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THE ERP AI 12

An Australian Market Assessment

Twelve enterprise platforms shaping embedded AI in the Australian ERP landscape

Microsoft Dynamics 365	SAP S/4HANA Cloud	Oracle Fusion Cloud ERP	IFS Cloud
Infor CloudSuite	Epicor Kinetic	Workday	TechnologyOne
MYOB Acumatica	Oracle NetSuite	Pronto Xi	SYSPRO

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17 July 2026 | Prepared for Australian executives, transformation leaders, CIOs, CFOs and ERP buyers.

Independent editorialassessment.Productcapability,licensingandregionalavailabilitychangerapidly.Verifycurrent information during formal software selection.

Executive summary

Artificial intelligence is changing the basis on which ERP platforms compete. Traditional functional coverage remains essential, but buyers must now assess whether AI is embedded in real workflows, grounded in trusted enterprise data, governed appropriately and genuinely available to Australian customers.

The ERP AI 12 is not a universal league table. It is an Australian-market assessment of twelve platforms that merit serious consideration because of their embedded AI direction, enterprise workflow depth, industry fit, governance approach and relevance to local organisations.

Core conclusion

The ERP AI leaders will not necessarily be the vendors with the largest number of announcements. They will be the platforms that convert trusted enterprise context into better decisions and controlled action - with measurable operational outcomes.

Five findings

- Market leaders are moving from copilots that generate or summarise content to governed agents that coordinate work and take controlled action.
- Industry and process context increasingly matter more than a generic chatbot interface.
- Australian availability, data handling, partner capability, local support and licensing must be tested separately from global product announcements.
- Local and mid-market vendors can be more deployable than global platforms when their functionality, industry fit and support model are better aligned.
- Weak data, fragmented architecture and poor process discipline remain the largest barriers to ERP AI value.

Platforms included

Microsoft Dynamics 365, SAP S/4HANA Cloud, Oracle Fusion Cloud ERP, IFS Cloud, Infor CloudSuite, Epicor Kinetic, Workday, TechnologyOne, MYOB Acumatica, Oracle NetSuite, Pronto Xi, SYSPRO.

Read alongside: SMC's Embedding AI into Enterprise Platforms series

1. Why Australia requires its own assessment

Global ERP AI rankings are often developed through a North American or European lens. Australian organisations operate within a smaller implementation market, a different mix of industries and specific expectations around privacy, cyber security, public accountability, data handling, payroll, tax and local support.

The Australian economy has a high concentration of asset-intensive and operationally complex sectors, including resources, utilities, construction, engineering, manufacturing, education, government, healthcare and not-for-profit services. This changes the importance of industry depth, field service, asset management, projects, workforce capability and local partner capacity.
Australian government guidance also reinforces the need for accountability, risk management, transparency, human oversight and careful privilege controls. This becomes more important as ERP AI shifts from recommendations to autonomous or semi-autonomous action.

2. Assessment methodology

Dimension	What was considered
Embedded workflow depth **Enterprise context**	Is AI incorporated into finance, procurement, supply chain, manufacturing, projects, assets, workforce and service workflows? Can the capability work with permissions, business rules, transactions, master data and process history?
Insight-to-action maturity	Does the platform only generate content, or can it recommend, coordinate and execute governed actions?
Industry relevance	Does the AI understand the terminology, exceptions and decisions that matter in the organisation's sector?
Australian market fit	Are product availability, support, local implementation skills, compliance and data-handling options credible?
Governance and evidence	Can decisions and actions be audited, controlled and verified through production references rather than demonstrations?

Disclosure and limitations

Rob Stummer previously held senior executive roles at IFS and SYSPRO. Those relationships are disclosed because both vendors are included. They were assessed using the same published criteria as the other platforms. Inclusion does not constitute endorsement. This paper relies on publicly available product information and SMC vendor discussions as at 17 July 2026; it is not a substitute for an organisation-specific software selection.

3. The ERP AI 12 at a glance

The matrix below summarises each platform's principal differentiator and market position. It deliberately avoids a single numerical score because AI availability, licensing, industry suitability and customer maturity vary materially by use case.

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PLATFORM	AI POSITIONING
Microsoft Dynamics 365	AI ecosystem across ERP, productivity, low-code and data
SAP S/4HANA Cloud	Joule and agents grounded in enterprise processes and data
Oracle Fusion Cloud ERP	Role-based agents across finance, supply chain, HR and CX
IFS Cloud	Industrial AI across assets, service, projects and operations
Infor CloudSuite	Industry agents and orchestration for sector-specific workflows
Epicor Kinetic	Prism agents for manufacturing and distribution decisions
Workday	Workforce and finance AI with expanding agent governance
TechnologyOne	Local public-sector ERP with targeted, governed automation
MYOB Acumatica	ANZ mid-market AI Studio, recommendations and anomaly detection
Oracle NetSuite	Embedded finance, planning and generative AI for growth
Pronto Xi	Australian ERP with practical workflow AI and IBM watsonx
SYSPRO	Manufacturing AI, document intelligence and Sidekick

Assessment lens: workflow depth | availability | governance | industry fit | Australian relevance

Not a universal league table. Confirm current capability, licensing and regional availability.

4. Platform assessments 1-2

MicrosoftDynamics 365

Ecosystem scale

Microsoft is strong where an organisation wants ERP, productivity, low-code automation, collaboration and data services to operate as one AI-enabled environment. Its advantage is not a single ERP feature; it is the breadth of the surrounding ecosystem and the ability to build or govern agents across it.

Market position	Established; agentic expansion
Australian fit	Broad enterprise and upper mid-market
AI differentiator	A wide AI ecosystem spanning Dynamics 365, Microsoft 365, Power Platform, Copilot Studio, Azure and Dataverse.

Buyer caution: Licensing, architecture and governance complexity can grow quickly; buyers must confirm what is generally available in Australia versus preview.

Source [4]

SAP S/4HANA Cloud

Enterprise process depth

SAP remains a major contender for complex Australian organisations in resources, utilities, manufacturing, government and large national enterprises. Its differentiator is process depth and the ability to apply AI within tightly connected enterprise workflows.

Market position	Established; rapidly expanding
Australian fit	Large, complex and asset-intensive enterprises
AI differentiator	Joule and specialised agents grounded in extensive enterprise process and business-data context.

Buyer caution: Value depends heavily on a modern SAP estate, clean master data and disciplined management of customisation and technical debt.

Source [5]

4. Platform assessments 3-4

OracleFusion Cloud ERP

Finance and suite agents

Oracle has moved aggressively from embedded assistance into role-based agents. It is particularly strong for organisations seeking a unified cloud suite across finance, procurement, projects, workforce and supply chain.

Market position	Established; expanding
Australian fit	Large organisations seeking a broad cloud suite
AI differentiator	Agentic applications across finance, procurement, supply chain, HR and customer processes, supported by AI Agent Studio.

Buyer caution: Capabilities vary by release, geography, configuration and licence. Product demonstrations must be tested against the customer's actual environment.

Source [7]

IFS Cloud

Industrial AI

IFS deserves a central place in an Australian assessment because of the country's concentration in resources, utilities, construction, engineering, aerospace and field service. Its IFS.ai and Loops direction focuses on governed digital workers and measurable operational outcomes.

Market position	Established industrial AI; agentic expansion
Australian fit	Asset, service and project-intensive industries
AI differentiator	Contextual industrial intelligence across assets, field service, projects, manufacturing and complex operational workflows.

Buyer caution: IFS is highly differentiated in its target industries, but buyers outside those industries should test functional breadth and local partner depth carefully.

Source [8]

4. Platform assessments 5-6

Infor CloudSuite

Industry-specific orchestration

Infor's proposition is that AI becomes more useful when it understands industry terminology, measures, exceptions and operating practices. This is a strong thesis for Australian manufacturers, distributors and asset-intensive organisations.

Market position	Emerging; expanding
Australian fit	Manufacturing, distribution and service industries
AI differentiator	Industry AI agents and orchestration designed around sector-specific processes rather than generic chat experiences.

Buyer caution: Confirm which agents are live for the selected CloudSuite and whether the Australian implementation ecosystem has sufficient depth.

Source [9]

Epicor Kinetic

Vertical agentic ERP

Epicor is one of the clearest examples of vertical AI in the ERP mid-market. Its approach is practical: build agents around high-frequency manufacturing and distribution decisions rather than attach a generic assistant to the user interface.

Market position	Emerging; expanding
Australian fit	Mid-market manufacturing and distribution
AI differentiator	Prism agents focused on quoting, forecasting, ERP knowledge, communications and operational reasoning.

Buyer caution: Regional availability and production maturity differ by capability; buyers should demand live references and measurable outcomes.

Source [10]

4. Platform assessments 7-8

Workday

People and finance intelligence

Workday remains highly relevant where transformation is centred on people, workforce planning, skills, finance and professional services. Its governance capabilities are becoming as important as its agent catalogue.

Market position	Established in HCM/finance; expanding
Australian fit	Service enterprises, education and large employers
AI differentiator	AI and agents grounded in workforce and financial data, with growing emphasis on agent governance and skills.

Buyer caution: Workday should not automatically be treated as a full operational ERP for organisations requiring deep manufacturing, warehousing or asset management.

Source [11]

TechnologyOne

Australian public-sector fit

TechnologyOne demonstrates why an Australian lens matters. Local product development, public-sector experience, regulatory alignment and support may outweigh a larger but less deployable global roadmap.

Market position	Practical targeted AI; expanding
Australian fit	Government, local government, education and public services
AI differentiator	Local-market software, Australian support and targeted AI such as InvoiceIQ and smart summaries, supported by formal AI management certification.

Buyer caution: Its public AI portfolio is currently narrower than the largest global agent ecosystems. Buyers should assess practical value rather than feature count.

Source [12]

4. Platform assessments 9-10

MYOB Acumatica

ANZ mid-market accessibility

MYOB Acumatica is a credible Australian mid-market contender. Its opportunity is to make AI accessible without imposing upper-enterprise cost and complexity, while retaining local compliance and support.

Market position	Emerging; staged availability
Australian fit	Australian and New Zealand mid-market
AI differentiator	AI Studio, recommendations and anomaly detection with local processing and a practical mid-market proposition.

Buyer caution: Some of the most compelling capability has been introduced as technology preview. Buyers must distinguish preview, planned and generally available features.

Source [13]

Oracle NetSuite

Cloud mid-market breadth

NetSuite remains relevant because it can bring useful AI into a relatively unified finance and operations platform for growing organisations. The key is separating practical embedded value from broader Oracle group announcements.

Market position	Established embedded AI; expanding
Australian fit	Growing, multi-entity and finance-led businesses
AI differentiator	Embedded generative AI, planning, finance, reconciliation and extensibility within a widely adopted cloud suite.

Buyer caution: Its operational and industry-specific depth may be less extensive than specialised manufacturing or upper-enterprise platforms.

Source [14]

4. Platform assessments 11-12

Pronto Xi

Australian-developed ERP

Pronto's local presence and pragmatic business-case-led approach are meaningful advantages. Its AI position should be judged by the value delivered in live Xi workflows, not by the scale of its announcement programme.

Market position	Emerging; roadmap and partner-led
Australian fit	Australian mid-market manufacturing, distribution, mining and retail
AI differentiator	Local industry knowledge, Australian support and a practical AI direction supported by IBM watsonx.

Buyer caution: More public evidence is required on production breadth, customer adoption and measurable outcomes as new capabilities move into Xi releases.

Source [15]

SYSPRO

Manufacturing intelligence

SYSPRO belongs in the Australian assessment because its sector focus is tightly aligned to manufacturers and distributors. Its value rests on industry fit and embedded intelligence rather than trying to replicate a broad horizontal enterprise suite.

Market position	Established ML/assistant; expanding
Australian fit	Mid-market manufacturing and distribution
AI differentiator	Embedded machine learning, intelligent document services, Sidekick and deep manufacturing/distribution process knowledge.

Buyer caution: Its current public agentic breadth is less extensive than the market leaders; buyers should test roadmap timing, deployment model and local capability.

Source [16]

5. Cross-market observations

From copilots to agents

The market is moving beyond writing assistance and natural-language search. Leading vendors are developing agents that can reconcile accounts, communicate with suppliers, analyse exceptions, coordinate workflows and initiate controlled actions.

Industry context is becoming decisive

A generic AI interface is easy to demonstrate. Sustainable value is more likely when the platform understands the organisation's industry, permissions, transactions, business rules and exception patterns.

Availability matters more than the announcement

Buyers must distinguish generally available functionality from controlled release, public preview, technology preview and roadmap. They must also test Australian region support, data processing, dependencies and incremental licensing.

Governance is part of the product

As autonomy increases, identity, least privilege, audit logs, human approval, monitoring, fail-safe behaviour and clear accountability become selection criteria - not post-implementation controls.

Local vendors deserve serious attention

TechnologyOne, MYOB Acumatica and Pronto Xi illustrate that local market knowledge, support and regulatory alignment can outweigh a broader global feature catalogue. SYSPRO and Epicor also remain relevant where manufacturing and distribution depth is decisive.

AI cannot repair a weak transformation foundation

Poor master data, inconsistent processes, excessive customisation, fragmented integration and unclear ownership will limit value regardless of platform. ERP AI must be addressed through strategy, process, data, architecture, controls and change management together.

Lessons from SMC's vendor conversations

Over recent months, Rob Stummer has sat down with local and global ERP vendors to examine how AI is being embedded into enterprise platforms. The SMC series focuses on where vendors are placing AI, why those integration points were selected, what customers can use now, what remains on the roadmap and how security and governance are being addressed.

Explore the Embedding AI into Enterprise Platforms series

6. Questions Australian ERP buyers should ask

1. Which AI capabilities are generally available to Australian customers today?
2. Which capabilities are in preview, limited release or still on the roadmap?
3. What additional user, platform, model-consumption or agent licensing is required?
4. Where is organisational data processed and stored, and is it used to train external models?
5. Can AI access structured ERP data, unstructured documents and connected applications safely?
6. What actions can an agent perform without human approval?
7. How are recommendations, decisions, tool calls and actions logged and audited?
8. How are user permissions inherited and how is least privilege enforced?
9. Can the organisation select or change the underlying model?
10. What Australian customers are using each capability in production?
11. What measurable outcomes have those customers achieved?
12. What data, process, integration and change work is required before value is realistic?
13. How will AI affect segregation of duties and existing financial or operational controls?
14. What happens when a model, agent, integration or external AI service fails?
15. What contractual protections apply to security, confidentiality, availability and intellectual property?

Selection discipline

Use these questions in requests for proposal, scripted demonstrations, reference checks, security review, commercial negotiation and implementation planning. A polished demonstration is not evidence of deployable value.

Recommended assessment approach

- Define a small number of high-value business decisions or workflows before evaluating product features.
- Use the same scenarios, data and scoring criteria across vendors.
- Separate current generally available capability from roadmap potential.
- Complete data, architecture, security and change-readiness assessments in parallel.
- Negotiate AI licensing, consumption limits, data rights, service levels and roadmap commitments before major contractual commitment.

7. Conclusion

AI is now a material dimension of ERP selection, but it should not replace disciplined evaluation of functional fit, implementation risk, architecture, industry capability, total cost and vendor viability.

Microsoft, SAP and Oracle demonstrate the broadest enterprise AI ecosystems. IFS, Infor, Epicor and SYSPRO differentiate through industrial or sector-specific context. Workday is strong in people and finance. TechnologyOne, MYOB Acumatica and Pronto Xi demonstrate why Australian product, support and compliance context must be considered. NetSuite remains an accessible cloud option for growing and mid-market organisations.

There is no universally best AI-enabled ERP. The right platform is the one that fits the organisation's operating model, provides capability that is genuinely available, can be governed and supported, and produces measurable business outcomes.

Final view

The winners in ERP AI will be the vendors - and customers - that convert trusted intelligence into better decisions, stronger operations and measurable value.

About the author

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Rob Stummer has more than 25 years of experience building and scaling ERP and enterprise software businesses across Asia-Pacific. His career includes more than a decade as Managing Director, Australia and New Zealand at IFS, service as CEO APAC at SYSPRO, market-entry leadership and enterprise growth roles. He now leads growth at SMC and hosts the Embedding AI into Enterprise Platforms series. Rob holds a Master of Information and Communications Technology from the University of Melbourne and is a Graduate of the Australian Institute of Company Directors.

LinkedIn profile | Podcast series

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