

Oracle Ecosystem

Consulting and Advisory Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

HCLTech

Executive Summary 03

Provider Positioning 07

Introduction

Definition 10
Scope of Report 12
Provider Classifications 13

Appendix

Methodology & Team 22
Author & Editor Biographies 23
About Our Company & Research 25

Consulting and Advisory Services 14 – 20

Who Should Read This 15
Quadrant 16
Definition & Eligibility Criteria 17
Observations 18
Provider Profile 20

Report Author: Arun Kumar Singh

This study focuses on what ISG perceives as most critical in 2022 for Oracle Ecosystem.

Oracle continues its cloud growth

Oracle remains one of the largest enterprise application software providers globally. Its overall revenue grew by five percent in FY22, and the Americas contributed 57 percent of it. The company continues to report rapid growth in its cloud business revenue (more than 30 percent in the first quarter of FY23). This growth is driven by the strong demand for its Fusion ERP Cloud and NetSuite ERP cloud segments.

The majority of U.S. enterprises are running their mission-critical workloads on Oracle database management systems. For these enterprises, Oracle Cloud Infrastructure

(OCI) becomes a natural choice for cloud migration. However, Oracle is upping the ante for enterprises that are utilizing the Oracle database for third-party applications through its multicloud strategy. With the recent expansion of Oracle's partnership with Microsoft Azure and AWS, and with slashed prices for dedicated regions, service providers can push the adoption by enterprises of Oracle Cloud Applications and multicloud transformations with Oracle products such as OCI and Oracle Autonomous Database.

ISG observed that Oracle needs to improve on many fronts to continue fueling its cloud growth, including the enhancement of the product maturity of Oracle Cloud Applications, discrete license pricing, lack of roadmap for on-premises applications, overlapping products, access of Oracle Cloud to student communities, industry focus improvement, increasing opportunities for mid-tier Sis, and fragmented Oracle sales teams.

Oracle Cloud enables **agility** and **innovation** at **low cost.**



Digital transformation – a sweeping trend

With the COVID-19 pandemic, enterprises pivoted toward digital-transformation-led enterprise experiences, which directed U.S. enterprises to shift their investments and business focus beyond traditional front-, middle- and back-office transformation using Oracle applications (ERP, HCM, SCM, and CX) toward innovation around employees, partners, and customer experience.

Enterprises are evolving and adapting to changes 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-cloud and multicloud environments. With the adoption of the OpEx model, enterprises are investing their savings in innovations in terms of infrastructure, data centers, and

application and edge technologies, including AI, ML, 5G, IoT, and blockchain. Service providers have also built industry-specific Oracle solutions to support U.S. enterprises by delivering business-specific outcomes and innovation at a lower OpEx. With the support of service providers, enterprises are aggressively adopting digital assistants/bots, automated processes, and touchless operations.

CEO and CFO roles critical to cloud adoption

CIOs were the key decision makers of enterprise technology procurement. However, in the recent past, this has changed, and CEO has emerged as a key role pushing for application modernization within an organization to stay ahead of competition and leverage AI/ML, IoT, analytics, and other modern cloud technologies to drive innovation. On the other hand, CFOs are complementing CEOs by helping them drive ROI on cloud

investments and bringing attention to cloud value propositions around improved decision-making, business resiliency and agility, cost management, and innovation.

Key verticals driving demand

Manufacturing; financial services; business services; energy and utilities; healthcare, pharmaceuticals and CPG; and telecom and media are the five leading verticals that are driving the demand for Oracle applications and infrastructure technologies in the U.S. market.

Enterprises from verticals like manufacturing and energy and utilities are showing a timid response to migrating to OCI due to the lack of industry-specific features in Oracle Cloud Applications compared to their heavily customized, on-premises install base of EBS, JD Edwards, and PeopleSoft applications. On the other hand, in the midmarket segment, Oracle sees a surge in competition from

niche small and midsize SaaS providers. However, large enterprises are investing in Oracle Cloud Applications due to its ability to scale and its well-integrated applications and infrastructure stack that can support business needs. Furthermore, Oracle has decreased its number of partners globally by 20 percent since 2018. Currently, in the U.S. Oracle has more than 2,000 partners.

According to the ISG analysis and data received from 19 out of 31 service providers that participated in the study, the U.S. market for Oracle services has been observing double-digit revenue growth. Among the Oracle Ecosystem quadrants, the revenue share breakdown of Oracle services by consulting and advisory services, implementation and integration services, and managed services was approximately 14 percent, 50 percent and 36 percent, respectively, in 2021.



Key market observations

1. Cloud migration driving services engagements:

Cloud migration is still in its early stages. Oracle is continuously enhancing its cloud capabilities and partnerships to help enterprises migrate their databases and applications to OCI, improving availability and scalability. According to Oracle, over 1,000 enterprises from industries such as automotive, financial services, and healthcare are migrating their mission-critical workloads to OCI through Oracle Cloud Lift Services, and providers are helping them right from planning to production environment. This is creating opportunities for service providers for process transformation; technology transformation such as middleware architecture redesign; and post-implementation managed services support, including automated testing, DevOps, training as a service,

and database as a service. Service providers combine their industry and functional domain expertise with comprehensive methodologies, covering frameworks, templates, expertise, and accelerators to support enterprises with cloud assessments, implementation, migration, and continuous innovation with managed services.

2. Application modernization: Is a key component of U.S. enterprises' digital transformation journeys and remains one of the key focus areas of U.S. CIOs. Service providers are re-hosting/re-platforming existing enterprise applications on Oracle Cloud so that enterprises can retain familiar user experiences at a low cost. This is quite visible among U.S. enterprises in industries such as public sector and high technology, that are traditionally resistant to large-scale changes. OCI and Oracle's lift and shift services are helping

enterprises migrate to cloud and re-investing their savings in modernization efforts through OCI PaaS.

3. Data inconsistency and value creation:

Enterprises are reaching out to Oracle service providers to build and implement an integrated platform to drive data and process efficiency. Service providers have created a vast set of tools for data extraction, data refinement, data consolidation and data conversion for loading into Oracle Cloud from on-premises solutions like EBS.

4. Industry-specific solutions need acceleration:

There is growing demand for industry-specific and personalized Oracle solutions to address day-to-day business-specific challenges. This is particularly so with clients in the manufacturing, retail, healthcare, life sciences, and financial services industries. Service providers are developing pre-built configurations,

templates, frameworks, and tools to accelerate the speed to market and deliver business value in conjunction with utilizing enabling technologies. They have also established centers of excellence (COEs) and digital labs to support enterprises with their hands-on experience in industry-specific Oracle solutions and to co-develop custom solutions.

5. Security and governance: Enterprises with customized enterprise applications in on-premises environments are heavily investing in security and governance to safeguard themselves from cyberattacks. This is strengthening the focus on security and governance during Oracle service provider evaluations or while moving to Oracle Cloud environments. Managed service providers are bringing in their expertise in managed security services to address the security- and governance-related concerns of enterprises during cloud migrations.



6. Outcome-based model seeing slow traction: U.S. enterprises are engaging with service providers that are ready to share the risks and offer flexible, outcome-based pricing to realize the ROI on Oracle applications and infrastructure technologies. The outcome-based model is gaining more traction among large enterprises compared to midmarket firms.

metrics. Service providers like PwC and IBM are working closely with clients to implement a single, integrated Oracle platform to easily report and manage ESG metrics across industries.

Providers are evaluated on industry, functional, and technology expertise.

7. ESG reporting gaining traction: A majority of enterprises believe sustainability and ESG programs are critical to strengthen brand, attract new customers and talent, and increase profitability. However, enterprises struggle to drive sustainability and ESG initiatives internally because of disparate ESG data sources, inaccessibility to those sources, the inability to report on non-financial ESG metrics, and the manual effort required to gather and report on



Provider Positioning

Page 1 of 3

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
4iApps	Contender	Contender	Contender
Accenture	Leader	Leader	Leader
Aspire Systems	Not In	Contender	Contender
Atos	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Contender	Product Challenger	Product Challenger
Capgemini	Product Challenger	Leader	Product Challenger
Cognizant	Market Challenger	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Contender	Product Challenger	Product Challenger
EY	Leader	Market Challenger	Market Challenger
HCLTech	Rising Star ★	Leader	Leader



Provider Positioning

Page 2 of 3

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Hexaware	Not In	Product Challenger	Product Challenger
Hitachi Vantara	Contender	Product Challenger	Contender
Huron	Product Challenger	Rising Star ★	Contender
IBM	Leader	Leader	Market Challenger
Infosys	Leader	Leader	Leader
Inspirage	Product Challenger	Product Challenger	Product Challenger
ITOrizon	Contender	Contender	Contender
Jade Global	Contender	Contender	Contender
KPMG	Leader	Market Challenger	Market Challenger
Kyndryl	Contender	Market Challenger	Market Challenger



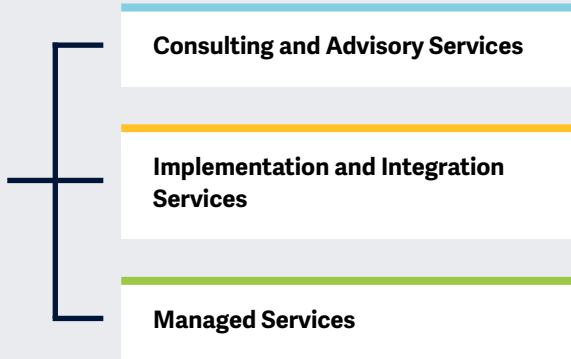
Provider Positioning

Page 3 of 3

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
LTI	Product Challenger	Market Challenger	Rising Star ★
Mastek	Not In	Product Challenger	Product Challenger
Mphasis	Contender	Contender	Contender
PwC	Leader	Market Challenger	Market Challenger
Syntax	Contender	Contender	Product Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Market Challenger	Product Challenger	Product Challenger
Trinamix	Contender	Contender	Contender
Wipro	Leader	Leader	Leader
Zensar	Contender	Product Challenger	Product Challenger



This study focuses on what ISG perceives as **most critical** in 2022 for Oracle Ecosystem.



Simplified Illustration Source: ISG 2022

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 such business functions as finance, procurement, distribution, HR, 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 evaluate 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.



Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: Consulting and Advisory Services, Implementation and Integration Services, and Managed Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information

from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT service providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their

focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger, and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) that ISG believes has

strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Consulting and Advisory Services

Who Should Read This

This report is relevant to all enterprises across industries in the U.S. for evaluating the providers of Oracle consulting and advisory services.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle consulting and advisory services to enterprises in the U.S. and how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the competitive landscape of the market.

Enterprises in the U.S. are looking to address such business problems as highly customized legacy systems, too many manual processes that incur high costs, the rise in OpEx due to the rapid adoption of next-generation technologies, and resistance to adopting new systems due to project complexities.

They are leveraging Oracle consulting and advisory services to identify current application and infrastructure landscapes and define technology strategies aligned with their business goals.

To support enterprises, service providers are building proprietary and industry-specific frameworks and templates for business transformational projects, with the inclusion of advanced technologies such as data analytics, automation, cloud, and cross-functional tools. This enables enterprises to build detailed modernization and implementation roadmaps to enhance the productivity, quality, and efficiency of their technology functions.



C-level executives focusing on driving business outcomes and organizational objectives through Oracle solutions should read this report to understand the trends and developments in Oracle offerings.



Consulting leaders should read this report to learn about the industry-specific solutions provided by Oracle, and service providers' prowess in successfully conducting consulting assignments for diverse industries.

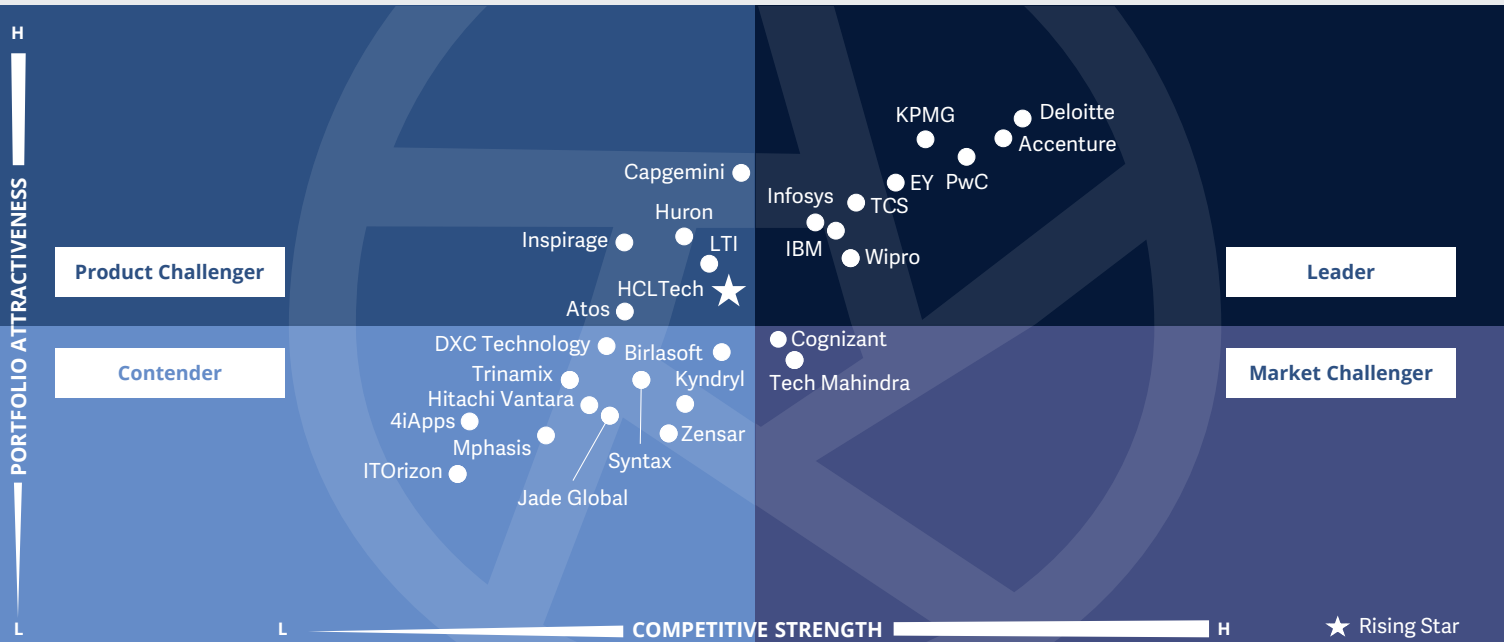


Digital transformation leaders that spearhead initiatives to build a resilient and futureproof organization should read this report to know how service providers design Oracle solutions and map respective technologies.



Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them with business strategy for better decision making.





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.

Arun Kumar Singh



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 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

- 1. Use of reference assessments models, strategies, and roadmaps:** Use assessment frameworks, recommendations with roadmaps, IT strategy alignment, technical reviews, benchmark tools, and templates
- 2. Industry knowledge and domain-related practices:** In-depth knowledge of Oracle stack and related functionalities, processes, workflows, tools, and platforms, along with industry expertise
- 3. Oracle Cloud Services Framework:** Provide cloud strategy assessment, readiness assessment, and architecture advisory services
- 4. Digital process transformation competency:** Experience in industry, functional processes, contextual customer knowledge, and strategy consulting to offer differentiated customer experience
- 5. Change management:** Support change management lifecycle to drive transformation through people, process, technology, and strategic transformations
- 6. Certifications and accreditations:** Showcase Oracle stack expertise through certifications, accreditations to propose timely solutions leveraging expertise, partnerships, and experience
- 7. 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



Observations

Enterprises are witnessing both organic and inorganic growth by entering new markets, either through mergers and acquisitions (M&A) or greenfield strategies. They are also looking to rationalize their business processes and technological landscapes. ISG has observed that service providers are helping enterprises identify the current application and infrastructure landscapes and define technology strategies aligned with their business goals, with a detailed modernization and implementation roadmap to increase the productivity, quality, and efficiency of their technology functions.

Service providers have built proprietary and industry-specific frameworks and templates for business transformation projects, with the inclusion of advanced technologies such as AI/ML, data analytics, automation, cloud, and open-source tools, as well as cross-functional services.

The main business problems U.S. enterprises are looking to address through Oracle consulting and advisory services are:

- Highly customized legacy systems and many manual processes that incur high costs
- Lack of a holistic view in terms of business processes, integration, and data accuracy, which impact the business planning and omnichannel transformation
- Rise in OpEx due to the rapid adoption of next-generation technologies and hybrid and multicloud platforms
- Resistance to adopting new systems and project complexity
- M&A consolidation and associated business process alignment across geographic segments/divisions to support shared service operating models

- Futureproofing business platform designs to support business agility

Large service providers continue to seek niche service providers industry-specific or functional-specific capabilities to expand their Oracle Services practice.

From the 40 companies assessed for this study, 28 have qualified for this quadrant, with nine Leaders and one Rising Star.

accenture

Accenture has significant business and technology consulting capabilities and focuses on strengthening its Oracle portfolio. It emphasizes understanding the market to develop business models that can address changing client needs. It adopts the acqui-hire strategy to enhance its industry-specific, functional skills around Oracle. In the past three years, Accenture acquired 10 companies, including Inspirage, Sentia, McGregor Partners, and Carbon Intelligence.

Deloitte

Deloitte has a strong partnership with Oracle, spanning more than two decades. It is the first company to be recognized with the Oracle Global Cloud Elite Partner status. Deloitte helps enterprise clients with business transformation, digital transformation, finance transformation, service delivery, embedding analytics, and innovation.

EY

EY has strong business transformation capabilities and technical skills and offers organizational change management services in industries such as consumer products, healthcare, insurance, professional services, and banking. In the past few years, EY has been strengthening its digital transformation and consulting capabilities by acquiring niche companies Quantitative Scientific Solutions, Gensquared, Fabernovel, Digital Detox, Q4 Associates, Cambria, and AFARA.



Consulting and Advisory Services



IBM always had a “co-opetition” kind of relationship with Oracle, which has evolved post the divestiture of Kyndryl. IBM Consulting focuses on digital transformation and has transformed itself by building technical expertise around hybrid cloud applications and embracing a co-innovation model with clients, with the help of hybrid-cloud and AI ecosystem partners and developers.



Infosys leverages its Cobalt platform, which combines services, solutions, and platforms, to help enterprises with their cloud transformation journeys. With the Cobalt platform, enterprises access a catalog of more than 35,000 assets and over 300 cloud-first solution blueprints to gain accelerated time-to-market and business value. Infosys recently acquired BASE life science to enhance its industry-specific consulting and technology expertise.



KPMG offers outcome-based functional transformation solutions, combining its domain knowledge and scalable delivery capabilities to drive changes and enhance performance and business value. In 2021, KPMG acquired Certus APAC to strengthen its implementation services in industries such as financial services, utilities, retail, and the public sector.



PwC gains a competitive edge with its ability to analyze industry-specific problems; leverage insights from its advisory, tax, and assurance service lines; and use Oracle solutions to deliver value to its clients. PwC is strengthening its application consulting, cloud, and digital transformation capabilities through acquisitions; it has recently acquired Zero&One, ID-Consult, and Pollen8.



TCS has taken an integrated, measurable, holistic approach to consulting-led transformation services to drive business growth. TCS Enterprise Navigator™ focuses on multiple methodologies, such as design thinking, strategic value mapping, user adoption through organization change management, and service delivery, to modernize enterprises’ businesses.



Wipro acts as an “ecosystem orchestrator” for its clients in their digital transformation journeys by delivering value and innovation through the combination of technologies, industry expertise, and ecosystems. It is expanding its consulting services by acquiring companies such as Capco, CAS Group, and International TechneGroup Inc.



HCLTech (Rising Star) has broad consulting services around Oracle. With its technology expertise, it drives transformation and customer experience enhancement, with a focus on the outcome-based/risk-sharing models. It leverages various accelerators and frameworks to help clients assess, implement, and quickly adopt Oracle solutions.



HCLTech



"HCLTech's consulting services offer business insights, with the company's industry experience."

Arun Kumar Singh

Overview

HCLTech is headquartered in Noida and operates in 52 countries. It has over 208,900 employees across 215 global offices. In FY22, it generated \$11.5 billion (+12.8 percent YoY) in revenue, with IT & business services as its largest segment. HCLTech has an expansive consulting practice, covering experience strategy and application adoption. In the U.S., it has more than 1,350 Oracle-skilled associates. It has more than 140 clients, 70 percent of which are large enterprises.

Strengths

Customer experience: HCLTech leverages its Nexus methodology to capitalize on customer experience to drive innovation and transformation. Through its innovation labs, HCLTech engages with clients to drive design thinking and human-centered design sessions to understand customer needs.

Business process optimization: HCLTech focuses on process transformation, optimization, and automation. It leverages its industry and domain expertise, underlying client data (to derive insights), BPMN toolset, and PAIR framework for continuous improvement.

Comprehensive digital transformation program:

HCLTech's Digital Sphere™ helps clients adapt to frequently changing market dynamics and stay competitive and innovative. Digital Sphere™ helps in creating digital strategy for enterprises, which has eight dimensions: strategy, CX, data and insights, process capabilities, digital platforms and applications, digital operating model, culture and change management, and KPIs and outcomes.

Caution

HCLTech should focus more on industry-specific solutions.

HCLTech should continue to improve its change management and governance processes.

HCLTech should improve its offshore teams' communication skills.





Appendix

The ISG Provider Lens™ 2022 – Oracle Ecosystem analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:

Arun Kumar Singh

Editors:

Dona George and Mark Brownstein

Research Analyst:

Meenakshi Srivastava

Data Analyst:

Pooja Rani Nayak

Consultant Advisors

Bill Huber, Bill Shoemaker and Yadu Singh

Project Manager:

Abhilash M V

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Oracle Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Arun Kumar Singh
Senior Manager and Principal Analyst

Arun is a principal analyst and senior research manager at ISG Research. He has more than 16 years of experience as a technology analyst and advisor with strong product strategy, industry research, and consulting skills. He has worked closely with multiple stakeholders in the technology domain delivering projects around product development and strategy, go-to-market strategy, patent (intellectual property) research, competitive intelligence, and M&A advisory. He has published multiple research studies

on enterprise applications, security, and managed workplace services. Based out of ISG's Bengaluru office, Arun is responsible for delivering the ISG Provider Lens™ studies on Cybersecurity Solutions and Services and the Oracle Ecosystem. He regularly writes about the latest cybersecurity industry trends and works closely with ISG advisors to deliver on ad-hoc research requirements related to market, competitive intelligence, location analysis.

Research Analyst



Meenakshi Srivastava
Senior Research Analyst

Meenakshi Srivastava is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Private Hybrid Cloud Data Center and Oracle Ecosystem. She creates content for Provider Lens™ studies and supports lead analysts in the research process for multiple regions. She has three years of experience in the IT industry and three years in the market research industry. She is also responsible for authoring the enterprise context and

global summary reports for her respective studies. Prior to her role in ISG, she has worked on various signature research projects, which involved both qualitative and quantitative analyses as well as content creation and contextualization for other market research firms. She has an expertise of working on both primary and secondary research projects and is also associated with other custom and ad-hoc research projects.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



***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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

***ISG**

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 more than 75 of the world's top 100 enterprises, 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; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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 www.isg-one.com.





DECEMBER, 2022

REPORT: ORACLE ECOSYSTEM