail Intelligence, Cegid Pulse allows managers to analyze sales data using natural language queries, enabling quicker decisions, trend analysis, sales forecasts, and real-time dashboards.

Cegid also launched Cegid Pulse, a generative AI assistant for retail teams.

Epicor

Epicor is recognized as an accelerator in the 2025 Enterprise ERP Technology Value Matrix. The vendor's comprehensive ERP system serves midmarket to enterprise-sized organizations in complex automotive, distribution, building supply, manufacturing, and retail industries. The solution integrates finance, supply chain management and planning, CRM, product management, project management, business intelligence, and analytics functionality. Additionally, the vendor continues to differentiate through the configurability of its platform, with industry-specific ERP solutions that include low-code/no-code capabilities, pre-built API connectors, and a range of composable add-on modules. Customers can fine-tune their Epicor ERP deployment to specific requirements with these options.

Epicor industry-specific ERP systems are built for midmarket and enterprise companies in manufacturing, distribution, building supply, retail, and automotive sectors.

Recent updates and announcements include:

► Epicor Prism.

In January 2025, the vendor announced the launch of Epicor Prism, a network of vertical AI agents built for supply chain industries. With Prism, Epicor customers can use AI-driven, conversational agents to simplify daily work and solve complex business needs more easily. It connects to an Agentic AI Network, where agents collaborate to automate supply chain actions based on predefined rules and approvals.

► Grow Data Platform.

Epicor launched the Grow Data Platform, a full-stack no-code solution that centralizes enterprise data into a scalable data lake and structured warehouse tables, enabling high-performance queries for analytics. In May 2025, Epicor introduced the first Grow AI use case for the Grow Data Platform, allowing users to apply AI to structured data for predictive insights and operational efficiency.

► **Ascend.**

Epicor announced Ascend with Epicor, a cloud migration program that uses AI-driven tools and proven methodologies to accelerate transitions from on-premises and competitor systems to the Epicor cloud platform. Ascend automates critical migration tasks such as scoping, data conversion, and configuration setup to reduce time to value for both existing and new customers.

Epicor launched Prism, a network of AI agents that work together to automate supply chain tasks and solve problems with minimal input.

► **Prophet 21 Updates.**

Epicor's move to a Continuous Integration/Continuous Delivery (CI/CD) model allowed the company to accelerate product innovation for Prophet 21, delivering 19 enhancements in the 2024.2 release alone. The 2025.1 release introduced several powerful features, including improved DynaChange Rules for automating workflows, reducing manual intervention, and increasing operational efficiency. Enhancements to Report Studio introduced dynamic time-based tokens, enabling more precise, timely reporting for better planning and decision-making. The KYKLO acquisition added PIM and B2B eCommerce tools that help distributors improve product data quality and boost online sales. The introduction of Grow AI Item Advisor, powered by Epicor's Grow platform, allows companies to make smarter inventory decisions, reducing overstock and minimizing missed sales.

The integration of Epicor Prism into Prophet 21 brings embedded AI into everyday operations, helping users automate tasks and gain actionable insights. Additional updates included new pricing features for managing special orders and direct shipments, enhancements to operational controls such as audit trails and task scheduling, and new capabilities in Epicor Business Applications, including Quick Ship and Elite EXTRA, giving customers access to more streamlined logistics and fulfillment tools.

► **Kinetic Updates.**

CO₂e tracking was expanded to the part level for purchase orders, job tables, and quotes, supporting detailed Scope 3 emissions reporting and helping manufacturers align with ESG requirements. The embedded Knowledge Agent, part of Epicor's AI network, now provides real-time, contextual support to cloud users, reducing support tickets and accelerating task execution. Epicor also continued its browser-first UX strategy, phasing out its legacy interface and introducing tools like funnel filtering, SQL-to-BAQ conversion, and performance safeguards that make the system more intuitive and faster. Many features were sourced directly from

customer feedback via the Epicor Ideas portal, including improvements to MRP accuracy, dynamic inventory movement, intercompany order management, and enhanced RFQ tools.

Epicor introduced cloud self-service administration via the Cloud Management Portal, allowing users to manage updates, restart services, and regenerate data models without IT intervention. Finally, Epicor improved data access with new reportable fields, dynamic attribute support, and enhanced dashboards, enabling manufacturers to make data-driven decisions faster.

Epicor formed a new integration partnership with Sovos to enhance the Epicor Financials Suite by providing a reliable, automated global tax compliance solution covering tax determination, reporting, and regulatory adherence. Epicor also partnered with ADP to offer enhanced integration between the Epicor General Ledger, time collection systems, and ADP Workforce Now, streamlining payroll and HCM operations.

► **Predictive Analytics Solutions.**

Epicor introduced two industry-first predictive analytics solutions to support smarter decision-making in the automotive aftermarket. The Predictive Inventory Assistant (PIA) uses machine learning to identify stocking opportunities based on financial and performance data from comparable stores, recommending high-performing parts that a business doesn't yet carry but should. This allows automotive distributors to reduce guesswork, improve inventory turnover, and capture missed revenue opportunities. Meanwhile, the Predictive Maintenance Assistant (PMA) helps service and repair shops anticipate future repairs for common vehicles by analyzing trends in real-time. This enables service writers and technicians to prepare more accurate estimates, advise customers proactively, and reduce downtime from unexpected part shortages. Together, these tools deliver a competitive edge by embedding AI-driven forecasting directly into everyday workflows, helping businesses boost profitability, increase customer satisfaction, and strengthen long-term planning across inventory and service operations.

► **KYKLO Acquisition.**

In June 2024, Epicor announced its acquisition of KYKLO, a Product Information Management (PIM) software provider and content-driven lead generation solutions, to add capabilities to its Epicor Commerce offering.

Epicor launched the Grow Data Platform, a full-stack no-code solution that centralizes enterprise data into a scalable data lake and structured warehouse tables.

► **Solenium Group Inc. And Visual Skus Inc. Acquisition.**

In October 2024, the vendor announced its acquisition of Solenium Group Inc. and its sister company, Visual SKUs Inc. The two providers of PIM and Digital Asset Management solutions for the automotive aftermarket are long-term Epicor partners, and the move is expected to strengthen Epicor's positioning in this vertical.

► **Acadia Software Acquisition.**

In October 2024, Epicor announced it had acquired Acadia Software. Acadia Software provides Connected Worker solutions that deliver real-time insight and guidance to frontline workers in manufacturing and other supply chain industries. The integration of these capabilities will enable Epicor customers to improve task execution across frontline teams.

► **Smart Software Acquisition.**

Epicor announced the acquisition of Smart Software, now Epicor IP&O. Smart Software provides AI-driven demand forecasting and inventory optimization, helping customers lower excess inventory, reduce stockouts, and optimize service levels.

Epicor also expanded its capabilities through acquisitions of Smart Software, KYKLO, Solenium, and Acadia Software, deepening its strengths in forecasting, e-commerce, digital asset management, and frontline worker support.

Core Providers

Core Providers in the Enterprise ERP Technology Value Matrix are QAD, Ramco, and Workday.

QAD

QAD is ranked as a core provider in the 2025 Enterprise ERP technology value matrix, recognized for its cloud-based QAD Adaptive ERP. QAD Adaptive Applications offer tools, including connected workforce (QAD Redzone), process intelligence, supplier relationship management, digital supply chain planning, advanced scheduling, global trade and transportation execution, and quality management. The QAD Enterprise Platform allows companies to adapt and automate processes based on their specific needs. The platform supports unintrusive customization and flexibility, helping organizations tailor the system to meet operational requirements.

QAD Adaptive ERP is built specifically for automotive, consumer goods, high tech, industrial, food and beverage, and life sciences manufacturers. The solution runs on the QAD Cloud and is fully managed by QAD. The system offers a consistent user experience across devices, with built-in personalization and extensibility features. Users benefit from no-code/low-code customization tools, with existing

QAD offers a cloud-based ERP system built specifically for manufacturers in industries like automotive, consumer goods, high tech, industrial, food and beverage, and life sciences.

platform extensions preserved during system updates. QAD also provides built-in analytics, a centralized data lake, and tools for monitoring key performance indicators, enabling fast access to operational insights.

Recent updates and announcements include:

► **Boomi Strategic Alliance.**

In May 2025, QAD CEO Sanjay Brahmawar and Boomi CEO Steve Lucas announced a strategic alliance to redefine integration for smart manufacturing based on Boomi's AI-driven automation and QAD Champion AI.

► **New CEO.**

In March 2025, QAD appointed Sanjay Brahmawar as CEO, bringing leadership experience from Software AG to guide its next phase of cloud growth.

► **Phenix Software Inc. Acquisition.**

In October 2024, QAD acquired Phenix Software Inc., rebranded as QAD Advanced Scheduling, to enhance production sequencing, minimize changeovers, and improve factory performance.

► **Adaptive Applications Updates.**

In October 2024, QAD released new Adaptive Applications enhancements to boost productivity and operational excellence across manufacturing and supply chain operations.

QAD made strategic moves to expand and modernize its platform. It acquired Phenix Software to improve production scheduling and reduce factory downtime, and announced a new partnership with Boomi to make system integrations smarter and more automated using AI.

Ramco

Ramco is recognized as a core provider in this year's Enterprise ERP Technology Value Matrix. The vendor specializes in multi-tenant cloud and mobile-optimized ERP solutions, with flexible deployment options. The Ramco ERP platform also supports scalability and integrates with the full breadth of the vendor's business applications, which include functionality for financials, supply chain management, manufacturing, payroll, and core HR. The solution is best suited for the needs of midsized to enterprise-sized organizations, with expertise in serving customers across industries including facilities management, cement, manufacturing, real estate, staffing, professional services, logistics, and aviation. To meet specialized needs, the vendor also offers pre-configured solutions for organizations in facilities management, discrete manufacturing, foundry, and cement manufacturing. An in-memory real-time optimization engine, advanced analytics, and machine learning capabilities enhance Ramco's capabilities.

Ramco provides cloud-based ERP solutions built for midsized to large businesses across industries like manufacturing, logistics, real estate, staffing, and aviation.

Recent updates and announcements include:

► **Product Updates.**

Ramco continues to expand its industry-specific ERP solutions, offering tailored functionality for sectors such as facilities management, discrete manufacturing, cement, and foundry operations. This ensures alignment with sector-specific compliance needs. The platform delivers process automation enhancements, including automated reconciliation, invoice generation using OCR, and improved handling of stock movements between stores and production.

Ramco has introduced a range of mobile applications to support field operations, including approval workflows, procurement, asset maintenance, and facility management, extending usability beyond the desktop. Through strategic partnerships with third-party applications, Ramco is integrating advanced capabilities in AI, automation, tax compliance, and supply chain planning to enhance the depth and intelligence of its ERP offerings.

Ramco expanded its industry-specific ERP options, adding tailored features for foundries, cement producers, and manufacturers. It also improved automation in invoice creation, reconciliation, and stock transfers.

Workday

Workday is recognized as a core provider in this year's Enterprise ERP Technology Value Matrix. The vendor's cloud-based Enterprise Management Cloud offers financial management, enterprise planning, and human resources management functionality. Serving a broad range of industries, including professional services, retail, utilities, and telecommunications, Workday operates a business model that enables customers to implement applications as needed. For example, accounting, analytics, project automation, and procurement management can be deployed standalone without implementing the full Workday suite. The Workday Integration Cloud enables customers to integrate their Workday applications with external tools to eliminate friction.

Workday ERP is a cloud-based ERP system focused on finance, HR, and enterprise planning. It's used in industries such as professional services, retail, utilities, and telecom.

Recent updates and announcements include:

► **Workday Illuminate AI.**

In September 2024, Workday announced Workday Illuminate AI models with contextual understanding of HR and financial processes. The models use generative AI to expedite tasks and deliver actionable insights in the flow of work.

► **Evisort Acquisition.**

In September 2024, the vendor announced it had signed a definitive agreement to acquire Evisort, an AI-native document intelligence technology provider. The move is expected to add more AI capabilities to processes across accounting, procurement, and employee knowledge bases.

► **Workday Agent System of Record.**

In February 2025, Workday announced the Workday Agent System of Record to help customers effectively manage AI agents across Workday and other third-party solutions.

Workday launched Illuminate AI, a set of generative AI models that help users complete HR and finance tasks faster and deliver insights within their workflow.