

Oracle Cloud and Technology Ecosystem

A research report comparing provider strengths,
challenges, and competitive differentiators

Customized report courtesy of:



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Report Author: Mauricio Ohtani

This study focuses on the expanding Oracle Ecosystem that creates alternatives as demand grows

Oracle, a leading provider of enterprise software and cloud services, has gained significant momentum in the competitive landscape of cloud platforms. With the rise of cloud computing, businesses increasingly rely on cloud infrastructure to meet their computing needs. Oracle has emerged as a strong contender, challenging established players like Amazon Web Services (AWS), Microsoft Azure, Google Cloud Platform, and IBM Cloud.

During Oracle CloudWorld 2023, Oracle announced expanded collaborations with Microsoft and Red Hat. The collaboration with Red Hat offers customers greater choice and flexibility, with Red Hat Enterprise Linux now a supported operating system running on Oracle Cloud Infrastructure. The partnership also highlighted the benefits of the Red Hat

OpenShift Container Platform for managing, modernizing, and accelerating cloud-native application development at scale across any infrastructure.

In addition, Oracle and Microsoft introduced Oracle Database@Azure, a service that provides customers with direct access to Oracle database services running on Oracle Cloud Infrastructure and deployed in Microsoft Azure datacenters. This combination offers customers more flexibility regarding where they run their workloads and simplifies cloud purchasing and management between Oracle Database and Azure services. It's a significant step forward in cloud technology collaboration, offering exciting possibilities for future developments.

Cloud computing has become an integral part of the digital landscape in Europe. With its numerous benefits, such as scalability, cost-efficiency, and flexibility, cloud computing has revolutionized how businesses operate and individuals access and store data. Europe has embraced cloud computing as a region, but it also faces unique challenges and considerations.

An ecosystem
to **accelerate the
transition to the
cloud** and drive
superior customer
outcomes



Executive Summary

One of the critical concerns in Europe regarding cloud computing is data privacy and protection. With the General Data Protection Regulation (GDPR) implementation in 2018, European countries have stringent regulations to safeguard personal data. Cloud service providers operating in Europe must comply with these regulations, ensuring data is stored and processed securely and transparently.

The issue of cybersecurity is another critical aspect of cloud computing reality in Europe. As more businesses and individuals rely on cloud services, the risk of cyber threats and data breaches increases. European organizations invest heavily in cybersecurity measures to protect their sensitive information and prevent unauthorized access to cloud resources.

The adoption of cloud computing in Europe has been challenging. Some concerns include vendor lock-in, data sovereignty, and regulatory compliance. Organizations must carefully evaluate their cloud strategies and choose providers aligning with their requirements and compliance obligations.

In other words, cloud computing has transformed the European business landscape, enabling organizations to leverage the benefits of scalability, cost-efficiency, and flexibility. However, data privacy, cybersecurity, and compliance with GDPR remain crucial. As Europe continues its digital transformation journey, cloud computing will drive innovation and growth.

At Oracle CloudWorld 2023, Oracle announced the launch of Oracle Access Governance to simplify security adoption and a partnership with Thales for the launch of CipherTrust Cloud Key Management's Hold Your Own Key (HYOK) in OCI across all 45 Oracle Cloud regions, demonstrating their commitment to enhancing cybersecurity.

Cloud computing, pivotal in Europe's digital transformation, is being adopted by businesses to streamline operations, enhance collaboration, and improve customer experiences. Integrating Artificial Intelligence (AI), Machine Learning (ML), and Generative AI with cloud computing enhances business capabilities. It provides a competitive edge

by enabling data analysis, insight generation, prediction making, process automation, and creating new content or designs.

During Oracle CloudWorld 2023, Oracle has embedded AI and ML across their software-as-a-service (SaaS) apps, delivering prebuilt models in Oracle Database and MySQL HeatWave. They've also announced new partnerships with companies like Anaconda and NVIDIA. Oracle Cloud Infrastructure (OCI) now delivers the Enterprise Generative AI service, which supports large language models (LLMs) to help organizations automate business processes and enhance customer experiences. In the healthcare sector, Oracle has introduced new Generative AI services integrated with Oracle's electronic health record (EHR) solutions. They've introduced Generative AI capabilities within Oracle Fusion Cloud Customer Experience (CX) for customer service.

Oracle service partners in Europe have a broad spectrum of cloud service providers to choose from, depending on their needs. Public cloud providers such as Oracle and others like

Amazon Web Services, Microsoft Azure, and Google Cloud Platform offer scalable, cost-effective solutions for businesses of all sizes. Meanwhile, private cloud solutions provide improved security and control, making them appropriate for organizations with stringent data governance requirements.

Oracle's momentum can be attributed to its comprehensive suite of cloud services and its focus on delivering enterprise-grade solutions. The company offers a wide range of cloud offerings, including infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS). This diverse portfolio allows businesses to choose the cloud services that best suit their requirements.

One of the critical advantages of Oracle's cloud platform is its seamless integration with existing enterprise software. Many businesses already rely on Oracle's software solutions for their day-to-day operations, and the company has leveraged this existing customer base to drive the adoption of its cloud services. By offering a smooth transition from on-premises



Executive Summary

software to the cloud, Oracle has positioned itself as a trusted partner for businesses migrating their operations to the cloud.

In terms of performance and scalability, Oracle's cloud platform has demonstrated its capabilities to handle large-scale workloads. The company has invested heavily in building a robust infrastructure that can support the demands of modern businesses. With data centers strategically located worldwide, Oracle ensures low latency and high availability for its cloud services. Some of the recent examples of Oracle's investments in the technology space in Europe are:

- Oracle announced a new cloud region in Spain, adding to its ten European cloud regions. The new area will offer customers access to Oracle's full range of cloud services, including Oracle Autonomous Database, Oracle Cloud Applications, Oracle Cloud Infrastructure, and Oracle Fusion Cloud Customer Experience;
- Oracle launched a new initiative called Oracle for Research, which aims to support researchers and innovators across

Europe with free access to Oracle Cloud, mentoring, and training. The initiative will help researchers accelerate their discoveries and innovations, as well as foster collaboration and knowledge sharing among the research community;

- Oracle joined forces with SAP, the market leader in enterprise application software, to offer customers a seamless integration of Oracle Cloud Infrastructure and SAP Cloud Platform. The integration will enable customers to run SAP applications and workloads on Oracle's high-performance, secure, and scalable cloud infrastructure while benefiting from Oracle's autonomous capabilities and cost advantages.

While competitors like AWS, Azure, and Google Cloud Platform have a larger market share, Oracle's momentum in the cloud platform market is undeniable. The company's strong reputation in enterprise software and its comprehensive suite of cloud services has positioned it as a formidable player in the industry. As businesses continue to embrace cloud computing, Oracle's

momentum is expected to grow, further solidifying its position as a leading provider of cloud platforms.

Oracle has been gaining momentum in cloud applications and has reported an accelerating growth rate among cloud applications. In Q4 2021, Oracle's non-GAAP net income was up 20% to \$4.5 billion, with non-GAAP earnings per share reaching \$1.54. Total quarterly revenues were up 8% year-over-year to \$11.2 billion¹. Oracle Cloud Infrastructure (OCI) consumption revenue in Q4 was up 103%¹. Oracle plans to double its cloud roughly Capex spend in FY22 to about \$4 billion.

Oracle has gained momentum in the cloud market, with solid in its cloud applications and infrastructure businesses. In its fourth-quarter financial results, Oracle reported better-than-expected top and bottom-line results, thanks partly to the strong revenue growth rates of its ERP and HCM applications. On a conference call, Oracle co-founder and CTO Larry Ellison said that the company's strategy to develop cloud applications with cloud infrastructure is now beginning to drive top-line growth.

Oracle Cloud Infrastructure (OCI) consumption revenue in Q4 was up 103%. Oracle is also expanding its global cloud footprint, with plans to have at least 44 cloud regions by the end of 2022. This is one of the fastest expansions of any primary cloud provider.

Oracle Cloud Infrastructure offers several advantages over other cloud platforms, like Google Cloud. Customers choose Oracle Cloud Infrastructure for reasons such as the ability to migrate every workload and build faster in the cloud, deploy the same public cloud power on-premises, simplify, and automate security with a zero-trust approach, reduce risk with Oracle's unique SLAs, and optimize spend with guaranteed pricing and no hidden fees.

At CloudWorld 2023, Oracle announced the general availability of OCI Compute bare metal instances powered by NVIDIA H100 GPUs, delivering more choices for AI infrastructure and general-purpose computing, and expanded partnerships with companies like VMware to simplify cloud procurement. Thanks to these innovations and Oracle's core infrastructure, which provides unmatched flexibility, security,



Executive Summary

and performance at the best value, customers can move from data centers to OCI and achieved high improvements.

Overall, Oracle's momentum in the cloud market is driven by its strong growth in its applications and infrastructure businesses and its continued expansion of its global cloud footprint.

The rapid pace of technological change and the evolution of technologies such as Data Analytics or Generative AI have forced companies to adopt these solutions to differentiate themselves in the market. This has led to a high demand for understanding and adopting these technologies, which requires service companies to provide high-quality training in record time.





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
4i Apps	Contender	Contender	Contender
Accenture	Leader	Leader	Leader
Aspire Systems	Contender	Contender	Contender
Birlasoft	Market Challenger	Market Challenger	Contender
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	Product Challenger
DSP	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Eviden	Product Challenger	Product Challenger	Product Challenger





Provider Positioning

Page 2 of 3

	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
Fujitsu	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader
IBM	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader
inlumi	Market Challenger	Contender	Contender
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Leader	Leader
Mastek	Not In	Product Challenger	Product Challenger
PROMATIS	Contender	Product Challenger	Product Challenger
PwC	Leader	Leader	Leader





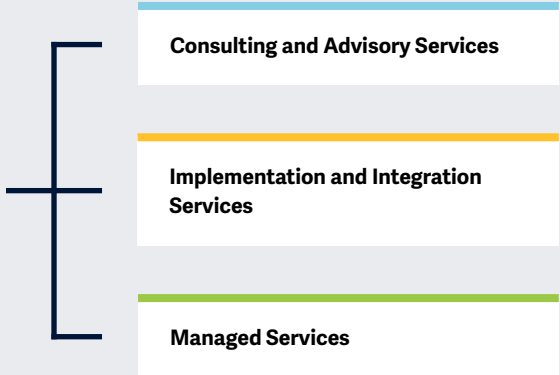
Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services
Quistor	Rising Star ★	Rising Star ★	Rising Star ★
Steltix	Rising Star ★	Product Challenger	Rising Star ★
Syntax	Product Challenger	Product Challenger	Market Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader
Timestamp	Leader	Leader	Product Challenger
Version 1	Product Challenger	Rising Star ★	Leader
Wipro	Leader	Leader	Leader
Zensar	Product Challenger	Product Challenger	Contender



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



Simplified Illustration; Source: ISG 2023

Definition

In 2023, businesses are strategically allocating their spending to digital transformation, enterprise applications, and enabling technologies like machine learning, AI, autonomy, and cloud computing. The optimization, growth, cost, and efficiency objectives drive this allocation. Enterprises aim to increase efficiency and derive value from their investments made during the pandemic era. They focus on leveraging technology to streamline processes, improve productivity, and enhance operational effectiveness.

The current uncertain economic environment has resulted in two significant trends. Firstly, there has been a slowdown in the growth of the top three hyperscalers, facing headwinds as demand weakens for cloud infrastructure services and dropping 18% in Q2, according to the last ISG Index report in July 2023. Secondly, there has been a renewed emphasis on managed services. These trends have given rise to what is known as the "Oracle Phenomenon." Our inquiries with enterprises indicate that they view Oracle as a vehicle to achieve efficiency, value realization, and innovation.

Oracle has intensified its investments in cloud and technology offerings, becoming part of the top hyperscalers. It has more than 27,000 partners worldwide, serving 430,000 customers in 175 countries through a pool of 18,000 implementation consultants and 13,000 customer specialists. Oracle's partners drive customer success by delivering tailored solutions, specialized services, and exceptional experiences.



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: Consulting and Advisory Services, Implementation and Integration Services, and Managed Services.

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

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study is the basis for critical decision-making regarding 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 IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes 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 ISG Provider Lens™ quadrant may include service providers that ISG believes have 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.

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.

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

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





Consulting and Advisory Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe 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 Europe and how each provider addresses the critical challenges faced in the region. The report also provides a comprehensive overview of the competitive landscape of the market.

Oracle's vision is to empower enterprises with cutting-edge technological solutions that drive business success and industry transformation. Oracle continuously innovates and delivers value through its cloud services, including Oracle Fusion Cloud Applications, Oracle Autonomous Database, Oracle Cloud Infrastructure (OCI) and Oracle Cloud Customer Experience. It leverages its expertise in emerging technologies such as AI, ML, blockchain and IoT to create new opportunities for customers.

In the European market, a significant surge in the demand for consulting and advisory services related to Oracle applications and cloud infrastructure is expected. The need for digital transformation, innovation and agility fuels this growth in demand. Oracle offers a comprehensive suite of solutions to optimize business processes, enhance CX and harness data for strategic insights.

Top-performing Oracle partners are trusted, highly experienced consulting and advisory service providers. They offer end-to-end support, align Oracle solutions with enterprise goals, facilitate smooth cloud migration, ensure security and compliance, and enhance ROI through continuous improvement and innovation.



C-suite executives aiming to achieve business objectives with Oracle solutions should read this report to gain insights into the evolving trends and advancements in Oracle's offerings.



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



Leaders in digital transformation should read this report to understand how service providers align Oracle solutions with the latest technologies for resilient organizations.

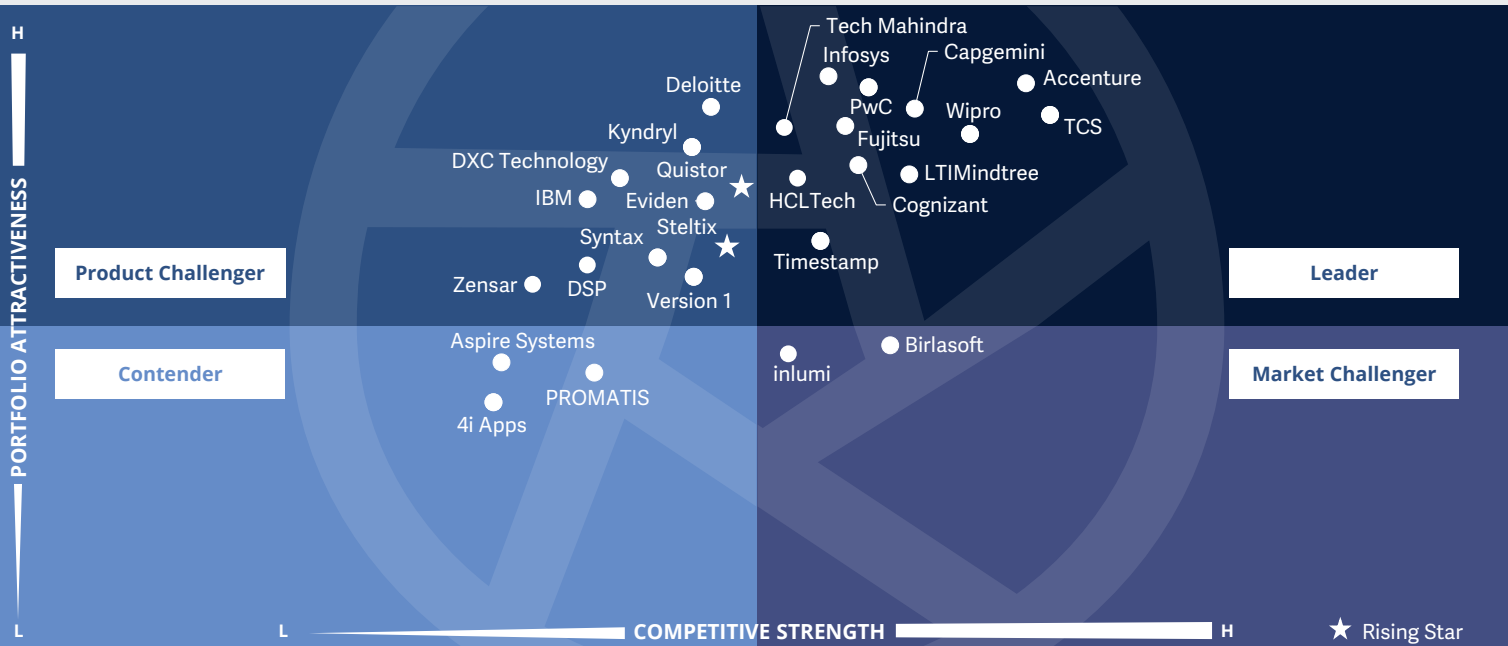


Marketing and sales leaders should read this report to assess the positioning and competencies of service partners, which can help them make informed strategic decisions and enhance their business strategies.



**Oracle Cloud and Technology Ecosystem
Consulting and Advisory Services**

Europe 2023



This quadrant assesses the **best-performing Oracle partners that provide the technology and guidance** to meet client needs at every journey step, from planning and adoption to continuous innovation.

Mauricio Ohtani



Consulting and Advisory Services

Definition

The services analyzed in this quadrant cover Oracle applications and infrastructure technologies. This quadrant evaluates the Oracle consulting and advisory service providers that help enterprises modernize, optimize and transform their business operations to increase efficiency, flexibility, and scalability. Service providers leverage the best practices to maximize and optimize the value of existing and new Oracle investments. This, in turn, helps drive Oracle stack adoption, reduce risks, and improve business agility. The consulting and advisory services assess enterprise maturity, improve and maintain Oracle investments, reduce risks through cloud hybrid options, develop the future-state model/framework, conduct security assessments, and define governance processes.

Service providers offer typical transformations to enable clients to use the Oracle stack, including project planning, solution design, business process modeling, user training, product installation and configuration, testing, and more. The providers need expertise in understanding the client's business and technology landscape and offer frameworks, tools, and accelerators to support fast and safe transformations.

Eligibility Criteria

1. Uses reference assessment models, strategy, roadmaps and frameworks
2. Offers recommendations with IT strategy alignment, technical reviews, benchmark tools and templates
3. Presents industry knowledge and domain-related practices
4. Explores in-depth knowledge of Oracle stack and related functionalities, processes, workflows, tools and platforms, along with industry expertise
5. Applies the Oracle Cloud Services Framework by providing cloud strategy assessment, readiness assessment and architecture advisory services
6. Holds experience in industry, functional processes, contextual customer knowledge and strategy consulting to offer differentiated customer experience
7. Supports change management lifecycle to drive transformation through people, process, technology and strategic transformations
8. More than two projects executed in the last 12 months



Consulting and Advisory Services

Observations

Oracle's vision is to empower its customers with the best technological solutions that enable them to achieve their business goals and transform their industries. Oracle is committed to delivering continuous innovation and value to its customers through its cloud offerings, such as Oracle Fusion Cloud Applications, Oracle Autonomous Database, Oracle Cloud Infrastructure, and Oracle Cloud Customer Experience. Oracle also leverages its expertise and experience in emerging technologies, such as artificial intelligence, machine learning, blockchain, and the Internet of Things, to create new customer opportunities and solutions.

The European market for consulting and advisory services on Oracle apps and cloud infrastructure is expected to grow significantly in the next few years, driven by the increasing demand for digital transformation, innovation, and agility among businesses. Oracle apps and cloud infrastructure offer a comprehensive and integrated suite of solutions enabling organizations to optimize

their business processes, enhance customer experience, and leverage data and analytics for strategic insights.

The best-performing Oracle partners are reliable and experienced consulting and advisory services providers that offer implementation, management, and end-to-end support for Oracle apps and cloud infrastructure. They are prepared to align proposed solutions to the business goals and requirements, migrate legacy systems and data with minimal disruption and risk, ensure security, compliance, and performance, and maximize the value and ROI through continuous improvement and innovation.

Of the 36 companies assessed for this study, 28 have qualified for this quadrant, with 12 Leaders and 2 Rising Stars.

accenture

Accenture has a large and diverse workforce and offers various services. It has a strong partnership with Oracle, winning many awards for their solutions.

Capgemini

Capgemini has been working with Oracle for a long time, showing expertise in their cloud solutions and receiving many awards, through a large and diverse staff.

cognizant

Cognizant provides various services and supports clients in updating their IT core with Oracle Cloud Infrastructure, helping them reach their business objectives in various sectors.

FUJITSU

Fujitsu has a long and close relationship with Oracle, delivering private cloud on Oracle technology, being a top Oracle partner in EMEA, and using Oracle HCM globally.

HCLTech

HCLTech is a Global System Integrator and Oracle Partner. It leverages its long-standing alliance to help clients enhance their current investments and get ready for the future by transforming the core and envisioning the future.

Infosys

Infosys supports clients in transforming their businesses with Oracle technology, delivering end-to-end solutions. It has a long and fruitful partnership with top organizations.

LTIMindtree

LTIMindtree is a global IT company based in India. It has a long and innovative partnership with Oracle, co-creating solutions for enterprises.



Consulting and Advisory Services



PwC is based in the U.K. and has extensive expertise in Oracle products, with many certifications and satisfied customers. It helps clients improve their business models, capabilities, and opportunities.



TCS is based in India and has skilled workforce distributed in 300 global offices, present in 55 countries. TCS and Oracle have partnered on shared co-innovation and delivery excellence values.



Tech Mahindra is a global IT company headquartered in India. It has a long and fruitful business relationship with Oracle. It has many specializations, certifications, and skills in Oracle products.

Timestamp

Timestamp is a technology enabler and integrator group founded in Portugal in 2003, with offices in Portugal, Holland, and Spain. Its expertise is in Oracle solutions in the Iberian market, with many consultants and certifications. It operates on several continents also.



Wipro has a large and diverse workforce and provides various services. It has a long and strong relationship with Oracle, helping customers transform their business with intelligent models, cloud platforms, industry insights, and innovation networks.

Quistor

Quistor (Rising Star) is Dutch IT consulting firm and Oracle partner that offers JD Edwards, Oracle BI, and Oracle Technology solutions to 250+ customers across Europe.

Steltix

Steltix (Rising Star) is a global Oracle ERP software and business solutions provider. It supports enterprises with various platforms, innovation, partnerships, deliverables, and professionals.



Capgemini



“Capgemini is a leader in Oracle cloud solutions, offering ERP, HR, and manufacturing services. It has a long and strong partnership with Oracle, holding various certifications and awards.”

Mauricio Ohtani

Overview

Capgemini is headquartered in Paris, France and operates in more than 50 countries. It has 360,000 employees worldwide. In FY22, the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini and Oracle have been partners since 1997, with Capgemini being a key global partner for Oracle. The company participates in the Sell, Service & License, and Hardware tracks, demonstrating its expertise in the Oracle SaaS, PaaS and IaaS portfolio.

Strengths

ERP Advisory Services: Capgemini empowers organizations to undergo transformative changes by leveraging extensive expertise in cloud solutions. Its ERP Advisory Services offer a comprehensive suite of fully integrated cloud solutions tailored to meet each client’s unique needs. With a deep understanding of Oracle ERP Cloud and Oracle NetSuite Cloud solutions, Capgemini’s consultants provide strategic advice and practical insights to help organizations optimize their processes, improve efficiency, and drive business growth.

HR intelligence: Capgemini helps clients on their journey to ‘HR intelligence’ with Transformative HR solutions, using a market-leading Oracle Cloud HCM foundation as the

basis. This foundation combines strategic insights with an accelerated methodology so clients can start achieving tangible results using the latest HR technologies – at pace, and for the long-term.

Successful partnership: Capgemini offers broad and deep knowledge of Oracle’s portfolio based on 25 years of relationship. It has achieved Oracle Partner Network certifications that include Oracle Platinum Partner, Oracle Cloud Premier, Oracle Cloud Managed Service Provider, and Oracle Cloud Excellence Implementer. Capgemini has won dozens of Oracle awards, including the Oracle Partner of the Year EMEA Award for Oracle Cloud Infrastructure (OCI) in 2020.

Caution

Oracle’s market positioning is getting more robust, with a clear focus on cloud services and AI. Capgemini must accelerate client acquisition, leveraging its broad and deep knowledge and expertise on Oracle’s solutions to stay even better as a leader in this quadrant.





Implementation and Integration Services

Implementation and Integration Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe 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 Europe and shows 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.

Oracle's mission is to empower enterprises with innovative technology solutions such as Oracle Fusion Cloud Applications and OCI. They leverage emerging technologies such as AI, ML, blockchain and IoT to create new opportunities for customers.

The European market for Oracle implementation and integration services is expected to grow, driven by the demand for digital transformation. Oracle offers a comprehensive suite of solutions to enhance business processes and CX.

Leading experienced Oracle partners offer comprehensive implementation and integration services, aligning Oracle solutions with enterprise goals, ensuring secure cloud migration and enhancing ROI through ongoing innovation.



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



Technology leaders can stay updated on Oracle's latest trends, features and integration insights through this report.



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

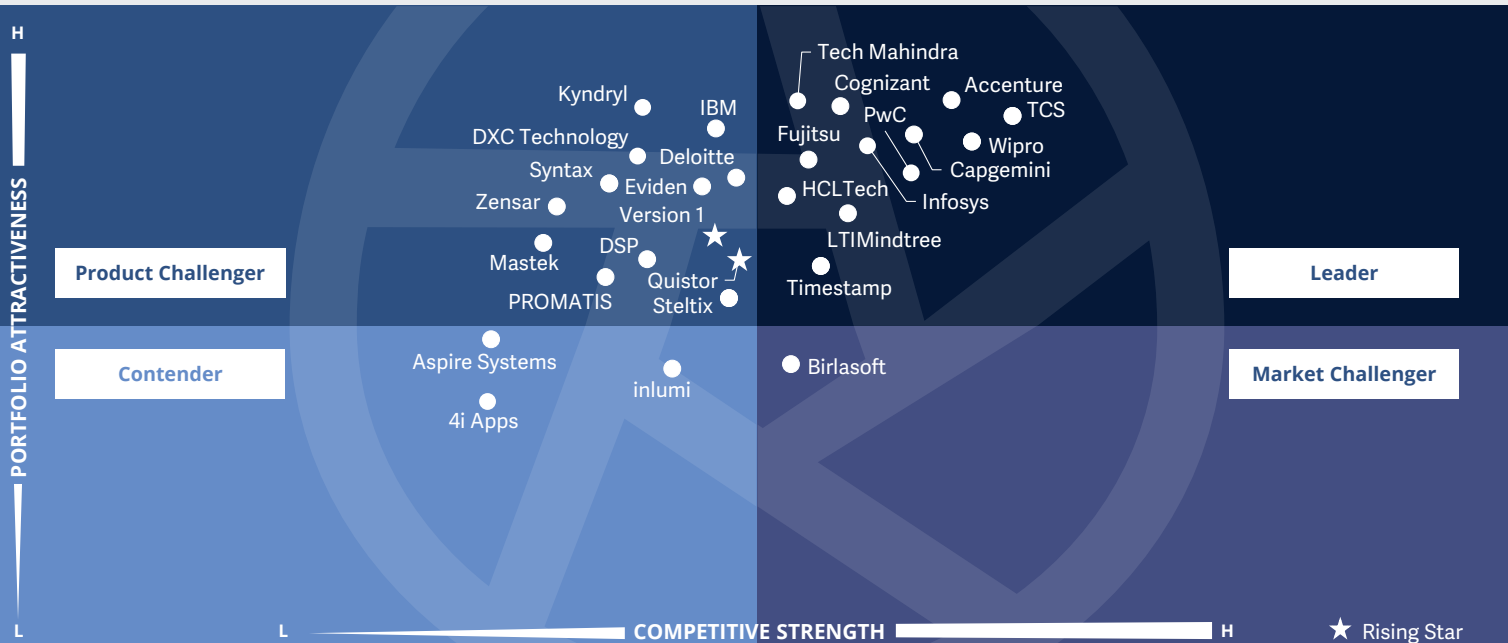


This report helps **marketing and sales leaders** assess service partners, improving software integration and decision-making.



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

Europe 2023



This quadrant assesses **Oracle partners** that offer implementation and integration services to **enable customers to effectively deploy, configure, and customize** Oracle applications and cloud infrastructure solutions in their settings.

Mauricio Ohtani



Implementation and Integration Services

Definition

This quadrant evaluates service providers specialized in implementation, migration, and integration services around Oracle applications and infrastructure technologies. The providers' ability to develop accelerators and components that drive efficiency and quality of implementations will be examined.

Modernizing initiatives is a significant focus among providers to drive innovation by enhancing, improving, and developing proprietary tools to deliver accurate results faster. Providers' capabilities in implementation include designing the entire implementation plan, creating a data migration strategy, modernizing processes, deploying hybrid and multicloud environments, ensuring data security, and developing governance protocols. The providers also must demonstrate the ability to integrate Oracle applications and infrastructure technologies with internal systems such as ERP, CRM, collaboration tools, and third-party solutions.

These applications and infrastructure technologies are usually part of the complex system landscape of large and globally operating enterprise clients. The scope of this study considers that these clients, in most cases, use various products of the Oracle portfolio. In many cases, the implementation is conducted as a part of a long-term program, with multiple rollouts in different divisions of the client organization and regions.

Eligibility Criteria

- 1. Use of predefined solutions, templates and expertise:** Experience in using pre-built solutions and accelerators for successful Oracle stack deployment
- 2. Integration and migration services:** Competencies in application development, modernization, data migration and testing services across the Oracle stack
- 3. Ability to offer maintenance and support:** Installations, upgrades, new feature/module release management, migration, patch and lifecycle management of instances
- 4. Deployment speed:** Ability to quickly design solutions based on reference architecture and deploy new modules and enhancements
- 5. Enabling technologies:** Ability to work with APIs, automation, data science and AI and ML to drive implementations and integrations with major hyperscalers
- 6. More than two projects** executed and implemented in the last 12 months



Implementation and Integration Services

Observations

Oracle offers a comprehensive portfolio of products and services that enable customers to transform their business processes, optimize their IT resources, and enhance their competitive advantage. Oracle's implementation and integration services help customers deploy, configure, integrate, and customize Oracle applications and cloud infrastructure according to their needs and requirements.

Oracle's implementation and integration services are provided by a network of certified partners with rich experience and knowledge working with Oracle products. Oracle's partners adhere to the same high standards and quality guidelines as Oracle's teams, ensuring reliable and satisfactory outcomes for customers. Oracle's implementation and integration services are adaptable, scalable, and cost-efficient, enabling customers to select the service level that matches their needs, budget, and timeline. Whether customers require a comprehensive implementation and integration project or a particular service element, Oracle can deliver a suitable solution.

Oracle's partners aim to help customers deploy and optimize their cloud solutions and integrate them with existing on-premises or third-party systems. Oracle's experts can support customers throughout the entire lifecycle of their cloud projects, from planning and design to testing and deployment, monitoring, and support. Oracle's services can also help customers adopt best practices, methodologies, and tools to ensure a successful outcome. Oracle offers a comprehensive portfolio of cloud applications and infrastructure services that can help customers achieve their business goals.

Of the 36 companies assessed for this study, 29 have qualified for this quadrant, with 12 Leaders and 2 Rising Stars.

accenture

Accenture is a global technology company delivering innovative solutions to global enterprises. It collaborates on large-scale projects, using Oracle's cloud stack and application suite. Accenture invests in Oracle to help clients achieve their goals.

Capgemini

Capgemini and Oracle are long-term partners, offering cloud solutions for various industries. They have won awards for their collaboration and innovation. They help clients adopt and integrate Oracle's cloud solutions with minimal disruption.

cognizant

Cognizant helps clients modernize their IT core with Oracle Cloud Infrastructure, enabling business innovation and process simplification. Cognizant provides cloud implementation, migration, integration, and reporting services for various industries.

FUJITSU

Fujitsu and Oracle are partners for cloud solutions, delivering digital services and business transformation. Fujitsu helps clients migrate and scale workloads and applications to Oracle Cloud IaaS. Fujitsu has an accelerator program for cloud implementation and integration.

HCLTech

HCLTech and Oracle offer cloud and on-premises solutions for various industries and domains, optimizing clients' business processes and outcomes with tools, accelerators, frameworks, and talent.

Infosys

Infosys works with Oracle as a partner to drive purposeful transformations. Infosys has domain expertise, tech proficiency, and innovation investments. Infosys collaborates with Oracle on QA, product enhancements, emerging technologies, and best-fit solutions.

LTIMindtree

LTIMindtree co-innovates with Oracle globally to reimagine enterprise businesses. It is certified as an Oracle Cloud Solution Provider with thousands of Oracle-Certified Professionals, and operates in many countries and has a significant revenue in FY23.



Implementation and Integration Services



PwC has extensive expertise and certifications in Oracle products. PwC uses Oracle to improve decision-making, empower the workforce, drive innovation, and accelerate growth. PwC offers services in various domains.



TCS headquarters in India, partners with Oracle for co-innovation and delivery excellence. TCS offers a consulting-led, cognitive-powered, integrated portfolio of implementation and integration services on Oracle Cloud Infrastructure.



Tech Mahindra (Rising Star) is a global leader in cloud services, offering solutions to transform business with cloud technologies. Also, Tech Mahindra is a long-term Oracle partner that manages Oracle on-premises applications such as PeopleSoft, E-Business Suite, and JD Edwards.

Timestamp

Timestamp started in Portugal in 2003 and combines the roles of technology enabler and information systems integrator. Timestamp connects systems and creates a unified environment with Oracle Cloud solutions.



Wipro is a global IT leader and helps clients adapt to the digital world with cognitive, cloud, analytics, and emerging technologies. Partnering with Oracle, Wipro offers implementation and integration services of Oracle Cloud solutions.

Quistor

Quistor (Rising Star) is an Oracle partner and IT consulting firm from the Netherlands, and provides JD Edwards, Oracle BI, and Oracle Technology services to over 250 European clients. Quistor won the Oracle Cloud Infrastructure Partner of the Year Award in 2019.

Version 1

Version 1 (Rising Star) is a global IT provider with 2500+ experts, offers impactful services and solutions. As an Oracle partner since 1996, it helps customers thrive in the Digital-First world.



Capgemini



“Capgemini delivers cloud solutions with Oracle, tailored to each client’s needs and industry. It wins awards for its collaboration and innovation. It accelerates cloud adoption and integration with minimal disruption.”

Mauricio Ohtani

Overview

Capgemini is headquartered in Paris, France and operates in more than 50 countries. It has 360,000 employees worldwide. In FY22, the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini has a strong capability in Oracle implementation and integration driven by strategic partnerships with companies and comprehensive experience that helps to shape Oracle platforms and applications to suit clients’ needs.

Strengths

Implementation and integration services:

Capgemini has global recognition for its implementation and integration services in cloud solutions, including Oracle Cloud Infrastructure (OCI). Its team of experts tailors Oracle solutions meticulously to align with each client’s unique needs, ensuring seamless integration with their existing systems and processes for maximum efficiency and value.

Industry-specific accelerators:

Understanding the unique needs of the manufacturing sector, Capgemini has developed a Manufacturing Advantage offer. This innovative solution harnesses the power of industry-specific cloud technologies and is further enhanced by Capgemini’s industry-specific accelerators and intellectual

property. The result is a streamlined implementation and integration process that accelerates cloud adoption while minimizing disruption to ongoing operations.

Capgemini’s Cloud Infrastructure Services:

Capgemini provides a robust and reliable foundation for business applications, leveraging OCI to deliver scalable, secure, high-performance solutions. This expertise extends to its Cloud Migration Services, which ensure a smooth transition to the Oracle Cloud. Using proven methodologies and tools, Capgemini minimizes disruption, reduces risks, and guarantees a successful migration, supporting even the most demanding workloads.

Caution

Some organizations may worry about vendor lock-in. By spreading systems across several cloud platforms, they can move between service providers more easily if better opportunities arise. Capgemini needs to show its capabilities in integrating multiple clouds.





Managed Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe 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 Europe and shows 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.

Managed services encompass the entire Oracle applications and cloud infrastructure lifecycle, from planning to deployment and support to optimization. They can be tailored to meet specific customer needs based on the IT setup, business requirements, budget and SLAs.

The demand for managed services is rising in Europe as organizations aim to enhance IT efficiency, reduce costs and boost agility. MSPs offer a range of services for Oracle applications and cloud infrastructure, including hosting, integration, security, backup and more. They enable organizations to leverage Oracle's cloud solutions while ensuring compliance with local regulations.

However, not all MSPs are the same, as their quality, expertise and terms can vary. Some MSPs may have hidden fees or contracts that impact customer satisfaction and ROI. Therefore, careful evaluation of MSPs is crucial to selecting the right partner for Oracle needs.



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



Delivery leaders managing key Europe accounts and focusing on CX and Net Promoter Score (NPS) can read this report to find how Oracle managed service providers maintain credibility and excellence.



Technology leaders can stay updated on Oracle's latest trends, features and integration insights through this report.



Sourcing and procurement managers should consider this report to develop a clear understanding of the Oracle managed service provider landscape, facilitated by the comparative analysis of different providers.



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 and technology to infrastructure. The study focuses on providers that offer support to run enterprise clients' businesses, including technical and operational tasks encompassing customizations, personalization, and configurations. Service providers should support onsite or offsite service delivery or both. The service providers should offer hands-on training programs around Oracle applications and infrastructure technologies through onsite, online, or partner locations. In addition, service providers should have a strong and credible partnership with technology integration providers and critical third-party software providers, covering the breadth of the 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. They should also demonstrate their ability to manage cloud environments with major hyperscalers. Their customization and personalization competency should be able to meet a client organization's critical business requirements through provider expertise in designing, developing, deploying, and enhancing customized solutions.

The study covers experience in providing monitoring and issue resolution services across entire Oracle-engineered systems (Exadata, database appliance, zero-data loss recovery appliance, and private cloud appliance) that help maximize uptime and increase the efficiency of mission-critical environments. Oracle's managed service solutions enable organizations to save costs, increase business agility and efficiency, and ensure freedom of choice or customization.

Eligibility Criteria

- 1. Ability to provide support for Oracle stack:** Experience in managing and maintaining Oracle stack, but not limited to configurations, setups, administration, data, reporting and security, including processes, workflows and applications
- 2. Change and release management framework:** Experience in managing Oracle change and release management processes to assess the impact of change, reduce any potential errors, automate manual tasks and other functions
- 3. Application maintenance services:** Comprehensive experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment
- 4. Database support services:** Experience in Oracle databases administration, upgrades, patches, disaster recovery, backups, performance tuning and monitoring for high availability
- 5. More than two projects** executed and implemented in the last 12 months



Managed Services

Observations

Oracle managed services cover the entire Oracle applications and cloud infrastructure lifecycle, from planning and design to deployment and migration, operation and optimization, support and maintenance. Oracle managed services can be tailored to meet each customer's specific needs and objectives, depending on their existing IT environment, business requirements, budget constraints, and service level agreements (SLAs).

The demand for managed services is growing rapidly in Europe as more and more organizations seek to optimize their IT operations, reduce costs, and improve agility. Managed services providers (MSPs) offer a range of services, such as application hosting, migration, integration, maintenance, support, security, backup, disaster recovery, and performance tuning, for Oracle applications and cloud infrastructure. MSPs can help organizations leverage the benefits of Oracle's cloud solutions, such as scalability, flexibility, reliability, and innovation while ensuring compliance with local regulations and standards.

However, not all MSPs are created equal. Some may need more expertise, experience, or resources to deliver high-quality services that meet each customer's specific needs and expectations. Some may also have hidden fees, lock-in contracts, or service level agreements (SLAs) that can compromise the customer's satisfaction and return on investment. Therefore, it is essential for organizations to carefully evaluate and select the right MSP for their Oracle applications and cloud infrastructure needs by assessing the details of the following highlighted Oracle partners.

Of the 36 companies assessed for this study, 29 have qualified for this quadrant, with 12 Leaders and 2 Rising Stars.

accenture

Accenture is a global technology company delivering innovative solutions to global enterprises. It collaborates on large-scale projects, using Oracle's cloud stack and application suite.

Capgemini

Capgemini, a French multinational IT services and consulting company, offers Oracle Managed Services, which provides comprehensive solutions for application and technology infrastructure.

cognizant

Cognizant is an American multinational IT services provider, offers consulting and business process outsourcing and comprehensive solutions for applications and technology infrastructures.

FUJITSU

Fujitsu is a Japanese IT company that offers various products and services. Its managed services help customers run and operate their workloads on Oracle Cloud Infrastructure, providing end-to-end system governance, monitoring, patching, backup, and disaster recovery.

HCLTech

HCLTech is a leading IT company with a cloud, data, and AI solutions portfolio. Its Oracle capability in managed services enables customers to optimize their workloads on Oracle Cloud.

Infosys®

Infosys is a global leader in digital services that provides business consulting, information technology, and outsourcing services. Its managed services expertise enables customers to optimize their workloads on Oracle Cloud.

LTIMindtree

LTIMindtree is an Indian multinational IT company that provides various products and services, such as cloud computing, data storage, AI, and managed services that help customers run and operate their workloads on Oracle Cloud Infrastructure



Managed Services



PwC is a British multinational professional services brand that provides assurance, tax, advisory, legal, and IT services. It enables customers to optimize their workloads on Oracle Cloud.



TCS is a worldwide IT company from India that provides cloud, data, and AI products and services. It supports customers' workloads on Oracle Cloud with system administration, monitoring, patching, backup, and disaster recovery.



Tech Mahindra is a global IT company that offers managed services capabilities in Oracle Cloud that enable customers to optimize their workloads on Oracle Cloud with end-to-end system management.

Version 1

Version 1 is a global IT service provider with over 2500 experts, delivering impactful IT services and solutions. The company is committed to best practices, consultant certification, and investing in new solutions and services to maximize customer Oracle investments.



Wipro operates in 66 countries with 249,700 employees. It helps clients adapt to the digital world with cognitive computing, hyper-automation, robotics, cloud, analytics, and emerging technologies. Wipro and Oracle have a long-standing relationship.

Quistor

Quistor (Rising Star) is a European IT company that provides Oracle products and services. Quistor won the Oracle Cloud Infrastructure Partner of the Year Award in 2019, showing its commitment and excellence in Oracle Cloud solutions.

Steltix

Steltix (Rising Star) operates with offices in Europe, Africa, the USA & Asia Pacific. The firm offers solutions for various platforms, including Oracle JD Edwards EnterpriseOne, Oracle Cloud Infrastructure, Nextworld, Oracle NetSuite, and Sage.





“Capgemini excels in Oracle-managed services, winning awards and delivering value. Its Manufacturing Advantage offer combines Oracle’s SCM Cloud with industry-specific solutions.”

Mauricio Ohtani

Capgemini

Overview

Capgemini is headquartered in Paris, France and operates in More than 50 countries. It has 360,000 employees worldwide. In FY22, the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini and Oracle have been partners since 1997, with Capgemini being a key global partner for Oracle, participating in the Sell, Service & License, and Hardware tracks and having expertise in Oracle’s cloud services, demonstrating expertise across the Oracle SaaS, PaaS, and IaaS portfolio.

Strengths

Manufacturing Advantage offering: Capgemini’s Oracle managed services capabilities are exceptional, particularly regarding their Manufacturing Advantage offer. This offering combines the power of Oracle’s industry Fusion SCM Cloud with Capgemini’s industry-specific accelerators and IP. This combination accelerates the cloud adoption process, delivering significant benefits to clients.

Global leader in Oracle managed services and innovation: Capgemini, a renowned global consulting, technology services, and digital transformation leader, has showcased its exceptional capabilities in Oracle managed services. Numerous accolades have acknowledged its expertise, including the prestigious Oracle Partner

of the Year EMEA Award for Oracle Cloud Infrastructure (OCI) in 2020. This recognition is a testament to Capgemini’s commitment to delivering top-tier Oracle solutions and their ability to drive innovation and provide value for their clients.

Ability to deliver high-quality services: Capgemini’s Oracle managed services dedication and expertise have been recognized with numerous Oracle awards, including the Oracle Partner of the Year EMEA Award for Oracle Cloud Infrastructure (OCI) in 2020. This accolade is a testament to the commitment to excellence and ability to deliver high-quality services that meet the evolving needs of their clients.

Caution

Capgemini’s Oracle managed services may require significant changes in the organizational culture and the employees’ skills. Clients should prepare for the change management process and provide adequate training and support for their staff.





Appendix

The ISG Provider Lens™ 2023 – Oracle Cloud and Technology Ecosystem study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with 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 December 2023, 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 Cloud and Technology 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





Lead Analyst

Mauricio Ohtani
Lead Analyst and Senior Consultant

Analyst and Author Mauricio Ohtani brings extensive experience in the research business of Brazilian and Latin American service markets. Mauricio is a senior consulting partner at TGT Consult in Brazil. With more than 30 years of experience, he developed and served different roles in the information technology market for diverse vertical industries, supporting many countries in Latin America.

Before TGT and ISG, Mauricio was area vice president at Gartner Inc., responsible for Brazil and Latin America's research and advisory business.



Research Analyst

Sandya Kattimani
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Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Oracle Ecosystem, and Mainframes. Sandya has over 8 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities.

Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis, and digital transformation. She is responsible for authoring the enterprise content and the global summary report, which includes market trends and insights.





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, principal analyst 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 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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