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For: Application Development & Delivery Professionals

Global, Industry, And Technology Forces Shape The ERP Landscape

by China Martens and Paul D. Hamerman, May 9, 2013

KEY TAKEAWAYS

It's Time To Think More Creatively About ERP

ERP is changing in response to growing user demands for improvements in usability and accessibility. Vendors are also starting to rethink the underlying infrastructure for ERP applications to enable more real-time data access and accelerate processing of vast amounts of information.

As Mobile And SaaS Reshape ERP, Hybrid Is The Future

ERP is no longer a cut-and-dried decision between either an ERP suite or a set of best-of-breed applications. Instead, more and more firms will find themselves making hybrid investments in a mix of on-premises, hosted, and SaaS ERP deployments for their global operations, with a core suite complemented by components from a partner ecosystem.

Ensure That The ERP You Choose Reflects Your Business

Examine your firm and its core operations, and then imagine them in three to five years' time. Is the ERP software you currently use a good (or good-enough) fit to enable the business processes on which you run your business? Consider carefully where you may need to enhance key processes to drive greater business efficiency and differentiation.

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Global, Industry, And Technology Forces Shape The ERP Landscape

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with Mike Gilpin, George Lawrie, and Nasry Angel

WHY READ THIS REPORT

Three key forces are reshaping the enterprise resource planning (ERP) market: the growing demands of global businesses; the increasing need for industry-specific functionality; and the expanding use of newer technologies like software-as-a-service (SaaS) and mobile apps. This report, one of several market landscape reports in the business applications playbook, helps application development and delivery (AD&D) professionals and their ERP business partners understand the forces changing the ERP application market landscape and the impact these forces will have on the evolution of the ERP category. This understanding is crucial to an informed application strategy as ERP becomes much more modular and achieves a balance between a limited set of core standard functionality and a wide variety of plug-in functional components, each of which will focus on one or more elements of a particular ERP business process.

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Forrester regularly talks with ERP vendors including Epicor Software, Infor, Microsoft, NetSuite, Oracle, Plex Systems, SAP, Syspro, The Sage Group, and Unit4. Forrester also talks regularly with ERP users in inquiry and advisory sessions.

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ERP: ADAPTING TO CHANGING BUSINESS NEEDS, BUT STILL HARD TO IMPLEMENT

ERP software automates a firm's enterprise transactions and delivers business intelligence on top of this underlying system of record. ERP originated in manufacturing, with an initial focus on inventory control and production planning. Since then, ERP has become a broader term for the software an organization uses to run its business.[1] In the broadest definition, ERP application suites include elements of customer relationship management (CRM), project life-cycle management (PLM), supply chain management (SCM), and the entire hire-to-retire business process of human resource management systems (HRMS) and talent management software.[2] Forrester defines ERP as the applications that execute the end-to-end business processes supporting a firm's business, encompassing finance (record-to-report), order management (order-to-cash), and procurement (purchase-to-pay) as well as industry-specific functionality and applications if required (see Figure 1).[3]

As with other business applications like CRM, ERP is expanding its traditional function as a firm's system of record by also offering some elements of systems of engagement. Firms today look to ERP to provide data that's more usable, more intelligible and actionable, more time-sensitive, and more easily enhanced with additional information. In each case, these user data requirements are starting to reshape ERP software, as vendors respond to firms' needs to:

- **Open up access to their ERP data.** Companies are no longer content to keep their ERP data walled off from the rest of the organization. They want broader access to and use of this data so more employees can easily access information that's relevant to their roles and helps them do their jobs more effectively.[4] Firms also want their staff to be able to access ERP data and use ERP applications from more devices, including smartphones and tablets.

  Impact on ERP: Firms are demanding improvements in user interfaces so that not only power users, but also occasional users of ERP systems can quickly access the information they need. In many cases, ERP vendors' moves to develop (or reinvent) fresh user experiences for mobile devices are driving changes that will ultimately affect desktop ERP user interfaces.[5]

  > "We're looking for usability. Our current ERP feels like 1990s software. It's eight clicks to do anything." (IT manager, US utility)

- **Better understand and interact with their ERP data.** While the primary function of ERP applications remains the recording of transactions and storing of data, firms want to analyze that data much more broadly and deeply. They're eager for reporting to happen within the ERP applications themselves — eliminating the need for batch extracts — and want to use ERP data as the basis for intelligent decision-making. They want to enable a wider range of employees to access information than was previously possible.

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Impact on ERP: Ask any firm to name what's most frustrating about its current ERP system, and you're likely to hear that difficulty in generating reports is one of the firm's top three frustrations. ERP vendors are responding to user demands for more reporting functionality by developing business intelligence that is embedded within ERP systems, is more contextual, and can be used by nontechnical analysts. Vendors are also moving to further empower business users with embedded ERP workflow tools.[6]

> "In the near term, we're more focused on our budgeting, planning, and forecasting capabilities. Reporting and analytics capabilities are probably our biggest near-term needs." (CIO, global professional services firm)

- **Consume their ERP data in a more timely fashion.** Firms increasingly want to make decisions on the fly, requiring confidence that the ERP data sources for those analytics are as current as possible. At the same time, firms want to augment and complement the knowledge they gain from their ERP systems with external sources of information. These sources may include social media streams to gain deeper insights into customer sentiment or unstructured data such as traffic or weather patterns that can help businesses make decisions.[7]

Impact on ERP: The push from firms for access to more near-real-time data is one factor causing ERP vendors to rethink the underlying infrastructure of their software.[8] Traditionally, ERP applications have been built on top of a relational database, which fits their primary function of processing and storing transactions. ERP applications are starting to be built on in-memory databases promising not only much faster transaction speeds, but also rapid processing of vast amounts of data and analytics.[9]

> "We want more visibility and transparency into orders for our reps. At the moment, the rep doesn't know the order is complete until it arrives at their door." (Vice president of business development, beauty retailer)

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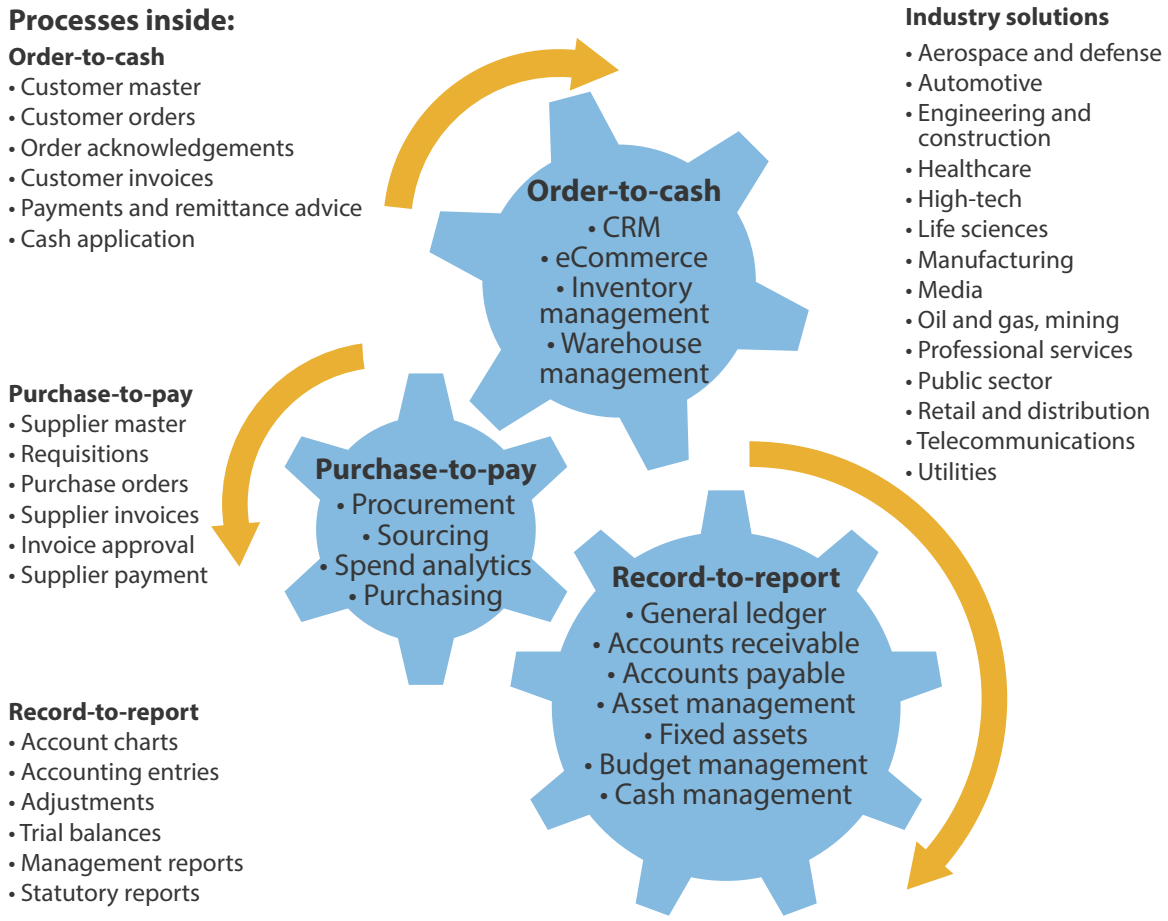
Figure 1 ERP Footprint



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ERP Is Evolving Slowly As Customers Struggle With Value Realization

ERP is in the early stages of major changes at all levels of the application — from the look and feel of the user interface to the database and the underlying architecture. As these changes take effect, ERP will evolve to provide more focused core functionality supplemented by a wide range of plug-in components and cloud services. Each plug-in will deliver elements of a particular ERP business process and will originate from ERP suite vendors or best-of-breed players or application development partners.

In time, ERP suite vendors will develop application ecosystems comprising their own and their partners' components.[10] This will help AD&D pros looking to diversify their current — and

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often overly broad — ERP suites in favor of a more streamlined set of core ERP functionality complemented by specific components that fit their firms' business needs, reflecting the customers, countries, and industries they serve. Yet many firms are still dealing with the frustrations of their current systems, which can include investing in and continuing to pay for software that they often have yet to deploy.

> "We own the majority of our ERP vendor's modules, but we don't use them extensively. We're trying to determine where we want to go. We've not taken a good look at whether to further leverage them. We're looking to reduce the number of modules as part of our contract renegotiation." (Vice president of IT, residential and commercial service provider)

ERP remains the application that many firms will spend the most money on, as well as being one of the most complex and time-consuming to implement and support. This explains why our survey data indicates that, although ERP has the highest level of planned investment among business software categories, it doesn't have the highest level of change (see Figure 2). Upgrading to a new version of existing ERP applications or migrating to a new ERP system is a daunting task for many AD&D pros. So it's no surprise that firms may opt to defer that decision several times — even if they're very unhappy with their current ERP applications — thereby lengthening ERP lifespans to a decade or two, or even longer. Disappointment with current ERP software isn't only about gaps in running the current business, but is also related to the inability to support future plans.

> "We want to define our strategy for the next three to five years to be more integrated and more global. At the moment, we're in reactive mode as the orders come in. We want to achieve faster response and to eliminate waste." (Business relationship manager, power management company)

> "We've outgrown much of what we have. We're trying to determine where to go and what can help us to more than double our size in the next five to 10 years." (CIO, professional services firm)

Firms' main issues with ERP range from technology limitations to the human experience. Beyond the issues mentioned above, organizations struggle with:

- **The gap between business requirements and ERP capabilities.** There will never be a perfect match between what packaged business applications provide and a given firm's specific business needs. However, that gap can be particularly wide with traditional ERP, particularly as a firm's business processes change as the organization itself grows and changes. To bridge these gaps, firms often find themselves doing more in-house ERP development and customization than they had anticipated. Typically, if companies find that the functionality they need isn't available in their packaged business applications or is too expensive or complex, they decide to build their own software (see Figure 3).

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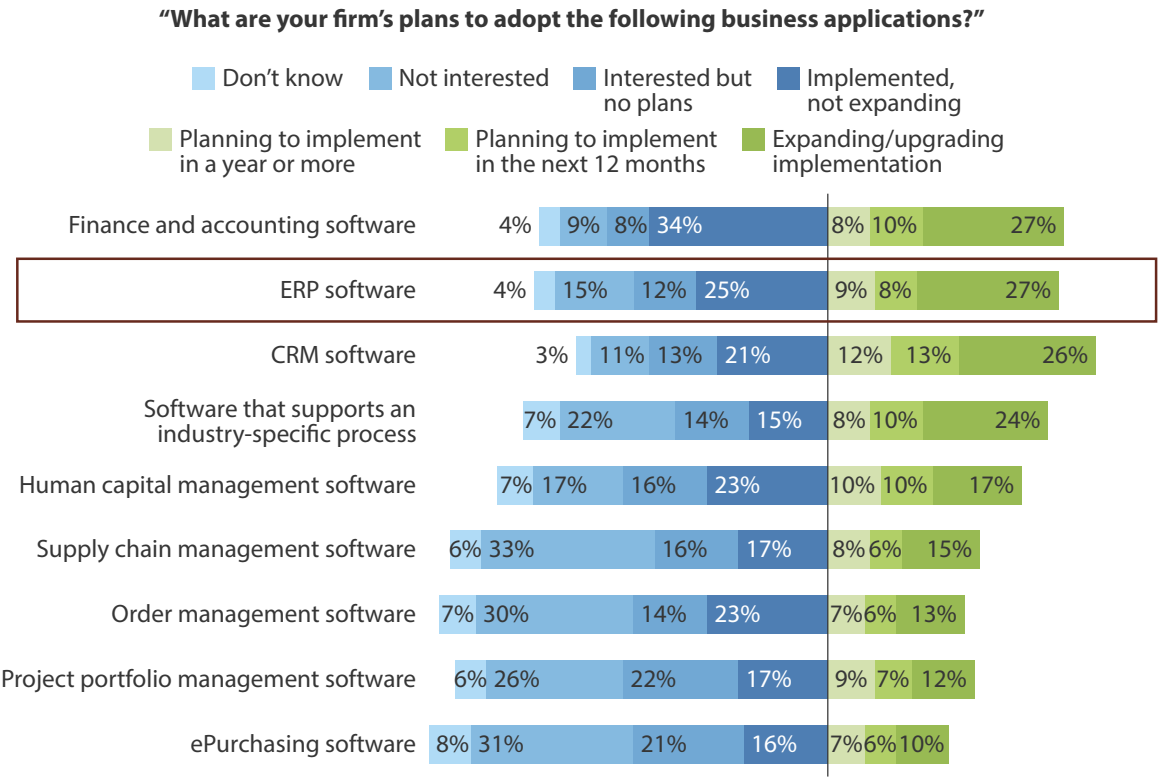
"Our systems are very dated. The processes are built on applications that were implemented in the early 1990s. We've aged past them." (CIO, food manufacturer)

- **The gap between business processes and what ERP can provide.** Although ERP systems won't match a firm's business processes perfectly, companies must strike a balance between using out-of-the-box functionality and customizing or enhancing that functionality, whether in-house or via a relationship with a third party.[11] Firms struggle to determine how much ERP customization is really necessary and cost-effective — and in what areas.

"We're starting to think, 'Are we that special? Where do we really want to differentiate?' We're trying to figure out how our peers are doing it." (IT manager, US airline)

Figure 2 Firms Have Mixed Feelings About Changing Their ERP Applications



Base: 826 enterprise software decision-makers responsible for packaged applications
(percentages may not total 100 because of rounding)

Source: Forrsights Software Survey, Q4 2012

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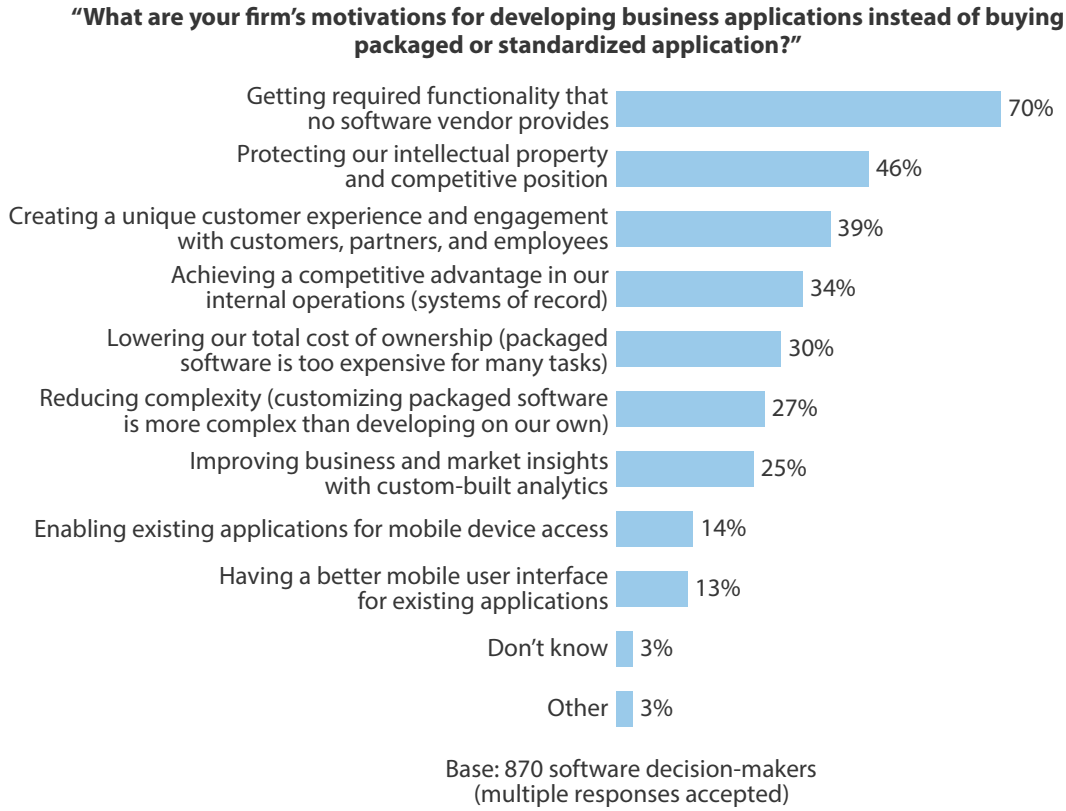
Figure 3 Firms Build Business Apps When Packaged Applications Lack Functionality Or Usability



Source: Forrsights Software Survey, Q4 2012

87181 Source: Forrester Research, Inc.

GLOBALIZATION, INDUSTRY NEEDS, SAAS, AND MOBILE DRIVE MARKET CHANGE

Companies of all sizes are changing faster than ever before. They're setting up operations in new geographies, moving into adjacent businesses, and frequently even rethinking their core business. They need more flexible software to run the business and accommodate sudden expansions or contractions — whether temporary or permanent — in business size, scope, and mission. They're eager to exploit rich historical ERP data about their business and customers, combine it with information from other sources, and analyze the resulting data in as near real-time as possible. Three key drivers — globalization, industry focus, and emerging technologies — are shaping the future of ERP as firms seek:

- **A global ERP strategy to fit their global business footprint.** As firms expand their operations in Asia Pacific, South America, and Eastern Europe, they demand ERP systems that can serve more of the globe.[12] ERP vendors work to meet those needs in several ways, including

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expanding their own products to support more currencies, languages, and legislation; teaming with local partners or global SIs to add regional functionality; and establishing a more direct presence around the globe, often via acquisitions, particularly as a way to improve the quality of local software support.

While some firms aim to establish a single global ERP instance, others prefer hub-and-spoke models that differentiate between the ERP used at firm's headquarters and the ERP used by its regional business units.[13] One version of that model is "two-tier ERP": corporate continues to use its on-premises ERP suite, but deploys a more cost-effective option using SaaS ERP elsewhere in the world. Two-tier ERP is proving attractive to firms looking to set up a new business in a particular geography. When that business is largely self-contained, firms want to make an ERP investment that will scale with that business, perhaps exponentially, over a period of five to 10 years. They don't want to have to replace ERP systems as that operation grows — and they want to enable ERP data to flow between that newer business unit and their corporate headquarters.

> "We're looking to start up business in a new market. We want to try to keep our footprint small and learn about the market. But that new operation could end up playing a larger part in our overall global market." (Head of architecture, online retailer)

- **Industry solutions that help close the functionality gap.** Very few ERP vendors directly cater to a broad swath of industries.[14] Yet firms' desire for more standardized ERP functionality extends to their industry-specific needs. ERP vendors often meet those needs by acquiring industry functionality that they can then bolt onto existing ERP systems (see Figure 4). But the lines between industry versions of ERP often blur as firms enter complementary businesses, as when a retailer gets into distribution, a beverage maker starts selling other products, or a mining company becomes a steel producer. The rise of connected equipment brings new options; for example, a tire manufacturer that can track tires for predictive maintenance can then also offer fleet management services. And as firms grow by acquisition, they need their ERP software to keep pace, not hinder their progress.

> "We've had a few acquisitions. The particular challenge is to bring all of the lines of business together under one umbrella. We're particularly looking to integrate the manufacturing arm of the business to streamline processes, data sharing, and financials." (Vice president of software development, manufacturing firm)

- **Technology innovation that keeps pace with new requirements.** The strong trends toward SaaS and mobility require ERP vendors to invest in their technology to keep pace with evolving customer needs. So many new market entrants have joined SaaS ERP pioneers like NetSuite and Plex Systems that the vast majority of ERP vendors either have one or more SaaS ERP offerings or have concrete plans to enter the market (see Figure 5). Many firms have already adjusted their

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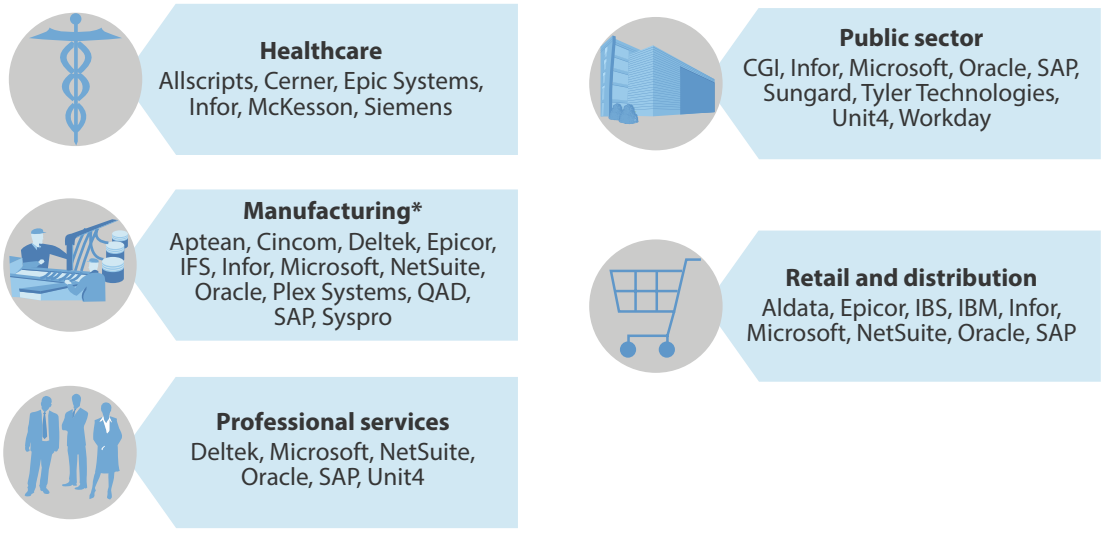
application strategy to give preference to SaaS. Our research has revealed that the key aspects of SaaS applications attracting firms are lowering overall costs, reducing spending on traditional applications, and helping the business innovate outside of the IT department (see Figure 6).

The huge surge in mobile device usage is also affecting ERP as more people expect to be able to do business using their smartphones and tablets. Sales and field service often lead the way, driving mobile strategy and investment in CRM applications, but ERP users like corporate services and order fulfillment aren't that far behind (see Figure 7). ERP vendors have been forced to reinvent their user experience for mobile devices and are starting to apply the lessons they've learned to their traditional ERP applications. The SaaS and mobile trends also act together to disrupt traditional ERP architectures, as the cloud speeds the move toward exposing back-end services through APIs, which are then consumed by both mobile and web apps, whether those apps come from ERP vendors or are built as separate systems of engagement.[15] Ultimately, this trend means that the largest potential for mobile apps lies outside of traditional ERP users.

Figure 4 Examples Of ERP Vendors By Industry



*Includes build-to-order, discrete, process, and project manufacturing

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Figure 5 ERP Vendors That Offer SaaS ERP Or Plan To Do So

ERP vendor	On-premises ERP	SaaS ERP available	SaaS ERP on road map
Epicor	Yes	Epicor ERP	N/A
Infor	Yes	Infor SyteLine	More SaaS ERP to come for Infor 10x products.
Microsoft	Yes	Not yet; Dynamics GP and NAV currently available via partner hosting	For Dynamics AX, GP, and NAV
NetSuite	No	NetSuite ERP and NetSuite OneWorld	N/A
Oracle	Yes	Oracle ERP Cloud Service and Oracle Supply Chain Management Cloud Service	Further enhancements to cloud offerings to come.
Plex Systems	No	Plex Manufacturing Cloud	N/A
Sage Group	Yes	Sage 200 and Sage Murano (on Azure in Europe)	Sage ERP X3, Sage 300 ERP, Sage Office Line Evolution, Sage 100 ERP*
SAP	Yes	Business ByDesign and Financials On Demand	Likely to deliver more SaaS ERP via its SAP HANA Cloud Platform
Unit4	Yes	Agresso Business World and FinancialForce Accounting	More SaaS ERP to come.
Workday	No	Workday Financial Management	Further enhancements to and expansion of current offerings to come.

*Sage Office Line Evolution will be available in Germany; Sage 100 ERP will be available in North America.

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Figure 6 Firms Embrace SaaS To Cut Costs, Boost Innovation, And Improve The User Experience

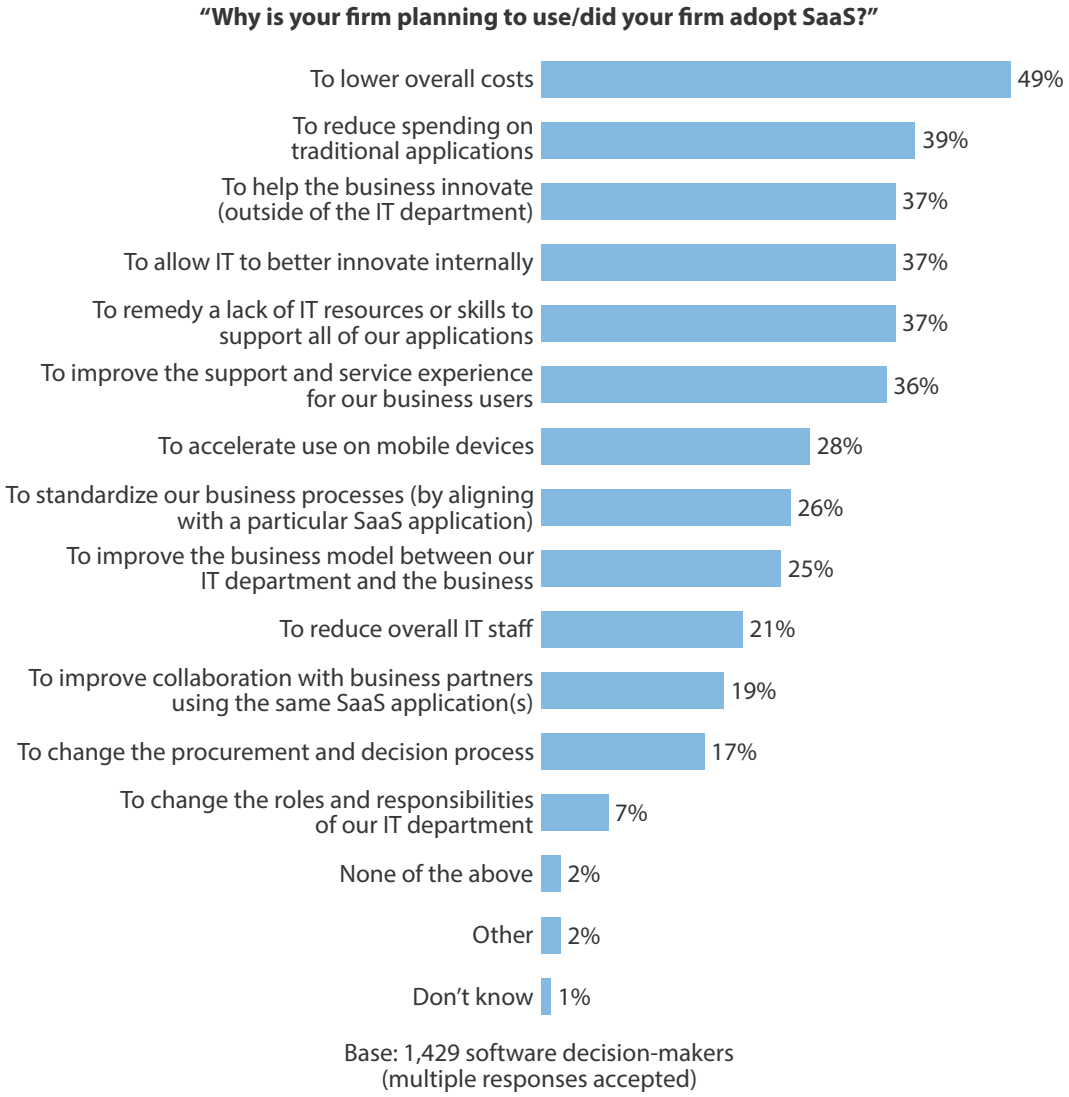

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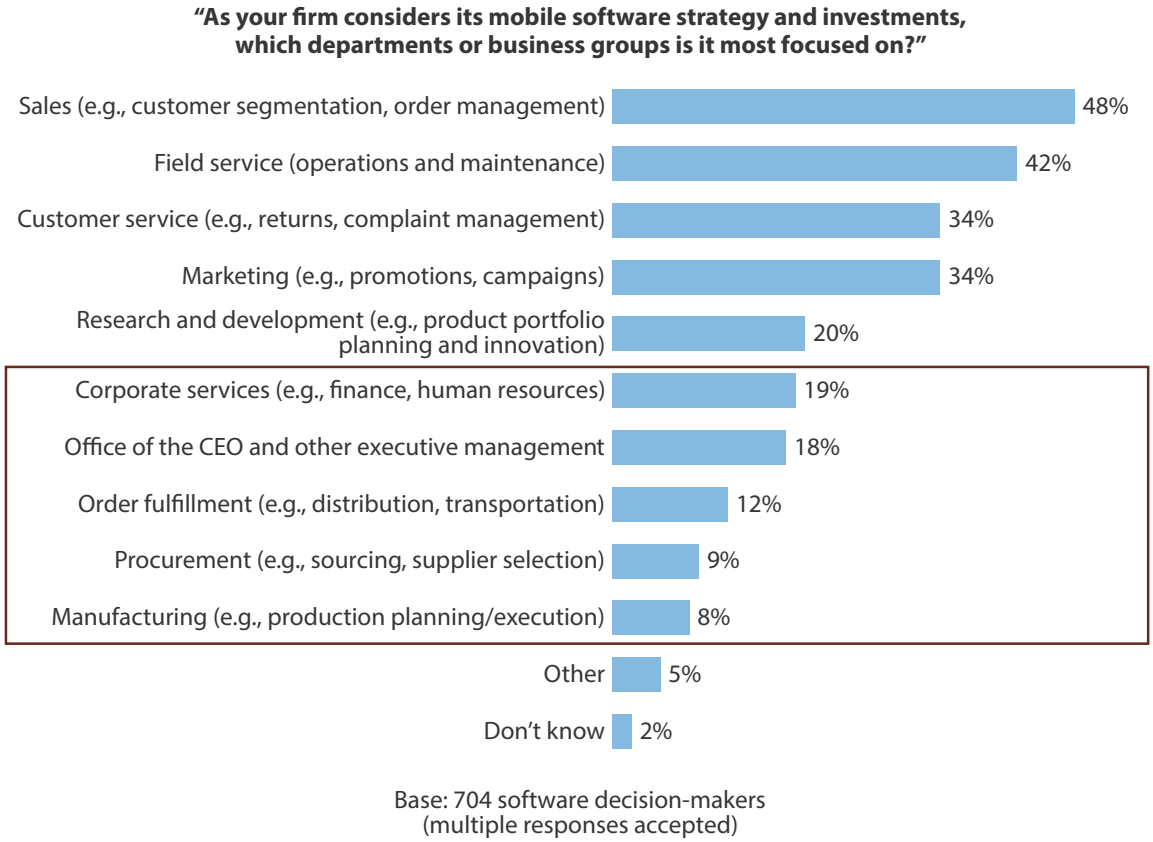
Figure 7 Mobile ERP Lags Behind Mobile CRM, But Firms Are Interested In Adoption



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RECOMMENDATIONS

HOW TO PREPARE FOR THE COMING ERP CHANGE

How can you move from today's ERP pain points to tomorrow's improved scenario? It's important to note that any changes in ERP's capabilities and scope will be gradual, given the complexity and breadth of the software — but it's clear that change is coming. Firms should:

- **Re-envision your ERP application portfolios.** Many firms struggling with older ERP applications face the prospect that they'll have to reimplement — or even rip and replace — their existing technologies. Focus your energy on considering what today's ERP can offer, where vendors are heading, and how you can leverage their evolving technology strategies within the context of your business.

"We want to understand who we are and what we do before we start off buying software." (CIO, food manufacturer)

- **Be open to a hybrid future.** Forrester hears from many clients that they see ERP investments as an all-or-nothing decision between ERP app suites or best-of-breed software. In the future, a mix of core ERP and third-party functionality will become the norm. Some of that best-of-breed capability will be specific to certain geographies, industries, or business practices. Individual firms will do less customization and use more best-of-breed add-on ERP modules and applications, many of which will be found in ERP vendors' partner ecosystems.

"Building the ultimate integrated platform means that we can't meet enough of our varied customers' requirements and the different buyers we sell to. That ripples back into our selling activities and then back into distribution — there are very different processes around them. That's not a good reason to go with a very vanilla ERP offering." (CIO, food manufacturer)

- **Expect and anticipate continued ERP consolidation.** Mergers and acquisitions are a fact of life in ERP as vendors look to expand their geographic, industry, and technology reach. There have already been a number of large SaaS business applications acquisitions by Oracle (Taleo) and SAP (Ariba and SuccessFactors). Forrester expects to see more of these large acquisitions, along with continuing purchases of industry-specific functionality. Be sure to push your ERP vendor on any areas of its strategy that lack clarity, particularly in relation to pricing, integration, and deployment models (e.g., SaaS).

- **Craft a thoughtful, business-focused application strategy and road map.** Plan ahead and document that planning with an application strategy and an application road map. Think through how ERP applications can best reflect your firm's business processes and strategies. Consider how and to what degree you need to tune or transform your entire business application portfolio — and use Forrester's business applications playbook to help guide that thinking.[16]

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SUPPLEMENTAL MATERIAL

Methodology

Forrester's Forrsights Software Survey, Q4 2012, was fielded to 2,438 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during November 2012 and December 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester.

We have provided exact sample sizes in this report on a question-by-question basis. Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas from company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

ENDNOTES

[1] In talking with clients, Forrester hears a wide variety of definitions for ERP, including ERP being synonymous with the application suite of a single application vendor and ERP being the software a firm's IT department imposes upon the firm's business users.

[2] For Forrester's take on the human resource management systems (HRMS) market landscape, see the October 5, 2012, "Consolidation And Innovation Transform The HRM Vendor Landscape" report.

For a more in-depth look at HRMS, see the January 25, 2012, "The Forrester Wave™: Human Resource Management Systems, Q1, 2012" report.

For a more in-depth look at talent management, see the April 10, 2013, "The Forrester Wave™: Learning And Talent Development, Q1 2013" report.

[3] Vertical-focused applications may be provided by general-purpose ERP vendors or by companies that focus on serving that particular industry, either as a full ERP offering or elements of that software.

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[4] For instance, a firm can open up access to financial data held within its ERP software to its sales staff, providing up-to-date insight into the status of customers' invoices; sales can then use this information to help determine good cross-sell and upsell opportunities.

[5] Many ERP vendors now describe adopting a "mobile first" strategy when it comes to developing new business application functionality.

[6] For more on ERP workflow, see the October 25, 2011, "ERP Workflow: A New Option To Treat Business Process Pain" report.

[7] For instance, a nationwide hardware store can benefit from factoring in near-real-time weather patterns, particularly storms, to determine which of its stores are most likely to need to stock up on equipment like snow shovels.

[8] There are other, less customer-focused, reasons for an ERP vendor to reconsider the database its software runs on; in particular, the desire to bring more users onto the vendor's own infrastructure rather than that of its competitor and the wish to eliminate or cut back on the substantial database licensing fees it may currently be paying to a third-party software vendor.

[9] Forrester's research has determined that firms are placing increasing importance on making strategic decisions by detecting and responding to events in near real-time, with advanced analytics, big data platforms, and cloud computing being some of the technologies making this development possible. See the February 7, 2013, "The Top Emerging Technologies To Watch Now Through 2018" report.

[10] We're already seeing ERP ecosystems start to emerge as ERP vendors create app stores built around their platform-as-a-service and other development tools. The applications come from the vendor, its partners (whether ISVs or SIs), and potentially from its customers. Over time, as is beginning to happen in the more established CRM ecosystem, ERP vendors themselves will define end-to-end business processes in terms of the functionality their applications provide and areas in which those applications are best complemented by best-of-breed alternatives from one or two core partners.

[11] Every firm faces a central dilemma: how to resolve the standardization and differentiation of its business applications to the satisfaction and benefit of all within the organization. One way for driving an appropriate level of standardization across business units and to repeat best practices is to deploy business app centers of excellence. See the November 14, 2012, "Organize To Deliver And Manage Application Transformation" report.

[12] Perhaps only Oracle and SAP can lay claim to that title, and then only regarding their on-premises ERP application suites (E-Business Suite and Business Suite, respectively).

[13] Adopting a hub-and-spoke ERP deployment model is one way that firms can reconcile potentially conflicting enterprise and business unit requirements. See the October 19, 2010, "It's Time To Clarify Your Global ERP Strategy" report.

[14] Again, the on-premises enterprise application suite players, Oracle and SAP, are the two vendors that advance industry solutions for more than 25 different verticals.

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[15] Many firms recognize that their IT groups cannot satisfy their continuously changing and growing range of requirements — at least not as quickly and cost-effectively as they require. At the same time, AD&D pros are well aware that many of their current and legacy applications have already been extended beyond the breaking point and can ill afford any more add-ons, modifications, or patches; they urgently need modernization and transformation. Forrester has defined a reference architecture for future business applications that AD&D teams can use as a starting point for defining their future target state and which incorporates Geoffrey Moore's concepts of systems of record versus systems of engagement. See the May 24, 2012, "Increase Business Flexibility By Embracing Future Trends" report.

[16] Forrester's business applications playbook lays out research for AD&D pros looking to make new investments in business systems including ERP, CRM, and industry-specific applications. For instance, see the May 30, 2012, "Optimize Application Strategy To Generate Business Value" report and see the March 26, 2013, "Define The Road Map For Transforming Your App Landscape" report.

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« **ANDREA DAVIES,** client persona representing Application Development & Delivery Professionals

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