

An abstract collage of skyscraper facades, primarily in shades of blue and teal, arranged in a geometric, overlapping pattern on the left side of the cover. The buildings are shown from low angles, emphasizing their height. The collage is composed of several diamond-shaped and rectangular fragments.

***ISG** Provider Lens™

2022

Oracle
Ecosystem 2022

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.



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Definition

The global enterprise applications market continues to witness growth in 2022 despite the COVID-19 pandemic impact. The pandemic pushed many enterprises to accelerate their digital transformation strategies to secure and expand their customer bases and improve their customer experience, helping to fast-track the change in the enterprise applications market with various enabling technologies such as machine learning, AI, autonomy and cloud. Enterprises are evolving and adapting by enhancing their business functions such as finance, procurement, distribution, HR, and sales; automating workflows; and integrating various business systems and moving them to hybrid and multicloud environments.

Oracle remains one of the largest enterprise application software providers globally. 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. Enterprise applications remain at the center of and continue to steer Oracle's strategy from being an on-premises software vendor to a cloud software and infrastructure technology provider. To help its 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 accommodating customers' choices.

To drive customer success, Oracle's partners play a pivotal role in helping enterprises with solutions and differentiated services to achieve their desired business outcomes by delivering exceptional customer experience. Oracle continues to invest in and strengthen its relationships with partners; it focuses on expanding its partners' expertise (through its Build, Sell, Services, and License and Hardware Tracks), providing robust training programs and enabling them to offer customized solutions to address business-specific challenge. Oracle's close collaboration with its partners helps it throughout client engagement journeys to drive successful migrations and implementations, ensuring customer satisfaction in today's cloud-first world.

The Oracle Ecosystem 2022 Study will be evaluating the service maturity and technical competency of Oracle Partner Network, and the depth and breadth of the understanding of the service lifecycle around Oracle applications and infrastructure technologies.

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

- Key differentiators by segments
- Key strengths and weaknesses of relevant providers
- Key business challenges and market drivers in different countries such as the U.S., Germany 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 new engagements.

Quadrant Research

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

Simplified illustration



Source: ISG 2022

Consulting and Advisory Services

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 increase 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 hybrid options, develop the future-state model/framework, conduct security assessments and define governance processes.

Service providers should offer flexible support onsite, offsite and offshore. Innovation-focused service providers should leverage various innovation frameworks, embed new technologies, conduct proof of concepts, create strategic application roadmap planning, etc., to solve real business challenges across industries by ideating and innovating.

Eligibility criteria:

- **Use of reference assessments models, strategy and roadmaps:** Use assessment frameworks, recommendations with roadmaps, IT strategy alignment, technical reviews, benchmark tools and templates.
- **Industry knowledge and domain-related practices:** In-depth knowledge of Oracle stack and related functionalities, processes, workflows, tools and platforms, along with industry expertise.
- **Oracle Cloud Services Framework:** Provide cloud strategy assessment, readiness assessment and architecture advisory services.
- **Digital process transformation competency:** Experience in industry, functional processes, contextual customer knowledge and strategy consulting to offer differentiated customer experience.
- **Change management:** Support change management lifecycle to drive transformation through people, process, technology and strategic transformations.
- **Certifications and accreditations:** Showcase Oracle stack expertise through certifications, accreditations to propose timely solutions leveraging expertise, partnerships and experience.
- **Optimization services:** Experience in tuning services and delivering maximum uptime, optimal performance and business value from Oracle investments. Optimization services include infrastructure assessments, application reviews and system design reviews.

Implementation and Integration Services

This quadrant evaluates 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 efficiency and quality of implementations will be examined.

Modernizing initiatives is a major focus area among providers 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.

Eligibility criteria:

- **Use of predefined solutions, templates and expertise:** Experience in using pre-built solutions and accelerators for successful Oracle stack deployment.
- **Integration and migration services:** Competencies in application development, modernization, data migration and testing services across the Oracle stack.
- **Ability to offer maintenance and support:** Installations, upgrades, new feature/module release management, migration, patch management and lifecycle management of instances.
- **Deployment speed:** Ability to quickly design solutions based on reference architecture and deploy new modules and enhancements.
- **Experience in with enabling technologies:** Ability to work with APIs, automation, data science and AI and machine learning to enable digital business transformation and drive implementations and integrations with major hyperscalers.
- **Size and capabilities of delivery teams:** Maintain a diverse set of certified experts and a resource pool to manage implementation and integration.
- **Vertical market knowledge:** Experience in implementing Oracle's industry-specific applications to address complex industry business challenges.

Managed Services

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, including technical and operational tasks encompassing customizations, personalization and configurations. Service providers should support onsite or offsite service delivery, or a combination of both. The service providers should 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 providers, covering the breadth of the AMS-related portfolio.

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

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

Eligibility criteria:

- **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.
- **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, etc.
- **Application maintenance services:** Comprehensive experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment.
- **Database support services:** Experience in Oracle databases administration, upgrades, patches, disaster recovery, backups, performance tuning and monitoring for high availability and business continuity.
- **Testing as a service:** Experience in testing services, using automated/on-demand continuous testing tools.

Quadrants by Region

Quadrant	Brazil	Germany	U.S
Consulting and Advisory Services	✓	✓	✓
Implementation and Integration Services	✓	✓	✓
Managed Services	✓	✓	✓

Schedule

The research phase falls in the period between **July and August 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 or 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!

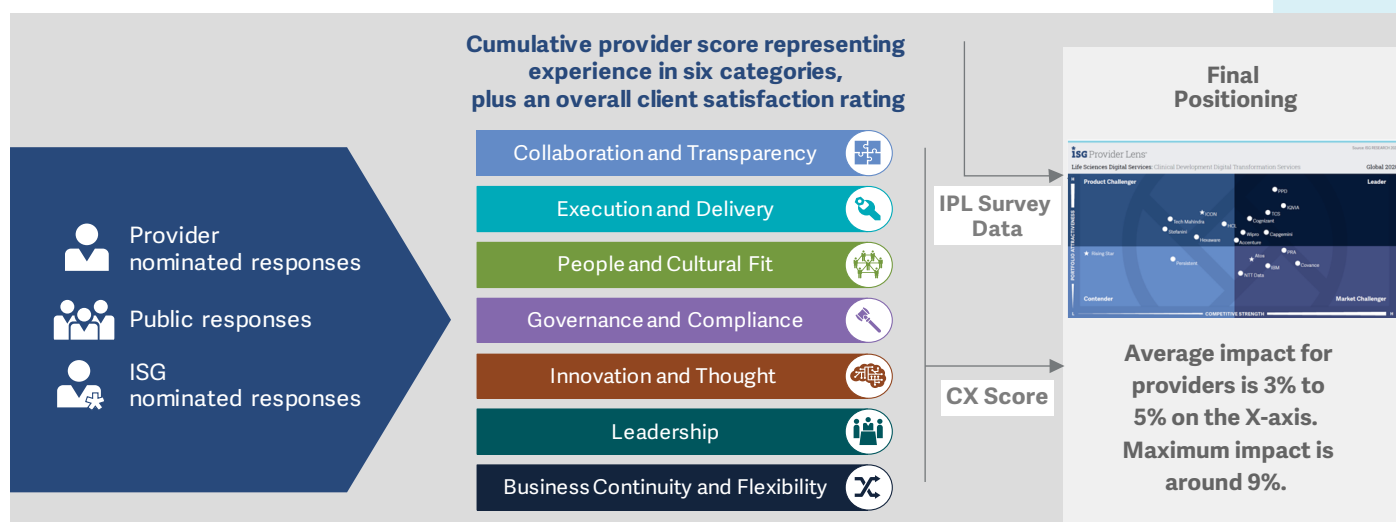
Research production disclaimer:

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

The Star of Excellence is an independent recognition of excellent service delivery based on the voice of the customer concept. ISG designed the program 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 ISG Provider Lens™ (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.

3db Solutions	Data Intensity	Inventcloud Tecnologia
4i Apps Solutions	Deloitte	IT Convergence
AccelAlpha	Denovo	Jade Global
Accenture	Docebit Servicos Especializados Em Ti Eireli	Kalypso
Affigent	Donyati	KPMG
Alithya USA	DXC Technology	Kyndryl
Apex IT	EBS-IT Consultoria Em Informatica	L&T Infotech
Applications Software Technology	Equinix	Litmus Software
Apps Associates	Evosys	Logicalis
ArganoKeste	EY	Movable
Arrow Electronics	Fujitsu	Mpl Corporate Software
Aspire Systems	HCL Technologies	Mythics
Asseco Poland	Hexaware	Namos Solutions
Astute Business Solutions	Hitachi Vantara	NEC
Ataway	Hunkler	Neos IT Services
Atos	Huron Consulting	Ninecon Consultores Associados
Bechtle	iAppSys	NTT DATA
Birlasoft	IBM	OLR America
Boxfusion Consulting	IDEALIT Group	OpenMethods
Capgemini	Infolob Solutions	OPITZ
Centroid	Infosys	Oracle
CherryRoad Technologies	Innovacx Solutions	Peloton group
Cintra Software and Services	Inoapps	PM Comunicacao
Cognizant	Inspirage	Prime Db Representacoes - Eireli
Crayon		Primus Delphi Group

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.

Promatis Software	Speridian Technologies	To Brasil Consultoria Em Tecnologia Da Informacao
PwC	Steltix	Trellium
Qubix	Synchro Technologies	Trinamix
Ready Tecnologia Da Informação	TCS	V8 Consulting
Recours	TEAM	Verano Engenharia Comercio Importacao E Exportacao
Reply	Tech Data Project Management	Vigilant Technologies
Robotron Datenbank Software	Tech Mahindra	Wipro
Service Informatica	Techedge Spa	XT Global
SoftwareOne	Telefonica	Zensar
Sopra Steria	The Hackett Group	
SpearMC	TietoEVERY	

Contacts for this study



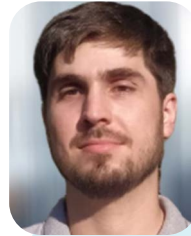
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Ulrich Meister
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Do you need any further information?

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 that know the provider portfolios and offerings and the enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & 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



Bill Huber
Partner, Digital Platforms
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Do you need any further information?

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