ISG Provider Lens™

Oracle Cloud and Technology Ecosystem

Comparison of Oracle service providers' portfolio attractiveness and competitive differentiators

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In 2023, businesses navigate unprecedented levels of uncertainty and aim to improve efficiencies, plan for the unknown, deepen customer relationships and derive value from their investments made during the pandemic era while optimizing costs. Their strategy is leveraging next-generation technology to streamline processes, improve productivity and enhance operational effectiveness. The current uncertain global economic environment has resulted in two significant trends. Firstly, according to the last ISG Index report in July 2023, there has been a slowdown in the growth of the top three hyperscalers, facing headwinds as demand weakens for cloud infrastructure services, dropping 18 percent in Q2. Secondly, there has been a renewed emphasis on managed services. These trends have given rise to what is known as the 'Oracle Phenomenon'. Our inquiries with enterprises indicate that they are strategically allocating their spending in digital transformation, enterprise applications and enabling technologies, such as cloud computing, generative AI, and automated tools. Also, they indicate their view of

Oracle as a vehicle to achieve efficiency, value realization and innovation. Enterprises seek a trusted partner with a proven ability to offer Oracle services and solutions.

On the other hand, Oracle has intensified its investments in cloud and technology offerings, becoming part of the top hyperscalers. It has more than 27,000 partners worldwide, serving 430,000 customers in 175 countries through a pool of 18,000 implementation consultants and 13,000 customer specialists. Oracle's partners drive customer success by delivering tailored solutions, specialized services and exceptional experiences.

The study will assess the **service maturity** and **technical competence** of Oracle's top-performing partners.

Simplified Illustration; Source: ISG 2023

Consulting and Advisory Services

Implementation and Integration Services

Managed Services

Definition

The ISG Provider Lens™ Oracle Ecosystem study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., Europe and Brazil

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Consulting and Advisory Services

Definition

The services analyzed in this quadrant cover Oracle applications and infrastructure technologies. This quadrant evaluates the Oracle consulting and advisory service providers that help enterprises modernize, **optimize** and **transform** their business operations to enhance efficiency, flexibility and scalability. Service providers leverage the best practices to maximize and **optimize** the value of existing and new Oracle investments. This, in turn, helps drive Oracle stack adoption, reduce risks and improve business agility. The consulting and advisory services are used to assess enterprise maturity, improve and maintain Oracle investments, reduce risks through cloud options, develop the future-state model/framework, conduct security assessments and define governance processes.

Service providers offer typical transformations services to enable clients to use the Oracle stack, entailing project planning, solution design, business process modeling, user training, product installation, configuration and testing. The providers need expertise in understanding the client's business and technology landscape and offer frameworks, tools and accelerators to support fast and safe transformations. In addition, all service providers must demonstrate responsibilities covering various aspects, such as confidentiality, conflict of interest, accountability and compliance.

Eligibility Criteria

1. Uses **reference assessments models, strategy, roadmaps and frameworks**

2. Offers recommendations with **IT strategy alignment, technical reviews, benchmark tools and templates**

3. Presents **industry knowledge and domain-related practices**

4. Explores **in-depth knowledge of Oracle stack** and related functionalities, processes, workflows, tools and platforms, along with industry expertise

5. Applies the **Oracle Cloud Services Framework** by providing cloud strategy assessment, readiness assessment and architecture advisory services

6. Holds **experience in industry, functional processes, contextual customer knowledge and strategy consulting** to offer differentiated customer experience

7. Supports **change management lifecycle** to drive transformation through people, process, technology and strategic transformations

8. **More than two projects executed in the last 12 months**

Implementation and Integration Services

Definition

This quadrant evaluates service providers specialized in implementation, migration and integration services around Oracle applications and infrastructure technologies. It will examine the providers' ability to develop accelerators and components that drive efficiency and quality of implementations.

Providers are focusing on modernizing initiatives to drive innovation by enhancing, improving and developing proprietary tools to deliver accurate results faster. Providers' capabilities in implementation include designing the entire implementation plan, creating data migration strategy, modernizing processes, deploying hybrid and multicloud environments, ensuring data security and developing governance protocols. The providers also must demonstrate the ability to integrate Oracle applications and infrastructure technologies with internal systems, such as ERP, CRM, collaboration tools and third-party solutions.

These applications and infrastructure technologies are usually part of the complex system landscape of large and globally operating enterprise clients. The scope of this study considers that these clients, in most cases, use various products of the Oracle portfolio. In many cases, the implementation becomes a part of a long-term program, with multiple rollouts in various divisions of the client organization and regions.

Eligibility Criteria

1. **Use of predefined solutions, templates and expertise:** Experience in using pre-built solutions and accelerators for successful Oracle stack deployment

2. **Integration and migration services:** Competencies in application development, modernization, data migration and testing services across the Oracle stack

3. **Ability to offer maintenance and support:** Installations, upgrades, migration, new feature/module release management, patch and lifecycle management of instances

4. **Deployment speed:** Ability to quickly design solutions based on reference architecture and deploy new modules and enhancements

5. **Enabling technologies:** Ability to work with APIs, automation, data science and AI and ML to drive implementations and integrations with major hyperscalers

6. **More than two projects executed and implemented in the last 12 months**

Managed Services

Definition

This quadrant analyzes specialized providers that offer turnkey, managed services (based on Agile, DevOps and ITIL frameworks) with comprehensive coverage, from applications and technology to infrastructure. The study focuses on providers that offer support to run enterprise clients' businesses and carry out operational tasks encompassing customizations, personalization and configurations. Service providers should support onsite or offsite service delivery or a combination of both and offer hands-on training programs around Oracle applications and infrastructure technologies through onsite, online or partner locations. In addition, service providers should have a strong and credible partnership with technology integration providers and critical third-party software ones, covering the breadth of the Application Management Systems portfolio.

Service providers should showcase their digital business transformation service capability to work with APIs, automation, data science and AI and ML paired with cognitive computing.

They should also demonstrate their ability to manage cloud environments with major hyperscalers. Their personalization competency should be able to meet clients' key business requirements through provider expertise in designing, developing, deploying and enhancing customized solutions.

The study covers experience in monitoring and issue resolution services across entire Oracle-engineered systems. Exadata, database appliance, zero-data loss recovery appliance and private cloud appliance help maximize uptime and improve efficiency of mission-critical environments. Oracle's managed service solutions enable organizations to save costs, enhance business agility and efficiency and ensure freedom of choice.

Eligibility Criteria

1. **Ability to provide support for Oracle stack:** Experience in managing and maintaining Oracle stack, but not limited to configurations, setups, administration, data, reporting and security, including processes, workflows and applications

2. **Change and release management framework:** Experience in managing Oracle change and release management processes to assess the impact of change, reduce any potential errors, automate manual tasks and other functions

3. **Application maintenance services:** Comprehensive experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment

4. **Database support services:** Experience in Oracle databases administration, upgrades, patches, disaster recovery, backups, performance tuning and monitoring for high availability

5. **More than two projects executed and implemented in the last 12 months**

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Oracle Ecosystem 2023:

Quadrant	Brazil	Europe	U.S.
Consulting and Advisory Services	✔	✔	✔
Implementation and Integration Services	✔	✔	✔
Managed Services	✔	✔	✔

The research phase falls in the period between July and September 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2023.

Milestones	Beginning	End
Survey Launch	July 25, 2023	
Survey Phase	July 25, 2023	August 25, 2023
Sneak Previews	November 2023	
Press Release & Publication	December 2023	

Please refer to the link to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

**ISG
Star of
Excellence**

Contacts For This Study

Vishal Srivastava

Lead Analyst, U.S.

Mauricio Ohtani

Lead Analyst, Europe

Cristiane Tarricone

Lead Analyst, Brazil

Sandya Kattimani

Research Analyst

Gabriel Sobanski

Research Analyst

Pooja Rani Nayak

Data Analyst

Abhilash M V

Project Manager

ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisor to this study

Yadu Singh

Director

Sandip Tarafdar

Director

Shriram Natarajan

Director

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

3db Solutions Ltda Me	Arvato Systems*	Cintra Software and Services	EBS-IT*
4iApps Solutions*	Aspire Systems*	Cognizant*	Equinix
AccelAlpha	Asseco Poland	Compass UOL*	EY*
Accenture*	Astute Business Solutions	Computacenter*	Five9
ActioNet	Ataway	Crayon AS	Frontera
ADTSys	Atos*	Data Intensity	Fujitsu*
Affigent (Akima)	AX4B*	Datacosmos	G&P*
Alithya USA	Bechtle	DBS Digital	HCLTech*
Apex IT*	Birlasoft*	Deloitte*	Hexaware*
Applications Software Technology	Boxfusion Consulting Ltd.	Denovo	Hitachi Vantara*
Apps Associates	Capgemini*	Docebit Servicos Especializados Em Ti Eireli	Hunkler
ArganoKeste	Centroid	Donyati	Huron*
Arisant	CGI	Drivestream, Inc	iAppSys
Arrow Electronics	CherryRoad Technologies	DXC Technology*	IBM*

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* Rated in previous iteration

IDEALIT Group	Lanlink*	NineCon*	Recours
Infolob Solutions	Leidos	NTT DATA*	Reply S.p.A
Infosys*	Litmus Software Inc	OLR America Inc	Robotron Datenbank Software
Ingram	Logicalis*	OpenMethods	Service Informatica Ltda.
Innovacx Solutions Inc	LTIMindtree*	OPITZ	Service IT*
Inoapps	Mastek*	Peloton group	Sierra-Cedar, LLC
Inspirage*	McKinsey	PMWeb*	SoftwareOne AG
InventCloud*	Movable, Inc.	Prime Db Representacoes - Eireli	Sopra Steria*
IT Convergence	Mphasis*	Primus Delphi Group	SpearMC
ITOrizon*	MPL*	Promatis Software	Speridian Technologies*
Jade Global*	Mythics	PwC*	Stefanini
Kalypso	Namos Solutions	Qubix	Steltix
KPMG*	NEC Corporation	Rackspace	Synchro Technologies
Kyndryl*	Neos IT Services	Ready Tecnologia Da Informação Ltda	Syntax*

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Tarea Gerenciamento

TCS*

TEAM

Tech Data Project Management

Tech Mahindra*

Techedge

Telefonica

Terillium

The Hackett Group

Tietoevry

To Brasil*

TRI*

Trinamix*

T-Systems*

Unisys

UST

V8.Tech*

Verano Engenharia Comercio Importacao
E Exportacao Ltda

Vigilant Technologies

Wipro*

Zensar*

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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