

Oracle Ecosystem

Implementation and Integration 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.



Executive Summary

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.





Implementation and Integration 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 implementation and integration services.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle implementation and integration services to enterprises in the U.S. 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 requirements of the U.S. public sector when looking for Oracle implementation and integration services are cost-effectiveness, speed to outcome, standardization of capabilities and the ability to manage Oracle technologies in the long term. These needs arise mainly due to the skill shortages faced by clients.

There is strong demand for cloud-based solutions and platforms. Oracle is focusing on a “cloud everything” approach. Despite struggling to compete with the three major hyperscalers, it has been driving the adoption of Oracle Cloud Infrastructure (OCI).

Enterprises have access to a broad range of providers that offer Oracle integration solutions. However, the list of leading providers serving the U.S. public sector is short, which shows the type of relationships required to be a leader in this space. The specific requirements around pricing, labor and agency outcomes also pose challenges for inexperienced vendors. Thus, the leaders in this space are typically large providers with long-standing experience in Oracle services and in serving the U.S. public sector.



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



Supplier sourcing, procurement and management professionals should read this report to develop a better understanding of the current landscape of implementation and integration service providers 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 implementation and integration service partners and how these companies can help them in their business.

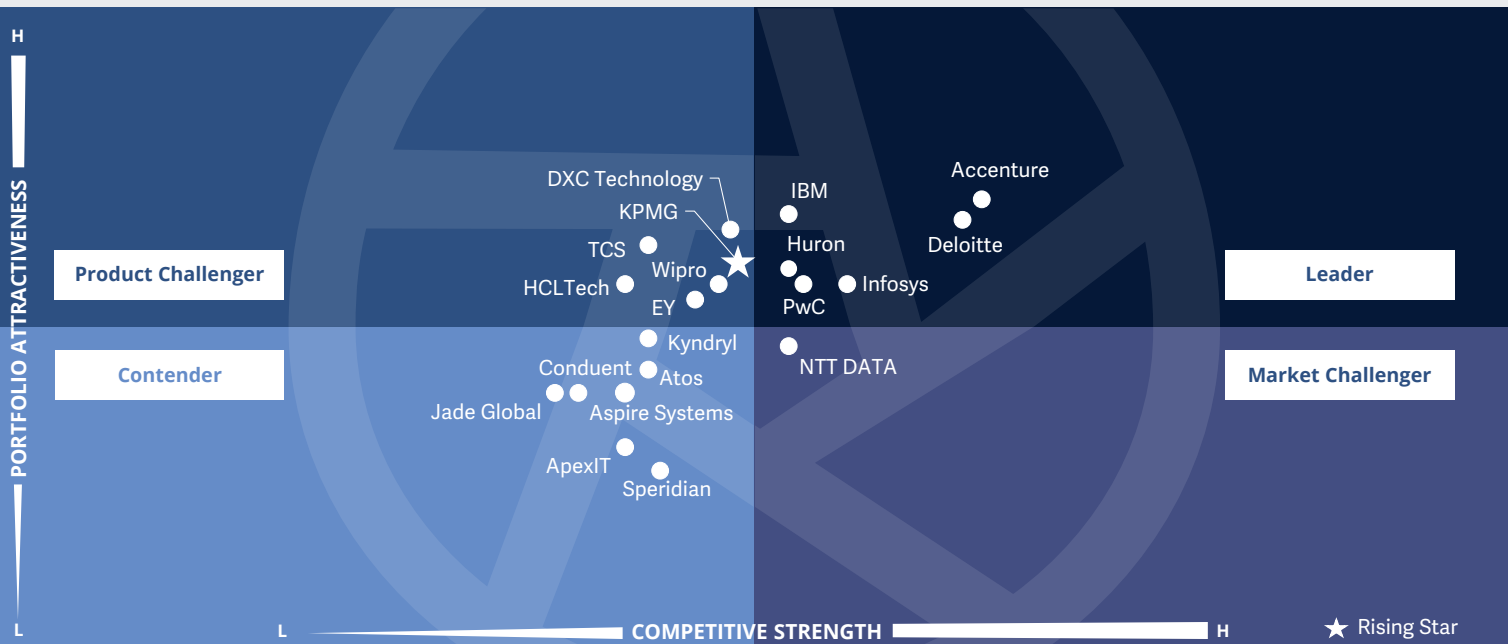


Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners, which can help them integrate complex business management software and data flows for better decision-making.



Oracle Ecosystem Implementation and Integration Services

U.S. Public Sector 2022



The use of **accelerators is increasing in the Oracle ecosystem**, as agencies require **faster time to outcomes and measurable benefits**. Leading providers in this space can meet these requirements.

Phil Hassey



Implementation and Integration Services

Definition

This quadrant evaluates providers that offer implementation, migration and integration services around Oracle applications and infrastructure technologies. The providers' ability to develop accelerators and components for driving the efficiency and quality of implementations will be examined. Modernization initiatives are considered a focus area for providers to drive innovation by developing and enhancing proprietary tools to deliver accurate and faster results.

Capabilities include designing the entire implementation plan, creating data migration strategies, modernizing processes, deploying hybrid cloud and multicloud environments, ensuring data security and developing governance protocols.

In addition, the providers must demonstrate the ability to integrate Oracle applications and infrastructure technologies with internal systems such as ERP, CRM, collaboration tools and third-party solutions.

Eligibility Criteria

- 1. Expertise:** The provider has expertise in public sector organizational, operational and compliance requirements
- 2. Use of predefined solutions/templates:** The provider has experience in utilizing prebuilt solutions and accelerators for a successful Oracle stack deployment
- 3. Integration and migration services:** The provider offers application development, modernization, data migration and testing services across the Oracle stack
- 4. Ability to offer maintenance and support:** The provider can perform installations, upgrades, new feature/module release management, migration, patch management and lifecycle management of instances
- 5. Deployment speed:** The provider can quickly design solutions based on reference architecture, align the prevailing technical environment and deploy new features, modules and enhancements
- 6. Experience in emerging technologies:** The provider has the capability to work with APIs, automation, data science and AI/machine learning, paired with cognitive computing, to enable digital business transformation. It can also drive implementations and integrations with major hyperscalers
- 7. Size and capabilities of delivery teams:** The provider has a diverse set of certified experts and resources to manage implementations and integrations



Implementation and Integration Services

Observations

Integration is the cornerstone of the Oracle business from a system integrator perspective. Although client requirements are generally clear, it is the performance of the integrator that determines the success of the investment.

The key requirements of the U.S. public sector across the Oracle portfolio are cost-effectiveness, speed to outcome, standardization of capabilities, and the ability to manage and resource the technology in the long term. These needs are particularly pronounced due to the skills issues faced by several clients.

From a technology point of view, the strong push is for cloud-based solutions and platforms. Oracle is aggressively pursuing a “cloud everything” approach. Despite struggling to gain momentum against the three major hyperscalers, it has been working on driving the adoption of Oracle Cloud Infrastructure (OCI).

Enterprises have access to a broad range of providers that offer Oracle integration solutions. In comparison, the list of potential leaders for the U.S. public sector is shorter. This reflects the types of relationships required to be a leader in the space. The unique requirements around pricing, labor and agency outcomes also pose challenges for inexperienced vendors. Thus, the leaders are typically large providers with a long history with Oracle and the U.S. public sector.

From the 23 companies assessed for this study, 20 have qualified for this quadrant, with six being identified as Leaders and one as a Rising Star.



Accenture is Oracle's largest implementation partner. It has a large pool of highly certified professionals with a range of capabilities across sub-industries in the U.S. public sector.

Deloitte

Deloitte was the first company to obtain the top partner status with Oracle. This reflects its long-standing history with the platform and the outcomes it ensures for clients.



Huron has a deep focus on public sector solutions particularly for higher education — a strong testimony to its ranking in this space.



IBM has a long history with Oracle and in the U.S. public sector. It offers a strong system integration capability.



Infosys is a strong provider of integration and implementation solutions across clients in Oracle, both in the private and public sector.

PwC

PwC has built strong capabilities in implementation with a focus on addressing agency requirements to improve stakeholder outcomes.



KPMG (Rising Star) is developing a broader range of capabilities in the implementation space, building on the experience gained from consulting engagements. It leverages both traditional consulting and preconfigured solutions to drive client outcomes.



Infosys



"Infosys' investments in local markets across the U.S. drive its visibility in the public sector."

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

IP-led solutions: Infosys leverages an extensive series of platforms, tools and accelerators to drive differentiation in the implementation and integration of Oracle. These include the 4E assessment methodology, Accelerated Cloud Transformation (ACT) methodology, VRM framework, Infosys Industry Solutions and Infosys Oracle Cloud Suite.

Investments in a range of commercial models: Infosys is looking to invest in a range of pricing models to transform engagements and increase ROI for clients. The commercial models include as-a-service with license and

solution bundling, outcome-linked pricing with KPIs and gainsharing, and catalog-based with fixed price and time solutions.

Development of local talent: Infosys has committed substantial investments in developing skills for the U.S. market. It has set up delivery centers in locations such as Indianapolis, Indiana; Providence, Rhode Island; and Phoenix, Arizona. This expansion of ground presence will particularly support state government investments.

Caution

Infosys has made strong gains in offering capabilities for the U.S. public sector. However, it should accelerate this development and ensure that it provides a breadth of resources to support client growth.





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.

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

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](#).

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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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.





DECEMBER, 2022

REPORT: ORACLE ECOSYSTEM