

Oracle Ecosystem

Managed Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Infosys
Public Services

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The ecosystem focus is on measurable stakeholder outcomes.

The cloud is the cornerstone of Oracle's future although results to date are mixed.

Oracle remains one of the largest enterprise application software providers globally, with its overall revenue growing by 5 percent and the Americas accounting for 57 percent in FY22. The platform provider continues to report strong growth (over 30 percent as of Q1 FY23) in its cloud business, driven by the growing demand for its Fusion Cloud ERP and NetSuite ERP cloud segments.

A significant number of U.S.-based enterprise and government agencies are running their mission-critical workloads

on Oracle database management systems and Oracle enterprise applications. Oracle Cloud Infrastructure (OCI) can be a logical choice of cloud migration platform for these agencies, but it is not the only option. Taking this into account, the platform provider has strengthened its relationships with Microsoft Azure and AWS to broaden the potential customer pool. However, OCI is not on pace with Azure, AWS and Google Cloud — a reminder of how difficult it is to scale out cloud capabilities.

Oracle should thus improve on many fronts to achieve true scale and growth. Key areas of improvement are the product maturity of Oracle Cloud applications, discrete license pricing models, product overlaps, access to the student community, industry focus, opportunities for mid-tier system integrators, and fragmentation in Oracle sales teams.

Cloud and legacy Oracle skills are now essential.



Furthermore, Oracle should adopt a less aggressive stance during the sales cycle, particularly with clients seeking a gradual approach to cloud migration or have other specific requirements.

Given the real threat to the core Oracle database offering from AWS, and the battle for skills, perhaps one of the redeeming factors for Oracle is that bitter rival SAP is barely placed in a more positive environment. Both enterprise application powerhouses have let down many customers in the transition to the cloud, which, in part, has helped the hyperscalers in their rush to innovation and growth.

Some of the challenges are accentuated in the public sector. Budgets have been cut, the focus has been on COVID-19 responses, and resources are constrained. It is essential that Oracle and the partner ecosystem are mindful of this as the company looks to engage in the sector.

According to ISG analysis and data received from 19 out of 31 service providers that participated in the study, the U.S. market for Oracle services has seen double-digit revenue growth. The quadrants presented in this study — consulting and advisory services, implementation and integration services, and managed services — accounted for 14 percent, 50 percent and 36 percent in revenue share, respectively, in 2022.

Key market observations

1. Cloud migration is driving service

engagements: Oracle cloud migration is still in its early stages. Oracle is continuously strengthening its cloud capabilities and partnerships to help enterprises migrate their databases and applications to OCI or the hyperscalers. This creates opportunities for process transformation as well as technology transformation such as middleware architecture redesign.

This also covers post-implementation managed services support including automated testing, DevOps, training as a service and database as a service. Furthermore, service providers bring industry and functional domain expertise to the U.S. public sector along with comprehensive methodologies around frameworks, templates, expertise and accelerators to support enterprises. Additional capabilities include cloud assessment, implementation, migration and continuous innovation with managed services.

2. Application modernization: This is a key component of digital transformation for U.S. agencies and will remain a key focus area in 2022. Service providers are rehosting/replatforming existing Oracle applications for agencies to retain familiar user experiences at a lower cost. Given its natural aversion to rapid change and disruption,

the public sector works well with this incremental approach.

3. Data inconsistency and value creation:

The U.S. public sector continues to struggle with achieving a single-pane-of-glass visibility of the data residing in silos across their agencies' units. They also face challenges in deriving real-time and actionable insights for better decision-making. To address these issues, service providers have developed a vast set of tools for data extraction, data refinement, data consolidation and data conversion for loading it into Oracle Cloud from on-premises solutions such as the E-Business Suite (EBS).

4. Security and governance: Agencies with customized enterprise applications in an on-premises environment are heavily investing in security and governance to safeguard themselves from cyberattacks. This results in a



broader focus on security and governance during service provider evaluations or while moving to Oracle Cloud environments.

5. ESG reporting gaining traction:

According to Oracle's 2022 global study on environmental, social and governance (ESG), 89 percent of enterprises find that sustainability and ESG programs are critical for strengthening their brand, attracting new customers and talent, and increasing profitability. This is not just reflected in the private sector; the public sector needs a similar investment strategy for ESG-related solutions. PwC and IBM are among the service providers that work closely with clients to implement a single integrated Oracle platform, allowing them to easily report and manage the ESG metrics across industries.

6. Skills and talent: Over the next few years, reskilling and adding new talent will be a major focus area for agencies using Oracle and across all technology investments. The demand for skills is outpacing supply across all markets besides the U.S. public sector. Despite the rapid advances in automation for implementation, providers should invest more in developing highly advanced solutions to fully meet customer requirements. One of the major shifts in recent times has been the push to localize delivery centers in the U.S., particularly through India-based vendors. ISG expects this trend to persist with the continuous evolution of offshore and onshore service delivery models, including the growth of RPA and bots.

Vendors should focus on providing greater end-to-end solutions.



Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
ApexIT	Contender	Contender	Contender
Aspire Systems	Contender	Contender	Contender
Atos	Contender	Contender	Contender
Conduent	Contender	Contender	Contender
Deloitte	Leader	Leader	Leader
DXC Technology	Market Challenger	Product Challenger	Leader
EY	Product Challenger	Product Challenger	Not In
HCLTech	Product Challenger	Product Challenger	Product Challenger
Huron	Leader	Leader	Rising Star ★



 Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
IBM	Leader	Leader	Market Challenger
Infosys	Rising Star ★	Leader	Leader
Jade Global	Contender	Contender	Contender
KPMG	Leader	Rising Star ★	Not In
Kyndryl	Contender	Contender	Product Challenger
NTT DATA	Product Challenger	Market Challenger	Product Challenger
PwC	Leader	Leader	Product Challenger
Speridian	Contender	Contender	Contender
TCS	Product Challenger	Product Challenger	Product Challenger
Wipro	Product Challenger	Product Challenger	Leader



This study focuses on critical aspects of Oracle for the U.S. public sector in 2022.



Simplified Illustration Source: ISG 2022

Definition

The global enterprise applications market has continued to grow in 2022 despite the impact of the COVID-19 pandemic. The pandemic has pushed many enterprises to speed up their digital transformation strategies for securing and expanding their customer base and improving the customer experience. This, in turn, helps to fast-track changes in the enterprise applications market with various emerging technologies, such as machine learning, AI, autonomous technology and cloud computing. Enterprises are evolving and adapting to changes in the market by enhancing their business functions such as finance, procurement, distribution, HR, sales, workflow automation and the integration of various business systems to move them to hybrid and multicloud environments.

Oracle remains one of the largest enterprise application software providers globally. It has more than 27,000 partners across the globe, 18,000 implementation consultants and 13,000 customer specialists to support 430,000 customers in 175 countries. Enterprise applications continue to steer Oracle's strategy from being an on-premises software vendor to becoming a cloud software and infrastructure technology provider. To help public sector customers and invest in technologies for an innovative experience, Oracle is expanding the breadth and depth of its applications and infrastructure technologies. Its customer success strategy is based on flexibility and customer choices.

Oracle's partners play a pivotal role in supporting the U.S. public sector with solutions and differentiated services that help achieve the desired citizen,



government and business outcomes by delivering exceptional customer experiences. The company continues to strengthen its relationship with partners by broadening their expertise (build, sell, service, license and hardware tracks) through robust training programs, enabling them to offer customized solutions to address business-specific challenges. Oracle's close collaboration with its partners helps it throughout client engagement journeys to drive successful migrations and implementations, thus ensuring customer satisfaction in the current cloud-first world.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: consulting and advisory services, implementation and integration services, and managed services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the U.S. public sector

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

Provider Classifications

The provider position reflects the suitability of service providers for a defined market segment (quadrant). Without further additions, the position always applies to all company size classes

and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers, and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each quadrant may include a service provider(s) that ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





Managed Services

Who Should Read This

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

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

The key cloud services, such as PaaS, SaaS, and IaaS, are widely adopted across enterprises for scalability, data management, skill management and sustainability. These services are intertwined across cloud platforms and require long-term management strategies to optimize investments. The fact that a public cloud does not necessarily result in

the overall simplification of a technology environment confirms that outsourcing of specifically managed services still remains an essential business strategy.

The managed services market is dominated by large global and India-based vendors. However, it is reasonable to assume that the managed services space for Oracle solutions in the U.S. public sector will become as competitive as that for other Oracle services. This is mainly due to the development of specific capabilities in the U.S. public sector by India-based vendors and the portfolio expansion of the Big Four consulting providers. Given the impact of a hybrid cloud environment, a provider's capability in Oracle Cloud and in other hyperscalers' clouds for PaaS, IaaS and SaaS should also be considered in the overall decision process.



IT and technology leaders should read this report to gain a clear understanding of the strengths and attention of Oracle managed services providers and their expertise in developing frameworks and tools to efficiently manage their applications.



Sourcing and purchasing managers should read this report to have a clear understanding of the Oracle managed services provider ecosystem and how they can be compared to each other.

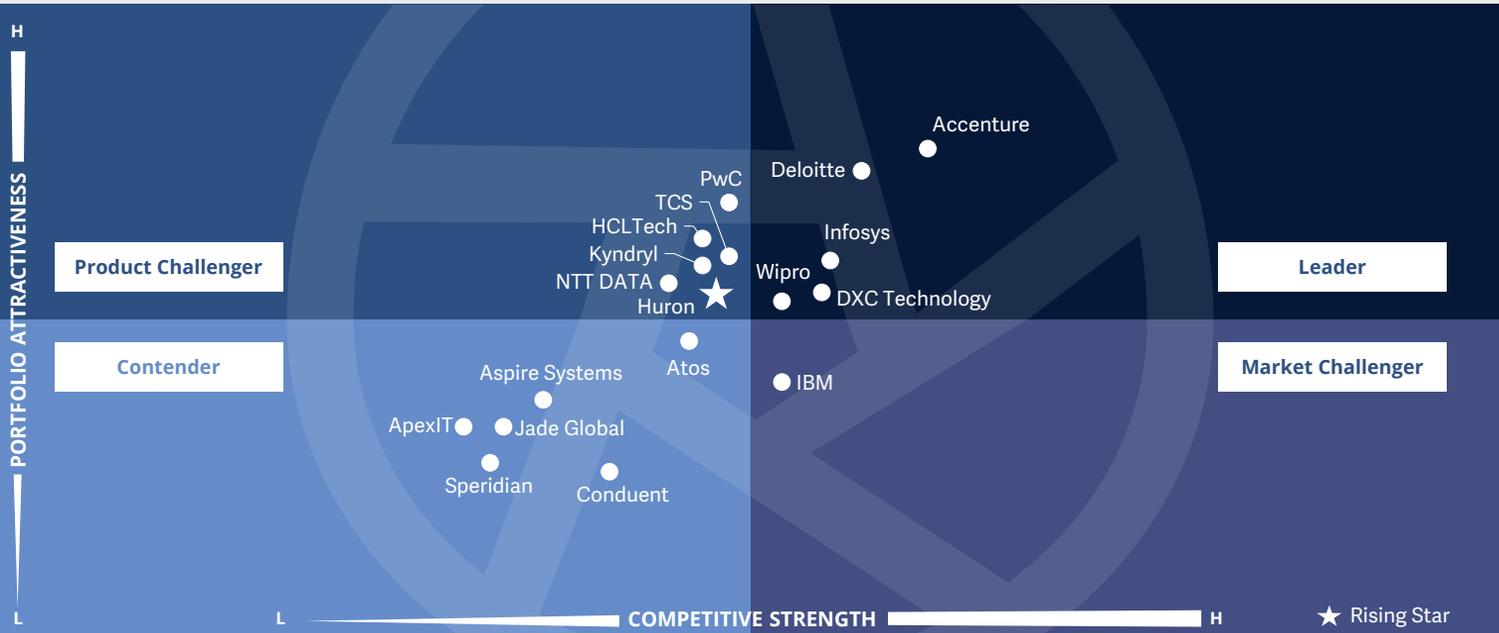


Software and technology development leaders should read this report to understand the positioning of Oracle managed services providers and learn how their offerings can impact their company's ongoing transformation initiatives.



Data and security professionals should read this report to understand how vendors handle data privacy and security requirements in Oracle managed services.





The managed services quadrant assesses **vendors that leverage automation** to drive dynamic changes in the Oracle market.

Phil Hassey



Managed Services

Definition

This quadrant analyzes specialized providers that offer turnkey managed services (based on agile, DevOps and ITIL frameworks) with comprehensive coverage, from applications to technology to infrastructure. The study focuses on providers that offer support to run enterprise clients' businesses, including technical and operational tasks encompassing customization, personalization and configuration.

Service providers should support onsite or offsite coverage or a combination of both. They should also offer hands-on Oracle training programs for Oracle applications and infrastructure technologies onsite, online or at partner locations.

Furthermore, they should have strong and credible partnerships with technology integration providers and critical third-party software providers, covering the breadth of AMS-related portfolio.

Service providers should showcase their digital business transformation service

capability to work with APIs, automation, data science, AI and machine learning, paired with cognitive computing, to enable digital business transformation and manage cloud environments with major hyperscalers. Their customization and personalization competency should be able meet the key business requirements of an organization through expertise in designing, developing, deploying and enhancing customized solutions.

The quadrant assesses their experience in offering monitoring and issue resolution services across the entire Oracle Engineered Systems (Exadata, database appliance, zero-data-loss recovery appliance and private cloud appliance), which helps maximize uptime and increase the efficiency of mission-critical environments.

The managed services solutions offered by these providers enable government agencies to achieve the following: cost savings, increased business agility and efficiency, and freedom of choice or customization.

Eligibility Criteria

- 1. Expertise:** The provider has expertise in public sector organizational, operational and compliance requirements
- 2. Ability to provide support for the Oracle stack, applications and infrastructure technologies:** The provider has experience in managing and maintaining Oracle's stack (including ITIL-aligned processes, workflows and applications) as well as configurations, setups, administration, data loading, reporting and security
- 3. Change and release management framework:** The provider has experience in managing the Oracle change and release management process to assess the impact of changes, reduce any potential errors and automating manual tasks
- 4. Application maintenance services:** The provider has comprehensive experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment
- 5. Database support services:** The provider has experience in Oracle database administration, upgrades, patches, disaster recovery, backup, performance tuning and monitoring for high availability and business continuity
- 6. Testing as a service:** The provider has experience in testing services after patches, updates or configuration changes to applications. They also use automated/on-demand continuous testing tools



Observations

The key attractions of the cloud — be it PaaS, SaaS or IaaS — of scalability, data management, skills management and sustainability are increasingly intertwined across cloud platforms and require long-term management strategies to optimize investments. Despite what early adopters were sold on, the reality is that the public cloud does not necessarily result in the overall simplification of the technology environment. This means that managed services remains an essential business strategy.

In the broader enterprise sector, the managed services market is dominated by Accenture, Deloitte and the largest India-based vendors. Similar to the implementation and integration quadrant, the first two participants are key providers of managed services to the U.S. public sector, while Indian providers are less visible and dominant.

It is, however, reasonable to assume that the managed services space for Oracle solutions in the U.S. public sector will become as competitive as the other two quadrants in this report. This will be driven by the development or enhancement of specific capabilities in the U.S. public sector by India-based vendors and the expansion across the portfolio by the Big Four providers that are in the consulting space. Given the impact of the hybrid cloud environment, a provider's capability (not just in Oracle Cloud but also in the hyperscalers for PaaS, IaaS and SaaS) should also be considered in the overall decision process.

From the 21 companies assessed for this study, 18 have qualified for this quadrant, with five being identified as Leaders and one as a Rising Star.

Accenture

Accenture has a breadth of managed services capabilities across most cloud platforms including Oracle. The company stands out for its consistent delivery in the range of solutions offered.

Deloitte

Deloitte was late in entering the managed services market compared to some of the other leaders. However, it has drawn on its strong relationship with Oracle as well as an increasingly important capability in managed services across the hybrid cloud world.

DXC Technology

DXC Technology is one of the three major outsourcing vendors. Despite facing challenges in some sectors since the dissolution of “big outsourcing” period, the company continues to maintain its capabilities and relationship with Oracle.



Infosys has significant capabilities in managed services backed by a large partnership network. The company has expanded its offerings both organically and through acquisitions.



Wipro has been a long-term provider of managed services. It offers a broad range of capabilities across the legacy and cloud offerings of Oracle, with an increased focus on cloud managed services solutions as the marketplace matures.



Huron (Rising Star) is increasingly providing a full range of end-to-end solutions for clients. A consistent focus on this space will enable the company to gain leadership in the future.



Infosys



“For clients in the U.S. public sector requiring managed services, Infosys is a natural fit.”

Phil Hassey

Overview

Infosys is headquartered in Bengaluru, India, and operates in more than 50 countries. It has over 345,000 employees across 247 global offices. As of Q2 FY23, the company had generated \$17.53 billion in revenue. Infosys has a strong Oracle practice and is increasing its visibility and presence in the U.S. public sector for Oracle and other platforms through Infosys Public Services, its subsidiary located in the U.S. that focuses exclusively on North American public sector organizations.

Strengths

Leveraging mature managed services capabilities: From a managed services perspective, the core focus is on driving efficiency through key offerings. These include AMS maturity evaluations services, training and the outcome-specific models for AMS.

Dedicated Oracle unit for the U.S. public sector: Infosys Public Services (IPS) is a subsidiary of the company, based in the U.S. It works exclusively with North American public sector organizations. IPS takes advantage of Infosys’ 40-plus years of cross-industry experience in IT and business services in the U.S. public sector.

Ability to deliver solutions for the future of Oracle:

Infosys has made significant investments in Oracle across the lifecycle. As a result of its delivery excellence, the company has won 21 Oracle awards since 2018. It has added 70 new logos, including in the public sector, and has a strong record of migrating on-premises Oracle clients to the cloud.

Caution

Infosys reports success in building out its capabilities in this space. The company has strong scope to gain leadership by expanding the number of local delivery centers in key states to bring about the desired business outcomes.





Appendix

Methodology & Team

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

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

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

The study was divided into the following steps:

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



Author & Editor Biographies

Author



Phil Hassey
Lead Analyst

Phil is a key contributor to ISG research team across many projects. With over 25 year's experience in research, corporate strategy, strategic marketing across a range of geographies, organisations and industries, he has an enviable reputation for understanding, assessing and communicating insight into the increasingly diverse and complex technology sector as it attempts to tightly integrate to business requirements. He is constantly "tilting the world view" with unique but grounded perspectives for clients.

He has worked for some of the largest, and smallest enterprises in the world to help them understand the role of the intersection of technology and business.

At the same time, he has also worked with technology and business providers to help ensure they place the customer requirements at the centre of their business. He has undertaken research and strategy projects on every continent, and for every possible application of technology and business.

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Bruce Guptill
Distinguished Analyst and Executive Advisor

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. Public Sector research for ISG's Provider Lens™

global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Masters' degree in Marketing and Finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.



Author & Editor Biographies



Research Analyst

Meenakshi Srivastava
Senior Research Analyst

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

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



IPL Product Owner

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

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

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



*ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

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*ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.



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