

Oracle Cloud and Technology Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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This study covers the U.S. Oracle service provider landscape, focusing on partners with cloud solution capabilities

The U.S. public cloud market has seen rapid innovation and growth in 2024, with enterprises across sectors adopting SaaS, PaaS and IaaS services extensively. Compared to other regions, this market is characterised by strong regulatory considerations large and complex scale and industry-specific developments that are not seen in some areas. Oracle is uniquely positioned with a breadth of solutions spanning horizontal and industry cloud applications, legacy on-premise software and platforms and cloud infrastructure. With investments in AI across the stack, a collaborative approach to partnerships and a renewed focus on customer success, Oracle has enhanced its position as a leading cloud provider in the U.S. market and is rapidly gaining ground compared to other application providers such as SAP and Salesforce and other hyperscalars such as AWS,

Microsoft and Google Cloud.

In particular, sectors such as Banking and Financial Services, the Public Sector and Telecommunications, with stringent requirements on compliance, security and data residency, have continued to be strongholds for Oracle. In contrast, newer high-growth sectors actively consider Oracle for both enterprise applications and OCI.

The U.S. Oracle service provider landscape continues to grow and evolve, with vigorous activity by global system integrators. Still, newer solution-specific boutique partners are gaining share with customers owing to flexibility, pricing and agility considerations. With more than 500 cloud service partners offering expertise in implementation, managed services and solution-specific areas, along with many others specializing in legacy license and hardware offerings, customers now have more options than ever when deploying Oracle technology.

Partner Program Evolution and Collaboration for Customer Success:

Oracle has recognised the need to enhance its partners' capacity and capability to compete

Oracle service providers enable digital transformation through effective cloud solution adoption.



with other cloud technology companies and effectively meet dynamic client needs. It has been actively evolving its partner program to ensure relevance to the changing technology landscape and finding the balance between nurturing legacy on-premise partners and those with exclusive cloud focus and expertise. While the focus is on enabling partners to build cloud solution-specific expertise, the latest enhancements to the Oracle Partner Network offer providers enhanced choice and flexibility, training and customer success support and technical accelerators, including test and development environments.

Oracle Customer Success Services (CSS) is a newly created organisation that has merged earlier service teams to help ensure clients' ongoing success with Oracle technology. Importantly, CSS also trains and collaborates with implementers across Oracle's partner ecosystem to enable the successful setup of Oracle technologies, reducing client risk, providing practical support and ensuring client outcomes through continuous usage and adoption of Oracle cloud solutions. This commitment to collaborating closely with

partners benefits customers who might otherwise face difficulties coordinating between Oracle's service teams and partner organizations to address complex issues throughout the technology lifecycle.

Strong Financial Results:

Oracle's FY24 financial performance was strong, fueled by cloud services growth across cloud applications and OCI. Total revenues increased by 6 percent in USD and constant currency, reaching \$53.0 billion compared to the previous fiscal year. Indicating the widespread presence of key on-premise software, including in the U.S., license support revenues grew by 9 percent in USD and 10 percent in constant currency, reaching \$10.2 billion in Q4FY2024. OCI's revenue stood out with an impressive high double digit growth in USD and continuous currency, fueled by customer demand and significant investments in its data centre footprint and cloud services portfolio expansion. This positions Oracle favourably for continued success in the evolving tech landscape led by cloud computing. This means that partners continue to invest in Oracle practices to leverage the large services market.

OCI Growth and Momentum:

With more than 100 services, performance, security and multiple deployment options, OCI has become a key growth pillar for Oracle. The U.S. market has seen excellent client OCI momentum, driven by OCI's cost advantage, especially for foundational services, including computing, storage and networking. OCI offers the same prices in all cloud regions, including government and dedicated regions, while other cloud providers have a different pricing for the same service in various region.

U.S. Clients and providers have demonstrated a strong preference for running Oracle applications on OCI and there is increasing acceptance of its suitability for third-party and custom cloud-native applications.

Over the past year, Oracle has expanded its multicloud partnerships to include Google Cloud, announced in June 2024 and AWS in September 2024, providing joint customers with more options. OCI Interconnect with Microsoft Azure, launched in September 2023, is now operational in three U.S. regions and is being utilized by several joint customers to deliver

improved performance with low latency, all without extra costs.

Oracle is the only provider with a range of choices that should help drive revenue growth while ensuring customer retention.

AI for the enterprise: Oracle's AI innovation is centred on solving business problems effectively, focusing on enterprise-grade security, accuracy and accessibility. Oracle continues to embed AI and ML deeply across its entire product suite, spanning databases, AI infrastructure, cloud services, applications and industry solutions.

By integrating AI built natively into Fusion Applications, actionable insights, timely predictions and time-saving automation ensure that providers do not need to manage tricky integrations. Some examples of embedded AI in ERP and enterprise performance management (EPM) include automating finance tasks to help improve performance and planning, optimising working capital and increasing automation across financial processes. Within supply chain management (SCM), embedded AI helps




automate supply chain decision-making and optimization as a standard feature. HCM AI capabilities help enhance employee experience, improve workforce productivity and drive candidate engagement with tight control over data security and governance. Oracle AI for CX includes traditional and generative AI capabilities that help marketing, sales and service teams by optimizing their engagement strategies, anticipating customer needs and delivering personalized support; leveraging automation to perform low-value tasks and freeing client teams to focus on strategic and business priorities.

Additionally, OCI is designed to handle complex AI workloads and is said to offer the highest performance and most cost-effective GPU cluster technology, along with the highest bandwidth RDMA network in the cloud.

OCI AI services are a collection of offerings, including GenAI, with prebuilt ML models that make it easier for developers to apply AI to applications and business operations. The models can be custom-trained for more accurate business results.

Through investments in its data centre footprint, an enhancement to its cloud portfolio, AI innovation across the stack and a renewed partnership strategy focused on collaboration for customer success, Oracle has strengthened its position as a top cloud provider in the U.S. market.



 Provider Positioning

	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
4i Apps	Contender	Contender	Contender	Not In
Accenture	Leader	Leader	Leader	Leader
Aspire Systems	Contender	Contender	Contender	Contender
Astute	Contender	Contender	Contender	Contender
Birlasoft	Market Challenger	Contender	Market Challenger	Market Challenger
Capgemini	Leader	Leader	Leader	Product Challenger
Centroid	Rising Star ★	Product Challenger	Product Challenger	Leader
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Contender	Product Challenger	Product Challenger	Product Challenger






Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
Fujitsu	Product Challenger	Contender	Contender	Contender
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Not In	Product Challenger	Product Challenger	Contender
Hitachi Digital Services	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Huron	Contender	Contender	Contender	Not In
IBM	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader	Leader
KPMG	Leader	Leader	Leader	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader



 Provider Positioning

	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
Mastek	Not In	Contender	Contender	Contender
Mphasis	Contender	Contender	Product Challenger	Contender
PwC	Leader	Leader	Leader	Product Challenger
Sutherland	Contender	Contender	Not In	Contender
Syntax	Contender	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Product Challenger	Product Challenger
Trinamix	Product Challenger	Market Challenger	Contender	Contender
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Contender	Contender	Product Challenger	Contender



The Oracle Cloud and Technology Ecosystem 2025 study will assess the service maturity level and technical competence of **Oracle's top-performing partners.**

Simplified Illustration Source: ISG 2024



Definition

The ISG Provider Lens™ Oracle Cloud and Technology Ecosystem 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S., Europe, Brazil and Asia Pacific (APAC - a new region covering Asia Pacific, including ANZ, India and the ASEAN-6 (Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam), but excluding Japan, South Korea and China/Taiwan).

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



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Consulting and Advisory Services, Implementation and Integration Services, Managed Services and OCI Solutions and Capabilities.

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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which 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 Section

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

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

Oracle consulting and advisory service providers focus on enhancing enterprise efficiency, flexibility and scalability by modernizing and optimizing Oracle applications and infrastructure technologies. These providers help organizations maximize the value of their Oracle investments, reduce risks with cloud solutions and improve business agility. They offer a wide range of transformation services, including project planning, solution design, user training and product installation, which are tailored to

match client-specific business and technology landscapes. Providers must demonstrate a strong commitment to governance, confidentiality and compliance for successful transformations. Thus, understanding the capabilities of providers profiled in this quadrant is crucial for organizations aiming to leverage Oracle services effectively, make informed decisions and successfully execute modernization initiatives.



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.



Consulting executives should read this report to understand Oracle's industry-specific solutions and service providers' capabilities in delivering successful consulting projects across various sectors.

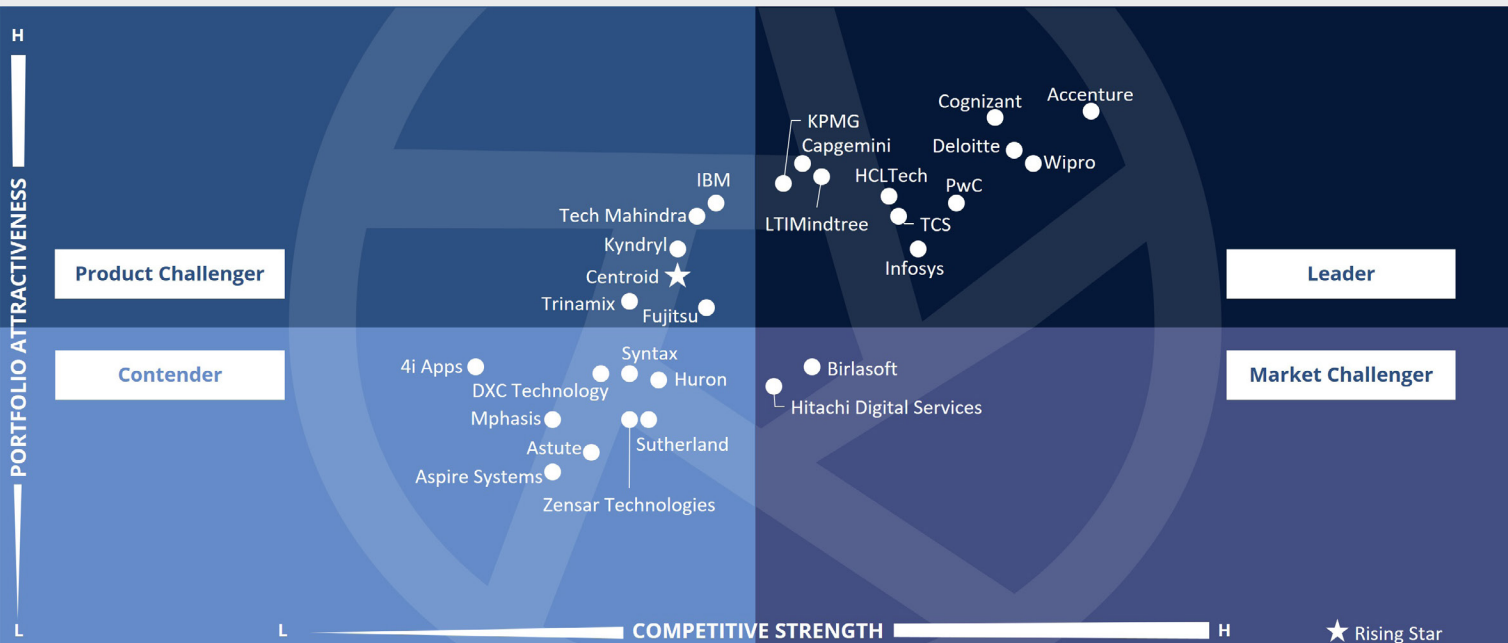


Digital transformation leaders should review this report to evaluate how service providers align Oracle solutions with the latest technologies for resilient organizations.



Marketing and sales leaders should read this report to understand service partners' positioning and competencies, which can help them make informed decisions and enhance business strategies.





This quadrant evaluates providers offering advice spanning **governance, solution design, technology architecture and change management** to U.S. clients adopting Oracle cloud solutions to reduce risk, optimise costs and drive adoption.

Siddharth Idnani



Consulting and Advisory Services

Definition

This quadrant evaluates Oracle service providers that help organizations effectively adopt and optimize Oracle solutions to enhance business efficiency, flexibility and scalability. They leverage the best practices to maximize 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 a future-state framework, conduct security assessments and define governance processes. Providers also offer transformation services to help clients use the Oracle stack, involving project planning, solution design, business process modelling and user training. They must deeply understand clients' business and technology landscapes and offer frameworks, tools and accelerators to ensure secure and compliant transformations.

Eligibility Criteria

1. **Strategic guidance with best practices:** Uses reference assessment models, strategy, road maps and frameworks
2. **Tailored IT strategy recommendations:** Offers recommendations aligned with IT strategy, technical reviews, benchmark tools and templates
3. **Industry expertise:** Demonstrates industry knowledge and domain-specific practices
4. **Mastery of the Oracle Ecosystem:** Showcases in-depth understanding of the Oracle solution portfolio and related functionalities, processes, workflows, tools and platforms, along with industry expertise
5. **Comprehensive cloud advisory:** Implements the Oracle Cloud Services Framework by providing cloud strategy assessments, readiness assessments and architectural advisory services
6. **Differentiated CX through strategic consulting:** Possesses expertise in functional processes, contextual customer knowledge and strategy consulting to offer differentiated CX
7. **Transformation through change management:** Supports change management lifecycle to drive transformation through people, process, technology and strategic initiatives



Consulting and Advisory Services

Observations

The U.S. market for Oracle consulting and advisory services is expanding rapidly, driven by a confluence of factors: the surging adoption of cloud SaaS for digital transformation and the critical need to migrate legacy Oracle platforms. Additionally, controlling cloud complexity and costs resulting from the proliferation of hyperscaler workloads across hybrid and multicloud deployments.

Recognizing the significance of a robust foundation built upon strong governance, a laser focus on value realization and tailored expertise matching their specific requirements, enterprises are increasingly seeking expert guidance before embarking on new Oracle cloud projects or revamping existing ones. This is where leading providers distinguish themselves through their global scale, strategic partnerships and strong track records built upon client success.

Several providers are strategically embracing a consulting-led approach to Oracle solution engagements driven by escalating client demand. They are building

expertise and expanding capabilities with a dual-pronged strategy: a deep focus and prioritization on specific technologies or industries while partnering with Oracle's Consulting Services teams to navigate complex cloud transformations.

Providers with expertise in the deployment of legacy Oracle technologies, including intricate licensing considerations, may often be favored when clients embark on modernization projects involving the migration of on-premise Oracle applications, databases, or middleware to the cloud. Clients require partners who can effectively guide them in optimizing investments while ensuring adherence to Oracle licensing policies.

From the 66 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture has extensive U.S. market experience, helping enterprises drive cloud transformation with tailored Oracle solutions. Its global presence, cutting-edge innovation and customer-centricity make it a leading choice for complex Oracle projects.

Capgemini

Capgemini is one of Oracle's strategic partners, offering award-winning cloud solutions for various industries. With deep expertise in Oracle's suite of products, Capgemini supports businesses in achieving scalability, agility and innovation.

cognizant

Cognizant's excels in Oracle consulting and advisory services, driving business transformation and innovation. Its customer-centric approach and business value realisation framework optimise processes, modernise applications and align strategies with client outcomes.

Deloitte.

Deloitte, an Oracle partner for over two decades, is a technology pioneer in Oracle solutions. It guides enterprise clients through transformations, service improvements, analytics integration and innovation.

HCLTech

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

Infosys®

With strategic advisory and Oracle consulting expertise, **Infosys** leverages certified professionals to help drive digital transformation and cloud adoption. Its client-specific solutions help set the foundation for successful Oracle implementations.



Consulting and Advisory Services



KPMG has deep expertise in Oracle Cloud applications, with a substantial risk and governance focus to help businesses design, architect and optimize Oracle systems to improve operational efficiency and drive growth.



Wipro drives Oracle transformations by aligning digital journeys with client goals. Its comprehensive Oracle consulting portfolio, supported by certified consultants and U.S. expertise, ensures enterprises derive value from their Oracle investments.



LTIMindtree offers advisory services to clients by leveraging proprietary frameworks and industry insights to accelerate Oracle Cloud deployment and adoption. Its services include cost-effective assessments, technology road maps and migrations to help clients maximize ROI.

Centroid (Rising Star)

Centroid (Rising Star) is gaining mindshare in the U.S. by working with clients to understand business challenges and leveraging its expertise across Oracle applications, technology and industry solutions to deliver innovative solutions for enterprises.



PwC has extensive U.S. market expertise in Oracle Applications, particularly ERP and EPM. It helps clients enhance business outcomes by utilizing industry-specific insights and leveraging its advisory, tax and assurance services experience.



TCS drives end-to-end business transformation and offers industry-specific advice by leveraging advanced automation and analytics. Its TCS Enterprise Navigator™ uses design thinking and strategic value mapping methodologies.



Cognizant



“Cognizant’s investments in innovation, industry solutions and a market-aligned partnership with Oracle have enhanced its market position as a cloud consulting services provider.”

Siddharth Idnani

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 340,100 employees across over 50 countries. In FY23, the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. The company is facilitating the modernization of clients’ IT core with Oracle Cloud Infrastructure (OCI). This shift in IT spending toward business innovation optimizes and modernizes core business processes, enabling clients across various industries to achieve their business objectives. As a leading Oracle Cloud consulting partner, it specializes in cloud transformation consulting and focuses on delivering solutions tailored to meet customer needs.

Strengths

Continuous innovation framework: Through its continuous innovation framework, Cognizant has collaborated with over 150 customers to generate over 320 innovative ideas across business, process and technology. This co-innovation with Oracle has yielded significant savings of \$70 million and incubated groundbreaking solutions.

Packaged industry solutions: With its preconfigured solutions and deep industry consulting capabilities, Cognizant has been a leading Oracle Cloud consulting partner for three niche U.S. industries: surface transport, quick-service restaurants and healthcare. Cognizant has also built capability around Oracle industry cloud applications in utilities, retail and insurance.

Cloud-first approach: Cognizant’s cloud-first approach prioritizes re-imagining the target state operating model and works with Oracle to help transition customers from legacy Oracle applications to the cloud. Its Cloud Map Advisory offering enables the cloud migration journey and helps effectively plan and prepare for multipillar Oracle Cloud implementation. It includes business process workshops by process area, as well as functional and technology workshops.

Caution

Cognizant’s focus on a few industries fosters targeted excellence, but it should explore developing packaged solutions for more industries, including high-growth sectors that demand innovative approaches.





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 Oracle implementation and integration service providers.

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

These providers specialize in delivering implementation, migration and integration services for Oracle applications and infrastructure technologies. They focus on developing accelerators and proprietary tools to enhance implementation efficiency and quality while aligning with Oracle's comprehensive suite of products designed for business transformation, IT efficiency and competitive advantage. Their services, customized by

certified partners, are adaptable, scalable and cost-effective, supporting end-to-end solutions and specific components.

Additionally, these providers must accurately integrate Oracle applications with clients' internal systems, such as ERP and CRM. As many implementations involve multiple Oracle products and long-term programs with various rollouts across divisions, certified partners guide customers throughout their cloud journey, equipping them with the best practices and tools to transform technology adoption into a pathway for achieving business aspirations. Understanding providers' capabilities in this quadrant is vital for organizations aiming to optimize Oracle solutions through expert implementation and integration services.



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 should read this report to stay updated on Oracle solutions and invest in task-specific tools and accelerators for Oracle implementations and related cloud platforms.



Technology leaders should read this report to gather in-depth and latest insights on Oracle's trends, features and integration updates.

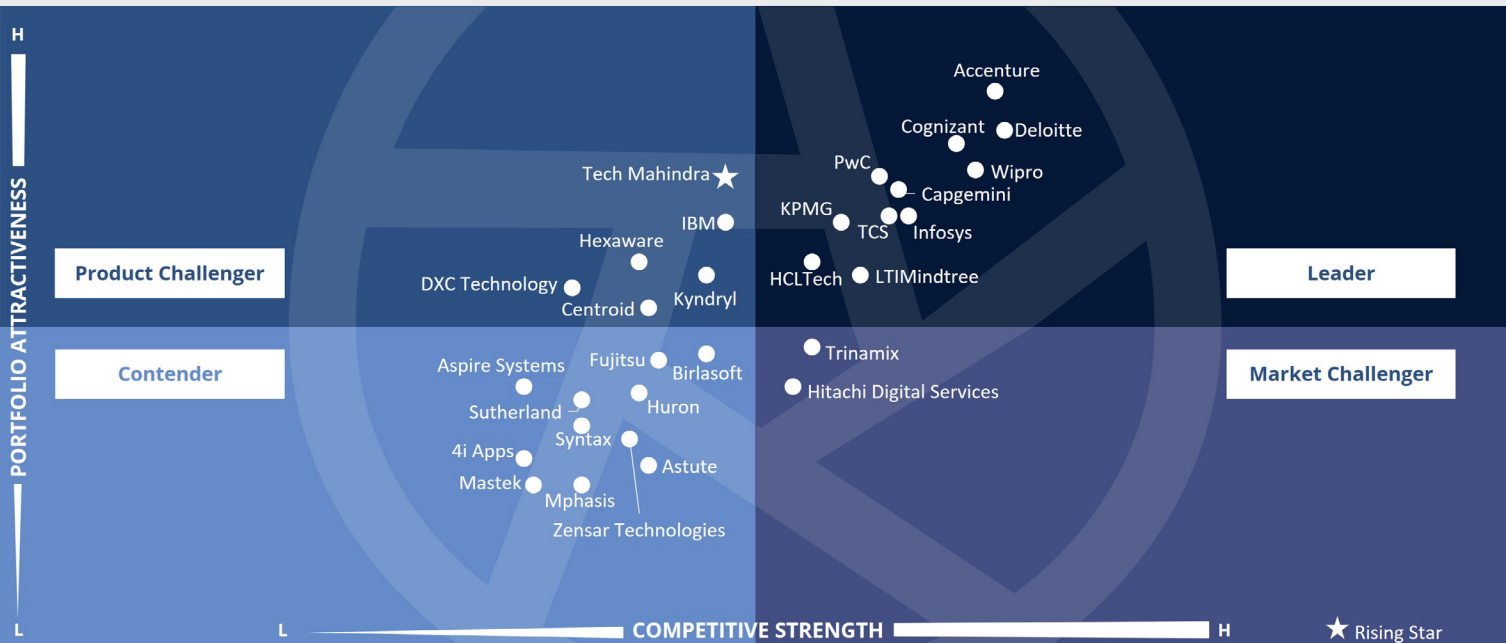


Marketing and sales leaders should read this report to assess service partners, improve software integration and make informed decisions.



**Oracle Cloud and Technology Ecosystem
Implementation and Integration Services**

U.S. 2024



This quadrant assesses U.S. Oracle implementation service providers on solution breadth, technical expertise, industry knowledge and **customer success**. It also evaluates **cross-platform integration capabilities**, which are critical to client success.

Siddharth Idnani



Implementation and Integration Services

Definition

This quadrant evaluates service providers' expertise in Oracle solution implementation and integration and examines their ability to develop accelerators and components that aid in effective deployments. Providers' implementation capabilities cover designing the entire implementation plan, creating data migration strategies, modernizing processes, deploying solutions on-premises or on the cloud (hybrid and multicloud), ensuring data security and developing governance protocols. Integration capabilities encompass the design, deployment and management of integrations between Oracle solutions, third-party systems and custom applications across various environments, including cloud, on-premises and hybrid setups. The scope of this study considers that, in most cases, clients may have deployed various products from the Oracle portfolio, which need to coexist and complement one another.

Eligibility Criteria

1. **Use of predefined solutions, templates and expertise:** Experience in using prebuilt solutions and accelerators for successful Oracle stack deployment
2. **Integration and migration services:** Competencies in application development and migration, database migration and modernization, data migration, workload migration and testing services across the Oracle stack
3. **Maintenance and support capabilities:** Proficiency in installations, upgrades, new feature/module release management, migration, patching and lifecycle management
4. **Deployment speed:** Ability to quickly design solutions based on reference architecture and deploy new modules and enhancements
5. **Enabling technologies:** Expertise in using APIs, automation, data science and AI and ML to drive implementations and integrations with major hyperscalers



Implementation and Integration Services

Observations

The U.S. market for Oracle implementation services has expanded, driven by the increasing demand for SaaS and OCI offerings. Quality client projects typically involve a well-defined scope, a comprehensive plan and strong project management. The service provider teams should deeply understand Oracle's capabilities and the client's business needs.

Leading providers stand out by delivering end-to-end service capabilities encompassing planning, deployment, ongoing support and training throughout the usage lifecycle.

Several Oracle projects are characterised by complex and phased migrations of existing on-premise client solutions to the cloud, focusing on security, compliance and business continuity. In addition to technical expertise, change management capabilities are critical differentiators when considering providers.

Industry expertise: Large enterprises prefer providers with deep domain expertise, particularly for key mission-critical SaaS projects impacting business metrics. When combined with Oracle technical expertise,

deep industry knowledge significantly impacts an Oracle implementation's success by reducing risks, accelerating time-to-value and maximizing ROI.

Integration capability: Leading providers excel by enabling the integration of Oracle solutions with third-party and custom-built applications. This is achieved through deep technical expertise, strong partnerships, prebuilt tools and accelerators that drive efficiency. Cross-pillar Oracle expertise enables the top providers to seamlessly combine existing and new Oracle deployments across on-premises and cloud environments to deliver optimal outcomes for clients.

From the 66 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture's Oracle talent pool, wide range of industry experience and purpose-built solutions are unmatched, helping clients in the U.S. with innovative deployment of complex Oracle technologies.



Capgemini is a leading Oracle implementation partner, offering a comprehensive range of services. With deep expertise and a long-standing history of collaboration, it helps organizations leverage Oracle solutions for business transformation across various industries.



Cognizant has expertise in Oracle applications, with a deep understanding of specific industry sectors such as quick service restaurants (QSR), offering U.S. clients with its exceptional value for their Oracle deployment.

Deloitte.

Deloitte's Ascend™ evaluates digital capabilities to help clients gain a competitive advantage by harnessing the full potential of Oracle Cloud and ensuring effective deployment and integration.

HCLTech

HCLTech excels through its usage of purpose-built tools and accelerators such as ADvantage SPADE and ADvantage T-Card that help clients reduce risk, enhance productivity and reduce time to market for key Oracle implementations.



Infosys strengthens Oracle implementations through its robust internal expertise and strategic alliances. Leveraging the Infosys Oracle Cloud Suite with prebuilt assets, it accelerates client digital transformations.



Implementation and Integration Services



KPMG delivers industry-specific Oracle solutions, accelerating innovation. It excels at seamless Oracle application integrations, optimizing data flow and minimizing disruptions in complex environments.



Wipro's accelerates Oracle deployments using tools such as QuMiC for faster data migration, RapidTxFaster for risk-free transitions to Oracle SaaS, and prebuilt templates and process maps for efficient implementation tailored to client requirements.



LTIMindtree's has significantly expanded its Oracle expertise, doubling certifications and growing its global workforce. Focused talent programs have enhanced its capabilities as a leading Oracle service provider.



Tech Mahindra distinguishes itself for delivering cost-effective Oracle solution implementation and integration, supported by growing expertise in new Oracle Cloud applications and infrastructure.



PwC's has expanded its partnership with Oracle by investing in the Oracle Customer Success Services Program, securing dedicated resources and proprietary tools to embed in client engagements, enhancing the effectiveness of Oracle Cloud application implementations.



TCS' Crystallus is a preconfigured industry solution built on Oracle Cloud that accelerates time to market with advanced automation and analytics. Customization based on client requirements helps drive continuous functional improvement and innovation.



Cognizant



“Cognizant’s strong expertise in Oracle implementation, particularly applications, is enhanced through excellent collaboration and alignment with Oracle to innovate and help deliver improved client value and outcomes.”

Siddharth Idnani

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 340,100 employees across over 50 countries. In FY23, the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant has a strong Oracle implementation and integration capability and has successfully executed over 400 Oracle Cloud projects worldwide. The company provides end-to-end services to help organizations migrate on-premises applications and implement Oracle’s HCM, ERP, SCM, EPM and CX Cloud applications.

Strengths

Talent management: Cognizant’s commitment to building Oracle Cloud competency is evident in its comprehensive talent management approach. By providing extensive training to over 90 percent of its associates on new solutions and empowering 75 percent with GenAI skills, the company is upskilling its workforce and fostering a culture of innovation. With a strong emphasis on talent retention, Cognizant is well positioned to deliver exceptional value to its clients.

Retail QSR ERP leadership: Cognizant’s Franchise Collaboration Hub is a leading Oracle Cloud franchisee solution targeted to the retail quick service restaurant (QSR) segment and the travel and hospitality industry. Franchisors migrating to the Oracle

ERP Cloud must offer comprehensive business processes for franchisee onboarding, accounting, sales reporting and analytics for wages, sales promotions and logistics.

U.S. market momentum: Cognizant’s strategic partnership with Oracle, including the Cloud Catalyst Program membership, is driving significant growth. It focuses on helping U.S. clients with legacy on-premises applications, including ERP, HCM, EPM and SCM, migrate to the cloud by leveraging analytics and integration for business transformation.

Caution

Cognizant is increasingly considered for large and complex Oracle projects. However, it needs to enhance its capabilities organically or through continued acquisitions, including recent ones, to address a wide range of Oracle solutions, particularly for small enterprises and midmarket customers.





Managed Services

Who Should Read This Section

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

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

Oracle managed services encompass the entire lifecycle of Oracle applications and cloud infrastructure, from planning and deployment to ongoing support and optimization. Tailored to meet customer-specific needs, these services help organizations improve efficiency and agility, with offerings that include application hosting, migration, integration, maintenance, support, security, backup, disaster recovery and performance tuning.

As demand for managed services grows, especially in pursuit of cost reduction and organizational agility, organizations must navigate a diverse MSP market. In this landscape, some providers may lack the necessary expertise and transparency that businesses require. This situation necessitates a thorough evaluation of MSP offerings to avoid hidden costs and enable alignment with the unique IT requirements and SLAs. Overall, selecting the right MSP is critical for leveraging Oracle's cloud solutions while complying with regional standards and maximizing customer satisfaction and ROIs.



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



Delivery leaders managing key U.S. accounts and focusing on CX and Net Promoter Score should read this report for insights on how Oracle managed service providers maintain credibility and excellence.



Sourcing and procurement managers should read this report to understand the Oracle managed service provider landscape and compare providers' capabilities.

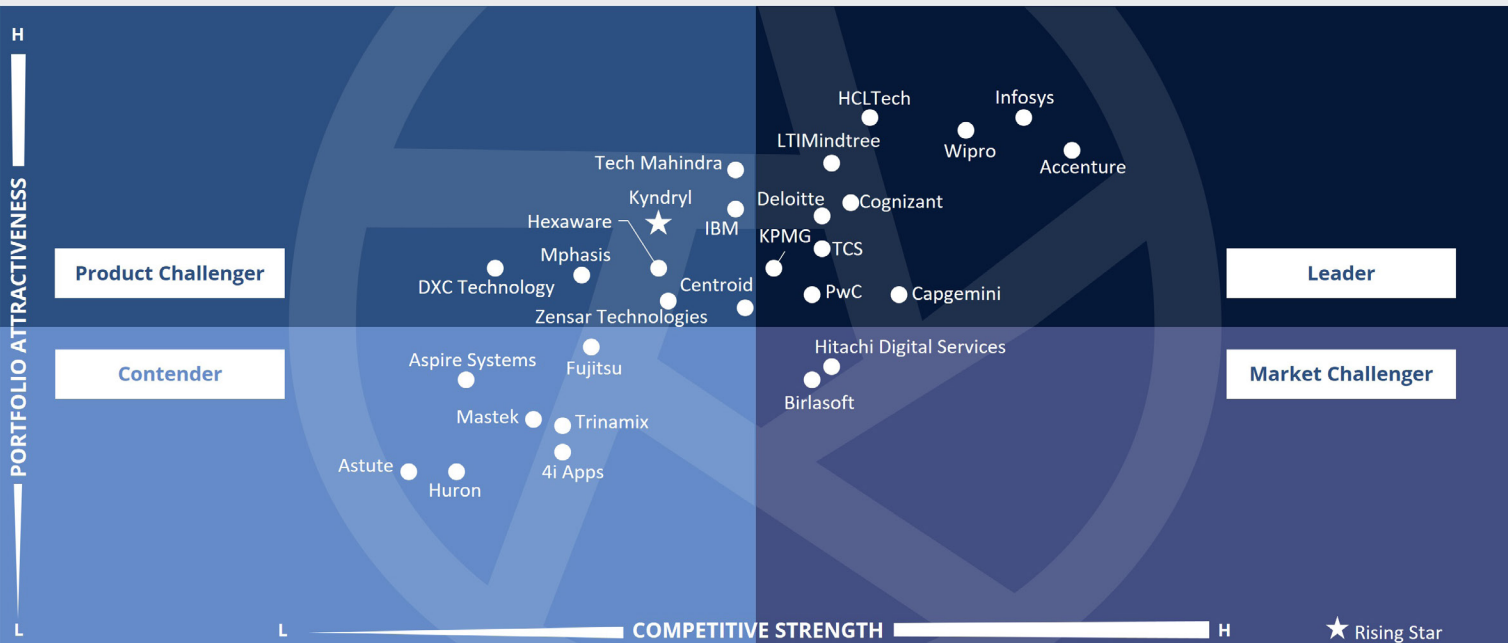


Technology leaders should read this report to stay updated on Oracle's latest trends, features, managed services and related insights.



**Oracle Cloud and Technology Ecosystem
Managed Services**

U.S. 2024



This quadrant evaluates U.S. Oracle Managed Services providers on their **innovation, flexibility, service breadth**, client outcome alignment and ability to manage complex global Oracle environments at scale.

Siddharth Idnani



Managed Services

Definition

This quadrant analyzes specialized service providers that offer turnkey, managed services (based on Agile, DevOps and ITIL frameworks), covering the entire Oracle portfolio- Cloud Applications, OCI, Software and Hybrid systems. These MSPs serve as partners in managing and optimizing Oracle technology, allowing organizations to focus on core operations while receiving expert support and strategic advice. MSPs should provide onsite, offsite or hybrid service models and offer robust training programs on Oracle solutions. In addition, providers must maintain strong partnerships with technology providers and third-party vendors, covering a broad range of Oracle solutions.

MSPs should also have expertise in managing complex multicloud customer environments and be capable of addressing clients' key business requirements by leveraging their expertise in designing, deploying and optimizing customized.

Eligibility Criteria

1. **Oracle stack support:** Expert in managing configurations, administrations and data management reporting security and applications
2. **Change and release management:** Expert in managing Oracle change and release processes, reducing errors, automating tasks, and optimizing functions
3. **Infrastructure management:** Experience in provisioning and configuring OCI resources (VMs, storage and networking), monitoring performance, capacity planning, scaling and ensuring disaster recovery and business continuity
4. **Application maintenance:** Experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment
5. **Database support:** Expertise in administering, upgrading, patching and optimizing Oracle databases, ensuring high availability and implementing DR plans
6. **Cost optimization:** Expertise in cost analysis, rightsizing resources and identifying cost-saving opportunities



Managed Services

Observations

With the growing demand for Oracle cloud solutions in the U.S. market, organisations are challenged to balance ongoing support for critical innovation projects with constrained budgets and limited headcount. A successful Oracle deployment needs to be followed by strong service management expertise to ensure cloud adoption. This has led to a growing opportunity for existing and new Managed Services Providers to address client-specific needs through tailored solutions that bring expertise to manage risk and compliance while continuing to adopt the latest Oracle technologies.

Oracle-endorsed Managed Services: While many providers have diverse Managed Services capabilities across the Oracle Portfolio, a select group has acquired Oracle's coveted Cloud Solutions Provider Expertise status. An Oracle Cloud Solutions Provider is a recognised Oracle partner with the skills and demonstrated experience to build, deploy, run and manage both Oracle and non-Oracle workloads on Oracle Cloud Infrastructure. In addition to

certification and customer success stories, an annual third-party audit is required to attain and maintain status as a Cloud Solutions Provider.

Evolving pricing models: Clients in the U.S. increasingly demanding outcome-based Managed Services for Oracle solutions over traditional service delivery models to maximise value and align service delivery with business objectives. Some key providers have, therefore, pivoted their commercial models to offer clients greater choice, share risk and reward and identify clear, measurable outcomes and quantifiable metrics through a collaborative and transparent approach that facilitates long-term engagements.

From the 66 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture's managed services offerings are comprehensive and cater to various needs such as cloud migrations, infrastructure management, system monitoring and application management. Its end-to-end services ensure consistent support throughout the entire Oracle lifecycle.



Capgemini is a leading managed services provider in the U.S., offering comprehensive support for Oracle solutions. It helps clients derive value from their Oracle investments through services such as application management, cloud migration and performance tuning.



Cognizant provides tailored Oracle managed services to help clients drive business outcomes. It ensures the right combination of skills, industry expertise and innovation to deploy, run and manage Oracle Cloud workloads.

Deloitte.

Deloitte's OpenCloud cloud management platform offers customers added choice during the three key phases (build, manage and operate) of designing an Oracle Cloud environment.

HCLTech

HCLTech provides a comprehensive suite of Oracle services, supporting both on-premises and cloud deployments. Leveraging its global reach and a strong offshore delivery model, HCLTech delivers exceptional value as an Oracle managed services provider to U.S. clients.



Infosys' LEAP, an end-to-end platform, elevates Oracle managed services by focusing on user experience, driving proactive support and improving efficiency.



Managed Services



KPMG's Powered Evolution optimizes Oracle applications, ensuring peak performance. This service includes base, enrichment and governance services tailored to individual client needs.



Wipro's Organizational Change Management (OCM) framework helps clients manage change in Oracle projects, ensuring smooth transitions, driving user adoption and achieving positive business outcomes.



LTIMindtree's Oracle managed services help shift focus from running operations to business transformation. Powered by the Novigo platform, its offerings reduce AMS spending and improve efficiency through hyperautomation.

kyndryl

Kyndryl (Rising Star) is a prominent Oracle managed service provider with Oracle CSPE status in the U.S. It offers deep expertise in OCI, including integration and data management. Kyndryl also efficiently manages Oracle ERP applications in multicloud and hybrid environments.



PwC's Zero Ops approach leverages AI and ML, automation, ChatPwC and other accelerators to eliminate low-value application management services (AMS) tasks from service delivery, shifting focus to innovation and client impact.



TCS has extensive experience managing complex legacy and cloud Oracle environments across several industries in the U.S., leveraging innovation and global scale for high-quality service delivery.





“Cognizant’s global scale, U.S. market focus and status as an Oracle Cloud Solutions Provider Expertise (CSPE) make it a top choice for managed services.”

Siddharth Idnani

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 340,100 employees across over 50 countries. In FY23, the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant offers comprehensive Oracle managed services, including cloud advisory, service migration, application maintenance and development, release and patch management, DevOps, provisioning and orchestration, monitoring, incidence and change management, and cloud optimization.

Strengths

Cloud Central integration: Cognizant’s Cloud Central offers a subscription-based platform with over 150 prebuilt integrations. This platform has strong reporting and analysis capability, with over 650 post-implementation reports that can provide insights into integration health.

Robust partnerships: Cognizant leverages partnerships with solution providers across automation, business processes, testing and other areas to drive integration and provide seamless delivery. In particular, with a multicloud focus, its partnerships with the other hyperscalers and GenAI companies hold great promise in the emerging managed services landscape.

AI-enabled automation: Cognizant leverages AI-powered tools such as Cognizant AVMplus® and AppLens™ to enhance service delivery. AVMplus® helps customers progress toward an outcome-based metrics measurement model by mechanizing application management best practices and creating a reference services framework for every engagement. AppLens™ provides intuitive insights into Oracle patches and upgrades that allow implementation options tailored to client requirements, reducing risk and enhancing value.

Caution

Cognizant should leverage its deep Oracle expertise and noteworthy CSPE status as a strategic advantage to secure large, multiyear, cross-pillar managed services projects.





OCI Solutions and Capabilities

OCI Solutions and Capabilities

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. for evaluating the providers of Oracle OCI solutions and capabilities.

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

The OCI Solutions and Capabilities quadrant evaluates service providers with specialized expertise in helping businesses adopt and maximize OCI and its comprehensive suite of cloud services. Providers are recognized for their ability to modernize IT, optimize cloud operations and facilitate digital transformation through OCI offerings. Their proficiency in IaaS and PaaS is critical, as it demonstrates providers' proven capabilities in designing and managing complex, industry-specific environments.

The report assesses providers' cloud migration strategies, including approaches to multicloud and hybrid setups, system integration, and adherence to security and governance standards. Additionally, their capabilities in OCI data management, analytics, cloud-native application development and tailored industry solutions are evaluated, alongside their experience in enhancing OCI's generative AI (GenAI) services to foster innovation. Therefore, providers must read this report to identify best practices and ensure that they align their solutions effectively with the evolving needs of enterprises leveraging OCI.



Operations leaders should read this report to gain insights into service providers' operational efficiencies and understand their capabilities in effectively managing cloud environments.



Technology leaders should read this report to evaluate how different service providers align with their cloud modernization initiatives to stay informed about their organizations' strategic direction.



Delivery leaders managing key U.S. accounts and focusing on CX and Net Promoter Score should read this report to gain insights on how providers approach OCI adoption and digital transformation.

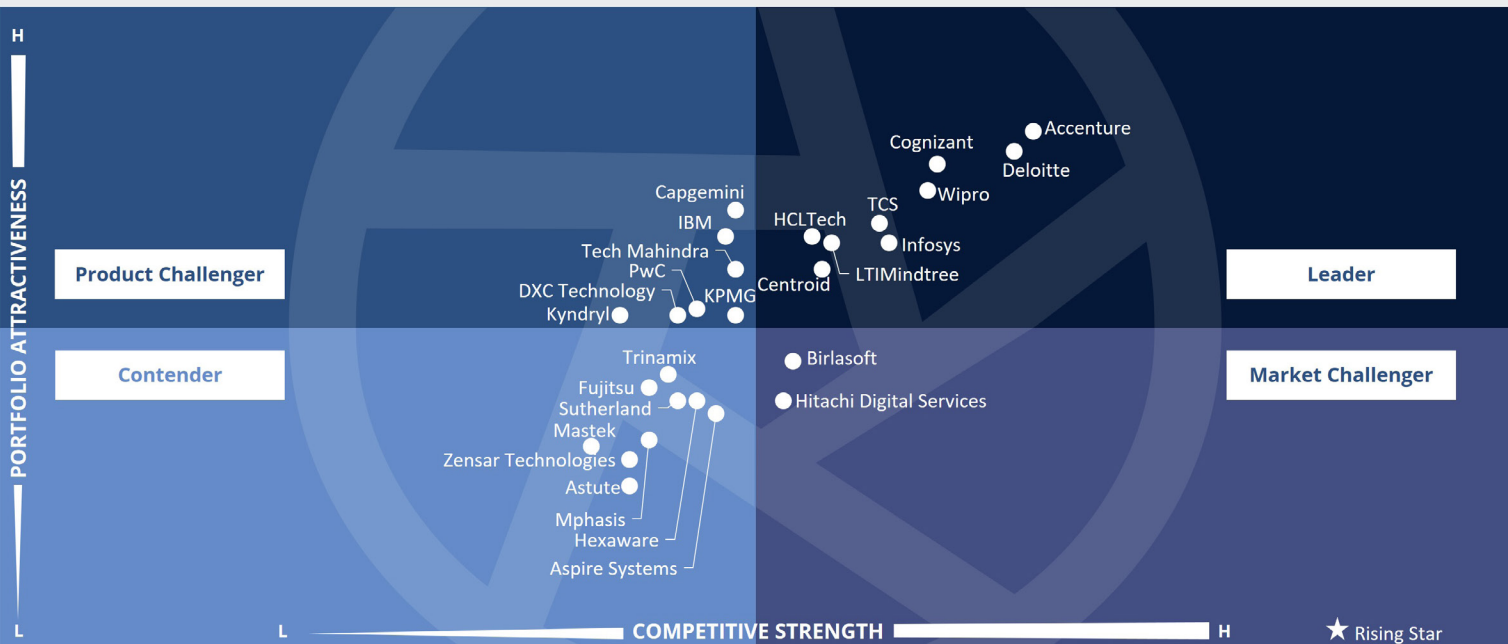


Governance and compliance officers should read this report to gain insights into the Oracle OCI solutions landscape and evaluate providers' capabilities in maintaining security and compliance standards.



**Oracle Cloud and Technology Ecosystem
OCI Solutions and Capabilities**

U.S. 2024



This quadrant assesses U.S. service providers' expertise on OCI solutions, focusing on cloud migration expertise, **multicloud and hybrid cloud experience**, on-premise integration capability and compliance standards

Siddharth Idnani



OCI Solutions and Capabilities

Definition

This quadrant assesses service providers' with specialized expertise and solutions that help businesses effectively adopt and leverage OCI's comprehensive suite of cloud services. Their capabilities include modernizing IT, optimizing cloud operations and facilitating digital transformation through OCI offerings. These providers stand out for their OCI IaaS and PaaS expertise, with proven capabilities in designing and managing complex, industry-specific environments.

They will be assessed on their cloud migration approaches, including multicloud and hybrid setups, system integration and compliance with security and governance standards.

Capabilities in OCI data management, analytics, cloud-native application development and customized industry solutions will also be evaluated.

For AI, providers will be assessed on the basis of their experience and expertise in complementing OCI's GenAI services to drive innovation.

Eligibility Criteria

1. **Mastery of OCI architecture:** Expertise in OCI architecture, deployment and management across infrastructure and platform services
2. **Strategy for cloud migrations:** Proven experience in cloud migration strategies, including multicloud and hybrid cloud deployments
3. **Seamless integration:** Ability to integrate OCI with existing enterprise systems and third-party solutions
4. **Data-driven insights:** Proficiency in utilizing OCI's data management services to drive data-driven insights and business intelligence
5. **Security and compliance assurance:** Expertise in ensuring security, governance and compliance within OCI environments
6. **Innovation with OCI:** Ability to design, develop and deploy cloud-native applications using OCI's microservices, Kubernetes and serverless computing offerings
7. **Industry-specific solutions:** Ability to offer tailored OCI solutions to address industry-specific needs
8. **Smart optimization:** Use of automation, AI and ML tools, GenAI and cost-optimization strategies



OCI Solutions and Capabilities

Observations

Oracle continues to gain market share in the U.S. hyperscaler market by providing highly secure, scalable and high-performance OCI services. In particular, Oracle has captured significant business in industries where security, regulatory compliance and performance are critical. This growth is driven both by traditional enterprise workloads and rising demand for AI and ML applications, which rely on the powerful processing capabilities of the OCI Gen2 cloud.

Distributed Cloud: OCI is the only cloud provider offering comprehensive cloud services worldwide with diverse deployment options, including OCI public cloud, hybrid cloud solutions such as Exadata Cloud@customer, or Dedicated Cloud Region services within customer data centres. This diverse choice of modular deployment options allows customers to adopt the cloud with agility, flexibility and minimal risk.

Defence, Government and Intelligence

Community Cloud: Oracle National Security Regions (ONSRs) are designed for the U.S.

Defence Department and Intelligence Community. ONSR regions support and accelerate the delivery of national security workloads at the secret and top-secret levels. These air-gapped regions, entirely disconnected from the internet, securely deliver cloud services to enable the security of classified data, removal of data silos and innovation. In addition, Oracle operates government cloud regions in the U.S. with adherence to local data residency, classification, operational and security requirements.

From the 66 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders and 0 Rising Star.

accenture

Accenture's scale of OCI offerings is extensive, spanning infrastructure and platform capabilities across multicloud and hybrid cloud environments. Since 2003, the company has won 183 awards for its innovative solutions, and this legacy now extends to OCI customers.

Centroid

Centroid, an Oracle-certified CSPE provider, accelerates customer workload migration to OCI. With a U.S.-focused team, it offers tailored services for midsize enterprise clients, leveraging over 25 years of Oracle expertise for enhanced OCI adoption.

cognizant

Cognizant's CSPE status and strong OCI expertise, combined with its deep industry specialization in sectors such as retail, have positioned it as a leading choice among U.S. customers considering OCI deployments.

Deloitte.

Deloitte is the 2024 winner in the Global Customer Success category for providers offering OCI services, recognized by Oracle. This achievement highlights its global OCI capabilities, particularly in the U.S. market.

HCLTech

HCLTech is a top choice for U.S. customers adopting OCI, owing to its deep OCI expertise, cloud solution provider status endorsed by Oracle, and competitive, cost-effective solutions.

Infosys

Infosys' Cobalt accelerates OCI adoption with prebuilt solutions and tools such as iConsolidate and iMigrate, optimizing costs and time to market. Through strong Oracle partnerships, Infosys drives client value realization on OCI.

LTIMindtree

LTIMindtree's Infinity platform accelerates OCI journeys with industry-aligned blueprints, a solution marketplace and GenAI-powered capabilities. It provides 360-degree observability, enabling fast migration and modernization while addressing persistent challenges.



OCI Solutions and Capabilities



TCS' multicloud expertise, Oracle CSPE status and partnership legacy are strong credentials that help differentiate it from several other OCI solution providers in the U.S. market.



Wipro's recognition as a 2024 award-winning Oracle partner for driving customer innovation on OCI highlights its expertise in Oracle solutions. U.S. clients can leverage Wipro's multicloud capabilities to enhance their operations' agility, performance and innovation.



Cognizant



“Cognizant’s OCI expertise within the Oracle PartnerNetwork is among the best. With a strong focus on growing its capability and extending GenAI innovation, Cognizant is poised to lead the OCI services market in the U.S.”

Siddharth Idnani

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 340,100 employees across over 50 countries. In FY23, the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant provides end-to-end support for OCI solutions, from planning and strategy development to implementation, management and ongoing optimization. As an Oracle strategic partner, the company provides a range of services that cater to the specific needs of organizations looking to migrate to or optimize their OCI use.

Strengths

OCI advisory and migration offerings:

Cognizant’s CloudFit assessment services help define enterprise end-state cloud architecture and the right-size capacity for performance. Cloud Lift is a tested and reliable solution that covers application inventory, assessment, code analysis, migration planning and execution and post-migration support. It helps enterprises migrate Oracle and non-Oracle enterprise workloads to OCI, thus generating value from OCI investments.

Single point of contact support:

Cognizant is one of the few global partners that have attained Oracle’s CSPE status. As a CSPE partner, the company can serve as a single point of contact for end-to-end stack support, from infrastructure to application


services, under unified SaaS, such as service levels. With expert advisors and specialized tools and services for enterprise risk mitigation, monitoring, security, resilience and performance optimization, Cognizant automates workload management while managing regulatory compliance.

GenAI services: Cognizant’s Ora0 platform is built entirely on OCI services; its robust foundation enables seamless delivery of client solutions leveraging OCI GenAI services and GPU compute capabilities.

Caution

Cognizant should leverage its expertise in OCI and prebuilt industry solutions to attract and acquire cross-industry clients requiring multicloud support, including migrations from competing hyperscalers.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – Oracle Cloud and Technology Ecosystem study analyzes the relevant software vendors/service providers in the Europe 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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of December 2024 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Oracle Cloud and Technology Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendors across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following main evaluation criteria:

- * Strategy and vision
- * Innovation
- * Brand awareness and presence in the market
- * Sales and partner landscape
- * Breadth and depth of portfolio of services offered
- * Technology advancements



Author & Editor Biographies

Lead Author



Siddharth Idnani
Distinguished Analyst

Siddharth has close to three decades of India market experience with the world's leading IT companies- with versatility across market segments, and technologies (Cloud, Software, Services, Hardware & Solutions). Siddharth has held diverse leadership positions in General Management, Sales Leadership & Strategic Alliances. In his last role, Siddharth was Head – Alliances & Channels at Oracle India, leading the growth of the Oracle cloud partner ecosystem. Prior to Oracle, he has held key leadership positions at Microsoft, Wolters Kluwer, Oracle, Sun Microsystems, Dell, IBM & Modi Xerox. Siddharth is known for his cross vertical industry knowledge, customer relationships and authentic leadership.

Siddharth is passionate about supporting early in career professionals, and is a mentor to many on a pro bono basis. He is also an active advisor to tech start-ups and boutique technology partners in the India market. He holds a post graduate degree in Management (Marketing) from IMI, New Delhi and a graduate degree in Economics from Fergusson College, Pune. He is a resident of Gurgaon.

Enterprise Context and Overview Author



Sandhya Kattimani
Research Analyst

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. Sandya has over six 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.





Study Sponsor

Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding

CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens/ISG Research

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 partner 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.

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iSG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

Founded in 2006, and based in Stamford, Conn., ISG employs 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.





DECEMBER, 2024

REPORT: ORACLE CLOUD AND TECHNOLOGY ECOSYSTEM