



***ISG** Provider Lens™

2022

Oracle Ecosystem 2022 -
U.S. Public Sector

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Connecticut, ISG employs more than 1,300 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.



Table of Contents

Definition	4
Quadrant Research.....	5
Quadrants by Region	9
Schedule.....	10
Partial list of companies being invited for the survey	12
Contacts for this study.....	13
ISG Provider Lens™ QCRT Program Description	14
Quality & Consistency Review Team for this study	14

© 2022 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.

Definition

The global enterprise applications market continues to witness growth in 2022 despite the impact of the COVID-19 pandemic. The pandemic pushed many enterprises to speed up their digital transformation strategies to secure and expand their customer base and improve customer experience, helping fast-track the changes in the enterprise applications market with various emerging technologies, such as machine learning, AI, autonomous technology and cloud computing. Enterprises are evolving and adapting to the changes in the market by enhancing their business functions such as finance, procurement, distribution, HR, sales, workflow automation and the integration of various business systems to move them to hybrid cloud and multicloud environments.

Oracle continues to remain one of the largest enterprise application software providers globally. It has more than 27,000 partners across the globe, serving 430,000 customers in 175 countries through a team of 18,000 implementation consultants and 13,000 customer specialists. Enterprise applications remain at the center and continue to steer Oracle's strategy from an on-premises software vendor to a cloud software and infrastructure technology provider. To help its public sector customers and invest in technologies to create innovative experiences, Oracle continues to expand the breadth and depth of its applications and infrastructure technologies. Its customer success strategy is based on flexibility and customer choices.

Oracle partners play a pivotal role in helping U.S. public sector agencies with solutions and differentiated services to achieve their desired citizen, government and business outcomes by delivering exceptional customer experiences. Oracle continues to invest in and strengthen its relationship with partners; it focuses on expanding its partners' expertise (Build, Sell, Service and License & Hardware tracks) through robust training programs, enabling them to offer customized solutions to address business-specific challenges. Oracle's close collaboration with its partners helps it throughout client engagement journeys to drive successful migrations and implementations, thus ensuring customer satisfaction in the current cloud-first world.

The Oracle Ecosystem 2022 study will be evaluating the service maturity and technical competency of Oracle's partner network and the depth and breadth of partners' understanding of the service lifecycle around Oracle's applications and infrastructure technologies.

This 2022 ISG Provider Lens™ study offers buyers and decision-makers objective guidance regarding the Leaders, Rising Stars and Contenders in developing for, selling to and supporting Oracle to serve the public sector entities in the U.S.

U.S. agencies face tremendous pressure to improve how they operate, reduce costs and modernize themselves to embrace digital reality, with a focus on cost savings and minimizing manual processes, which can reduce the number of employees needed. Their technology and service acquisition needs and associated challenges are similar to those of complex commercial enterprises, but they typically have more restrictive acquisition, staffing, management, reporting and operational requirements. Moreover, objective insights, assessments and guidance are more valuable than ever for them.

ISG's U.S. public sector advisory and consulting teams use these reports to help clients understand the scope of capabilities and offerings suitable to clients' requirements. These studies also serve as competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.

The ISG Provider Lens™ study offers IT decision-makers the following:

- Key differentiators by segments
- Key strengths and weaknesses of relevant providers

Quadrant Research

As a part of this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants across Oracle applications and infrastructure technologies:

Simplified illustration



Source: ISG 2022

Consulting and Advisory Services

This quadrant evaluates the Oracle consulting and advisory service providers that help public sector clients modernize, optimize and transform their business operations to increase efficiency, flexibility and scalability. These consulting and advisory services are used to assess agency maturity, improve and maintain Oracle investments, reduce risks through hybrid cloud options, develop future-state models and frameworks, conduct security assessments and define governance processes. The services analyzed here cover Oracle applications and infrastructure technologies.

Eligibility criteria:

- **Use of reference assessment models, strategies and roadmaps:** The provider utilizes assessment frameworks, roadmaps, IT strategy assessment and alignment, security assessments and governance, technical architecture reviews, benchmark tools and templates.
- **Industry knowledge and domain-related practices:** The provider has in-depth knowledge of Oracle's portfolio and related functionalities, processes, workflows and tools specific to the U.S. public sector market.
- **Oracle Cloud Services Framework:** The provider has expertise in cloud strategy assessment, readiness assessment and architecture advisory services.
- **Digital process transformation competency:** The provider has industry experience, functional processes, contextual knowledge to leverage new technologies to offer differentiated citizen experiences.
- **Certifications and accreditations around the Oracle stack:** The provider has Oracle-platform-related certifications, accreditations to provide timely solutions by leveraging expertise, partnerships and experience.
- **Ability to deliver optimization services:** The provider has experience in tuning services and delivering maximum uptime, optimal performance and business value from Oracle investments and in offering system health checks.

Implementation and Integration Services

This quadrant evaluates the service providers specialized in implementation, migration and integration services around Oracle applications and infrastructure technologies. The providers' ability to develop accelerators and components that drive the efficiency and quality of implementations will be examined. Modernization initiatives are considered a focus area for providers to drive innovation by developing and enhancing proprietary tools to deliver accurate and faster results. Providers' capabilities in implementation include designing the entire implementation plan, creating data migration strategies, modernizing processes, deploying hybrid cloud and multicloud environments and ensuring data security and developing governance protocols. In addition, the providers must demonstrate the ability to integrate Oracle applications and infrastructure technologies with internal systems such as ERP, CRM, collaboration tools and third-party solutions.

Eligibility criteria:

- **Expertise:** The provider has expertise in public sector organizational, operational and compliance requirements.
- **Use of predefined solutions/templates:** The provider has experience in utilizing pre-built solutions and accelerators for successful Oracle stack deployment.
- **Integration and migration services:** The provider offers application development, modernization, data migration and testing services across Oracle's stack.
- **Ability to offer maintenance and support:** The provider can perform installations, upgrades, new feature/module release management, migration, patch management and lifecycle management of instances.
- **Deployment speed:** The provider can quickly design solutions based on reference architecture, align the prevailing technical environment, and deploy new features, modules and enhancements.
- **Experience in emerging technologies:** The provider has the capability to work with APIs, automation, data science and AI/machine learning, paired with cognitive computing, to enable digital business transformation and the ability to drive implementations and integrations with major hyperscalers.
- **Size and capabilities of delivery teams:** The provider has a diverse set of certified expertise and resource pool to manage implementations and integrations.

Managed Services

This quadrant analyzes specialized providers that offer turnkey managed services (based on agile, DevOps and ITIL frameworks) with comprehensive coverage, from applications to technology to infrastructure. The study focuses on providers that offer support to run enterprise clients' businesses, including technical and operational tasks encompassing customization, personalization and configuration. Service providers should support onsite or offsite coverage or a combination of both. They should also offer hands-on Oracle training programs for Oracle applications and infrastructure technologies onsite, online or at partner locations. Furthermore, they should have a strong and credible partnership with technology integration providers and critical third-party software providers, covering the breadth of AMS-related portfolio.

Service providers should showcase their digital business transformation service capability to work with APIs, automation, data science and AI and machine learning, paired with cognitive computing, to enable digital business transformation and the ability to manage cloud environments with major hyperscalers. Their customization and personalization competency should be able meet the key business requirements of an organization through expertise in designing, developing, deploying and enhancing customized solutions.

The study includes experience in providing monitoring and issue resolution services across the entire Oracle Engineered Systems (Exadata, database appliance, zero-data-loss recovery appliance and private cloud appliance), which helps maximize uptime and increase the efficiency of mission-critical environments. Managed services solutions by these providers enable government agencies to achieve the following:

- Cost savings
- Increase in business agility and efficiency
- Freedom of choice or customization

Eligibility criteria:

- **Expertise:** The provider has expertise in public sector organizational, operational and compliance requirements.
- **Ability to provide support for the Oracle stack, applications and infrastructure technologies:** The provider has experience in managing and maintaining Oracle's stack (including ITIL-aligned processes, workflows and applications) and also including configurations, setups, administration, data loading, reporting and security.
- **Change and release management framework:** The provider has experience in managing the Oracle change and release management process to assess the impact of changes, reduce any potential errors and automating manual tasks.
- **Application maintenance services:** The provider has comprehensive experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment.
- **Database support services:** The provider has experience in Oracle database administration, upgrades, patches, disaster recovery, backup, performance tuning and monitoring for high availability and business continuity.
- **Testing as a service:** The provider has experience in testing services after patches, updates or configuration changes to applications; utilizing automated/on-demand continuous testing tools.

Quadrants by Region

Quadrant	U.S. Public Sector
Consulting and Advisory Services	✓
Implementation and Integration Services	✓
Managed Services	✓

Schedule

The research phase falls in the period between **July and September 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **December 2022**.

Milestones	Beginning	End
Launch	July 5, 2022	
Survey phase	July 5, 2022	August 22, 2022
Sneak previews	October 2022	
Press release	December 2022	

Please refer to [this link](#) below to view/download the ISG Provider Lens™ 2022 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!

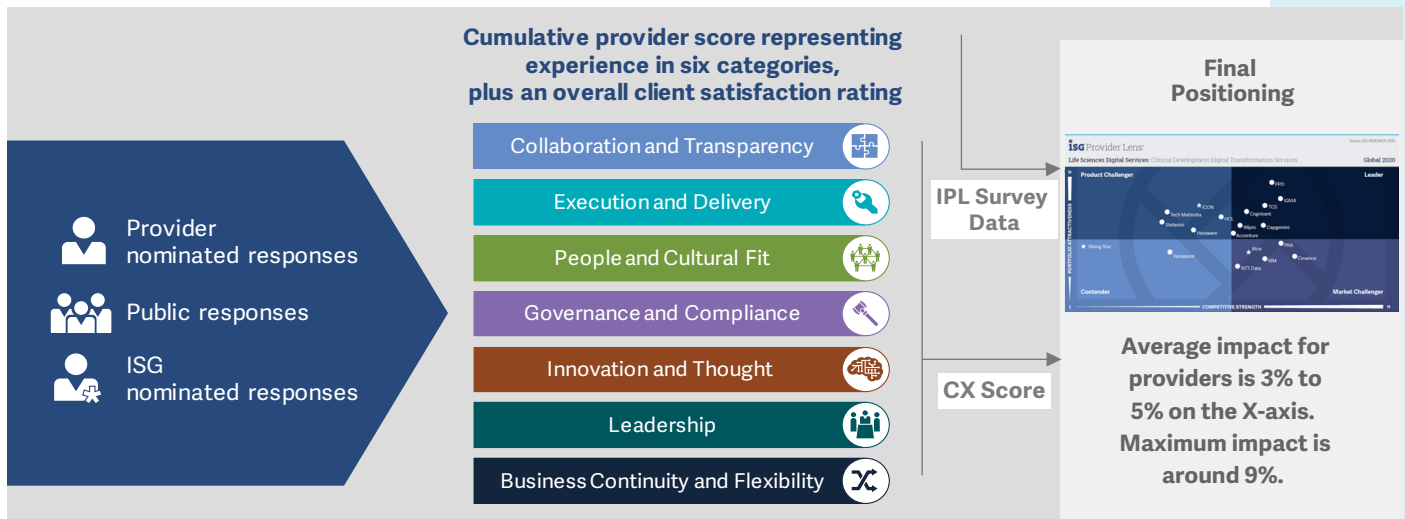
Research production disclaimer:

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

ISG Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “voice of the customer.” The program is 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. 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: Star@isg-one.com

Partial list of companies being invited for the survey

Are you in the list or do you see your company as a relevant provider that is missing in the list?

Then feel free to contact us to ensure your active participation in the research phase.

4i Apps Solutions Pvt Ltd	Frontera	Mphasis
Accelalpha Inc.	Fujitsu	NTT Data
Accenture	General Dynamics	PwC
ActioNet	Grant Thornton LLP	Rackspace
Applications Software Technology LLC	HCL	Sierra-Cedar, LLC
Arisant	Hexaware	Stefanini
Atos	HPE	TCS
Birlasoft	Huron Consulting Services LLC	Tech Mahindra
Capgemini	IBM	The Hackett Group Inc
CGI	Infosys	Unisys
CherryRoad Technologies	KPMG	UST
Cintra Software & Services, Inc.	Kyndryl	Vigilant Technologies
Cognizant	Leidos	Wipro
Deloitte	LTI	Zensar
Drivestream, Inc	McKinsey	
DXC Technology	Mindtree	

Contacts for this study



Phil Hassey
Lead Analyst, U.S. Public Sector



Meenakshi Srivastava
Research Analyst



Abhilash M V
Global Project Manager

Do you need any further information?

If you have any questions, please do not hesitate to contact us at ISG.ProviderLens@isg-one.com.

ISG Provider Lens™ QCRT Program Description

ISG Provider Lens™ offers market assessments by incorporating practitioner insights, reflecting regional focus and conducting 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) that ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. 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 providers inclusion, participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens™ QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



Randy Meek
Director



Jill Anderson
Director

Do you need any further information?

If you have any questions, please do not hesitate to contact us at ISG.ProviderLens@isg-one.com.