Oracle Cloud and Technology Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCLTech

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Executive Summary

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This study focuses on the expanding Oracle ecosystem that creates alternatives to meet the growing demand for related services

Oracle: A Trailblazer in the U.S. Cloud Computing Arena

As a venerable giant in the domain of enterprise software and cloud services, Oracle has been making remarkable strides in the competitive cloud computing landscape of the U.S. In a market dominated by giants such as Amazon Web Services (AWS), Microsoft Azure, Google Cloud and IBM Cloud, Oracle's innovative approach and strategic collaborations are reshaping the industry dynamics.

Innovative Partnerships and Strategic Expansions

Enhanced collaboration with Red Hat: Oracle's partnership with Red Hat has been a game-changer, bringing greater choice and flexibility to its customers. The integration of Red Hat Enterprise Linux within Oracle Cloud Infrastructure (OCI) exemplifies Oracle's commitment to versatile and robust cloud solutions. Furthermore, the utilization of Red Hat OpenShift Container Platform bolsters Oracle's capabilities in managing and accelerating cloud-native application development.

Oracle and Microsoft's groundbreaking alliance: The launch of Oracle Database@Azure is a significant milestone in cloud collaboration. This innovative service provides seamless access to Oracle's database services running on OCI, deployed within Microsoft Azure data centers. This strategic move not only offers customers more flexibility in managing their workloads but also simplifies the intricacies of procuring and managing cloud services across Oracle Database and Azure.

Expanded focus on industry solutions: Oracle is expanding its focus on industry solutions, such as healthcare, financial services and retail. This allows Oracle to better meet the needs of its customers in these specific industries.

Oracle **drives cloud innovation** in the U.S. with a focus on flexibility and security

Executive Summary

Growing partner ecosystem: Oracle is expanding its partner ecosystem to help customers implement, manage and optimize their Oracle-based solutions. Oracle's partners include GSI partners, system integrators and cloud service providers.

Oracle's Influence in the U.S. Digital Ecosystem

Commitment to data security and privacy: In the U.S., where data privacy and cybersecurity are paramount, Oracle demonstrates its commitment to these standards. By aligning with the stringent U.S. regulations, Oracle ensures that data is stored and processed with the utmost security and transparency.

Addressing cloud computing challenges: Oracle adeptly handles common challenges in cloud adoption, such as vendor lock-in, data sovereignty and regulatory compliance. This approach empowers U.S. businesses to confidently navigate the cloud ecosystem, tailoring strategies aligning with their needs and compliance requirements.

Empowering Businesses with AI and Cloud Innovations

AI and ML integration: Oracle's incorporation of AI and ML technologies across its SaaS applications, including Oracle Database and MySQL HeatWave, and its partnerships with industry leaders such as Anaconda and NVIDIA position Oracle as a pioneer in AI-driven cloud solutions.

Introduction of generative AI (GenAI) services: Oracle's rollout of GenAI services, particularly in sectors like healthcare, demonstrates its commitment to harnessing AI for enhancing operational efficiencies and CX.

Expanding Oracle Cloud Services Portfolio

Diverse cloud offerings: Oracle's comprehensive cloud services, including IaaS, PaaS and SaaS, provide businesses with the flexibility to choose solutions that best fit their unique requirements. This versatility is key in Oracle's strategy to facilitate a smooth transition for businesses shifting from on-premises systems to the cloud. Strategic domestic expansion: Oracle's investment in expanding its cloud infrastructure within the U.S. is a testament to its commitment to delivering high-performance, accessible cloud services catering to the specific needs of U.S. enterprises.

Financial Growth and Market Position

Stellar financial performance: Oracle's significant financial growth, evidenced by increases in non-GAAP net income and cloud infrastructure revenue, showcases its escalating influence in the cloud sector.

Solidifying market presence: Despite fierce competition, Oracle's comprehensive cloud solutions and robust infrastructure have firmly established it as a formidable player in the U.S. cloud market.

Oracle's trajectory in the U.S. cloud market is marked by strategic foresight, innovative solutions and a deep understanding of the evolving business landscape. By prioritizing customer-centric solutions, security and technological advancement, Oracle solidifies its position as a leader in cloud computing, setting the stage for future growth and innovation.

> Oracle's innovative approach and strategic collaborations are reshaping the industry dynamics.

Provider Positioning

	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
4i Apps	Contender	Contender	Contender
Accenture	Leader	Leader	Leader
Aspire Systems	Not In	Contender	Contender
Birlasoft	Market Challenger	Product Challenger	Rising Star ★
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Contender	Product Challenger	Product Challenger
Eviden	Product Challenger	Product Challenger	Product Challenger
EY	Leader	Market Challenger	Market Challenger
Fujitsu	Product Challenger	Contender	Contender

  ORACLE CLOUD AND TECHNOLOGY ECOSYSTEM QUADRANT REPORT | DECEMBER 2023 **5**

Provider Positioning

	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
Grazitti Interactive	Not In	Contender	Not In
HCLTech	Leader	Leader	Leader
Hexaware	Not In	Rising Star ★	Product Challenger
Hitachi Digital Services	Contender	Product Challenger	Contender
Huron	Product Challenger	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Leader
ITOrizon	Contender	Contender	Contender
Jade Global	Contender	Contender	Not In
KPMG	Leader	Market Challenger	Market Challenger
Kyndryl	Contender	Market Challenger	Market Challenger

Provider Positioning   **Page 3 of 3**

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

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

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.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: Consulting and Advisory Services, Implementation and Integration Services, and Managed Services.

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

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study is the basis for critical decision-making regarding 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 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 service providers that ISG believes have 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.

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.

★ **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.

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.

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.

Consulting and Advisory Services

Consulting and Advisory Services

Who Should Read This Section

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 critical challenges faced in the region. The report also provides a comprehensive overview of the competitive landscape of the market.

Oracle's mission is to propel clients to achieve business success through cutting-edge technology. With a focus on innovation, Oracle offers advanced cloud solutions such as Oracle Fusion Cloud Applications, Autonomous Database, Oracle Cloud Infrastructure (OCI) and Cloud Customer Experience.

In the U.S., the demand for Oracle consulting and advisory services is increasing due to the growing necessity for digital transformation. Oracle's suite of apps and cloud infrastructure provides a comprehensive solution for refining business processes, enhancing CX and leveraging data for strategic insights. Leading Oracle partners excel in delivering end-to-end support, customizing solutions, ensuring security and compliance, and driving continual innovation and ROI.

C-suite executives aiming to achieve business objectives with Oracle solutions should review this report to gain insights into the evolving trends and advancements in Oracle's offerings.

Digital transformation leaders should review this report to understand how service providers align Oracle solutions with the latest technologies for resilient organizations.

Consulting executives should explore this report to understand Oracle's industry-specific solutions and service providers' capabilities in delivering successful consulting projects across various sectors.
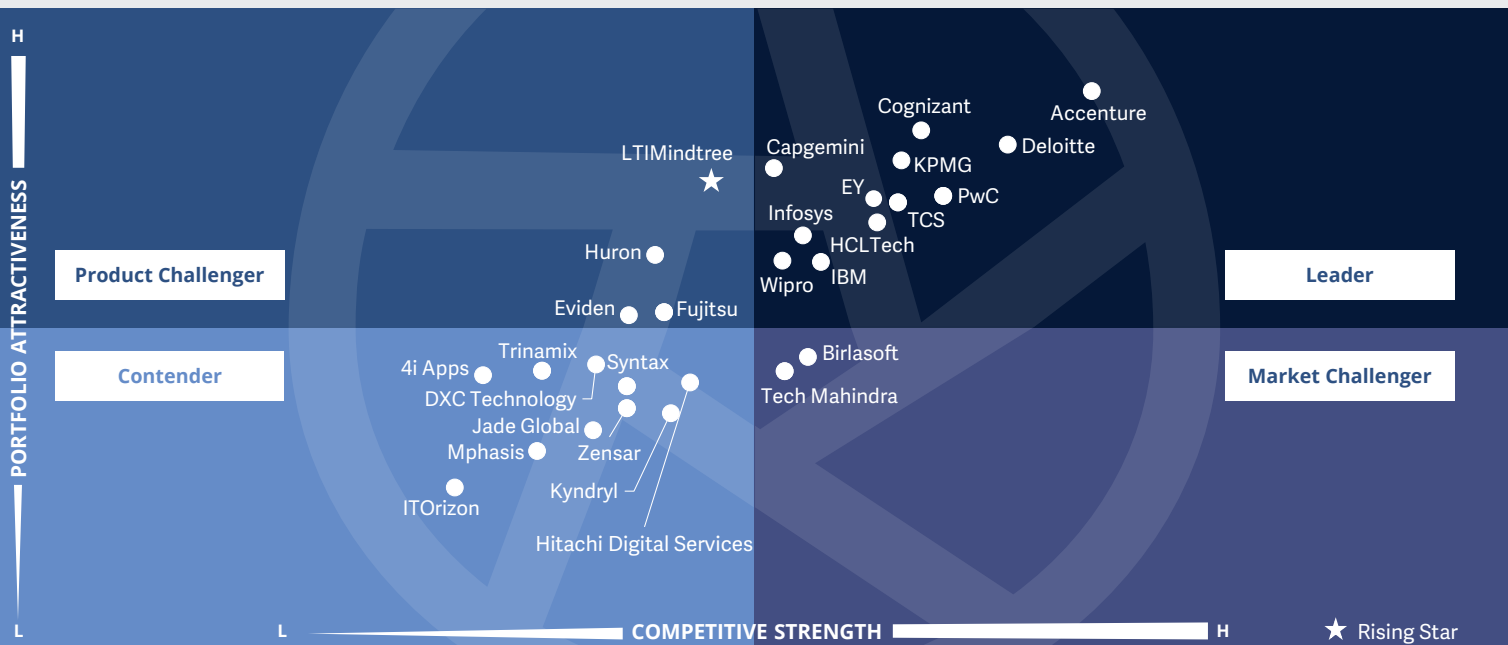
Marketing and sales leaders should read this report to understand the positioning and competencies of service partners, which can help them make informed decisions and enhance business strategies.

ISG Provider Lens™

Source: ISG RESEARCH

Oracle Cloud and Technology Ecosystem
Consulting and Advisory Services

U.S 2023

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

LTIMindtree ★

Capgemini
Cognizant
Accenture
Deloitte
KPMG
EY
PwC
TCS
Infosys
HCLTech
Huron
Wipro
IBM
Eviden
Fujitsu

Leader

Trinamix
Syntax
Birlasoft
4i Apps
Tech Mahindra
DXC Technology
Jade Global
Mphasis
Zensar
ITOrizon
Kyndryl
Hitachi Digital Services

Market Challenger

L

L

COMPETITIVE STRENGTH

H

★ Rising Star

This quadrant assesses the **best-performing Oracle partners that provide the technology and guidance** to meet clients' needs at every step, from planning and adoption to continuous innovation.

Vishal Srivastava

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 transformation 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 assessment 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

Observations

Oracle is dedicated to empowering clients with cutting-edge technological solutions, driving them toward unprecedented business success and industry transformation. At the core of Oracle's ethos is a relentless pursuit of innovation and value creation, made tangible through its advanced cloud solutions such as Oracle Fusion Cloud Applications, Oracle Autonomous Database, Oracle Cloud Infrastructure (OCI) and Oracle Customer Experience Cloud. Oracle's mastery of emergent technologies — including AI, ML, blockchain and IoT — is not just about staying ahead, but it is also about forging new paths for customer success and novel solutions. In the U.S., the market for consulting and advisory services pertaining to Oracle apps and cloud infrastructure is poised for remarkable growth. This surge is fueled by a growing imperative for digital transformation, a hunger for innovation and a quest for agility in the business world. Oracle's suite of apps and cloud infrastructure emerges as a comprehensive, integrated solution, empowering organizations to refine their business processes,

elevate CX and harness data and analytics for pivotal strategic insights. The top performers are adept at delivering full-spectrum support for Oracle apps and cloud infrastructure — from implementation and management to unwavering end-to-end assistance. Their expertise lies in customizing solutions to align with enterprise goals, seamlessly transitioning legacy systems and data to the cloud with minimal risk, guaranteeing security, compliance and performance, and continually driving value and ROI through perpetual innovation and improvement.

From the 63 companies assessed for this study, 28 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture, a business and technology consulting leader, has been bolstering its Oracle capabilities through strategic acquisitions, such as Inspirage and Sentia, in the past three years. Since 2003, the company has won 183 awards for its dedication and innovative solutions.

Capgemini

Capgemini, a 25-year-long Oracle collaborator, excels in cloud solutions, holding key Oracle Partner Network certifications, including Platinum Partner, Cloud Premier, Cloud Managed Service Provider and Cloud Excellence Implementer.

cognizant

Cognizant offers a wide range of services and assists clients in modernizing their IT infrastructure through OCI, enabling them to accomplish their business goals across diverse industries.

Deloitte

Deloitte, a partner of Oracle for over two decades, is the pioneer in achieving Oracle Global Cloud Elite Partner status. It excels in guiding enterprise clients through transformations, service improvements, analytics integration and innovation.

EY

EY partners with Oracle to offer consulting, technology and cloud services that help clients optimize their business operations and address industry-specific challenges.

HCLTech

HCLTech, a global system integrator and Oracle partner, collaborates with clients to transform their IT core, enhancing CX through outcome-based models and facilitating rapid Oracle solution adoption.

IBM

IBM and Oracle have evolved their relationship after the divestiture of Kyndryl. IBM currently focuses on digital transformation and employs a co-innovation approach with clients and ecosystem partners in hybrid cloud and AI.

Consulting and Advisory Services

Infosys partners with Oracle to provide end-to-end solutions for business transformation. It has a strong, longstanding alliance with a vision to enhance customer satisfaction and performance across various industries and geographies.

KPMG, based in Amsterdam, operates worldwide with more than 236,000 employees in 655 offices. It is an Oracle Global Cloud Elite Partner, has expertise in Oracle products, and serves banking, consumer goods, retail and high-tech manufacturing.

PwC, based in the U.K., is an Oracle expert with many certifications and content clients. It excels in enhancing business models and capabilities, utilizing industry-specific insights from its advisory, tax and assurance services, and Oracle solutions.

TCS, with its global footprint and headquarters in India, takes an integrated approach to consulting-led transformation services. Its TCS Enterprise Navigator™ uses design thinking and strategic value mapping methodologies.

Wipro, with its diverse workforce, partners with Oracle for business transformation, acting as an ecosystem orchestrator. It is expanding its consulting services through acquisitions such as Capco, CAS Group and International TechneGroup Inc.

LTIMindtree (Rising Star), a global IT company based in India, has partnered with Oracle for over two decades. It has a team of more than 4,200 Oracle specialists, including over 2,500 cloud experts.

HCLTech

Leader

> "HCLTech's transformative tools ensure end-to-end support. Its PDAER Framework customizes solutions to fit needs, budget and landscape. Renowned for global Oracle solutions, HCLTech delivers agile services and strategic automation."
>
> *Vishal Srivastava*

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23, the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. As an Oracle partner for more than 20 years and a reliable global system integrator, HCLTech helps its clients optimize their existing investments and prepare for the future by transforming their IT core and reimagining the future.

Strengths

Delivering global Oracle solutions: HCLTech delivers efficient and agile global services across Oracle Industry Cloud Solutions, enabling automation and expanding investments. Its consulting services ensure customization, guiding clients with industry insights for a confident journey toward an innovative future. With 15 global delivery centers, proven tools and flexible delivery models, HCLTech serves clients across major verticals.

IP-driven transformation: HCLTech's transformation approach utilizes tools such as FENIX 2.0, ADvantage SPADE™, PDAER and the 5D Agile Toolkit, spanning the entire cycle from assessments to post-go-live testing. As a Gold Level Partner with Automation Anywhere and a strategic collaborator with Blue Prism, HCLTech incorporates ML-based RPA into the transformation process. It showcases the AI-ML product EXACTO™ on the Blue Prism Digital Exchange.

PDAER Framework for solution benefit assessment: HCLTech's PDAER Framework is a comprehensive methodology for organizations, delivering ideal solutions aligned with specific needs, budget constraints and the existing landscape. It facilitates decisions by outlining crucial topics, activities and supporting information, ensuring a customized road map. This approach adapts to accommodate an enterprise's size, landscape complexity and desired level of output detail.

Caution

HCLTech should understand the unique needs of different industries and tailor Oracle solutions to address those requirements. Offering industry-centric solutions can provide a competitive edge.

Implementation and Integration Services

Implementation and Integration Services

Who Should Read This Section

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

In this quadrant, ISG highlights the current market positioning of providers offering Oracle implementation and integration services to enterprises in the U.S. and shows 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.

Oracle offers a comprehensive suite of products and services designed for business transformation, IT efficiency and competitive advantage. The core includes implementation and integration services customized by certified partners to meet unique customer needs. These services stand out for their adaptability, scalability and cost-effectiveness.

Oracle delivers tailored solutions, whether for end-to-end implementation or specific components. Certified partners guide customers through the entire cloud journey, ensuring seamless integration and support. Beyond technical implementation, Oracle empowers customers with best practices, methodologies and tools for successful outcomes, turning their technology adoption into a pathway to business aspirations.

C-level executives should read this report to find the right Oracle integration partner that is aligned with their company's goals and long-term technology strategy.

Engineers and architects can use this report to stay updated on Oracle solutions and invest in task-specific tools and accelerators for their Oracle implementations and related cloud platforms.

Technology leaders should read this report for the most current insights on Oracle's trends, features and integration updates.
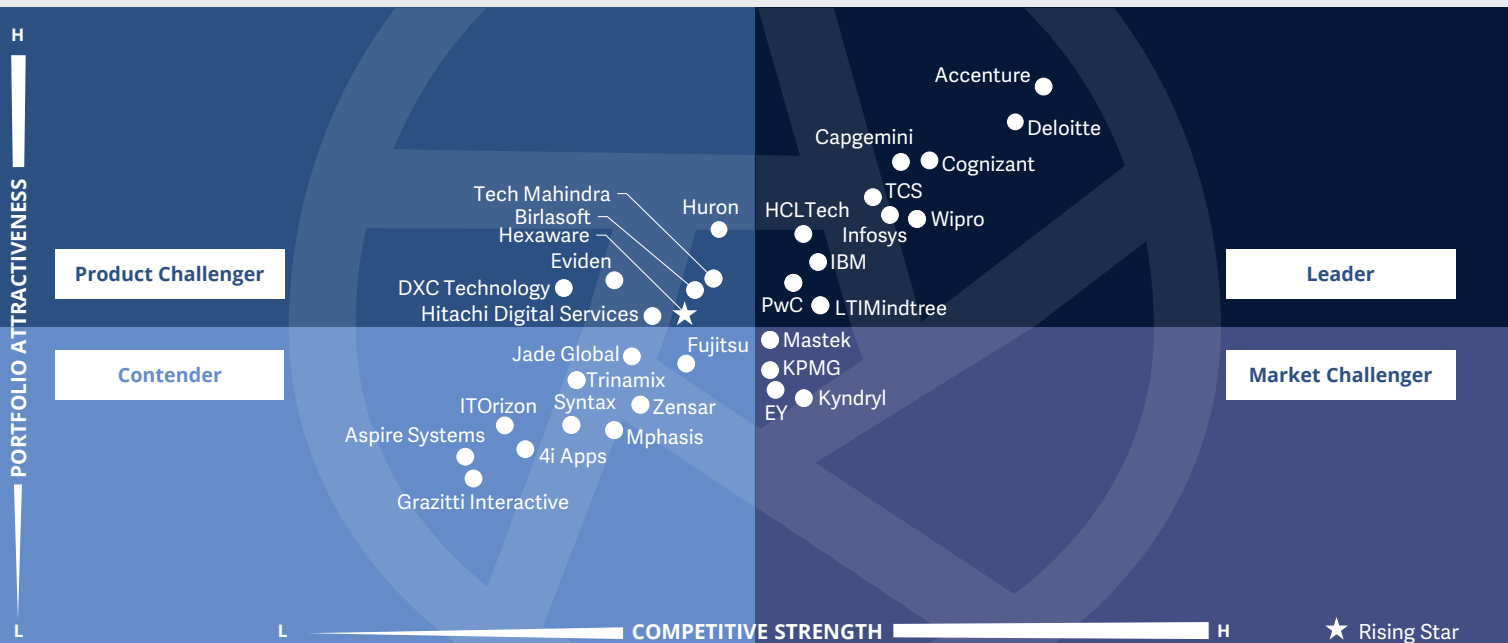
Marketing and sales leaders should read this report to assess service partners, improve software integration and make informed decisions.

ISG Provider Lens™

Oracle Cloud and Technology Ecosystem
Implementation and Integration Services

U.S 2023

PORTFOLIO ATTRACTIVENESS

H

COMPETITIVE STRENGTH

Product Challenger

Contender

Leader

Market Challenger

L

L   H   ★ Rising Star

Accenture
Deloitte
Capgemini
Cognizant
TCS
Tech Mahindra   Huron   HCLTech   Wipro
Birlasoft   Infosys
Hexaware   IBM
Eviden
DXC Technology   PwC   LTIMindtree
Hitachi Digital Services   ★
Fujitsu   Mastek
Jade Global   KPMG
Trinamix
ITOrizon   Syntax   Zensar   EY   Kyndryl
Aspire Systems
4i Apps   Mphasis
Grazitti Interactive

This quadrant assesses **Oracle partners** that offer implementation and integration services to **enable customers to effectively deploy, configure and customize** Oracle applications and cloud infrastructure solutions in their settings.

Vishal Srivastava

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, new feature/module release management, migration, 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

Observations

Oracle presents an all-encompassing array of products and services meticulously designed to revolutionize business processes, maximize IT efficiency and secure a competitive edge in the marketplace. At the core of Oracle's offering is a suite of implementation and integration services, expertly tailored to deploy, configure, integrate and customize Oracle applications and cloud infrastructure to meet each customer's unique demands.

Oracle's network of certified partners brings this robust suite of services to life, each with extensive experience and deep knowledge of Oracle products. These partners, adhering to Oracle's stringent standards and quality benchmarks, ensure outcomes that are not only reliable but exceed customer expectations. Oracle's implementation and integration services stand out for their adaptability, scalability and cost-effectiveness, allowing customers to choose services that align with their specific needs, financial constraints and timelines.

Oracle is equipped to deliver the required services, whether a comprehensive, end-to-end implementation and integration or a specific service component. Oracle's partners are committed to guiding customers in deploying and fine-tuning their cloud solutions, ensuring seamless integration with existing on-premises or third-party systems. Oracle's experts accompany customers throughout their cloud journey — from the initial planning and design stages through testing and deployment to ongoing monitoring and support.

Moreover, Oracle's services go beyond technical implementation; they empower customers to adopt best practices, methodologies and tools critical for successful project outcomes. With Oracle's comprehensive portfolio of cloud applications and infrastructure services, customers do not just adopt technology; they embark on a path to achieving their business aspirations.

From the 63 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture invests in client needs with shorter transformation timelines and robust change management. It uses OCI integration services best practices and integrates partner solutions with its myConcerto platform. In 2023, Accenture was the finalist for the Cloud Architect of the Year Award.

Capgemini

Capgemini and Oracle, long-term partners, offer award-winning cloud solutions for various industries. Their expertise in Oracle implementation and integration, supported by accelerators and frameworks, ensures enterprise clients' seamless adoption.

cognizant

Cognizant optimizes IT modernization with OCI for various industries. Its cloud implementation spans domains such as finance, HCM, supply chain management (SCM), enterprise performance management (EPM), and CRM.

Deloitte

Deloitte's distinctive approach includes outcome-based, risk-sharing pricing models delivering concrete business value. Deloitte Ascend™ evaluates digital capabilities and orchestrates a competitive advantage by harnessing the full potential of Oracle Cloud.

HCLTech

HCLTech excels in implementing and integrating various Oracle products. It is expanding in Hartford with 500 jobs in IT, IoT, AR, etc. Collaborating with Oracle, HCLTech optimizes business processes through cloud and on-premises solutions using tools and expertise.

IBM

IBM offers extensive implementation and integration services for Oracle, emphasizing hybrid cloud solutions backed by frameworks and tools. It maintains a well-established Oracle Cloud practice with over 10,000 Oracle practitioners and additional resources.

Implementation and Integration Services

Infosys provides a smart implementation suite with pre-built industry solutions. It has received multiple awards, including the Global Partner of the Year, for its expertise in Oracle Cloud and Infosys Cobalt solutions, which drive cloud transformation.

LTIMindtree

LTIMindtree has been an Oracle partner for 20 years, offering cloud technology to help customers maximize ROI. It is recognized for Commerce Cloud Transformation, Sustainability Excellence, JD Edwards Product Innovation and Oracle Nordics Cloud Partner of the Year for OCI.

PwC, an Oracle expert, enhances decision-making, innovation and growth across domains. Its digital operations use Oracle Fusion Cloud to optimize the supply chain, integrating processes within a centralized command center.

TCS, headquartered in India, partners with Oracle for co-innovation and top-notch delivery. Its comprehensive implementation services, powered by proprietary CrystallusTM modules and accelerators, expedite Oracle technology implementations.

Wipro offers comprehensive Oracle Cloud services aided by a strong partner network. It helps clients navigate the digital landscape with Oracle, providing implementation and integration services for Oracle Cloud solutions.

HEXAWARE

Hexaware (Rising Star) provides complete Oracle Cloud application services, including implementation, support and upgrades. It has completed multiple Oracle Cloud implementations across HCM, ERP, SCM, EPM and CX.

HCLTech

Leader

"HCLTech excels in efficiently delivering Oracle solutions with agility, establishing itself as a trusted partner for end-to-end Oracle transformation. It serves as the pivot for enterprises' cloud adoption and growth strategies."

Vishal Srivastava

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23, the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. HCLTech has a strong partnership with Oracle and offers comprehensive implementation and integration services and solutions designed to move clients' organizations to the next level.

Strengths

Efficient data migration capabilities: HCLTech excels in data migration through its proprietary tool, ADvantage SPADE, endorsed by Oracle and accessible via Oracle Cloud Marketplace. This automated solution reduces migration time and costs by up to 30 percent, offering prebuilt data mapping, templates and reconciliation reports. ADvantage SPADE seamlessly connects to multiple data sources, supports dynamic queries and ensures data security throughout the migration process.

Application modernization and migration tools: HCLTech provides a range of automated tools powered by AI-ML and application re-engineering for comprehensive application modernization and migration. Tools like Prizm, ADvantage Modernize, ADvantage Cloud, ADvantage Upgrade, ADvantage Specs and ATMA assist enterprises in defining strategies, upgrading applications and ensuring compatibility with the latest versions of Oracle services.

Holistic Oracle implementation strategy: HCLTech adopts a thorough approach to Oracle installation and updates. This includes readiness assessment, customized planning, execution by seasoned professionals, compatibility checks, rigorous testing, user training and continuous alignment with Oracle's release policy. This involves active monitoring, compatibility assessments, strategic upgrades and the establishment of test environments to ensure seamless transitions.

Caution

HCLTech could benefit from prioritizing the co-creation of industry-specific solutions in collaboration with Oracle. This strategic approach can significantly bolster the company's ability to cater to the distinct implementation and integration requirements of enterprises operating within specific industries.

Managed Services

Managed Services

Who Should Read This Section

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

In this quadrant, ISG highlights the current market positioning of providers offering Oracle managed services to enterprises in the U.S. and shows 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.

Managed services encompass the entire Oracle applications and cloud infrastructure lifecycle, from planning to deployment, support to optimization. The services can be tailored to meet specific customer needs based on their IT setup, business requirements, budgets and SLAs.

In the U.S., the demand for managed services is rising as organizations pursue efficiency and agility. MSPs offer a comprehensive range of services complementing Oracle's offerings, covering application hosting, migration, integration, maintenance, support, security, backup, disaster recovery and performance tuning.

However, the diverse MSP market poses challenges, with some providers lacking expertise and transparency. Organizations must rigorously evaluate MSP offerings to ensure compatibility with their specific requirements for Oracle applications and cloud infrastructure, avoiding potential adverse impacts on customer satisfaction and ROI.

C-level executives should read this report to find the right Oracle managed services partner aligned with their company's goals and long-term technology strategy.

Technology leaders should read this report to stay updated on Oracle's latest trends, features and managed services–related insights.

Delivery leaders managing key U.S. accounts and focusing on CX and NPS should read this report to find insights on how Oracle managed service providers maintain credibility and excellence.
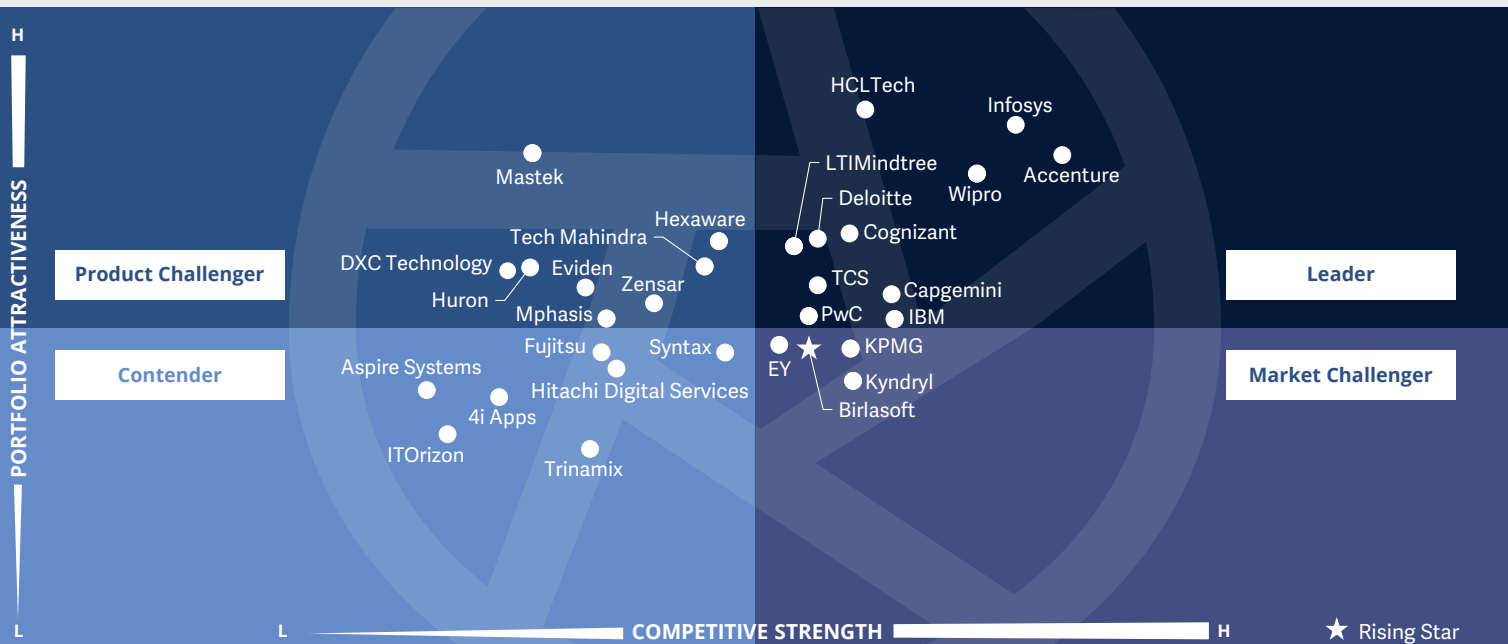
Sourcing and procurement managers should study this report to understand the Oracle managed service provider landscape and compare providers' capabilities.

ISG Provider Lens™

Oracle Cloud and Technology Ecosystem Managed Services

U.S 2023

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

L

COMPETITIVE STRENGTH

L ——————— H

Leader

Market Challenger

★ Rising Star

Mastek

HCLTech

Infosys

LTIMindtree

Accenture

Deloitte

Wipro

Hexaware

Cognizant

Tech Mahindra

DXC Technology

Eviden

TCS

Capgemini

Huron

Zensar

PwC

IBM

Mphasis

Fujitsu

Syntax

KPMG

EY

Aspire Systems

Kyndryl

Hitachi Digital Services

Birlasoft

4i Apps

ITOrizon

Trinamix

This quadrant evaluates **Oracle partners' capability to provide managed services** for maintenance and support that cover monitoring, remote support, centralized management, data quality and security, and compliance-related aspects.

Vishal Srivastava

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 providers, 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

Observations

Oracle's suite of managed services delivers end-to-end solutions for the entire applications and cloud infrastructure lifecycle. This comprehensive suite is tailored to meet the distinct needs of every client. It aligns with clients' unique IT ecosystems, business objectives and financial considerations, precisely based on SLAs.

In the U.S., the clamor for managed services intensifies as organizations strive for enhanced efficiency, cost reduction and greater organizational agility. MSPs are stepping up to meet this demand, offering an extensive range of services designed to complement Oracle's applications and cloud infrastructure, from application hosting, seamless migration and integration to routine maintenance, dedicated support, advanced security, reliable backup, robust disaster recovery and meticulous performance tuning. MSPs empower organizations to leverage the benefits such as scalability, agility, steadfast reliability and relentless innovation offered by Oracle's cloud solutions while ensuring compliance with the regional regulations and standards.

However, the market for MSPs is vast and diverse. The providers may fail to effectively deliver the high-caliber expertise, experience or resources necessary to fulfill customer expectations and project requirements. Some may resort to less transparent practices, evidenced in hidden costs, restrictive contracts or substandard SLAs in terms of customer satisfaction and ROI. Therefore, organizations must rigorously evaluate MSPs' offerings, dissecting their fine details, to ensure the selection of the most compatible MSP that fulfills their specific Oracle applications and cloud infrastructure requirements.

From the 63 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture demonstrates agility through the build, measure and learn methodology. It emphasizes continuous improvement through feedback loops, aiming to fuel innovation, enhance the end-user experience, expedite time to value and reduce costs.

Capgemini

Capgemini offers Oracle PaaS and IaaS along with expert managed services, meeting Oracle's rigorous criteria for managing cloud infrastructure and providing services such as advisory, migration, DevOps, monitoring and optimization.

cognizant

Cognizant provides tailored Oracle Cloud solutions and a wide range of IT services, including consulting and technology solutions, to drive business outcomes. It ensures the right combination of skills and expertise to build, deploy, run and manage Oracle Cloud workloads.

Deloitte

Deloitte's AMS (r)evolution merges application expertise, industry knowledge and a unique delivery model. Strategic guidance and execution are seamlessly integrated to create customized managed service solutions.

HCLTech

HCLTech's Oracle managed services boost business value and cost savings. They focus on client relationships and offer a range of cloud, data and AI solutions for workload optimization on Oracle Cloud.

IBM

IBM and Oracle partner to provide tailored solutions for businesses. IBM combines Oracle platforms with advanced technologies such as ML, RPA, IoT and blockchain to provide industry-specific consulting, implementation and managed services.

Managed Services

Infosys partners with Oracle to enhance automation and productivity using an advanced AMS support model and platforms. As a global digital services leader, Infosys offers consulting, IT solutions and outsourcing, allowing clients to optimize workloads on Oracle Cloud.

LTIMindtree is a leading Indian IT company offering cloud computing, data storage, AI and managed services for OCI. It strives to expedite clients' cloud adoption and business transformation by enhancing offerings, go-to-market strategies and CX.

PwC, a multinational professional services firm, provides services such as assurance, tax, advisory, legal and IT. It assists clients in optimizing their Oracle Cloud operations and guides them in product selection using the Predictable Value approach.

TCS, a global IT company from India, combines Oracle application management expertise with advanced technology and automation skills to assist clients in achieving their business objectives.

Wipro simplifies and automates Oracle environments for enterprises through managed services. It employs tools such as the Oracle ServiceNXT framework and various platforms to standardize processes.

Birlasoft

Birlasoft's (Rising Star) AMS services boost organizations' efficiency, reduce IT costs and offer essential IT support. Its expertise in application and infrastructure management services ensures the safety, productivity and currency of product lifecycle management (PLM) environments.

HCLTech

Leader

"HCLTech's unique approach to Oracle stack managed services ensures end-to-end management, optimization and comprehensive support. This differentiates HCLTech in the Oracle technology stack ecosystem."

Vishal Srivastava

Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 223,400 employees across over 215 delivery centers worldwide. In FY23, the company generated $12.6 billion in revenue, with IT and Business Services as its largest segment. HCLTech has a longstanding alliance with Oracle, spanning more than 20 years. As an Oracle partner and a reliable global system integrator, HCLTech helps its clients optimize their current investments and prepare for the future by transforming the core and envisioning innovative pathways forward.

Strengths

Cloud Application Management Services (CAMS): Oracle Universe (OU-CAMS), offered in dedicated and shared services modes, includes quarterly updates support and a regression test pack. ADvantage TCart, HCLTech's Oracle Cloud Applications regression toolkit, is officially approved and published on Oracle Cloud Marketplace, ensuring a reliable and effective solution.

Application development services: HCLTech leverages the Oracle POD–based integrated delivery model, merging Oracle application management and development services. Its agile product teams, handling both flexible and core components, assume complete ownership of support tickets and enhancements, ensuring comprehensive and efficient services tailored for clients.

Intelligent operations platform: HCLTech's iONA is a powerful intelligent operations platform designed to streamline enterprise operations. Featuring advanced tools, such as iControl and iAutomate, it empowers organizations to capture data, learn continuously and enhance intelligence through AI-ML technologies. Going beyond conventional systems, iONA offers contextual information and automates redundant tasks, marking a significant leap toward operational efficiency and fostering innovation.

Caution

HCLTech should consider exploring alternative pricing models such as value-based pricing and pay-as-you-go to expand its client base in the U.S. Extending this strategy could also bolster its portfolio, specifically catering to midsize enterprises.

Appendix

Methodology & Team

The ISG Provider Lens 2023™ – Oracle Cloud and Technology System study 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.

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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 December 2023, 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 Cloud and Technology 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

Lead Analyst and Author

Vishal Srivastava
Principal Consultant

Vishal Srivastava is a Principal Consultant with Technology Modernization Practice. He is a delivery thought leader who has more than two decades of experience in sourcing, digital transformation, enterprise technology strategy, software development and data engineering & analytics. He is enthusiastic about strategic implications of new emerging technology such as composable enterprise, web3 and quantum computing on business and people.

Research Analyst

Sandya Kattimani
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Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes, and Oracle Ecosystem. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation.

She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other Ad hoc business research assignments.

Author & Editor Biographies

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, principal analyst 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.

About Our Company & Research

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 900 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 1,600 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.

ISG Provider Lens™

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