



NUCLEUS
RESEARCH

Enterprise ERP Technology Value Matrix 2026

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The Bottom Line

Nucleus found that the enterprise ERP market continues to evolve beyond its traditional role as a transactional system of record, with organizations increasingly relying on ERP platforms to improve agility, resilience, visibility, and operational execution across the business. While AI agents, orchestration frameworks, and automation capabilities have become the primary focus of vendor innovation, customer adoption remains dependent on foundational factors such as data quality, governance, process maturity, and organizational readiness. Rather than creating a new direction for the market, AI is accelerating an existing evolution toward more intelligent, connected, and operationally aware ERP platforms that unify financial and operational data, automate routine work, and support faster decision-making. The vendors best positioned for long-term success will not necessarily be those with the largest number of AI capabilities, but those that can embed intelligence into governed, industry-specific workflows that reduce manual effort, improve visibility, and deliver measurable business outcomes at scale.

Market Overview

Nucleus found that the enterprise ERP market is entering a new phase of modernization as organizations look to improve operational resilience, financial visibility, and execution speed in an increasingly volatile business environment. Supply chain disruptions, geopolitical instability, tariff uncertainty, labor constraints, and pressure to improve margins have elevated ERP from a transactional backbone to a strategic operating platform. For enterprise organizations, ERP is no longer evaluated only on its ability to record transactions, close the books, and support global compliance. It is increasingly assessed on whether it can help organizations sense disruption, coordinate decisions across functions, and act faster across finance, supply chain, manufacturing, procurement, service, and project operations.

This shift has continued to accelerate the movement from ERP as a system of record toward ERP as a system of outcomes. Enterprise vendors are embedding automation, event-driven workflows, contextual analytics, and AI-enabled recommendations directly into business processes. The value proposition is moving from storing and reporting on historical data to continuously monitoring operations, surfacing exceptions, and guiding users toward the next best action. Nucleus found that this shift is particularly important for large organizations with complex operating models, including global manufacturers, distributors, project-based businesses, asset-intensive companies, and enterprises built through mergers and acquisitions. These organizations often face fragmented data, inconsistent processes, and disconnected applications that limit visibility and slow response times.

AI has become the most visible area of enterprise ERP innovation, but Nucleus found that customer adoption remains more measured than vendor messaging suggests. Nearly every leading enterprise ERP vendor has introduced copilots, AI agents, agent studios, or orchestration frameworks over the last 12 months. These tools are increasingly positioned to move beyond question-answering assistants and to support workflow execution across accounts payable, financial close, procurement, forecasting, anomaly detection, supplier management, and operational reporting. However, most enterprise customers are still in the early stages of determining where AI can deliver measurable value. Customers are interested in AI-enabled automation, but they remain focused on practical use cases that reduce manual work, improve analytics, summarize information, identify exceptions, or accelerate repetitive tasks.

Enterprise ERP has evolved from a system of record into an operational intelligence platform designed to help organizations sense disruptions, coordinate decision-making, and execute faster across the business.

Nucleus found that the most successful AI use cases in enterprise ERP are those embedded directly into existing workflows rather than deployed as standalone tools. Finance remains one of the clearest early areas of value, particularly around continuous accounting, reconciliation, variance analysis, close management, invoice processing, and reporting. These use cases are attractive because the process pain points are well understood, the labor burden is measurable, and the value can be tied to reduced manual effort, faster cycle times, and improved visibility. In operational areas such as supply chain, manufacturing, and service, AI adoption is progressing more cautiously because recommendations and autonomous actions must account for business rules, compliance requirements, physical constraints, and downstream operational consequences.

Despite significant investment in AI agents and orchestration frameworks, enterprise adoption remains tied to governance, data quality, and the ability to deliver measurable operational value.



Governance has therefore become a defining requirement in enterprise ERP. Nucleus found that large organizations are unlikely to trust AI

capabilities without clear controls around approval workflows, role-based permissions, audit trails, confidence thresholds, explainability, and human oversight. This is where ERP vendors maintain an important advantage over standalone AI providers. ERP systems contain the transactional history, workflow context, permissions, process rules, and operational data needed to support more accurate and governed AI outputs. While large language models can assist with analysis and content generation, enterprise ERP vendors are better positioned to operationalize AI by connecting intelligence to trusted data, governed processes, and auditable actions.

At the same time, Nucleus observed a growing disconnect between the pace of vendor AI announcements and the maturity of many customer environments. Even among enterprise organizations, data management maturity varies significantly. Larger companies often assume they are more prepared for advanced automation because of their scale, but complexity can create its own barriers. Global operations, acquired business units, legacy systems, inconsistent master data, and fragmented reporting structures can limit the value of AI and automation initiatives. As a result, customers still require strong process discipline, clean data, change management, and internal ownership before they can fully benefit from agentic ERP capabilities.

Enterprise customers are also placing greater emphasis on industry-specific depth. Nucleus found that customers increasingly want ERP vendors and partners that understand their operating environment, terminology, compliance needs, and process requirements. Manufacturers are looking for tighter connectivity between ERP, manufacturing execution, quality management, connected worker, and supply chain planning. Asset-intensive and service-centric organizations are seeking stronger alignment among ERP, enterprise asset management, field service, and project execution. Construction and project-based companies are modernizing systems to gain better visibility into project cost, labor, materials, and site-level execution. This demand has pushed vendors to deepen their vertical capabilities through product development, acquisitions, and the expansion of their partner ecosystems.

This has also contributed to a broader convergence between ERP and adjacent operational systems. Nucleus found that enterprise ERP vendors are expanding into or strengthening integrations with supply chain management, warehouse management, manufacturing execution, transportation, connected worker, procurement, and analytics capabilities. M&A activity over the last 12 months reflects this

As geopolitical volatility, supply chain disruptions, and cost pressures persist, organizations are increasingly evaluating ERP systems on their ability to improve agility, resilience, and operational execution rather than solely on transactional efficiency.

shift, with vendors acquiring capabilities to improve industry specialization, execution depth, implementation capacity, and operational workflow coverage. For customers, the goal is not necessarily to run every process inside a single application. Rather, they want fewer disconnected systems, better interoperability, and a clearer operating model for how financial and operational data moves across the business.

Cloud migration remains a major theme in the enterprise ERP market, and AI is becoming a new forcing function for modernization. Vendors are increasingly focusing innovation on cloud environments, particularly in embedded AI, analytics, workflow automation, and platform extensibility. For customers still operating heavily customized or on-premises environments, this creates both pressure and opportunity. Moving to cloud ERP can improve upgrade paths, data accessibility, security management, and access to new AI capabilities, but it also requires organizations to revisit legacy processes, integrations, and customizations. Nucleus found that customers are most successful when they treat cloud migration as an operational transformation initiative rather than a technical replacement project.

Usability and services remain critical differentiators. Enterprise ERP platforms are powerful, but that depth often creates complexity. Nucleus found that customers continue to demand cleaner user interfaces, better role-based experiences, faster support response times, stronger enablement, and more practical guidance from vendors and partners. The ability to configure ERP to fit business needs remains important, but customers also want vendors to provide best-practice guidance and avoid over-customization that slows future upgrades. As AI and automation increase platform sophistication, usability will become even more important because customers will need to trust, understand, and manage increasingly intelligent workflows.

Looking ahead, Nucleus expects enterprise ERP competition to center on the ability to deliver governed operational intelligence at scale. The leading vendors will not simply be those with the largest number of AI agents or the broadest feature lists. They will be the vendors that can embed intelligence into workflows, connect financial and operational data, support industry-specific execution, provide clear governance, and deliver measurable improvements in labor efficiency, decision speed, and operational resilience. For enterprise customers, ERP modernization in 2026 is less about adopting the latest AI capabilities and more about building the data, process, and platform foundation

The winners in enterprise ERP will not be the vendors with the most AI features, but those that can translate intelligence into measurable business outcomes across finance and operations.

required to respond faster, operate with greater control, and convert technology investments into business value.

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 Cloud is recognized as a Leader in the 2026 Enterprise ERP Technology Value Matrix. IFS supports midsize and large global organizations across industries, including aerospace and defense, energy and utilities, telecommunications, transportation, construction and engineering, manufacturing, and service-centric industries. Within manufacturing, the platform is commonly deployed across machinery and industrial equipment, automotive, high technology and electronics, life sciences, food and beverage, chemicals, fabricated metals, building materials, and pulp and paper environments. IFS Cloud serves as the vendor's strategic ERP platform. It is particularly aligned to asset-intensive, project-centric, and service-focused operations, with strengths across enterprise asset management, field service management, project operations, manufacturing, and industrial service environments. The platform combines supply chain management, manufacturing, finance, human resources, project management, asset management, and quality management capabilities within a unified architecture and shared data model designed to improve operational visibility and data consistency across business functions.

IFS continues to emphasize flexibility and extensibility through a composable platform architecture built on REST APIs, allowing organizations to integrate third-party systems and develop workflow-specific applications without extensive custom development. The platform supports deployment across public cloud, hosted, and on-

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 combines ERP, enterprise asset management, and field service management capabilities within a unified platform designed for asset-intensive and service-centric organizations.

premises environments. IFS has expanded its focus on industrial AI, operational intelligence, and embedded automation by enhancing IFS.ai, IFS.ai Copilot, Nexus Black, and IFS Loops. IFS Loops introduces digital workers designed to support operational processes across areas such as supply chain management and field service management, leveraging a library of specialized AI agents supporting functions including supplier communication, supplier selection, route optimization, and workflow coordination. Nexus Black serves as an environment for developing and delivering emerging AI-driven operational use cases across the broader IFS platform, particularly for capabilities that have not yet been broadly productized.

IFS continues to expand its Industrial AI strategy through IFS.ai, IFS.ai Copilot, Nexus Black, and IFS Loops, bringing AI-driven decision support and automation directly into operational workflows.

Recent updates and announcements include:

► **Supply Chain Execution Expansion Through Strategic Acquisitions.**

IFS expanded supply chain execution capabilities within IFS Cloud through the acquisitions of 7bridges and Softeon, extending ERP-managed planning into transportation management, warehouse execution, fulfillment, and logistics orchestration. These additions strengthen IFS's ability to support end-to-end supply chain execution while maintaining operational, inventory, and financial visibility within a unified ERP environment.

► **Agentic AI and Autonomous Operational Execution.**

IFS expanded agentic AI capabilities through the acquisition of The Loops alongside broader investments in ERP-embedded AI orchestration and automation. These updates enable AI-driven agents to monitor operational events, evaluate business conditions, and initiate actions across procurement, manufacturing, supply chain, logistics, and service workflows while maintaining ERP governance and financial controls.

IFS strengthened its supply chain execution capabilities through the acquisitions of 7bridges and Softeon, extending IFS Cloud into transportation, warehouse, fulfillment, and logistics operations.

► **Embedded Industrial AI and ERP-Augmented Decision Support.**

IFS continued expanding embedded AI capabilities within IFS Cloud, including enhancements to IFS.ai Copilot and manufacturing scheduling and optimization functionality. These updates are designed to improve operational planning, scenario analysis, and user decision support directly within ERP-managed workflows rather than relying on disconnected analytics environments.

► **Sustainability and Circular Manufacturing Enhancements.**

IFS expanded sustainability management and circular manufacturing capabilities within IFS Cloud, including support for emissions tracking, sustainability reporting, reverse logistics,

remanufacturing, and lifecycle cost analysis. The vendor also introduced IFS Zero, an AI-native sustainability platform designed to support enterprise-wide emissions management and operational sustainability initiatives using ERP operational data.

► **Core ERP Platform and Integration Enhancements.**

IFS continued expanding core platform capabilities through REST-first integration architecture, evergreen cloud updates, and a unified data model spanning ERP, EAM, FSM, sustainability, and AI-related workflows. These updates are designed to simplify interoperability, improve operational consistency, and support continuous delivery of new functionality across cloud deployments.

IFS accelerated its AI roadmap through investments in IFS Loops and The Loops acquisition, enabling AI-driven digital workers to automate operational processes across industrial environments.

Infor

Infor is recognized as a Leader in the 2026 Enterprise ERP Technology Value Matrix for its portfolio of industry-focused ERP offerings. Infor serves organizations across industries, including industrial manufacturing, automotive, aerospace and defense, distribution, fashion, food and beverage, healthcare, and the public sector. Infor's CloudSuite portfolio consists of industry-specific ERP suites that combine core ERP functionality with supply chain, warehouse, asset management, human resources, customer relationship management, and product lifecycle management capabilities tailored to targeted vertical markets. These offerings are built on the Infor Industry Cloud Platform and backed by Amazon Web Services (AWS)' global infrastructure.

Infor continues to emphasize preconfigured industry workflows and operational processes designed to reduce customization requirements and align deployments more closely with industry-specific business requirements.

Recently, Infor expanded its focus on role-based AI agents, workflow automation, process intelligence, and generative AI through the Infor Velocity Suite. The offering combines process mining, robotic process automation, AI agents, generative AI, and predefined industry use cases designed to help organizations with AI adoption to identify operational inefficiencies, automate repetitive tasks, and optimize operational visibility across manufacturing, distribution, and service-oriented workflows. Overall, Infor is a strong fit for organizations with complex operational requirements that extend beyond core financial management and require deep industry-specific functionality across multiple business units and geographies.

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

Recent updates and announcements include:

► **Expanded Infor Velocity Suite with AI Use Case Packs and AI agents.**

Infor expanded Infor Velocity Suite with industry-specific AI use case recommendation packs organized by role, process, and industry. Each pack gives users a clear starting point for adoption, showing which areas organizations can immediately benefit from, such as supplier management, financial efficiency, fulfillment efficiency, and more. New Industry AI Agents, enhanced supervisor-led orchestration, and Agent Factory have also been introduced to help organizations accelerate AI agent adoption, orchestration, and extensibility.

► **Enhancements to Infor Agentic Orchestrator.**

Infor enhanced the Infor Agentic Orchestrator with expanded coordination capabilities across AI agents, enterprise systems, and external data environments. The updates include interoperability through Model Context Protocol (MCP) integrations alongside expanded monitoring, governance, auditability, and observability capabilities designed to improve transparency and human oversight across AI-driven workflows.

► **Enhancements to Infor Process Mining with AI.**

Infor expanded process mining capabilities with generative AI-driven process summarization, enhanced dashboard customization, and deeper process performance analysis tools. These updates are designed to improve operational visibility and help organizations identify inefficiencies across enterprise workflows without relying on a heavily manual process analysis.

► **AI-driven Warehouse Optimization Enhancements.**

Infor introduced a Velocity Suite add-on for Infor WMS focused on warehouse pick path optimization using machine learning. The capability is designed to improve warehouse efficiency by reducing travel distance and improving picking workflows within distribution and fulfillment operations.

► **Expanded AI Deployment and Managed Services Support.**

Infor expanded post-deployment support capabilities with a year of complimentary CareFor Managed Services tied to Velocity Suite implementations. The offering is designed to provide post-go-live operational guidance and ongoing optimization support as organizations deploy AI-driven workflows and automation initiatives across enterprise operations.

Infor Velocity Suite brings together AI agents, process mining, robotic process automation, and generative AI to help organizations identify inefficiencies and automate operational workflows.

Infor expanded its AI strategy with new Industry AI Agents, the Agent Factory, and role-based AI use-case packs, designed to accelerate AI adoption across enterprise operations.

► **Infor Leap Cloud Migration Offering.**

Infor introduced Infor Leap, a structured cloud migration offering designed to accelerate ERP modernization initiatives for organizations moving from on-premises environments to Infor CloudSuite applications. The offering emphasizes predefined implementation methodologies, fixed-fee deployment structures, and reduced migration complexity to help organizations improve time-to-value and lower implementation risk.

Microsoft

Microsoft Dynamics 365 is recognized as a Leader in the 2026 Enterprise ERP Technology Value Matrix. Microsoft Dynamics 365 includes Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations, all delivered through the broader Microsoft Cloud ecosystem. Dynamics 365 Finance provides organizations with capabilities for financial management, global operations, forecasting, analytics, and cash flow planning, while Dynamics 365 Supply Chain Management supports end-to-end supply chain processes, including planning, procurement, manufacturing, inventory management, warehouse operations, asset management, and order fulfillment. Dynamics 365 Project Operations is designed to support project-based organizations by enabling resource management, project planning, time and expense tracking, and operational coordination throughout the project lifecycle. Together, these applications provide a connected operational environment for organizations managing finance, supply chain, manufacturing, customer operations, field service, retail, and project-based workflows within a unified platform.

Microsoft continues to differentiate by broadening the integration of Dynamics 365 with Azure, Microsoft Fabric, Power Platform, and Copilot capabilities across the Microsoft ecosystem. Organizations can leverage Microsoft Fabric to unify operational and analytical data across ERP, analytics, and business applications. At the same time, Azure provides the underlying cloud infrastructure, AI services, security, and scalability supporting Dynamics deployments. Microsoft also continues to expand embedded AI, Copilot, and agent-based automation capabilities across finance, supply chain, and manufacturing workflows, including reconciliation, operational analysis, and manufacturing coordination. Through Copilot Studio and Power Apps, organizations can also develop workflow-specific applications, automation, and AI-driven assistants with lower-code development tools integrated into the broader Microsoft platform ecosystem.

Infor enhanced its Agentic Orchestrator with expanded governance, observability, and Model Context Protocol (MCP) integrations to improve coordination between AI agents, enterprise applications, and external data sources.

Recent updates and announcements include:

► **Agentic ERP and Copilot Expansion.**

Microsoft expanded agentic AI capabilities across Dynamics 365 applications, including Finance, Supply Chain Management, Project Operations, Commerce, Human Resources, Sales, and Customer Service. The updates introduce additional AI agents, Copilot-driven workflow automation, and contextual operational assistance designed to improve productivity, automate repetitive processes, and support decision-making directly within ERP and operational workflows.

► **Dynamics 365 ERP Model Context Protocol (MCP) Expansion.**

Microsoft expanded Dynamics 365 ERP Model Context Protocol (MCP) capabilities with a new dynamic MCP server and an upcoming MCP server for analytics. These updates standardize how AI agents, applications, and external services securely access ERP data, analytics, and business logic while supporting extensibility, governance, auditability, and interoperability across Dynamics 365 environments.

► **ERP-Embedded AI Workflow Automation.**

Microsoft introduced additional AI-driven operational automation capabilities across finance, supply chain, warehouse, project operations, and service management workflows. Examples include supplier communication automation, AI-powered warehouse optimization, demand forecasting enhancements, financial reconciliation support, intelligent scheduling, and workflow orchestration designed to improve operational efficiency and reduce manual administrative effort.

► **Power Platform and Copilot Studio Enhancements.**

Microsoft expanded Power Platform and Copilot Studio capabilities with multi-agent orchestration, AI-powered automation, process mining, low-code agent development, governance controls, and enhanced Dataverse programmability. These updates strengthen Microsoft's ability to support enterprise-scale AI application development, workflow automation, and governed low-code extensibility across business operations.

► **Unified Data, Analytics, and AI Integration.**

Microsoft continued expanding unified data and analytics capabilities across Dynamics 365, Dataverse, Customer Insights, and Business Performance Analytics to support AI-ready

Microsoft Dynamics 365 combines finance, supply chain, project operations, and broader business applications within a unified platform built on the Microsoft Cloud ecosystem.

Microsoft continues to differentiate through deep integration between Dynamics 365, Azure, Microsoft Fabric, Power Platform, and Copilot to unify operational, analytical, and AI-driven workflows.

operational and customer data environments. These updates are designed to improve consistency between transactional workflows, analytics, and AI-driven recommendations while reducing fragmentation across business applications.

► **Governance, Security, and Enterprise AI Controls.**

Microsoft expanded governance and administration capabilities across Dynamics 365, Power Platform, Copilot Studio, and Dataverse with additional monitoring, auditability, security, risk assessment, and AI governance controls. These updates are intended to help organizations scale AI deployments while maintaining compliance, operational oversight, and enterprise security standards.

Microsoft enhanced Power Platform and Copilot Studio with multi-agent orchestration, low-code AI development, process mining, and governance.

Oracle

Oracle Fusion Cloud ERP is recognized as a Leader in the 2026 Enterprise ERP Technology Value Matrix. Oracle Fusion Cloud ERP is designed to support complex financial operations, global business environments, and high transaction volumes, with functionality spanning financial management, procurement, project management, risk management, analytics, and embedded B2B process support. The platform also connects closely with broader Fusion Applications capabilities, including Enterprise Performance Management (EPM), Supply Chain & Manufacturing, Human Capital Management (HCM), and Customer Experience (CX), enabling organizations to coordinate workflows and operational data across finance, supply chain, HR, and customer operations within a unified cloud environment. Oracle supports organizations operating across more than 125 countries, 23 industries, and over 30 languages, with the platform primarily serving enterprises with annual revenue exceeding \$300M. The vendor also provides industry-specific configurations for sectors including healthcare, higher education, public sector, utilities, financial services, communications, government, and professional services.

Oracle Fusion Cloud ERP combines finance, procurement, projects, risk management, analytics, and broader Fusion Applications capabilities within a unified cloud platform designed for complex global enterprises.

Oracle differentiates through an integrated technology stack spanning Fusion Applications, Oracle Database, AI services, analytics, security, and Oracle Cloud Infrastructure (OCI), enabling tighter optimization, governance, and operational consistency than approaches that rely on multiple third-party platforms.

Oracle's Fusion customers benefit from a unified data architecture spanning ERP, EPM, HCM, SCM, and CX domains, helping organizations reduce integration complexity, duplicate data movement, and reconciliation challenges across enterprise processes.

Oracle remains particularly well-positioned for organizations operating highly complex multinational finance environments requiring large-scale transaction processing, shared service center operations, sophisticated intercompany accounting, and extensive governance requirements.

Oracle has continued expanding embedded automation, analytics, and AI-driven workflow capabilities across the Fusion Applications portfolio, with increasing emphasis on operationally embedded agentic applications rather than standalone AI assistants. Oracle introduced additional prebuilt agents and automation capabilities across finance, procurement, project management, account reconciliation, master data management, payments, profitability analysis, and data exploration. The vendor has increasingly positioned these capabilities as embedded operational components within Fusion Applications, pairing domain-specific agents with predefined workflows, thresholds, and governance controls. Oracle also demonstrated agentic applications for ledger management, financial consolidation, and financial planning and analysis. In contrast, additional capabilities for collections and channel revenue management are expected to expand further across the platform. Last year, Oracle also introduced AI Agent Studio for Fusion Applications, allowing organizations to configure and deploy custom AI agents aligned with internal business processes and operational requirements. These capabilities are supported through Oracle Cloud Infrastructure (OCI), which continues to serve as the underlying infrastructure layer for Oracle's broader AI, analytics, database, and application strategy.

Oracle's AI strategy increasingly emphasizes operationally embedded AI agents capable of executing business processes directly within transactional workflows, rather than functioning solely as standalone productivity assistants or conversational interfaces.

Oracle is moving toward more autonomous finance operations through AI-driven exception handling, reconciliation automation, predictive forecasting, and workflow execution capabilities designed to reduce manual intervention across transactional processes.

The company's governance-centric AI approach combines domain-specific agents with embedded controls, role-based access management, auditability, approval workflows, and policy enforcement mechanisms integrated directly into business processes.

Oracle differentiates through its integrated technology stack spanning Fusion Applications, Oracle Cloud Infrastructure (OCI), analytics, database services, and AI capabilities.

Oracle continues to expand its AI strategy through operationally embedded agentic applications that combine specialized AI agents, predefined workflows, governance controls,

Recent updates and announcements include:

► **Agentic AI for Finance Operations.**

Oracle expanded agentic AI capabilities across finance workflows with the introduction of Ledger Agent, Payables Agent, Payments Agent, Expenses Agent, and Cash Processing Agent within Oracle Fusion Cloud ERP. These agents are designed to automate tasks such as invoice ingestion, payment execution, expense completion, compliance validation, cash reconciliation, and general ledger activities, helping reduce manual effort while improving financial process consistency and controls.

► **AI-Assisted Expense Automation.**

Oracle enhanced touchless expense management capabilities with AI-driven expense completion, receipt capture, matching, and policy compliance, including integrations with corporate card providers. These updates can help reduce administrative workload for employees and finance teams while improving expense accuracy and policy enforcement.

► **Embedded Banking and Cash Management Enhancements.**

Oracle expanded embedded banking and treasury capabilities through deeper integrations with financial institutions, including Bank of America and PNC Bank, as well as SEPA payment processing support. The updates improve real-time cash visibility, payment execution, positive pay controls, and bank transaction management within ERP workflows.

► **Predictive Cash Forecasting Enhancements.**

Oracle continued investments in predictive cash forecasting with expanded transaction traceability and forecasting intelligence tied directly to subledger activity. These updates can improve liquidity planning and provide finance teams with greater visibility into projected cash positions and operational drivers behind forecasts.

► **Automated Accounting and Financial Close Processing.**

Oracle introduced enhancements to accounting orchestration, automated posting, multi-ledger processing, and journal approval workflows within Oracle Fusion Cloud ERP. These updates are designed to reduce manual intervention during financial close processes while improving scalability for complex global accounting environments.

► **Redwood User Experience Expansion Across Finance Workflows.**

Oracle introduced and expanded AI Agent Studio, providing organizations with a governed framework for building, orchestrating, and deploying enterprise-specific AI agents across Fusion Applications.

Oracle continued expanding its Redwood user experience across finance and compliance workflows, including supplier bank account validation, collaboration messaging, tax reporting, and collections-related processes. These updates aim to improve usability, simplify navigation, and provide more consistent user experiences across ERP workflows.

► **Integrated Invoice and Receivables Processing.**

Oracle expanded receivables and invoice management capabilities with consolidated invoicing, REST API-based transaction processing, fulfillment-based invoicing, and controls designed to prevent self-review conflicts. These updates can help organizations streamline billing operations while strengthening financial governance and auditability.

► **Financial Controls and Compliance Modernization.**

Oracle introduced updates that support evolving global tax, reporting, and compliance requirements, including the Brazilian VAT reform, French e-reporting mandates, digital payment controls, and enhanced withholding tax processing. These updates help organizations manage changing regulatory requirements within standardized ERP workflows rather than relying on external processes or customizations.

► **Data Access and Integration Enhancements.**

Oracle expanded integration and extensibility capabilities through replicated read-only data extraction and AI-enabled B2B messaging enhancements. These updates can improve reporting accessibility, support external analytics initiatives, and simplify integration across enterprise applications and partner ecosystems.

► **Project and Asset Financial Management Enhancements.**

Oracle introduced updates supporting automated asset creation from payables invoices, project-linked expense distribution, equipment lease management, and expanded project costing adjustments. These capabilities improve financial traceability between operational activities, assets, and project accounting processes.

► **AI-Assisted Contract and Billing Management.**

Oracle introduced AI-assisted contract summarization capabilities within billing and revenue management workflows, alongside enhancements to contract request experiences. These updates can help organizations reduce manual review effort while improving

Oracle expanded agentic finance capabilities with new AI agents supporting general ledger, payables, payments, expenses, cash processing, and financial close activities.

visibility into project contracts, billing terms, and revenue-related activities.

► **Program and Resource Management Enhancements.**

Oracle expanded program management and resource assignment capabilities with usability and workflow improvements tied to project staffing and reporting processes. These updates are designed to improve resource coordination and reduce administrative friction when managing complex project environments.

► **Risk Management Analytics and Certification Enhancements.**

Oracle introduced a new risk management dashboard experience, along with AI-assisted security briefing recommendations for access certification activities. These updates improve visibility into governance and compliance activities while helping organizations streamline user access reviews and risk mitigation processes.

► **AI Agent Studio Expansion.**

Oracle significantly expanded AI Agent Studio capabilities with workflow agents, agent orchestration enhancements, external REST integrations, attachment handling, predefined topics, and faster testing through a new playground environment. These updates strengthen Oracle's ability to support configurable agentic workflows and enterprise-specific AI automation use cases. Beyond delivering prebuilt AI functionality, AI Agent Studio provides a governed framework for configuring, orchestrating, testing, and operationalizing enterprise-specific AI agents aligned with organizational policies, workflows, and approval structures.

► **Agentic Application Development Framework.**

Oracle introduced capabilities that allow organizations to build agentic applications using Oracle AI agents and to access those agents via REST APIs, Microsoft Teams, Slack, and external MCP server integrations. These updates position Oracle Fusion Applications as a broader operational AI platform rather than solely a transactional ERP system. These capabilities position Fusion Applications as an operational AI platform that supports enterprise-wide agent orchestration and business process automation across functional domains.

► **AI Monitoring and Value Measurement Tools.**

Oracle introduced new monitoring, evaluation, and value-tracking capabilities for AI agents, including RAG evaluation metrics and AI

Oracle continued investing in predictive cash forecasting, automated accounting orchestration, and financial close automation to reduce manual effort across complex finance operations.

value dashboards. These updates help organizations measure AI effectiveness, monitor agent performance, and improve governance around enterprise AI deployments.

► **Expanded Enterprise Data Connectivity for AI.**

Oracle expanded AI data connectivity through SharePoint connectors, web crawler integrations, and enhanced data extraction capabilities from read-optimized replicated data stores. These updates improve enterprise knowledge access for AI-driven workflows and simplify access to operational data across systems. Expanded connectivity supports enterprise knowledge access and operational data utilization while reducing dependence on fragmented integration architectures and disconnected AI services.

► **Redwood User Experience and Personalization Enhancements.**

Oracle continued expanding Redwood user experience capabilities with updated sign-in experiences, appearance editing, Redwood themes, and Redwood-based data extraction workflows. These updates improve consistency across Oracle Fusion Applications while giving organizations more flexibility in configuring user experiences.

► **Security and Multifactor Authentication Enhancements.**

Oracle expanded multifactor authentication controls and application security management capabilities across production and non-production environments. These updates strengthen identity security and improve governance for organizations operating large-scale enterprise environments.

► **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.

Oracle continued expanding the Redwood user experience across finance, compliance, and operational workflows to improve usability and consistency across Fusion Applications.

Experts

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

Deltek

Deltek is recognized as an Expert in the 2026 Enterprise ERP Technology Value Matrix for its portfolio of project-based ERP offerings. Deltek primarily serves organizations across government contracting, aerospace and defense, architecture and engineering, consulting, professional services, construction, and marketing industries. The vendor's ERP portfolio includes Costpoint, primarily aligned with government contractors and aerospace and defense organizations, offering a compliance-focused option with FedRAMP Moderate Equivalency to support CMMC compliance requirements; Vantagepoint, which supports architecture, engineering, and consulting firms; and Maconomy, which serves larger professional services organizations and agencies. Across these platforms, Deltek provides capabilities spanning project accounting, financial management, customer relationship management, procurement, human resources, resource management, project management, analytics, and compliance. Deltek continues to emphasize operational visibility, project lifecycle management, and workflow automation through modular platform architecture, low-code extensibility, and integration capabilities.

The vendor expanded embedded AI and user experience initiatives through Dela, Deltek's AI-enabled business orchestrator, which supports functions including opportunity analysis, project summaries, hiring optimization, time and expense management, and back-office process automation across the Deltek portfolio. The vendor also introduced Deltek Harmony™, a unified user experience initiative designed to improve consistency and usability across products, while continuing to expand generative AI-driven summarization and workflow support capabilities within platforms such as Costpoint, Vantagepoint, and GovWin IQ.

Recent updates and announcements include:

- ▶ **Deltek Platform and Intelligent Architecture Enhancements.**

Deltek introduced an updated platform strategy centered around its Deltek Native Architecture, focused on improving interoperability across ERP, accounting, project management, business development, and project delivery workflows. The updates emphasize unified operational data, workflow orchestration, and governed process management across project-centric environments.

- ▶ **Costpoint User Experience and AI Enhancements.**

Deltek delivers project-based ERP platforms designed for government contractors, professional services firms, architecture and engineering organizations, and project-centric businesses.

Deltek expanded Dela, its AI-enabled business orchestrator, with new capabilities supporting opportunity analysis, project delivery, hiring optimization, and back-office automation workflows.

Deltek introduced a redesigned Costpoint user experience built on the Harmony design framework alongside expanded Dela AI capabilities. These updates are designed to improve usability, reduce manual administrative effort, and support more efficient project, financial, and compliance management processes for government contractors.

► **Government Compliance and Cloud Security Enhancements.**

Deltek advanced its cybersecurity credentials by achieving ISO 27001 and CSA STAR Level 2 compliance for Costpoint GovCon Cloud Moderate (GCCM) and Maconomy and renewing FedRAMP Moderate Equivalency for Costpoint GCCM. These updates strengthen support for cybersecurity, regulatory, and Department of Defense cloud security requirements within government contracting environments.

Deltek strengthened its government contracting position by expanding cloud security certifications and renewing FedRAMP Moderate Equivalency support for Costpoint GovCon Cloud Moderate.

SAP

SAP is recognized as an Expert in the 2026 Enterprise ERP Technology Value Matrix. SAP S/4HANA is the vendor's flagship ERP platform and is designed to support large-scale, global organizations managing complex operational, financial, and supply chain environments. The platform supports both cloud and on-premises deployment models and provides industry-specific workflows and operational processes across product-centric and service-centric industries. Beyond core financial management capabilities, SAP's broader portfolio also includes supply chain management, procurement and spend management, human capital management, customer experience, and enterprise planning offerings integrated across the SAP ecosystem.

SAP S/4HANA supports complex global operations through a broad portfolio spanning ERP, supply chain, procurement, human capital management, customer experience, and enterprise planning capabilities.

SAP supports organizations across a broad range of industries, including manufacturing, consumer products, retail, life sciences, chemicals, energy, utilities, mining, construction, telecommunications, professional services, transportation, public sector, and financial services. The vendor continues to emphasize industry-specific operational functionality and process standardization through preconfigured workflows, embedded analytics, and broader integration across SAP Business Suite applications. Over the past 12 months, SAP has continued expanding AI, automation, and cloud transformation initiatives through SAP Joule, which serves as the vendor's AI engagement layer across SAP applications and data environments. SAP also continues to support cloud migration and modernization initiatives through RISE with SAP, designed to help existing SAP ERP customers transition from legacy on-premises environments to S/4HANA Cloud, and GROW with SAP, which is more broadly aligned with midsized

organizations seeking standardized cloud ERP deployments and faster implementation approaches.

Recent updates and announcements include:

► **SAP Autonomous Suite and Embedded AI Agents.**

SAP expanded embedded AI capabilities across finance, supply chain, procurement, HR, and customer workflows through its Autonomous Suite strategy, introducing additional AI assistants and operational agents embedded within SAP business applications. These updates are designed to automate transactional workflows, improve operational decision support, and enable AI-assisted execution within governed enterprise processes.

► **Joule Studio and Agent Development Enhancements.**

SAP introduced Joule Studio 2.0, expanding capabilities for AI agent development, orchestration, workflow generation, and operational automation across SAP and non-SAP environments. The platform is designed to support the creation of governed AI workflows using SAP business process logic, enterprise data context, and extensible orchestration capabilities.

► **Business Data Cloud and Enterprise Context Layer Expansion.**

SAP expanded Business Data Cloud and enterprise data interoperability capabilities to improve how AI agents access, reason over, and act on operational and analytical data across SAP and external environments. These updates are intended to improve consistency between enterprise data, workflows, governance policies, and AI-driven operational processes.

► **AI Governance, Company Memory, and Operational Control Framework.**

SAP introduced expanded AI governance and “company memory” capabilities designed to improve explainability, policy alignment, operational oversight, and contextual reasoning across AI-driven workflows. These updates are intended to help organizations govern AI agents and automate workflows in regulated, operationally complex enterprise environments.

► **Industry-Specific AI and Vertical Process Enhancements.**

SAP expanded its industry-focused AI capabilities through additional domain-specific agents and workflow automation aligned with regulated, operationally intensive industries. These updates leverage SAP’s industry process models and operational data structures to support more contextual AI-driven workflows

SAP continues to differentiate through industry-specific process support, embedded analytics, and standardized operational workflows across manufacturing, retail, life sciences, public sector, and service-based industries.

SAP expanded its Autonomous Suite strategy with additional AI agents and embedded automation capabilities designed to support finance, supply chain, procurement, HR, and customer-facing workflows.

across manufacturing, retail, life sciences, utilities, and supply chain operations.

► **Migration Modernization and AI-Assisted Transformation Tools.**

SAP expanded AI-assisted migration and modernization tooling tied to RISE with SAP and S/4HANA transformation initiatives. These updates are designed to automate portions of ERP migration, testing, configuration, and remediation activities while reducing complexity for organizations transitioning from legacy SAP ERP environments.

► **Expanded AI Ecosystem and Platform Partnerships.**

SAP expanded strategic partnerships with Anthropic, Microsoft, AWS, Google Cloud, and Palantir to strengthen AI reasoning, interoperability, analytics, migration tooling, and cloud platform capabilities across the SAP ecosystem. These partnerships are intended to support broader enterprise AI extensibility and operational integration across SAP and third-party environments.

SAP continued investing in Business Data Cloud to strengthen enterprise data interoperability and provide a consistent foundation for AI-driven operational processes and decision-making.

Accelerators

Accelerators in the Enterprise ERP Technology Value Matrix are Cegid, Epicor, and QAD | Redzone.

Cegid

Cegid XRP is recognized as an Accelerator in the 2026 Enterprise ERP Technology Value Matrix. Cegid primarily serves mid-sized and enterprise organizations across European markets, with offerings spanning ERP, finance, human resources, retail, and business management. The vendor's ERP portfolio includes Cegid XRP Flex, primarily designed for growing small and midsized organizations that require modular cloud ERP capabilities, and Cegid XRP Ultimate, which is better aligned with midsized and large organizations managing multi-entity and multi-process operations. Across these offerings, Cegid provides functionality spanning financial management, sales and distribution, supply chain operations, inventory management, manufacturing, procurement, project management, human resources, and analytics, all within a modular, cloud-based architecture.

Cegid continues to emphasize operational connectivity, modular deployment, and interoperability across business functions through its XRP platform strategy. Beyond ERP, the vendor maintains a broader portfolio supporting treasury management, accounting, retail and unified commerce, taxation, workforce management, talent acquisition,

Cegid XRP provides modular cloud ERP capabilities supporting finance, supply chain, manufacturing, human resources, and business operations across midsized and enterprise organizations.

travel and expense management, and customer engagement processes. In North America, Cegid's presence is more heavily concentrated around retail and workforce-related offerings, including unified commerce, point-of-sale, inventory visibility, store operations, and employee experience solutions. The vendor also continues expanding embedded AI and automation capabilities through Cegid Pulse, which serves as the company's broader AI platform supporting workflow assistance, operational insights, and productivity improvements across the Cegid application portfolio.

Cegid expanded its AI capabilities through Cegid Pulse, delivering workflow assistance, operational insights, and productivity enhancements across its portfolio.

Epicor

Epicor is recognized as an Accelerator in the 2026 Enterprise ERP Technology Value Matrix. The vendor's ERP portfolio primarily serves midmarket and enterprise organizations across manufacturing, distribution, automotive, retail, and building supply industries. Epicor provides functionality spanning financial management, supply chain operations, planning, customer relationship management, project management, analytics, and business intelligence, while continuing to emphasize industry-specific workflows and operational flexibility. Epicor's primary ERP offerings include Epicor Kinetic, which is aligned with discrete manufacturing and make-to-order environments; Prophet 21, focused on distribution organizations; and BisTrack, designed for building supply and lumber businesses. The vendor also continues to emphasize configurability through low-code/no-code capabilities, prebuilt API connectors, and composable add-on modules, enabling organizations to align deployments more closely with operational and industry-specific requirements.

Epicor expanded its focus on AI, analytics, and cloud modernization by introducing Epicor Prism and additional enhancements to the Epicor Grow Data Platform. Epicor Prism introduces a network of industry-focused AI agents designed to support conversational workflows, automation, and operational decision support across supply chain and ERP processes. Epicor Grow provides a centralized data environment that combines data lake and warehouse capabilities to support analytics, reporting, and operational visibility across ERP environments. The vendor also introduced Ascend with Epicor, a migration program designed to support organizations transitioning from on-premises or third-party ERP environments to Epicor's cloud platform. Epicor continues expanding its enterprise capabilities through investments in cloud architecture, AI, analytics, supply chain functionality, and industry-specific operational workflows, enabling the platform to support increasingly complex manufacturing, distribution, and multi-site business environments.

Epicor delivers industry-specific ERP platforms for discrete manufacturing, distribution, and building supply organizations through Epicor Kinetic, Prophet 21, and BisTrack.

Recent updates and announcements include:

► **Epicor Lux and Prism Agent Foundry.**

At Insights 2026, Epicor introduced Epicor Lux and Prism Agent Foundry, expanding governance, orchestration, and self-service AI agent development capabilities across the Epicor platform. These updates provide customers and partners with tools to build, customize, monitor, and govern vertical AI agents while maintaining ERP-level security, workflow controls, and operational oversight.

► **Headless ERP and AI Interoperability Enhancements.**

Epicor expanded API-first and headless ERP capabilities supporting AI-driven interfaces, agentic workflows, and interoperability with external large language model platforms through emerging standards such as MCP. These updates are designed to allow AI agents to securely execute operational workflows directly within ERP-managed business processes while preserving enterprise governance and security controls.

► **Epicor Prism and Vertical AI Expansion.**

Epicor expanded Epicor Prism, a portfolio of industry-focused AI agents designed for manufacturing, distribution, logistics, and supply chain workflows across Epicor Kinetic and Prophet 21. The platform includes capabilities supporting inventory optimization, shipment tracking, freight analysis, MRP interpretation, EDI monitoring, AP document capture, business rule automation, and workflow execution directly within ERP processes.

► **Cloud-First ERP Strategy and Platform Consolidation.**

Epicor continued advancing its cloud-first ERP strategy through the expansion of the Ascend with Epicor initiative, integrating ERP, analytics, AI, and cloud applications into a unified platform environment. The vendor also announced future limitations on major on-premises feature releases for several core ERP products, reinforcing long-term investment in cloud-based deployments and continuous delivery models.

► **Cloud Management and Self-Service Enhancements.**

Epicor expanded cloud management, analytics, and self-service administration capabilities across its ERP portfolio, including enhancements to the Epicor Grow Data Platform and Cloud Management Portal. These updates are designed to reduce IT dependency while improving operational visibility, environment

Epicor expanded its AI strategy through Epicor Prism, introducing industry-focused AI agents designed to automate workflows and support operational decision-making across ERP processes.

management, and user access to embedded analytics and reporting tools.

► **Kinetic and Prophet 21 Platform Enhancements.**

Epicor introduced major updates across Kinetic and Prophet 21, including expanded AI integrations, workflow automation, extensibility improvements, ESG-related functionality, and enhanced logistics and compliance capabilities. The updates also include expanded business rule configuration, mass update tools, shipment tracking visibility, and support for broader operational workflow automation.

► **Connected Supply Chain and Compliance Integrations.**

Epicor expanded integration capabilities across supply chain collaboration and compliance workflows through partnerships and integrations supporting supplier collaboration, tax automation, logistics workflows, and connected operational processes. These updates strengthen visibility and coordination across procurement, fulfillment, and financial operations.

► **Expanded Capabilities Through Acquisitions.**

Epicor continued expanding industry-specific functionality through acquisitions, supporting demand planning, inventory optimization, connected worker operations, product information management, and digital commerce capabilities. These additions expand Epicor's ability to provide more integrated operational and supply chain functionality within its ERP ecosystem rather than relying on standalone third-party applications.

► **Governance Enhancements.**

Epicor continued expanding governance and security controls across Prism AI workflows and cloud environments. The updates include role-based access controls, audit logging, approval-chain governance, and human-in-the-loop operational oversight designed to support secure AI-assisted execution across manufacturing, distribution, logistics, and financial workflows.

Epicor introduced Epicor Lux and Prism Agent Foundry, enabling customers and partners to build, govern, and orchestrate AI agents within ERP-managed business environments.

Epicor expanded API-first and headless ERP capabilities to support AI interoperability, agentic workflows, and secure integration with external AI platforms and services.

QAD | Redzone

QAD | Redzone is recognized as an Accelerator in the 2026 Enterprise ERP Technology Value Matrix. The vendor primarily serves manufacturers across industries, including automotive, food and beverage, high technology, industrial manufacturing, and life sciences. Over the past year, the company expanded its positioning around a broader manufacturing operations platform strategy that combines

QAD Adaptive ERP, Redzone connected workforce capabilities, and Champion AI within a unified operational environment. QAD Adaptive ERP continues to serve as the core transactional and operational backbone of the platform, supporting manufacturing, supply chain, procurement, quality management, transportation execution, global trade, scheduling, warehousing, and supplier management workflows. These capabilities are complemented by Redzone's frontline workforce and productivity tools, which are designed to improve communication, operational visibility, and manufacturing execution across plant environments.

The vendor continues to emphasize flexibility and process adaptability through the QAD Enterprise Platform, which enables organizations to configure workflows, automate operational processes, and tailor deployments to industry-specific manufacturing requirements without disrupting core environments. QAD | Redzone also expanded its focus on AI-driven operational support through Champion AI, which provides organizations with workflow guidance, operational insights, and decision support across manufacturing and supply chain processes. The platform is cloud-native, delivered through Amazon Web Services (AWS), and fully managed through QAD Cloud Services.

The system offers a consistent user experience across devices, with built-in personalization and extensibility features. Users benefit from no-code/low-code extensibility tools, with existing 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.

Updates over the last 12 months:

► **Champion AI Expansion.**

Bolstered by its November acquisition of Kavida.ai, QAD | Redzone expanded Champion AI capabilities across operational, supply chain, and manufacturing workflows, including AI agents supporting sourcing, sales, procurement, and implementation-related activities. The updates are designed to improve operational decision support, automate repetitive workflows, and provide role-based AI assistance across manufacturing environments.

► **Expanded Manufacturing and Warehouse Functionality.**

QAD | Redzone introduced a new warehousing solution, which is fully embedded in Adaptive, enabling streamlined implementations without the need for custom integrations. Also introduced were

QAD | Redzone combines Adaptive ERP, Redzone connected workforce capabilities, and Champion AI within a unified manufacturing operations platform designed for complex industrial environments.

QAD | Redzone expanded Champion AI capabilities through its acquisition of Kavida.ai, introducing additional AI agents supporting sourcing, procurement, sales, and manufacturing workflows.

enhancements across production scheduling, integrated connected workforce functionality, and industry-specific manufacturing capabilities. These updates include support for batch balancing, crew size, outbound logistics catch weight, and OEM-related operational processes to improve manufacturing execution and supply chain coordination.

► **Web-Based Platform and User Experience Enhancements.**

QAD Redzone continued investments in browser-based platform modernization through Web UI improvements, expanded integration capabilities, low-code extensions, API support, and customization migration tools. These updates are intended to improve usability, simplify extensibility, and reduce the complexity of maintaining customized ERP environments.

► **Source-to-Contract and AP Automation Enhancements.**

QAD Redzone expanded its AI-driven automation capabilities to support source-to-contract workflows, accounts payable automation, EDI processing, and cost optimization. These updates are designed to reduce manual administrative effort while improving the efficiency of procurement and financial processes.

► **Platform Reliability and Connectivity Improvements.**

QAD Redzone introduced enhancements focused on platform reliability, security, connectivity, and performance across the Adaptive ERP environment. These updates support broader enterprise scalability and operational continuity as organizations expand cloud-based manufacturing and supply chain operations.

QAD | Redzone introduced a fully embedded warehouse management solution within Adaptive ERP, helping manufacturers streamline warehouse operations without relying on third-party integrations.

Core Providers

Core Providers in the Enterprise ERP Technology Value Matrix are Ramco, Sage X3, and Workday.

Ramco

Ramco Systems is recognized as a Core Provider in the 2026 Enterprise ERP Technology Value Matrix. Ramco Systems primarily serves midsize and enterprise organizations across industries, including manufacturing, logistics, aviation, facilities management, engineering and construction, professional services, energy and utilities, and asset-intensive operations. The vendor's ERP platform supports financial management, supply chain operations, manufacturing, enterprise asset management, project management, quality management, human resources, payroll, and logistics workflows within a unified cloud-based environment.

Ramco Systems delivers industry-focused ERP capabilities for aviation, logistics, asset-intensive, and service-centric organizations through a unified cloud-based platform.

Ramco also provides industry-specific ERP offerings tailored to aviation, logistics, asset-centric, and service-centric organizations, along with preconfigured operational frameworks for industries such as facilities management, cement, foundry, and discrete manufacturing.

Ramco Systems continues to emphasize flexibility, mobility, and operational configurability through its next-generation ERP architecture built on Ramco VirtualWorks and its “Power of One” platform approach. The vendor enables organizations to configure and extend ERP workflows through a unified codebase architecture that supports customization and process adaptability without extensive redevelopment across environments. The platform also incorporates embedded analytics, workflow automation, real-time operational processing, and machine-learning-driven optimization capabilities to enhance operational visibility and decision-making across finance, manufacturing, logistics, and asset management environments.

Ramco Systems is evolving its ERP platform toward a fully AI-native, agent-driven, and conversational model in its focused segments, with flexible user interfaces and self-service reporting designed to enhance user productivity, autonomy, and decision-making.

Recent updates and announcements include:

► **Chia Conversational AI Agent Platform.**

Ramco Systems introduced Chia, a conversational AI agent platform designed to automate customer service and workflow execution across enterprise environments. The platform supports multi-step workflow orchestration, enterprise system integrations, multilingual interactions, and AI-driven task execution intended to reduce manual effort across customer support and operational workflows.

► **No-Code AI Agent and Workflow Configuration.**

Ramco Systems introduced a no-code AI Agent Foundry and Natural Language Workflow capabilities, enabling organizations to configure AI-driven workflows and automation logic using plain-language instructions. These updates are designed to reduce dependency on technical development resources while accelerating deployment of workflow-specific AI automation initiatives.

► **Enterprise AI Governance and Operational Visibility Enhancements.**

Ramco Systems expanded governance, auditability, and monitoring capabilities for AI-driven workflows through explainability tools, workflow logs, role-based access controls, and operational

Ramco Systems continues to differentiate through its “Power of One” architecture, enabling organizations to configure workflows and e

performance dashboards. These updates are intended to improve transparency, compliance oversight, and operational visibility across AI-assisted business processes.

► **Advancement of Conversational ERP and Workflow Automation.**

Ramco Systems expanded conversational ERP capabilities and strengthened workflow automation across procurement, invoicing, inventory tracking, and operational processes, enabling natural-language-driven interactions and improved transaction execution in select customer deployments.

► **Enhancements in Finance Automation and User Experience.**

Ramco Systems introduced improvements in accounts payable automation, interactive dashboards, and overall user-centric enterprise experiences, enabling better usability, streamlined processes, and improved operational efficiency.

► **Adoption of Role-Based Dashboards for Productivity.**

Ramco Systems enabled smarter role-based dashboards that were actively adopted by customers, delivering improved contextual visibility, personalized insights, and enhanced enterprise productivity.

► **Expansion of BInGO Analytics and Self-Service Configurability.**

Ramco Systems scaled its proprietary analytics platform, BInGO, with 50+ real-time dashboards and strengthened self-service capabilities, allowing users to configure workflows, alerts, and operational rules independently.

Ramco Systems introduced Chia, a conversational AI agent platform designed to automate workflow execution, enterprise interactions, and customer service processes across operational environments.

Sage X3

Sage X3 is recognized as a Core Provider in the 2026 Enterprise ERP Technology Value Matrix. Sage X3 primarily serves midsize and large organizations across industries, including discrete manufacturing, process manufacturing, food and beverage, chemicals, wholesale distribution, and business services. Operating across more than 80 countries, the platform provides integrated functionality spanning financial management, sales, customer relationship management, project management, supply chain operations, manufacturing, quality management, planning, and inventory management within a unified ERP environment. Sage X3 is designed to support multi-site and multinational organizations requiring operational visibility across finance, manufacturing, distribution, and supply chain workflows from a centralized platform. The vendor continues expanding its broader Sage AI strategy through Sage Copilot, which serves as the experience layer

Sage X3 supports multinational manufacturing, distribution, and process industry organizations through integrated finance, supply chain, manufacturing, quality, and inventory management capabilities.

for embedded AI interactions across the Sage portfolio, while also supporting workflow automation, guided operational processes, and low-code extensibility through capabilities such as X3 Builder and integrated workflow services.

The platform continues to emphasize industry-specific operational functionality and process coordination across manufacturing and supply chain environments. Sage X3's production management capabilities support manufacturing execution through multi-level bill of materials (BOM) management, engineering change control, traceability, and production workflow coordination designed to improve manufacturing visibility and product consistency across operations. The platform's supply chain management capabilities span procurement, inventory, purchasing, sales, manufacturing, and financial coordination workflows, while supporting supplier management, RFQ processing, purchase planning, and supplier invoice management to improve operational responsiveness and supply chain visibility across distribution and manufacturing environments.

Updates over the last 12 months:

► **Operational Intelligence and Contextual AI Enhancements.**

Sage expanded Sage X3 operational intelligence capabilities through contextual insights, conversational AI, and real-time operational monitoring supporting sales, supply chain, and operational workflows. These updates are designed to improve responsiveness by surfacing operational signals, alerts, and recommendations directly within ERP workflows before issues escalate into larger operational disruptions.

► **Agent-Based Operational Workflow Automation.**

Sage introduced additional operational AI agents across finance, sales, and operational workflows in Sage X3, including Finance Intelligence, Sales Intelligence, and Operational Intelligence. These capabilities support proactive monitoring, anomaly detection, workflow validation, and operational recommendations designed to reduce manual intervention and improve execution across ERP-managed processes.

► **Supply Chain Intelligence and End-to-End Visibility Enhancements.**

Sage expanded Sage Supply Chain Intelligence capabilities to improve supplier collaboration, inventory visibility, shipment monitoring, and operational coordination across manufacturing and distribution environments. These updates are intended to help

Sage X3 continues to emphasize operational visibility and manufacturing process coordination through industry-specific functionality spanning production, procurement, inventory, and supply chain workflows.

organizations improve supply chain responsiveness and reduce disruptions across planning and fulfillment operations.

► **AI-Powered Accounts Payable and Financial Workflow Automation.**

Sage expanded AI-driven financial workflow automation within Sage X3 through AP automation, intelligent document capture, vendor matching, and operational finance intelligence capabilities. These updates are designed to reduce manual processing effort, improve financial accuracy, and accelerate operational finance workflows.

► **Business Reporting and AI-Generated Insights Enhancements.**

Sage introduced expanded reporting and dashboarding capabilities through Sage Business Reporting and AI-generated operational insights embedded within ERP workflows. These updates improve operational visibility and enable organizations to analyze financial and operational data through more contextual, conversational experiences.

► **Developer Experience and Open AI Architecture Enhancements.**

Sage expanded Sage X3's extensibility and AI architecture capabilities through Sage X3 Builder, MCP-based integrations, AI-generated workflows, agent-creation tooling, and broader API-driven interoperability initiatives. These updates are intended to support customization, operational workflow automation, and integration with external AI and enterprise application environments.

Sage expanded its AI strategy through Sage Copilot and a growing portfolio of operational intelligence agents designed to support finance, sales, and operational decision-making workflows.

Workday

Workday is recognized as a Core Provider in the 2026 Enterprise ERP Technology Value Matrix. Workday's cloud-based platform provides functionality spanning financial management, human capital management, enterprise planning, procurement, analytics, and project management within a unified operational environment. The vendor primarily serves midsize and enterprise organizations across industries, including professional services, retail, healthcare, education, utilities, financial services, and telecommunications. Workday continues to emphasize a modular deployment model that allows organizations to implement applications independently based on operational requirements, including finance, planning, procurement, analytics, and human resources capabilities, without requiring full-suite deployment. While deployment is modular, the underlying data and security framework remain natively unified rather than fragmented modules

Workday combines financial management, human capital management, planning, procurement, analytics, and project management capabilities within a unified cloud-based platform.

patched together. The vendor provides AI-driven workflow and operational intelligence capabilities that support embedded automation, skills intelligence, financial analysis, workforce planning, and conversational assistance across the broader Workday platform. Sana is an AI-powered enterprise knowledge management platform that acts as a horizontal user interface, allowing employees to search corporate data, automate workflows, and interact with conversational AI agents across Workday and connected third-party systems.

Recent updates and announcements include:

► **Expansion of Workday AI Agents.**

Workday expanded its AI portfolio with additional AI agents supporting HR, finance, procurement, contract management, sourcing, employee self-service, and frontline workforce workflows. These updates are designed to automate operational tasks, improve decision support, and extend AI-driven workflow assistance across finance and human capital management processes.

► **Agent System of Record (ASOR) and AI Governance Framework.**

Workday introduced its Agent System of Record (ASOR), a centralized framework for managing AI agents, governance, identity, and operational oversight across enterprise environments. The platform was expanded through the Workday Agent Partner Network and integrations with Microsoft Azure AI Foundry, Copilot Studio, and Microsoft Entra Agent ID to support interoperability and governance across third-party AI ecosystems.

► **Workday Data Cloud and Developer Platform Enhancements.**

Workday introduced Workday Data Cloud and Workday Build to strengthen data unification, extensibility, and AI application development capabilities across the platform. These updates enable organizations to combine Workday operational data with external enterprise data sources while supporting the development of custom AI agents, workflow automation, and broader developer extensibility.

► **Expansion Through Strategic AI and Integration Acquisitions.**

Workday expanded AI, integration, and workflow automation capabilities through acquisitions, including Flowise, Paradox, Sana, and Pipedream. These additions strengthen Workday's capabilities in conversational AI, low-code AI agent development, enterprise knowledge management, and workflow orchestration across Workday and third-party systems.

Workday introduced its Agent System of Record (ASOR), providing a centralized framework for AI agent governance, identity management, operational oversight, and interoperability across enterprise environments.

► **Midmarket, Government, and Sovereign Cloud Expansion.**

Workday expanded industry and regional capabilities through the launch of Workday Government, Workday GO for midsized organizations, and the introduction of an EU Sovereign Cloud offering. The vendor also expanded regional investments across India, the United Kingdom, and Ireland to support local cloud delivery, AI operations, and regulatory compliance requirements.