**ĭSG** Provider Lens™

# Oracle Ecosystem

## Consulting and Advisory Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

**Infosys®**
**Public Services**

**QUADRANT REPORT | DECEMBER 2022 | U.S. PUBLIC SECTOR**

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## Executive Summary

Report Author: Phil Hassey

**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 |

# Introduction

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

Simplified Illustration Source: ISG 2022

**Consulting and Advisory Services**

**Implementation and Integration Services**

**Managed Services**
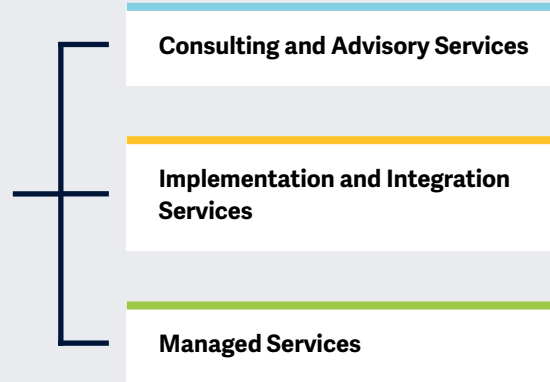
### Definition

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.

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

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

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

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

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

# Consulting and Advisory Services

## 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 consulting and advisory services.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle consulting and advisory services to enterprises in the U.S. 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 U.S. public sector clients are looking for niche providers to engage in a well-defined consulting and strategy process to fully optimize their Oracle investments. The U.S. state government agencies need to make sure their Oracle engagement is aligned with their overall service delivery and employee satisfaction

objectives. This helps them decide the required investment in a solution such as Oracle to move toward a digital future.

Employee engagement is critical for the success of any public sector solution, especially in the Oracle ecosystem that has substantial breadth and complexity. Therefore, agencies in the U.S. public sector are trying to develop the best possible employee engagement solutions with the support of large systems integrators and consulting firms that have a long history of engaging with the U.S. government.

**IT leaders** should read this report to better understand the strengths and attention of consulting service providers that can help them lead digital transformation in their businesses.

**Supplier sourcing, procurement and management professionals** should read this report to develop a better understanding of the current landscape of the suppliers of consulting and transformation services in the U.S. public sector.
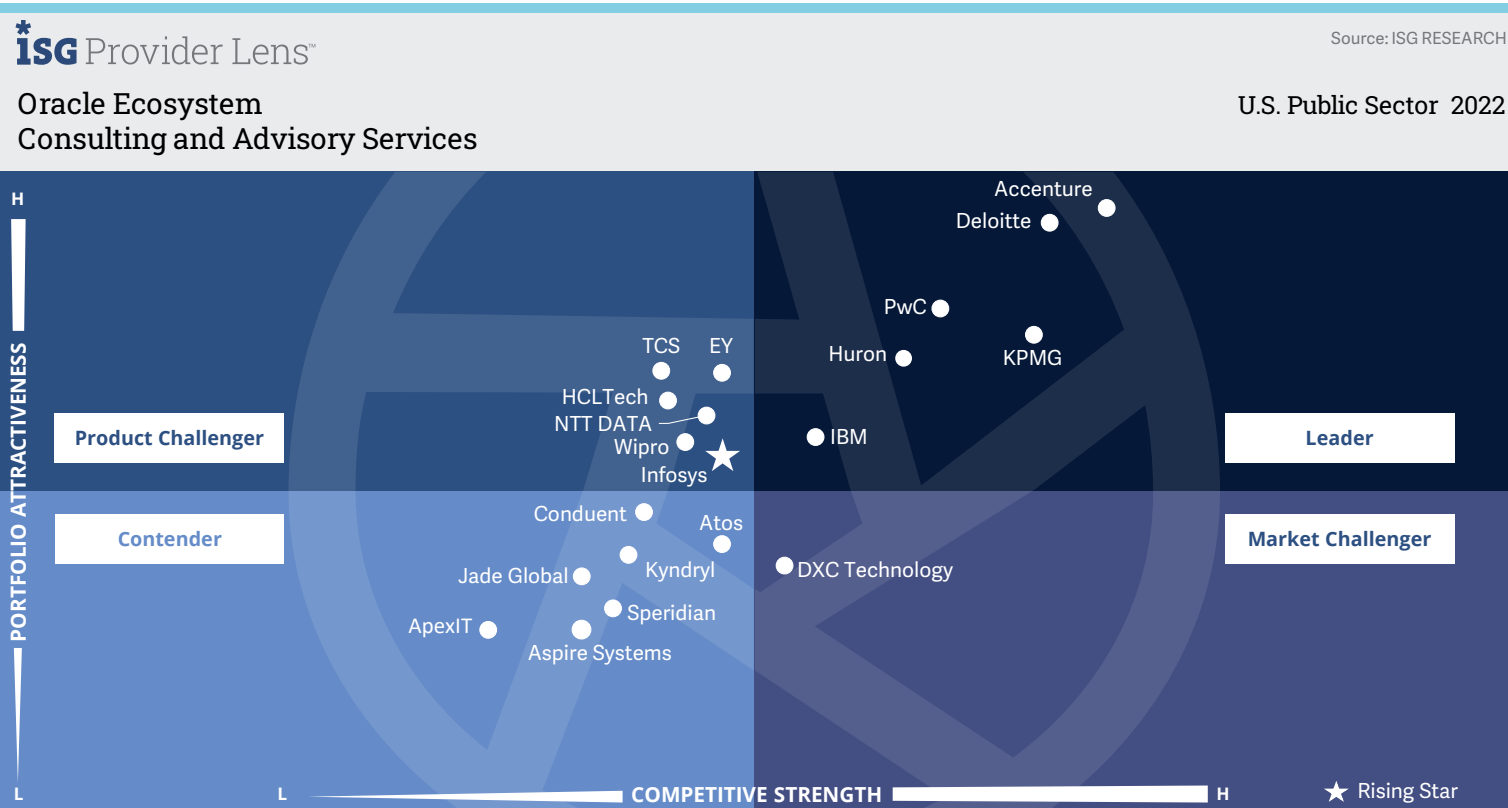
**Line-of-business, industry, finance, human resources and supply chain leaders** should read this report to understand the relative positioning of Oracle consulting service partners and how these companies can help them in their business.

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

ISG Provider Lens™

Source: ISG RESEARCH

Oracle Ecosystem
Consulting and Advisory Services

U.S. Public Sector 2022

H

**PORTFOLIO ATTRACTIVENESS**

Accenture
Deloitte

PwC
Huron          KPMG

**Product Challenger**

TCS   EY
HCLTech
NTT DATA
Wipro
Infosys
IBM

**Leader**

**Contender**

Conduent
Atos
Jade Global
Kyndryl
ApexIT
Speridian
Aspire Systems

DXC Technology

**Market Challenger**

L

L          **COMPETITIVE STRENGTH**          H          ★ Rising Star

This quadrant assesses a provider's ability to offer **consulting and strategy services**, specifically related to the **selection, deployment and ongoing management** of Oracle solutions in the U.S. public sector market.

*Phil Hassey*

## Consulting and Advisory Services

**Definition**

This quadrant evaluates providers of Oracle consulting and advisory services that help public sector clients modernize, optimize and transform their business operations for increasing efficiency, flexibility and scalability. These services are used to assess an agency's maturity, improve and maintain Oracle investments, reduce risks through hybrid cloud options, develop future-state models and frameworks, conduct security assessments, and define governance processes. The services analyzed here cover Oracle applications and infrastructure technologies.

Eligibility Criteria

1. **Use of reference assessment models, strategies and roadmaps:** The provider utilizes assessment frameworks, roadmaps, IT strategy assessment and alignment, security assessments and governance, technical architecture reviews, benchmark tools and templates

2. **Industry knowledge and domain-related practices:** The provider has in-depth knowledge of Oracle's portfolio and related functionalities, processes, workflows and tools specific to the U.S. public sector market

3. **Oracle Cloud services framework:** The provider has expertise in cloud strategy assessment, readiness assessment and architecture advisory services

4. **Digital process transformation competency:** The provider has the industry experience, functional processes and contextual knowledge to enable it to leverage new technologies to offer differentiated citizen experiences

5. **Certifications and accreditations around the Oracle stack:** The provider has Oracle platform-related certifications and accreditations

to provide timely solutions by leveraging its expertise, partnerships and experience

6. **Ability to deliver optimization services:** The provider has experience in tuning services and delivering maximum uptime, optimal performance and business value from Oracle investments and in offering system health checks

**Observations**

Investments in Oracle, either as a new client or an expansion of existing investments, are substantial for any enterprise, let alone U.S. state government agencies. To fully optimize the investments, it is essential that agencies engage in a well-defined consulting and strategy process.

The key benefits of engaging in a consulting and strategy-led approach are as follows:

- The Oracle engagement is aligned with the overall agency service delivery and employee satisfaction objectives, with the first stage providing real and obtainable business objectives.

- The vision is aligned across the agency. This initial step helps decide on the required investments in a solution set such as Oracle for the public sector agency to move toward a digital future.

- It ensures operational efficiency in solution development.

- Employee engagement is critical for the success of any public sector solution. This is even more important in the Oracle ecosystem that has substantial breadth and complexity.

One of the key challenges in this market is the lack of niche providers that can scale. The leaders are typically the largest system integrators and consulting firms that have a long history of engaging with the U.S. government.

From the 25 companies assessed for this study, 20 have qualified for this quadrant, with six being identified as Leaders and one as a Rising Star.

**accenture**

**Accenture** has a long history of supporting the U.S. public sector, both in terms of general requirements and around the Oracle ecosystem. The company has dedicated resources for the sector as part of its significant Oracle practice, backed by extensive expertise in providing consulting services.

**Deloitte**

**Deloitte** is a strong consulting and strategy provider across the technology ecosystem and the U.S. public sector. It also has strong capabilities in Oracle, particularly at the state government level.

**HURON**

**Huron** is a leading provider of Oracle services. It has a range of capabilities for the public sector and the higher education market, and it ensures strong client outcomes.

**IBM**

**IBM** is a long-term provider of consulting services for U.S. government agencies. The company is one of Oracle's most significant partners and invests extensively in this ecosystem.

**KPMG**

**KPMG** is a leading provider of solutions for the U.S. public sector, offering both traditional consulting and preconfigured solutions.

## Consulting and Advisory Services

### PwC

**PwC** leverages its portfolio, along with strengths in risk and governance, as part of a strategy to reinvigorate its Oracle capabilities.

Infosys®
**Public Services**

**Infosys** (Rising Star) offers extensive capabilities in Oracle globally. These are enhanced by heavy investments in the U.S. public sector, leading to a substantial upside opportunity.

# Infosys

"Oracle's penetration in the U.S. public sector is backed by Infosys as a strong consulting option."

*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

**Cobalt capability:** Infosys Cobalt facilitates large-scale transformations for public and private organizations by combining its ability to orchestrate the transformation journey with the breadth of Oracle solutions. Enterprises thus have ready access to an expanding portfolio of Oracle-powered, cloud-first solution blueprints. Furthermore, Infosys Cobalt works with the Oracle partner ecosystem to help agencies co-create new solutions and accelerate speed to market.

**Flexibility as a driver of agency experience:** One of Infosys' key attributes for the Oracle ecosystem is the flexibility of its consulting services. Partly driven by pricing options, the company often works closely with an agency on a one-to-one basis to ensure that outcomes are flexible to meet a naturally changing environment.

**Scale of capabilities:** As one of the world's largest system integrators, Infosys has significant scale. It has over 9,300 Oracle Cloud certifications, 600 bots and RPA tools, and 400 tools and accelerators. It also has more than 14,500 resources who are dedicated to creating Oracle solutions for clients.

## Caution

By expanding its capabilities in more impactful public sector engagements, Infosys will be well positioned to become a leader. The company should also actively highlight its investment and early outcomes.

# Appendix

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.

## Co-Author

### 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.

## About Our Company & Research

**ⁱSG Provider Lens™**

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

For more information about ISG Provider Lens research, please visit this webpage.

**ⁱSG Research™**

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

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

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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.

**ISG** Provider Lens™

**DECEMBER, 2022**

**REPORT: ORACLE ECOSYSTEM**