ISG Provider Lens™

Oracle Cloud and Technology Ecosystem

Comparison of Oracle service providers' portfolio attractiveness and competitive differentiators

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Introduction

In 2024, the IT landscape has been evolving rapidly. Organizations are dealing with a complex and dynamic environment where technology presents both opportunities and challenges. Business and technology leaders need to utilize Artificial Intelligence and Machine Learning, Cloud Computing and Connectivity, along with other technologies, to drive Digital Transformation and Innovation.

While taking advantage of these rapid technological advancements, addressing evolving security threats and complex compliance requirements, and a heightened focus on sustainability are challenges that must be tackled.

In this context, Oracle has solidified its position as a leading force in the cloud ecosystem by enhancing its Cloud Applications and establishing a differentiated position in the Cloud Infrastructure space with OCI, especially with hybrid cloud options, compared to other hyperscalers.

Oracle's focus on technology partnerships with Microsoft and Google Cloud has made it easier for joint customers to migrate, modernize, and manage their Oracle-based applications in the cloud.

A comprehensive range of innovative solutions offered by partners and providers is crucial in enabling customers to achieve their business transformation goals through advanced Oracle solutions.

It's imperative that providers continue to invest, evolve, and innovate to harness the potential of Oracle's technological advancements and align solutions with enterprise clients' specific business objectives and unique digital transformation challenges.

Oracle Cloud and Technology Ecosystem 2024: Deep View

Quadrants	Focus Areas					Oracle Portfolio		
Oracle Consulting & Advisory Services	Assessment & Gap Analysis	Cloud Roadmap	Digital Transformation	Technology Architecture	Change Management	Cloud Applications	Software & Hardware	Cloud Infrastructure - OCI
Oracle Implementation & Integration Services	Application Deployment & Migration	Data Management & Migration	Modernization	Tools & Accelerators	Support & Training			
Oracle Managed Services	Availability	Performance Management & Optimization	Business Continuity	Governance	Security			
OCI Solutions & Capabilities	Compute & Storage	Multi-Cloud	Gen AI	Hybrid Cloud	Business Analytics			

The **Oracle Cloud and Technology Ecosystem** 2024 study will assess the **service maturity level** and **technical competence** of Oracle's top-performing partners.

Simplified Illustration Source: ISG 2024

Consulting and Advisory Services

Implementation and Integration Services

Managed Services

OCI Solutions and Capabilities

Definition

The ISG Provider Lens™ Oracle Cloud and Technology Ecosystem 2024 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.

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

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

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

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 and cost-optimization strategies

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Oracle Cloud and Technology Ecosystem 2024:

Quadrants	APAC	Brazil	Europe	U.S.
Consulting and Advisory Services	✔	✔	✔	✔
Implementation and Integration Services	✔	✔	✔	✔
Managed Services	✔	✔	✔	✔
OCI Solutions and Capabilities	✔	✔	✔	✔

APAC – ANZ, India and the ASEAN-6 (Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam), but excluding Japan, South Korea and China/Taiwan.

The research phase falls in the period between September and October 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in February 2024.

Milestones	Beginning	End
Survey Launch	September 16 , 2024	
Survey Phase	September 16, 2024	October 15, 2024
Sneak Preview	January 2024	
Press Release & Publication	February 2024	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Oracle Ecosystem IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2024. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2024 – Oracle Cloud and Technology Ecosystem 2024 study analyzes the relevant software vendors/service providers in the global 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 study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

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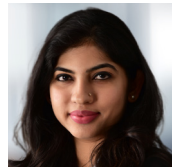**Research Analyst - U.S., Europe, APAC**

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

3db Solutions Ltda Me

4i Apps*

A-Host Company

Accelalpha Inc.

Accenture*

Acceptore Consultoria E Desenvolvimento De Sistemas Ltda

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Advanced Database & IT Sistemas De Informacao S A

Aggrandize*

Algar Ti Consultoria S/a

Alithya USA, Inc.

Allatone Solutions

Always On Digital Ltda - ME

Amber Servicos De Tecnologia Ltda

Apex IT

APFS, LLC

Applications Software Technology Llc

Apps Associates

Argano, LLC

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Dedalus*

Dell Computadores Do Brasil Ltda

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Denovo Ventures,LLC

Digi Soluções de Comunicação LTDA

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Docebit Servicos Especializados Em Ti Eireli

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G&P*

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OLR America inc

Orazzon It Services Ltda

Osas

OSI Digital

P&IT - Solucoes Em Rh Com Tecnologia Integrada Ltda

PA Infotel Co

Path Infotech

Peloton Group

Peloton Servicos em Tecnologia Ltda

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PM Comunicacao LTDA.

Pmweb*

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Telmex do Brasil SA

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Tharseo IT

The Hackett Group Inc

The MASYC Group, Inc.

Think IT

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TIVIT*

TRI*

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V8.Tech*

Verano

Version 1*

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Vmax Systems Ltda - Epp

Vs Data Comercio & Distribuicao Ltda

Wipro*

Wise Database Solucoes Em Ti Ltda

XT Global

Zensar*

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.

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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.

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