

# The Cloud ERP System Industry in Indonesia and the Competitive Landscape

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## Abstrak

Bisnis di Indonesia semakin banyak mengadopsi sistem Enterprise Resource Planning (ERP) berbasis cloud untuk menyederhanakan operasional, meningkatkan efisiensi, dan mendukung pengambilan keputusan berbasis data. Studi ini bertujuan untuk mengeksplorasi lanskap persaingan layanan implementasi ERP berbasis cloud di Indonesia, dengan fokus pada perusahaan-perusahaan dalam grup strategis yang sama PointStar Consulting, Odoo, HashMicro, dan ABJ Cloud. Tujuan utamanya adalah menganalisis bagaimana perusahaan-perusahaan ini membedakan penawaran mereka dan memposisikan diri di pasar yang berkembang pesat akibat transformasi digital. Analisis dilakukan menggunakan kerangka kerja Marketing Mix 7P Produk, Harga, Tempat, Promosi, Orang, Proses, dan Bukti Fisik untuk mengkaji bagaimana setiap perusahaan mengomunikasikan nilai dan berinteraksi dengan target audiensnya. Melalui analisis kualitatif berdasarkan data sekunder, studi ini menemukan bahwa setiap penyedia mengadopsi pendekatan yang berbeda berdasarkan model penetapan harga, spesialisasi layanan, dan target pasar. Studi ini menyimpulkan bahwa keunggulan kompetitif di sektor ERP berbasis cloud di Indonesia tidak hanya bergantung pada fitur produk atau harga, tetapi juga pada eksekusi pemasaran strategis dan kemampuan adaptasi terhadap kebutuhan klien lokal. Studi ini juga menyoroti keterbatasan dan menyarankan penelitian masa depan untuk menyertakan data primer dan cakupan industri yang lebih luas untuk mendapatkan pandangan yang lebih komprehensif tentang ekosistem ERP.

**Kata Kunci:** Transformasi Digital; ERP Cloud; Perencanaan Sumber Daya Perusahaan; Lanskap Persaingan; Bauran Pemasaran.

## Abstract

Indonesian businesses are increasingly adopting Cloud-based Enterprise Resource Planning (ERP) systems to streamline operations, improve efficiency, and support data-driven decision-making. This study aims to explore the competitive landscape of Cloud ERP implementation services in Indonesia, focusing on firms within the same strategic group PointStar Consulting, Odoo, HashMicro, and ABJ Cloud. The primary objective is to analyze how these companies differentiate their offerings and position themselves in a rapidly evolving market shaped by digital transformation. The analysis was conducted using the 7Ps Marketing Mix framework Product, Price, Place, Promotion, People, Process, and Physical Evidence to examine how each firm communicates value and engages with its target audience. Through qualitative analysis based on secondary data, the study finds that each provider adopts distinct approaches based on pricing models, service specialization, and target markets. The study concludes that competitive advantage in Indonesia's Cloud ERP sector depends not only on product features or pricing, but also on strategic marketing execution and adaptability to local client needs. The study also highlights limitations and suggests future research to include primary data and broader industry coverage for a more comprehensive view of the ERP ecosystem.

**Keyword:** Digital Transformation; Cloud ERP; Enterprise Resource Planning; Competitive Landscape; Marketing Mix.

## 1. Introduction

Indonesia, the largest economy in Southeast Asia, is undergoing a significant wave of digital transformation. Businesses are increasingly adopting technology-driven solutions to enhance operational efficiency, data accuracy, and decision-making speed (Rohmah & Komarudin, 2023). Enterprise Resource Planning (ERP) systems play a central role in this evolution by integrating functions across organizations, reducing logistical inefficiencies, and boosting profitability. As highlighted by Juliani and Masitoh (2024), ERP systems streamline operations, providing businesses with the infrastructure needed to scale efficiently. Cloud-based ERP systems, in particular, are gaining traction due to their ability to unify critical business processes such as finance, supply chain, HR, and operations on a scalable and accessible digital platform. Globally, the Cloud ERP market is expanding rapidly. According to Statista (2024), global ERP software revenues are projected to rise from USD 55.88 billion in 2025 to USD 65.29 billion by 2029, with cloud-based systems expected to comprise 62% of total ERP market share. This trend reflects a broader shift from on-premise solutions to more agile, cost-efficient, and real-time digital systems. In Indonesia, the momentum is similarly strong, with medium to large enterprises increasingly investing in Cloud ERP to replace manual workflows and legacy systems. Nevertheless, key implementation challenges remain, including high upfront costs, organizational resistance to change, and the lack of localized solutions tailored to Indonesia's diverse business context (Kosasih *et al.*, 2019). Existing studies have primarily focused on the demand-side issues of ERP adoption such as organizational readiness, user acceptance, and technical infrastructure (Rahayu & Day, 2015; Kosasih *et al.*, 2019). However, little research has explored how ERP service providers differentiate themselves and compete in this fast-growing and competitive market. This gap is significant. As the ERP ecosystem matures, service providers must not only offer robust technological solutions but also strategically define and communicate their value propositions. Marketing plays a pivotal role in shaping customer perceptions and competitive positioning, particularly in service-dominant industries like Cloud ERP consulting. The 7Ps Marketing Mix framework provides a comprehensive lens for analyzing how firms in the B2B and service sectors position themselves in a digital context.

Originating from McCarthy's (1960) foundational 4Ps Product, Price, Place, and Promotion the framework was later expanded by Booms and Bitner (1981) to include People, Process, and Physical Evidence, reflecting the distinct nature of service-based offerings (Goi, 2005). The relevance of the 7Ps has persisted into the digital age, where each element has evolved while maintaining its core purpose: delivering value to customers through an integrated, customer-centric approach (Chaffey & Ellis-Chadwick, 2019). In today's technology-driven sectors, the Product component often encompasses both tangible deliverables and digital user experiences. Pricing strategies are shaped by transparent, data-rich environments, while Place has transitioned into omnichannel and virtual platforms. Promotion has been transformed through digital marketing tools such as SEO, social media, and personalized email campaigns particularly vital for B2B firms seeking to engage informed buyers. The service-specific elements have likewise evolved: People are supported by digital CRM tools; Processes are enhanced through automation and standardized workflows; and Physical Evidence such as client case studies and digital assets serves as a key trust signal in intangible service environments (Chaffey & Ellis-Chadwick, 2019). Given the framework's continued relevance and adaptability, this study adopts the 7Ps Marketing Mix to evaluate the competitive strategies of Cloud ERP service providers in Indonesia. The research focuses on four companies PointStar Consulting, Odoo, HashMicro, and ABJ Cloud which were chosen because they operate within the same strategic group. Each firm provides Cloud ERP implementation and consulting services, targets similar customer segments, and offers comparable value propositions in the Indonesian market. By narrowing the focus to firms in the same strategic group, the study ensures a fair and meaningful comparison while highlighting how each player differentiates itself through marketing mix elements. This approach offers valuable insight into how service providers define their positioning in a dynamic, highly competitive, and digitally-driven business landscape.

## 2. Research Methodology

This research uses a qualitative approach to explore the competitive landscape of Cloud ERP implementation services in Indonesia, focusing on trends and strategies from January 2024 to the present. The study looks at four companies PointStar Consulting, Odoo, HashMicro, and ABJ Cloud which were chosen because they belong to the same strategic group. All four offer Cloud ERP implementation and consulting services targeting similar customer segments. By focusing on companies within this group, the research provides a fair comparison and uncovers how each player positions itself in a competitive and fast-changing market. To gather insights, the study relies on publicly available secondary data, such as websites, brochures, blog content, LinkedIn campaigns, webinars, market reports, and customer reviews (Hechavarria *et al.*, 2025). The analysis is guided by the 7Ps Marketing Mix framework Product, Price, Place, Promotion, People, Process, and Physical Evidence to evaluate how each company communicates its value and engages its target audience. This framework helps identify key differences, strengths, and potential gaps, offering a clearer picture of what drives success in the Cloud ERP industry and where companies can improve to stay competitive (Saha, 2020).

## 3. Results and Discussion

### 3.1 Results

This study evaluates the competitive landscape of ERP solution providers in Southeast Asia through the lens of the 7Ps Marketing Mix. It provides a comparative analysis of four key players in the region ABJ Cloud, Odoo, HashMicro, and PointStar Consulting highlighting their distinct approaches in addressing market demands, establishing customer trust, and driving growth within the dynamic B2B technology sector. The results are summarized in the following comparative table:

Table 1. Competitive Landscape of ERP Solution Providers

Element	ABJ Cloud	Odoo	HashMicro	PointStar Consulting
Product	Customized Oracle NetSuite	Modular, open-source ERP	Modular ERP tailored to industries	Industry-specific Oracle NetSuite solutions with proven implementation success
Price	Custom pricing	Free + modular paid subscription	Value-based with unlimited users	Flexible pricing, customized to client budgets, competitive in local markets
Place	Southeast Asia focus	Global reach via partners	Regional SEA presence	Strong presence in Indonesia, Singapore, Malaysia, Thailand via direct sales & digital
Promotion	B2B content & milestones	Community events & tutorials	Success stories & industry focus	SEO blogs, webinars, whitepapers, vendor awards, and long-term nurturing strategy

RESEARCH ARTICLE

People	Oracle-certified consultants	Internal & community contributors	Industry-specific consultants	15+ years of certified ERP & automation experts; consultative and industry-focused team
Process	Structured ERP transformation	Flexible, modular adoption	Consultative modular implementation	Defined sales-to-implementation journey; tailored proposals, demos, and nurturing stages
Physical Evidence	Oracle status, offices, cases	Global user base, testimonials	Client list, case studies	Website, client references, vendor awards, blog case studies, and partner certifications

### 3.2 Discussion

The competitive landscape of ERP providers in Southeast Asia reveals diverse strategies adopted by companies to cater to the varied needs of businesses. ERP solutions like Oracle NetSuite, implemented by companies such as PointStar Consulting and ABJ Cloud, are customized for vertical industries, especially those like manufacturing, retail, and food & beverage. These companies prioritize deep vertical customization and enterprise-grade ERP rollouts, with a focus on integrating key business functions such as finance, CRM, and procurement. As highlighted by Archana *et al.* (2022), this customization, supported by consultative selling and vendor-backed assurances, provides significant value to larger enterprises seeking complex, integrated solutions. In contrast, Odoo's open-source, modular ERP architecture appeals to SMEs and startups, allowing them to access flexible and cost-efficient solutions, which aligns with the findings of Chaffey and Ellis-Chadwick (2019) on the role of digital marketing and accessible offerings in driving customer engagement. HashMicro, offering customizable, industry-specific modules, bridges the gap between the large-scale, enterprise-focused solutions and more flexible, cost-efficient offerings for mid-sized businesses. The pricing strategies across these ERP providers vary depending on their market positioning and customer segments. PointStar and HashMicro offer flexible pricing models, which include bundled packages and term-based negotiations, designed to cater to the price-sensitive market of countries like Indonesia (Rahayu & Day, 2015). Odoo's disruptive freemium model, providing a free community version and tiered paid enterprise plans, offers an entry point for small businesses looking for low-cost solutions, and its upsell potential serves as a long-term retention strategy, as noted by Goi (2005) in his analysis of the marketing mix. This approach reflects the trend in Southeast Asia, where cost sensitivity remains high, particularly among SMEs (Statista, 2024).

Meanwhile, HashMicro's unlimited user licensing adds perceived value, making it an attractive choice for growing businesses. In terms of market presence, digital channels dominate ERP vendors' strategies in Southeast Asia. PointStar and HashMicro leverage a digital-first approach, engaging with prospects through SEO, targeted content, and online consultations, complemented by localized sales teams in their respective regions (Saha, 2020). ABJ Cloud offers a strong local presence with physical offices, enabling them to provide responsive support for enterprise clients. However, Odoo, operating through a global partner ecosystem, sometimes lacks the localized consultative support that firms like PointStar and HashMicro offer. As Rohmah and Komarudin (2023) highlight, the ability to balance digital scalability with regional personalization gives companies like PointStar and HashMicro a competitive edge in this fast-evolving market. Promotion strategies for ERP providers are heavily reliant on content-driven marketing, which is crucial for engaging B2B buyers. PointStar and ABJ Cloud invest in thought leadership through case studies, whitepapers, and webinars, which align with the long sales cycles typical in B2B markets (Booms & Bitner, 1981). HashMicro, on the other hand, focuses on industry-specific storytelling and educational content tailored to decision-makers in targeted verticals. Odoo differentiates itself with

## RESEARCH ARTICLE

community-driven events like Odoo Experience, fostering brand loyalty through open engagement and offering a unique approach to user interaction and advocacy (Chaffey & Ellis-Chadwick, 2019). Vendors that successfully integrate their promotional efforts into their sales funnels while maintaining relevance in local markets stand a better chance of generating qualified leads. The role of "People" remains critical in differentiating ERP providers. PointStar and ABJ Cloud emphasize certified Oracle consultants and consultative selling, aiding clients in navigating the complexities of ERP transitions. Odoo, with its strong developer community and internal engineering team, continues to enhance its platform, which facilitates user engagement. HashMicro's focus on industry-specific consultants ensures that their solutions are closely aligned with client requirements, a critical factor in building long-term relationships, as emphasized by Kalu (2017). The expertise of personnel, combined with customer references and a personalized sales approach, remains a fundamental competitive advantage in the ERP market. Lastly, the "Process" and "Physical Evidence" elements also play significant roles in defining competitive advantage. PointStar and ABJ Cloud follow structured processes tailored for enterprise clients, from needs analysis to post-sales engagement. HashMicro combines structure with flexibility to cater to mid-market clients, while Odoo's self-service onboarding and lightweight demos appeal to cost-conscious, tech-savvy businesses. As noted by Kosasih *et al.* (2019), the ability to adapt processes for both enterprise rollouts and mid-market engagements increases a provider's appeal in a diverse market like Southeast Asia. Additionally, trust-building assets such as certifications, client case studies, and vendor awards serve as critical differentiators. While all competitors utilize digital proof points, the integration of these elements into the buyer journey, particularly during the awareness and decision stages, is what ultimately builds trust and influences purchasing decisions. Overall, the analysis demonstrates that PointStar Consulting's strategy, with its emphasis on consultative selling, adaptive pricing, and localized digital content, aligns well with the growing demand for Cloud ERP solutions in Southeast Asia. By leveraging its regional presence and service delivery, PointStar is well-positioned to capture a significant share of the evolving market, as it balances complex enterprise solutions with scalability and market adaptability.

## 4. Conclusion

This study offers a comprehensive overview of the Cloud ERP competitive landscape in Indonesia, focusing on key players within the same strategic group namely PointStar Consulting, Odoo, HashMicro, and ABJ Cloud. Using the 7Ps Marketing Mix framework, the analysis captures how each company delivers value, differentiates its offerings, and adapts to the rapidly changing market environment. The findings reveal a diverse range of strategies across the competitive landscape. Odoo leverages its open-source, freemium model to attract small businesses seeking flexibility and affordability. HashMicro and ABJ Cloud focus on modular systems and localized solutions that cater to businesses with specific operational needs. PointStar Consulting, meanwhile, targets mid- to large-sized enterprises through consultative selling, industry specialization, and a strong digital presence. Together, these firms illustrate the varied approaches to meeting Southeast Asia's growing demand for Cloud ERP solutions. However, this study is not without limitations. The primary constraint lies in the exclusive use of secondary data, which restricts the depth of insight into internal strategies, customer satisfaction levels, and post-implementation experiences. Additionally, focusing only on companies within the same strategic group may omit other influential players operating with different models, such as SAP or Microsoft Dynamics partners, whose strategies could provide additional perspectives. The fast-changing nature of digital marketing and ERP technologies also means that some observations may become outdated relatively quickly. To improve future research, several suggestions can be made. First, incorporating primary data collection such as interviews with company executives, customers, or industry experts—would yield deeper, first-hand insights and validate secondary findings. Second, quantitative analysis of customer acquisition cost (CAC), return on marketing investment (ROMI), and customer retention rates could enhance the strategic assessment. Lastly, expanding the scope to include global competitors or adjacent technology providers could present a more holistic view of the evolving ERP ecosystem in Southeast Asia.



## RESEARCH ARTICLE

Ultimately, while this study provides meaningful insights for ERP providers and marketers operating in Indonesia, continued research is essential to stay ahead in a fast-paced digital environment where innovation, customer-centricity, and local adaptation remain key success factors.

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