Midsize Manufacturing ERP Buyers Guide

Software Provider and Product Assessment



ISG Research

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Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements.**

The 2025 ISG Buyers Guides™ for Manufacturing ERP, covering Manufacturing ERP and Midsize Manufacturing ERP, are the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for manufacturing ERP software. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience in its capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of manufacturing ERP software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of manufacturing ERP software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating manufacturing ERP software and offer these Buyers Guides as both the results of our in-depth analysis of these providers and as an evaluation methodology.

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How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to assess existing approaches and software providers or establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes in the most efficient manner.

1. Define the business case and goals.
   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business and IT needs.
   Defining the business and IT requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
   Utilize the product experience: capability and platform with support for adaptability, manageability, reliability and usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the software provider and products properly.
   Apply a weighting the evaluation categories in the evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

Using the ISG Buyers Guide and process provides enterprises a clear, structured approach to making smarter software and business investment decisions. It ensures alignment between strategy, people, processes and technology while reducing risk, saving time and improving outcomes. The ISG approach promotes data-driven decision-making and collaboration, helping choose the right software providers for maximum value and return on investment.

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Midsize Manufacturing ERP

Enterprise resource planning (ERP) systems have evolved from manufacturing tools into essential platforms that unify finance, production and operations to improve efficiency and visibility. ISG Research defines manufacturing ERP systems as comprehensive software platforms that manage the operational and financial processes of a manufacturing enterprise while recording transactions and financial consequences to support accounting, production and supply chain management. ERP consolidates data from finance, logistics, procurement, maintenance and quality into a single database, providing greater control across operations.

> **Midsize enterprises use Tier II ERP systems that balance functionality and simplicity.**

Midsize enterprises—typically those with 100 to 999 employees—use Tier II ERP systems that balance functionality and simplicity to meet operational and financial needs. These platforms combine configurability, cost efficiency and performance, making them easier to implement and maintain than Tier I systems while still providing the scalability midsize companies need for growth.

Tier II manufacturing ERP systems include preconfigured, industry-specific capabilities that shorten implementation and reduce customization, offering cost-effective control and better visibility into operations. Their design emphasizes usability, analytics and rapid deployment while supporting production, quality and supply chain management. Many large manufacturers also use Tier II systems in divisions or regions where faster deployment or lower cost is a priority.

Manufacturing ERP software continues to evolve through cloud computing. Once adopted slowly, cloud-based ERP systems are now the preferred model for midsize manufacturers replacing legacy systems to improve performance and scalability. We assert that by 2028, over 80% of ERP systems purchased by non-product companies will be deployed in the cloud to promote continuity, improve performance and lower costs. Cloud ERP software reduces infrastructure demands, shortens upgrade cycles and provides a foundation for innovation.

Today's manufacturing ERP systems benefit from emerging technologies. Software providers continuously embed AI and generative AI that automate planning tasks, enhance accuracy and accelerate decision-making to streamline production workflows and improve operational insight.

The 2025 ISG Buyers Guide™ for Midsize Manufacturing ERP evaluates software providers and products in key areas, including manufacturing operations, advanced planning and scheduling, demand planning, manufacturing execution, shop floor management, quality, maintenance and distribution. This research assessed the following 14 software providers: Acumatica, Aptean, Epicor, Exact, Forterro, IFS, Infor, Microsoft, Oracle NetSuite, QAD, Ramco, Rockwell Automation, Sage X3 and SAP Business One.

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Key Takeaways

Midsize manufacturing ERP platforms integrate financial, production and supply chain processes to improve operational visibility, efficiency and control. These systems balance functional breadth with configurability and cost efficiency, supporting modernization without Tier I complexity. Cloud architectures, embedded analytics and industry templates accelerate deployment and strengthen governance, while AI-driven automation expands ERP software's role in predictive, data-driven operations.

Software Provider Summary

The ISG Buyers Guide™ for Midsize Manufacturing ERP evaluates 14 software providers offering products supporting production operations, planning, scheduling, quality, maintenance and distribution. The research ranked the top three overall leaders as IFS, Sage X3 and Infor. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. IFS, Infor, Microsoft and Sage X3 were rated as Exemplary, with Acumatica, Epicor and Forterro rated as Innovative. Oracle NetSuite, QAD and SAP Business One were rated as Assurance, and Aptean, Exact, Ramco and Rockwell Automation were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%) which includes adaptability, manageability, reliability and usability. IFS, Sage X3 and Infor achieved the highest performance as Leaders in this category, supported by breadth and depth across midsize manufacturing ERP capabilities and robust platform architecture that enables adaptability, manageability, reliability and usability. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Oracle NetSuite, IFS and Sage X3 were the Leaders in this category showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Midsize manufacturers should evaluate ERP software modernization as a strategic investment that strengthens production visibility, quality control and operational coordination. Buyers should prioritize platforms that combine strong configurability, cloud-native extensibility and embedded intelligence to streamline planning, scheduling and shop-floor execution. Organizations benefit from selecting systems that integrate cleanly with MES, PLM and supply-chain applications, while reducing customization risk. A structured roadmap enables midsize manufacturers to align ERP system decisions with operational efficiency, compliance requirements and long-term growth objectives.

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The Findings – Midsize Manufacturing ERP

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds IFS atop the list, followed by Sage X3 and Infor. Providers that place in the top three of a category earn the designation of Leader. IFS has done so in five categories, Infor and Sage X3 in four and Microsoft, Oracle NetSuite and SAP Business One in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Midsize Manufacturing ERP

Overall

Providers	Grade	Performance
IFS	B++	*Leader* 78.9%
Sage X3	B+	*Leader* 73.4%
Infor	B+	*Leader* 72.7%
Microsoft	B+	72.0%
Acumatica	B+	69.9%
Forterro	B	66.4%
Oracle NetSuite	B	66.3%
Epicor	B	65.9%
SAP Business One	B	65.4%
Aptean	B-	61.6%
Rockwell Automation	B-	60.2%
QAD	B-	56.3%
Ramco	C++	51.3%
Exact	C+	46.8%

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Source: ISG Research
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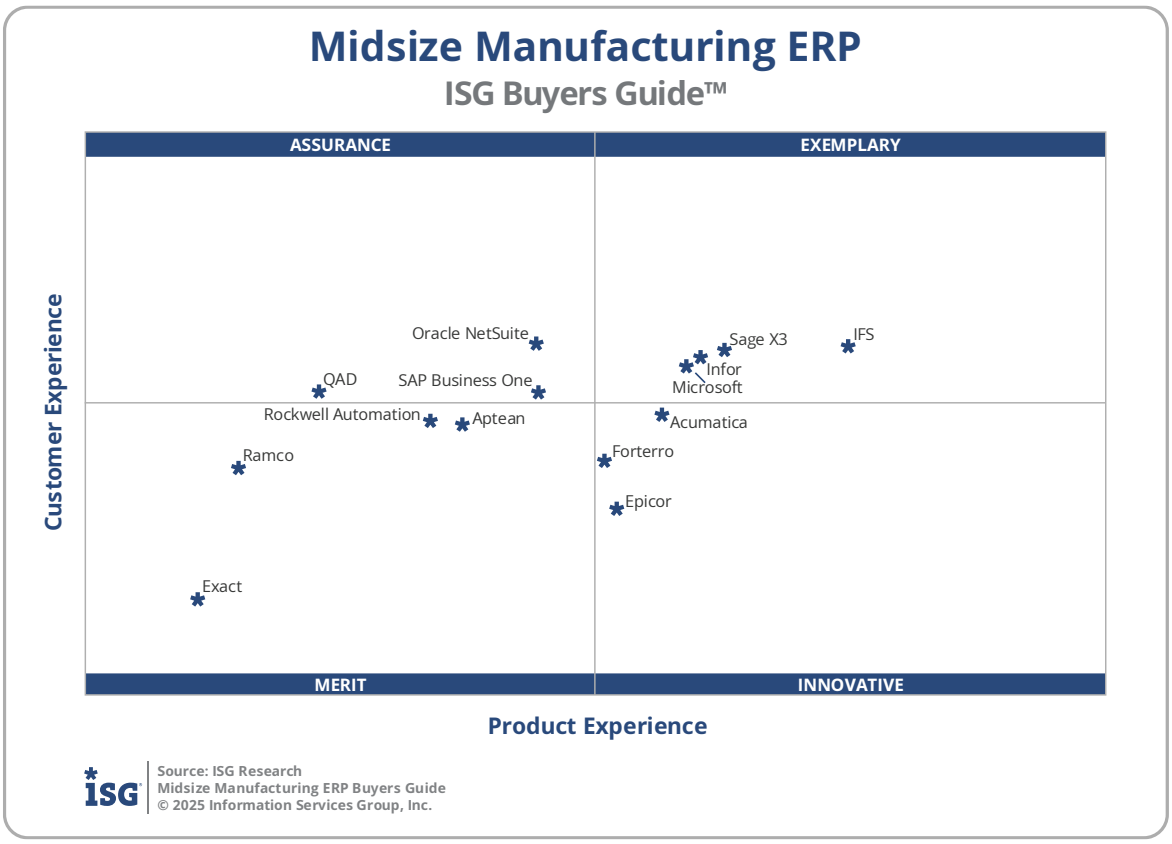
The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: IFS, Infor, Microsoft and Sage X3.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: Acumatica, Epicor and Forterro.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: Oracle NetSuite, QAD and SAP Business One.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Aptean, Exact, Ramco and Rockwell Automation.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

Midsize Manufacturing ERP
Product Experience

Providers	Grade	Performance
IFS	B++	Leader 63.1%
Sage X3	B+	Leader 57.8%
Infor	B+	Leader 56.9%
Microsoft	B+	56.4%
Acumatica	B+	55.3%
Epicor	B	53.4%
Forterro	B	52.8%
SAP Business One	B	50.1%
Oracle NetSuite	B-	50.0%
Aptean	B-	46.9%
Rockwell Automation	B-	45.6%
QAD	C++	40.9%
Ramco	C+	37.5%
Exact	C+	35.8%

Source: ISG Research
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The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (35%) and Platform (45%). IFS, Sage X3 and Infor were designated Product Experience Leaders.

Capability of the Product

The Capability criteria is designed to assess the products and features across a broad range of manufacturing ERP system capabilities that support the following areas: advanced planning and scheduling, demand planning, manufacturing execution, shop floor management, materiel flow optimization, multi-site operations, quality management, supplier and partner collaboration, facilities and equipment maintenance, warranty management, environmental data and metrics tracking, smart manufacturing and distribution.

Midsize Manufacturing ERP
Capability

Providers	Grade	Performance
IFS	A-	Leader 82.5%
Infor	B+	Leader 73.4%
Microsoft	B+	Leader 72.4%
Sage X3	B+	71.0%
Acumatica	B	67.8%
Epicor	B	67.4%
Forterro	B-	62.0%
Oracle NetSuite	B-	61.6%
Rockwell Automation	B-	60.6%
QAD	B-	57.0%
SAP Business One	C++	52.3%
Ramco	C++	50.3%
Aptean	C+	47.1%
Exact	C+	44.7%

Source: ISG Research
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ISG Research evaluated 19 different function points in three sections to assess the full scope of manufacturing ERP system capabilities. It also examined the investment by the software provider. The research weights Capability at 35% of the overall rating. IFS, Infor and Microsoft are the Leaders in this category.

The Capability evaluation framework for manufacturing ERP systems provides a framework for enterprises. Software providers that have more breadth and depth and support the entire set of needs fared better.

Platform of the Product

The Platform category evaluates the underlying requirements of a platform and examines how well a software product meets enterprise needs across business and IT. It measures how effectively the product can be managed and configured and integrated into enterprise environments, how efficiently it can be governed and secured, how reliably it performs and scales, and how intuitively it supports users across varied roles and skill levels. The platform category in the ISG Buyers Guide examines specific requirements for adaptability, manageability, reliability and usability.

The grading of the underlying platform focuses on a software product's overall robustness and the flexibility of a provider's software foundation. Adaptability measures a product's ability to be customized and integrated across systems and data, while manageability focuses on governance, security and compliance. Reliability considers performance and scalability across environments, and usability assesses how intuitive and accessible the product is through design, use of AI and ongoing provider investment.

ISG Research evaluated 16 function points in 5 sections to assess the full scope of platform capabilities. The research weights Platform at 45% of the overall rating. IFS, Sage X3 and SAP Business One are the Leaders in this category.

Platform is an essential evaluation category as it indicates the strength and resilience of a software provider's product architecture. A well-designed platform ensures secure and compliant operations, dependable scalability and uptime, and a unified, intuitive experience for range of usage personas. It also reflects the provider's capacity to enable deployment models while maintaining flexibility for enterprise demands.

Midsize Manufacturing ERP
Platform

Providers	Grade	Performance
IFS	B++	*Leader* 76.0%
Sage X3	B+	*Leader* 72.6%
SAP Business One	B+	*Leader* 70.7%
Acumatica	B+	70.1%
Infor	B+	69.3%
Forterro	B+	69.1%
Microsoft	B+	69.0%
Aptean	B	67.6%
Epicor	B	66.3%
Oracle NetSuite	B	63.2%
Rockwell Automation	C++	54.2%
QAD	C+	46.5%
Exact	C+	44.8%
Ramco	C+	44.1%

Source: ISG Research
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Software providers that performed best in the Platform category were those that have support for the breadth and depth of needs across business and IT supporting adaptability, manageability, reliability and usability. Providers with lower performance were challenged in one or more of these areas or did not demonstrate a cohesive, enterprise-grade approach. The underlying platform for a software provider's products is essential in any evaluation.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are Oracle NetSuite, IFS and Sage X3. These category leaders best communicate commitment and dedication to customer needs.

Midsize Manufacturing ERP

Customer Experience

Providers	Grade	Performance
Oracle NetSuite	B++	*Leader* 15.9%
IFS	B++	*Leader* 15.9%
Sage X3	B++	*Leader* 15.8%
Infor	B++	15.6%
Microsoft	B++	15.5%
QAD	B+	15.0%
SAP Business One	B+	14.9%
Acumatica	B+	14.5%
Rockwell Automation	B+	14.3%
Aptean	B+	14.3%
Forterro	B	13.6%
Ramco	B	13.4%
Epicor	B	12.6%
Exact	C++	10.8%

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Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Midsize Manufacturing ERP

For inclusion in the 2025 ISG Buyers Guide™ for Midsize Manufacturing ERP, a software provider must be in good standing financially and ethically, have at least $40 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

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Products Evaluated

Provider	Product Names	Version	Release Month/Year
Acumatica	Acumatica Cloud ERP	2025 R1	March 2025
Aptean	Aptean ERP	8.04 July 2025 HF1	July 2025
Epicor	Epicor Kinetic	2025.1	May 2025
Exact	Exact Globe+	Product Update 506	August 2025
Forterro	abas ERP	2024.Q3.1 (Service Pack)	June 2025
IFS	IFS Cloud	IFS Cloud 25R1	April 2025
Infor	Infor CloudSuite	N/A	April 2025
Microsoft	Dynamics 365 Finance	10.0.44	June 2025
Oracle NetSuite	NetSuite ERP	2025.2	July 2025
QAD	QAD Adaptive ERP	N/A	August 2025
Ramco	Ramco ERP	N/A	August 2025
Rockwell Automation	Plex Enterprise Resource Planning	N/A	August 2025
Sage X3	Sage X3	2025 R1 (12.0.37)	June 2025
SAP Business One	SAP Business One	10.0 SP 2505	May 2025

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Sage X3

Company and Product Profile

Sage X3, v. 2025 R1 (12.0.37), released June 2025

"Sage X3 is a comprehensive ERP (enterprise resource planning) software that helps businesses manage their finances, operations, and supply chain and improve their efficiency, profitability, and agility. Available through multiple cloud deployment options, Sage X3 gives you the flexibility to choose the cloud offering that works for your organization." – Sage

Summary

Our analysis classified Sage X3 as Exemplary, receiving an overall grade of B+ with a 73.4% performance. Sage X3's best grouped results came in Customer Experience with a 78.8% performance and a B++ grade. In Product Experience, Sage X3 received a B+ grade with a 71.9% performance. Sage X3 was designated an Overall Leader as well as a Leader in Product Experience, Platform and Customer Experience.

Midsize Manufacturing ERP

Sage X3

Exemplary Provider

Category	Performance	Grade
Overall	*Leader* 73.4%	B+
Product	*Leader* 71.9%	B+
Capability	71.0%	B+
Platform	*Leader* 72.6%	B+
Customer	*Leader* 78.8%	B++

Source: ISG Research
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Strengths

Sage X3 demonstrated solid performance in Customer Experience, highlighting the quality and quantity of its case studies and references. In Product Experience, particularly in Platform, Sage X3 showed the most strength in its methods to protect customer privacy and ensure sufficient regulatory compliance.

Challenges

Sage X3's Product Experience, particularly in Capability, could be strengthened by improving its smart manufacturing capabilities. Sage X3's Customer Experience could be enhanced by improving the documentation detailing its commitment to quality customer experiences.

About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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