

Oracle Cloud and Technology Ecosystem

Comparison of Oracle service providers' portfolio
attractiveness and competitive differentiators



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Executive Summary

03

Provider Positioning

06

Introduction

Definition

10

Scope of Report

11

Provider Classifications

12

Appendix

Methodology & Team

35

Author & Editor Biographies

36

About Our Company & Research

38

Professional Services

13 - 19

Who Should Read This Section

14

Quadrant

15

Definition & Eligibility Criteria

16

Observations

17

Provider Profiles

19

Managed Services

20 - 26

Who Should Read This Section

21

Quadrant

22

Definition & Eligibility Criteria

23

Observations

24

Provider Profiles

26

OCI Solutions and Capabilities

27 - 33

Who Should Read This Section

28

Quadrant

29

Definition & Eligibility Criteria

30

Observations

31

Provider Profiles

33

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Oracle's expanding U.S. cloud footprint opens new growth avenues for service providers

Public cloud adoption is surging across the U.S., as organizations reimagine their operations to thrive in a digital-first era. Rather than simply cutting costs or upgrading infrastructure, organizations are leveraging the cloud to create agile, interconnected environments that can quickly respond to shifting market demands. With cloud budgets now representing a majority of enterprise IT expenditures, the cloud has become a catalyst for new business models, smarter workflows and measurable growth.

Three forces shape this evolution:

- The shift from monolithic IT to composable, cloud-native architectures, enabling enterprises to reconfigure processes and applications with agility.
- The emergence of data and AI as the new currency of value, turning transactional systems into intelligent engines for prediction and personalization.
- The rise in regulatory complexities and sustainability imperatives, prompting organizations to rethink governance, compliance and operational resilience at scale.

Oracle's Cloud Ascent: Financial growth fueled by AI and multicloud strategy

In today's fast-changing landscape, Oracle has evolved from a traditional enterprise software vendor and database provider into a leader in cloud platforms and services. Its broad portfolio, including cloud applications, OCI, industry-specific applications and AI-enhanced data platforms, enables it to address the needs of highly regulated, complex and data-driven organizations.

In FY25, Oracle generated total revenue of \$57.4 billion, an 8 percent increase in USD (9 percent in constant currency). Q4 revenue rose 11 percent year-over-year to \$15.9 billion, with cloud services and license support totaling

Oracle helps drive U.S. public cloud growth, leveraging AI and ecosystem innovation



\$11.7 billion. Cloud infrastructure (IaaS) revenue reached approximately \$3.0 billion, up by 52 percent, while cloud applications (SaaS) grew 12 percent to \$3.7 billion. To meet rising demand for AI workloads, Oracle is investing heavily in infrastructure, data centers and cloud capacity. The momentum continues into FY26, with Oracle reporting Q1 cloud revenues of \$7.2 billion, up by 28 percent in USD and 27 percent in constant currency, while the remaining performance obligation (RPO) contract backlog increased by 359 percent to reach \$455 billion. OCI revenue is specifically projected to grow 77 percent, reaching \$18 billion for the fiscal year, driven by large, multibillion-dollar deals and expansion across multicloud environments. Strong growth in cloud services, especially OCI, showcases that Oracle is accelerating its transition from a traditional license and on-premises model to a recurring cloud revenue paradigm. This reshapes the consumption, contracting, delivery and support for both providers (partners) and enterprise clients. The growing RPO backlog improves visibility into future revenue streams and strengthens client trust in Oracle's commitment to long-

term investments in capacity, regions and partnerships.

Innovation with cloud applications

While OCI has garnered most of the attention, Oracle continues to expand its SaaS portfolio with embedded AI and other functional innovations, offering providers an opportunity to engage with enterprise clients for enhanced experiences and business outcomes.

In April 2025, Oracle made Oracle Cloud Success Navigator available for free to Oracle Fusion Cloud Applications Suite customers. This interactive digital platform helps customers accelerate cloud transformation and maximize the value of their Oracle Cloud investments.

At AI world 2025, Oracle announced major new enhancements to its AI Agent Studio for Fusion Applications, including a dedicated AI Agent Marketplace, broad LLM support and upgraded tools for building and testing enterprise AI agents. These enhancements further strengthen Oracle's end-to-end platform for developing and deploying AI agents and agent teams across the enterprise, while expanding

the Oracle Fusion Cloud Applications AI ecosystem by providing access to a network of Oracle-certified agents. Oracle also unveiled AI-powered enhancements to Oracle Fusion Data Intelligence to help customers quickly and easily unlock value from their enterprise data. The latest updates include the general availability of the Oracle Analytics Cloud AI Assistant, new analytical content and a road map of upcoming features across Oracle Fusion Cloud Applications, spanning ERP, HCM, SCM and CX.

The Oracle Redwood platform continues to evolve, delivering new interfaces and productivity enhancements across procurement, HR and SCM. Migration to Redwood is aligned with specific update releases, with 25B and 25C serving as key milestones for full adoption. Upcoming releases will expand Redwood's functionality and integrate telemetry insights, keeping it at the forefront of enterprise application design.

Platform and OCI innovation

At AI World 2025, Oracle also introduced the Oracle AI Data Platform, a comprehensive

solution designed to make enterprise data AI-ready and accelerate agentic application development. The platform unifies automated data ingestion, semantic enrichment, vector indexing and embedded GenAI tools, allowing organizations to seamlessly link industry-leading AI models to their data, processes and applications. Powered by OCI, Oracle Autonomous AI Database and OCI Generative AI services, the platform simplifies the journey from raw data to production-grade AI outcomes.

Oracle has rebranded its flagship database from Oracle Database 23ai to Oracle Database 26ai, reflecting a comprehensive rearchitecture that embeds AI directly into the core of data management. The breadth of new AI-driven capabilities, including AI Vector Search, agentic AI, and advances in AI management, development and analytics, justifies this major version leap and brings Oracle's AI for Data vision to life.

A key benefit of Oracle Database 26ai is its simple update process. Customers running 23ai can seamlessly move to 26ai by applying the October 2025 quarterly Release Update



Executive Summary

(RU 23.26.0), without any complex upgrade steps or application recertification. Likewise, autonomous databases already on 23ai will be automatically updated to 26ai without any customer action.

A major multicloud simplification is the launch of Multicloud Universal Credits, a unified licensing model that allows customers to purchase Oracle AI Database and OCI services once and use them across any major cloud environments, including Oracle Database@AWS, Oracle Database@Azure and Oracle Database@Google Cloud, along with services consumed directly on OCI. This provides customers with unprecedented commercial flexibility, consistent contract terms and the freedom to deploy databases in their preferred cloud region.

Partner ecosystem evolution

Service providers, including GSIs, regional consulting firms, specialized boutiques and managed services partners, remain a critical bridge between Oracle technology and enterprise outcomes. By combining deep domain expertise with Oracle's platform

capabilities, they drive client success across the U.S. Oracle services market. With rapid AI innovation, OCI's accelerated momentum against three large hyperscalers and increased SaaS adoption, providers face a compelling mix of opportunities and challenges.

Oracle has redesigned its partner program, transitioning to an enhanced Oracle Partner Network (OPN), a cloud-focused, five-tier, level-based model. The new structure allows partners to align benefits and incentives to their strategic investments. Levels 1-3 offer publicly available benefits, while Levels 4 and 5 are exclusive, require substantial investments and grant privileges available to a select set of large GSIs.

Customer success

Building upon 2024 initiatives, Oracle's Customer Success Services (CSS) continues to enhance its service delivery models through close collaboration with leading partners. This strategy combines the unique strengths of Oracle's internal services teams, including direct integration with Oracle Product Development, and deep sector- and client-specific insights

offered by providers with extensive industry engagement.

For partners, this evolution creates more options but also heightens the need to prioritize solution and industry focus areas to guide investment and specialization. Over the next twelve months, the market will see significant differentiation between providers that effectively navigate these changes and capitalize on the opportunity and those that do not.

With Oracle's rapidly growing cloud and AI capabilities, evolving partner programs and expanding multicloud opportunities, providers must develop deep specialization, define their unique value and invest in differentiated skills and solutions to remain competitive.





	Professional Services	Managed Services	OCI Solutions and Capabilities
Accenture	Leader	Leader	Leader
Argano	Product Challenger	Contender	Product Challenger
Aspire Systems	Contender	Contender	Contender
Astute	Not In	Contender	Contender
Birlasoft	Contender	Market Challenger	Market Challenger
Capgemini	Leader	Leader	Rising Star ★
Centroid	Not In	Product Challenger	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger





	Professional Services	Managed Services	OCI Solutions and Capabilities
Fujitsu	Contender	Contender	Contender
GT	Contender	Not In	Not In
HCLTech	Leader	Leader	Leader
Hexaware	Contender	Not In	Not In
Hitachi Digital Services	Market Challenger	Market Challenger	Market Challenger
Huron	Contender	Not In	Not In
IBM	Rising Star ★	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader
KPMG	Leader	Leader	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger





	Professional Services	Managed Services	OCI Solutions and Capabilities
LТИMindtree	Leader	Leader	Leader
Mastek	Contender	Contender	Contender
Mphasis	Contender	Not In	Not In
NTT DATA	Not In	Product Challenger	Product Challenger
PwC	Leader	Leader	Product Challenger
Sutherland	Contender	Contender	Contender
Syntax	Contender	Contender	Contender
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
Trinamix	Market Challenger	Contender	Contender





	Professional Services	Managed Services	OCI Solutions and Capabilities
Wipro	Leader	Leader	Leader
Zensar Technologies	Contender	Product Challenger	Contender



The Oracle Cloud and Technology Ecosystem 2025 study evaluates the service maturity level and technical competence of Oracle's top-performing partners.



Professional Services

Managed Services

OCI Solutions and Capabilities

Definition

Over the past year, Oracle has solidified its position as a leading player in AI and cloud infrastructure. This transformation is driven by its strategic focus on AI-centric application and platform innovations, which has resulted in record-breaking contract wins. Substantial infrastructure investments, including the pivotal Stargate deal, have positioned Oracle for notable revenue and market growth.

Oracle Cloud Infrastructure (OCI) has demonstrated significant growth, with consumption revenue soaring by 62 percent in Q4 FY25. The company anticipates an even more accelerated growth trajectory for OCI in FY26, with plans to triple the number of multicloud data centers, further expanding its reach and capabilities.

Oracle continues to prioritize innovation and investment in its Fusion Applications SaaS suite, which includes ERP, HCM, SCM and CX. It remains one of the few providers offering a complete suite of integrated business applications at scale, catering to diverse enterprise needs.

Oracle is positioning itself as an enabler for enterprises looking to leverage their own data and AI models. This commitment is underscored by significant partnerships and deals with industry giants such as OpenAI, Meta and Nvidia. These collaborations highlight Oracle's role in advancing its AI capabilities across various sectors.

Oracle is also actively redefining its Oracle Partner Network (OPN) to enable, incentivize and align partners with delivering customer success across its SaaS and OCI offerings. The ISG Provider Lens Oracle Ecosystem Partners 2025 study analyzes these partners helping enterprises capitalize on this shift with a broad range of services and deep Oracle expertise.

Simplified Illustration Source: ISG 2025



Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Professional Services, Managed Services, OCI Solutions and Capabilities.

The ISG Provider Lens® Oracle Cloud and Technology Ecosystem 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the regional market.

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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



**Provider Classifications: Quadrant Key**

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

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

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.





Professional Services

Who Should Read This Section

This report is valuable for service providers offering **Oracle professional services in the U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report evaluates providers offering consulting and implementation services to support organizations in adopting Oracle solutions.

C-level executives

Should read this report to gain critical insights into how service providers leveraging Oracle solutions can drive organizational transformation and strategic growth. This report can help C-level leaders understand the capabilities of these providers in areas such as process assessment, strategic planning, and change management, allowing them to make informed decisions about technology partnerships that will impact long-term business goals and success.

Technology leaders

Should read this report to gain a comprehensive understanding of providers' capabilities in assessing current technology landscapes, developing tailored strategic plans, and facilitating seamless implementations that align with business objectives. The report emphasizes the importance of operational efficiency, innovation, and industry expertise, ensuring that leaders can select partners with the necessary skills for successful project execution.

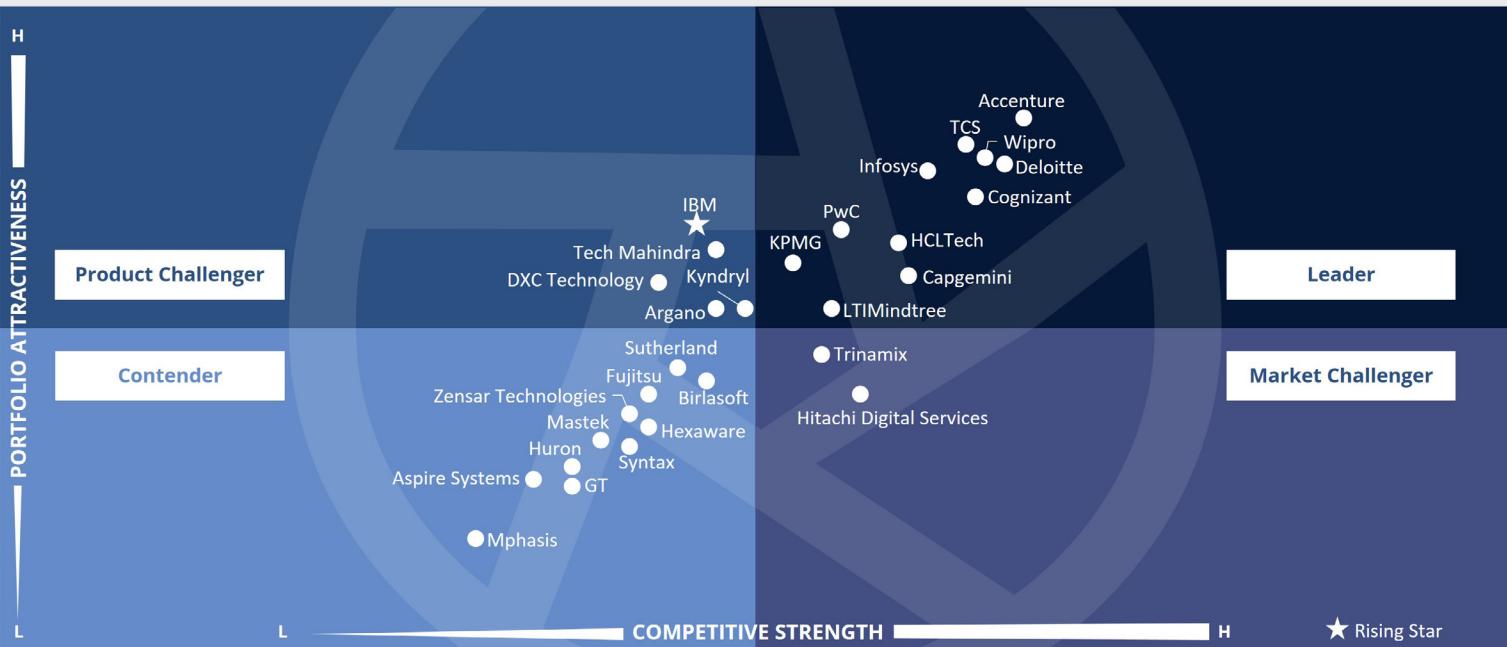
Consulting executives

Should read this report to identify strategic partnerships that can enhance their service offerings related to Oracle solutions. The comprehensive evaluation of providers can serve as valuable resources for consulting firms seeking to augment their expertise. The report provides insights into how these providers align Oracle implementations with business objectives, enabling consulting executives to facilitate more effective and innovative solutions for their clients.

Marketing and sales leaders

Should read this report to understand how leveraging Oracle solutions can enhance their strategic initiatives and drive customer engagement. By focusing on operational efficiency and innovation, the report highlights providers' abilities to streamline processes, improve data analytics, and enhance customer interactions, which are essential for successful marketing campaigns and sales strategies.





This quadrant spotlights providers delivering end-to-end Oracle services, emphasizing their ability to transform IT environments, drive adoption, and demonstrate excellence in **technology capability, integration expertise, and industry specialization**.

Siddharth Idnani



Definition

In this quadrant, ISG evaluates providers that offer an end-to-end approach to supporting organizations in leveraging Oracle solutions, including OCI and Fusion Applications. These providers deliver a suite of consulting and implementation services aimed at evaluating current technology landscapes, identifying opportunities for improvement and developing strategic plans tailored to address challenges and capitalize on emerging trends.

Focusing on operational efficiency and innovation, these providers help organizations implement and adopt Oracle solutions that align with business objectives. They bring industry expertise and a certified talent pool, ensuring seamless integration within complex IT environments.

Providers' capabilities in process assessment, strategic planning, change management and in-depth implementation services are also assessed in this quadrant.

Eligibility Criteria

1. **Strategic advisory:** Offer strategic consultancy and recommendations through assessment models, road maps and frameworks to ensure alignment with IT strategy.
2. **Migration and integration services:** Show proficiency in application development, database migration and modernization, with capabilities for workload and platform integration.
3. **Comprehensive cloud advisory:** Implement Oracle cloud services framework through cloud readiness assessments, strategic road map creation and architectural advice.
4. **Technical expertise:** Skilled in deploying Oracle stack using prebuilt solutions and accelerators.
5. **Industry expertise:** Showcase industry knowledge through domain-specific best practices.
6. **Enabling technologies:** Expertise in APIs, automation, data science, AI and ML, generative AI (GenAI) and agentic AI for integrations with major hyperscalers.
7. **Technology enablement:** Drive the adoption of modern technologies by designing capability-building workshops, governance models, and training programs, supported by proof-of-concept implementations and change-management tools.



Observations

In the U.S., Oracle professional services are driven by evolving enterprise priorities and the demand for partners to deliver measurable outcomes. Success now hinges on modernizing legacy systems for the cloud, harnessing data as a competitive asset and developing tailored, industry-specific solutions that address real-world complexity.

Cloud modernization

Cloud modernization remains at the forefront as organizations shift from on-premises Oracle systems to agile cloud platforms such as SaaS and OCI. Leading partners go beyond migration; they reimagine business processes, design scalable architectures and embed governance models that ensure security, agility and cost efficiency. This approach enables clients to unlock greater adaptability and deliver lasting business value.

Data-driven transformation

With unique and cutting-edge offerings such as the Autonomous Database and Oracle AI Data Platform, Oracle empowers enterprises

to evolve from static reporting to continuous, AI-driven intelligence. Top partners unify data sources, deploy analytics and embed automation into daily decision-making. By strengthening data governance and enabling real-time insights, they help clients identify growth opportunities and make confident, informed choices.

Industry-specific innovation

Industry expertise is critical to Oracle success. Most partners focus on three to five sectors, building deep domain knowledge to deliver tailored, compliant solutions. By integrating industry accelerators, proven frameworks and practical experience, they achieve quick results, reduce risks and deliver measurable business value. Leading GSIs combine broad coverage with deep sector-specific expertise.

From the 32 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture accelerates Oracle-led transformation for U.S. enterprises, leveraging deep expertise and extensive delivery capabilities. A multicategory FY25 award winner, it aligns GTM priorities with Oracle's growth pillars to drive industry and data reinvention.

Capgemini

Capgemini combines deep Oracle applications expertise, expanding OCI capabilities and AI-guided delivery via Project Phoenix. Its ISS platform streamlines staffing firms' front-to-back operations, while a robust partner ecosystem accelerates delivery quality.

cognizant

Cognizant combines full-stack Oracle expertise, strong cloud credentials and AI investment to deliver cocreated industry platforms. Its solutions for consumer sectors, mobility and public services leverage AI agents to enhance productivity, automation and intelligence.

Deloitte

Deloitte advances Oracle-enabled enterprise reinvention through coinnovation on OCI, deploying agentic AI to automate processes. As a FY25 global HCM Breakthrough winner, it delivers preconfigured, industry-specific solutions that reduce risk and time to value.

HCLTech

HCLTech strengthens Oracle delivery through dedicated innovation hubs, expanded cloud certifications and structured AI advisory. Proven SAP-to-Oracle migrations demonstrate execution excellence, helping manufacturers modernize operations and realize value.

Infosys

Infosys brings deep expertise in hi-tech, manufacturing and logistics industries, coupled with AI-driven delivery and global scale, to advance Oracle programs. Using KPI-led value management and industry platforms, Infosys enhances capabilities, accelerates value realization and reduces cost.



Professional Services



KPMG blends business transformation credentials with strong HR and finance expertise, delivering outcome-focused Oracle programs and data-driven optimization. Recognized with a 2025 HCM Breakthrough award, it helps enterprises achieve secure, scalable change.



LTIMindtree advances Oracle delivery with cross-stack expertise and a strong focus on manufacturing, healthcare and retail sectors, leveraging AI-driven implementation frameworks. It supports multicountry, compliant rollouts and invests in GenAI capabilities and cloud-native DevOps.



PwC leads Oracle delivery in the U.S. with an embedded Customer Success Services model and multiple 2025 awards, coupling a micro-vertical strategy with codeveloped solutions to accelerate adoption and deliver measurable, outcome-driven results.



TCS spans legacy Oracle and SaaS, expanding OCI references in the U.S. with preconfigured industry solutions to accelerate time to value, coinnovation hubs that link design to delivery, and flexible commercial models that de-risk and scale outcomes.



Wipro delivers reliable Oracle programs with high client satisfaction, combining deep integration expertise, AI-enabled accelerators and a dedicated CoE to automate complex multicountry deployments and streamline transportation and billing operations.



IBM (Rising Star) advances Oracle cloud adoption in the U.S., leveraging deep industry expertise, AI-powered delivery and automated maturity assessment to accelerate migrations and quantify ROI across industries such as financial services, healthcare and the public sector.



Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY24, the company generated €22.1 billion in revenue, with Applications and Technology as its largest segment. Drawing on extensive Oracle professional services credentials, Capgemini uses modern delivery approaches to accelerate transformation and reduce risk. For U.S. clients, it offers industry-tailored solutions that streamline operations and leverages a curated partner ecosystem to enhance quality across testing, integration, enablement and information management.

Strengths

AI-guided SaaS delivery: Capgemini's Project Phoenix is an AI-guided Oracle SaaS deployment platform designed to accelerate implementations and reduce risks. It features prebuilt libraries of SaaS configurations, integrations, industry-specific reports and data cleansing tools. The platform utilizes an AI-led approach to map standard business requirements to L1-L4 process breakdowns, aligned with industry KPIs. It includes premapped solution components such as personas, user stories, test scenarios and reports, along with AI-led impact analysis for non-standard requirements.

End-to-end staffing platform: Capgemini's Intelligent Staffing Solution, powered by Oracle Fusion Cloud ERP and HCM, is purpose-built for staffing firms. It integrates

front-office systems such as CRM, ATS and VMS with back-office processes, including billing, payroll and financial management, to scale operations and improve cash flow without increasing SG&A costs.

Partnership ecosystem: Capgemini has built a partner ecosystem to expand its Oracle SaaS capabilities and enhance delivery speed and quality. Key partners include Opkey (Redwood, auto-configuration and training), ChainSys (RapidShift), Epilogue Systems (RapidLearn) and SOLIX (data archival).

Caution

Capgemini is a reputed Oracle service provider. It can further strengthen its position by engaging with clients early to incorporate change management programs within the transformation lifecycle, thereby promoting user adoption.



"Capgemini combines strong Oracle applications expertise, expanding OCI capabilities and AI-powered frameworks with industry-specific solutions, making it a preferred partner for large-scale Oracle enterprise transformations in the U.S."

Siddharth Idnani





Managed Services

Who Should Read This Section

This report is valuable for service providers offering **Oracle managed services in the U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. Their strong alignment with Oracle and other key partners enables service providers to effectively manage complex and evolving client environments at scale.

C-level executives

Should read this report to comprehend how specialized MSPs in the Oracle ecosystem can enhance strategic decision-making and drive competitive advantage for their organizations. Through this report, executives can make informed choices about resource allocation, align IT investments with broader business objectives, and ensure that their organizations remain agile and responsive to changing market dynamics.

Delivery leader

Managing key U.S. accounts and focusing on CX and Net Promoter Score should read this report to gain critical insights into how MSPs can enhance customer experience by leveraging their expertise in Oracle technologies. The report highlights the role of these MSPs as strategic partners that provide reliable IT support and drive specific business outcomes through optimized operations and cost efficiencies.

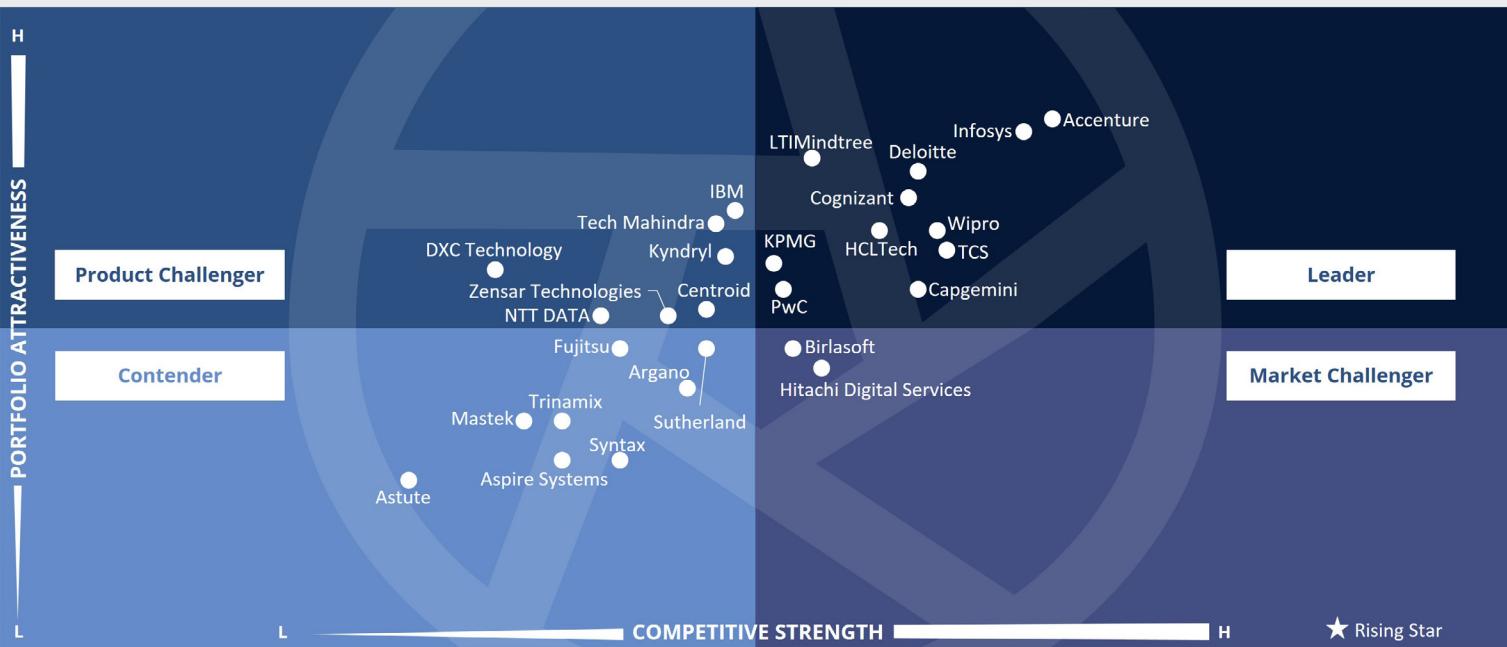
Technology leaders

Should read this report to understand the capabilities and specializations of MSPs in the Oracle ecosystem and then make informed decisions about outsourcing IT operations to enhance efficiency, security, and productivity. The report highlights the importance of leveraging AI and automation for digital transformation, the benefits of flexible and transparent pricing models, and the necessity of robust cybersecurity measures.

Sourcing and procurement managers

Should read this report to understand the Oracle MSP landscape and gain valuable insights into the specialized capabilities and offerings of providers. By understanding the security measures and the expertise these MSPs offer, sourcing and procurement managers can effectively evaluate potential partners, negotiate favorable terms, and ensure alignment with organizational goals.





This quadrant assesses U.S.-based Oracle Managed Services providers on their **innovation, flexibility, breadth of services, alignment with client outcomes**, and capability to manage complex global Oracle environments at scale.

Siddharth Idnani



Definition

In this quadrant, ISG evaluates MSPs based on their Oracle portfolio specializations. These MSPs transcend basic IT support, becoming strategic partners that deliver specific business outcomes for enterprises.

They ensure efficient, secure and reliable IT operations by leveraging AI and automation and established best practices in service delivery to optimize IT operations, enhance productivity, reduce costs and enable digital transformation.

Leading Oracle MSPs offer flexible solutions and transparent, outcome-based pricing models and integrate the same with internal IT teams. They rigorously prioritize robust security strategies against cyberthreats and service disruptions, ensuring data integrity and availability. Furthermore, these MSPs possess deep expertise in Oracle technologies, supported by a diverse pool of certified talent. Their strong alignment with Oracle and other key partners enables them to effectively manage complex and evolving client environments at scale.

Eligibility Criteria

1. **Service level agreement:** Capable of defining clear, documented service levels with performance metrics such as uptime, incident response and resolution times.
2. **Innovative pricing models:** Provides fixed-fee or outcome-based options, offering clients diverse pricing models for a competitive advantage.
3. **Application, database and infrastructure support:** Proficient in maintaining Oracle applications; developing technical solutions; ensuring operational integrity; upgrading and optimizing databases; and managing infrastructure through monitoring, planning and scaling.
4. **Operation and cost optimization:** Leverages automation, AI and ML, GenAI and Agentic AI to optimize resources, streamline operations and reduce costs.
5. **Security and compliance:** Adheres to industry and regional compliance standards and regulatory requirements.
6. **Change management:** Drives transformation through strategic change management initiatives in people, processes and technologies.
7. **Business continuity and disaster recovery:** Skilled in implementing robust continuity and disaster recovery plans, ensuring minimal disruption and data protection.



Observations

In 2025, the U.S. Oracle managed services market is shifting from routine maintenance to strategic value creation, driven by AI integration, multicloud governance and the decline of legacy AMS models.

AI-driven managed services

AI has become central to managed service delivery. Providers are now evaluated not only on SLAs but on how effectively they embed AI into both client operations and their own delivery. Automation of repetitive AMS tasks, such as configuration, quarterly update testing and tier-1 support, is cutting costs and freeing talent for higher-value work. The next frontier is agentic AI; these autonomous systems use client data to predict and solve complex challenges such as supply chain bottlenecks or predictive financial closing.

Multicloud governance and financial optimization

Oracle's expanding multicloud ecosystem, spanning AWS, Azure and Google Cloud, introduces governance and cost-control challenges. MSPs must integrate and manage

workloads across multiple clouds, optimizing applications on one platform while finetuning Oracle databases on OCI. Success depends on advanced interoperability, performance visibility and proactive financial optimization to minimize spend without compromising performance.

Shift to outcome-based partnerships

U.S. enterprises increasingly demand managed services tied to tangible results. In response to this, providers are adopting flexible commercial models linked to KPIs such as reduced financial close times or improved operational efficiency. With Oracle legacy support timelines shrinking, top partners accelerate modernization by migrating clients from outdated systems to full-stack cloud operations, helping enterprises achieve faster ROI from their cloud investments.

From the 32 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders.

accenture

Accenture brings global scale and GenAI-powered operations to Oracle environments, shifting AMS from SLA compliance to KPI-led value. Backed by broad CSPE coverage and deep U.S. expertise in industries such as communications, BFSI and retail, it drives measurable outcomes.

Capgemini

Capgemini unifies business, IT and service delivery, leveraging AI-driven automation for monitoring and incident resolution to boost productivity and KPI transparency, while evolving Oracle landscape to deliver near-term efficiency and long-term strategic value.

cognizant

Cognizant delivers outcomes-focused Oracle operations through automated delivery, human-centered change management and proactive KPI governance, reinforced by 2025 Global and North America Transformation awards, to reduce risk and elevate performance.

Deloitte

Deloitte combines a strategic Oracle partnership with multidisciplinary expertise to deliver scalable, AI-enabled operations, continuous improvement tooling, and global delivery centers, while collaborating across tax, audit and cyber to solve complex enterprise needs.

HCLTech

HCLTech provides end-to-end operations and optimization for Oracle environments, leveraging a global delivery network, structured change management and AI-driven automation and observability to enhance SLA performance, accelerate incident resolution and reduce run costs.





Infosys delivers Oracle operations and optimization via proprietary platforms, full-stack expertise and AI-driven application management. Recognized with a 2025 North America Customer Success award, it supports hybrid and multicloud environments to reduce risks and improve outcomes.



KPMG delivers outcome-focused operations and continuous improvement for Oracle cloud applications, integrating base services, enhancements and governance into cross-functional tax, audit, regulatory and cyber expertise to sustain agility, compliance and value.



LTIMindtree strengthens U.S. Oracle operations with AI-enabled migration and service delivery, automated monitoring and KPI visibility, touchless processes across finance, supply chain and HR, and proactive license optimization, improving compliance, cost and performance.



PwC applies deep industry knowledge and functional transformation expertise across Oracle solutions, combining AI-driven operations with integrated tax, audit and regulatory capabilities to manage complex environments and deliver measurable outcomes.



TCS delivers AI-enabled operations across Oracle environments, leveraging human-machine collaboration, automated workflows and a broad partner ecosystem to boost efficiency, accelerate transformation and improve reliability for U.S. enterprises.



Wipro enhances Oracle environments with AI-enabled application operations and tiered services tailored to client needs, spanning core support, release management, advanced analytics and process mining, while automation streamlines transitions and integrations.





“Capgemini excels in Oracle AMS by integrating technology deployment with a comprehensive, multilayered client engagement model, spanning the business, IT and service delivery functions.”

Siddharth Idnani

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY24, the company generated €22.1 billion in revenue, with Applications and Technology as its largest segment. Capgemini integrates run, transform and growth agendas across service, IT and business layers, coupling adaptive ADM with automation-led delivery and reusable accelerators. Its approach emphasizes measurable business outcomes, operational resilience and KPI-driven executive governance and transparency. In the U.S., it delivers Oracle services at scale for large enterprises across major industries.

Strengths

Multidimensional delivery framework:

Capgemini's Horizon Framework enables strategic alignment across three key operational layers for managed services. The Service layer focuses on optimizing service delivery and CX, ensuring reliability and efficiency. The IT layer targets mid-term transformation through infrastructure modernization, technology integration and scalable solutions. The Business layer drives long-term strategic growth by exploring new markets, disruptive models and future-ready capabilities.

Advanced application management:

Capgemini's Oracle ADMnext is a full-stack offering of disruptive, business-focused transformation and adaptive ADM services. Underpinned by a host of prebuilt assets

and enablers, ADMnext drives operational excellence with 35-40 percent productivity improvements that can help fund future transformations. Furthermore, the platform utilizes automation solutions enabled by AI, ML and RPA to unlock new business value.

Automated service delivery: Capgemini's CIAP (Capgemini Intelligent Automation Platform) is a powerful suite of capabilities designed to automate monitoring, incident resolution and root cause analysis across complex IT environments. The results and associated metrics are then meticulously tracked and displayed in VVM Rapport, a proprietary consolidated executive KPI dashboard providing full operational transparency to stakeholders.

Caution

While Capgemini possesses experience in legacy Oracle on-premises solutions and Fusion applications, it needs to expand its OCI managed services client base to solidify its credentials as a leading comprehensive MSP in the competitive U.S. market.





OCI Solutions and Capabilities

Who Should Read This Section

This report is valuable for service providers offering **OCI solutions and capabilities** in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report assesses service providers' capabilities on modernizing IT environments, optimizing cloud operations and driving digital transformation through OCI services.

Operations leaders

Should read this report to identify and evaluate service providers to effectively support their organizations in modernizing IT infrastructures and optimizing cloud operations through OCI solutions. By understanding the providers' capabilities in managing cloud migrations, multicloud and hybrid deployments, and their adherence to security and governance best practices, operations leaders can make informed choices that align with their operational goals.

Delivery leaders

Managing key U.S. accounts and focusing on CX and Net Promoter Score should read this report to gain insights on how providers enhance customer experiences through effective cloud solutions. Through this report, delivery leaders can identify partners whose capabilities in modernizing IT environments and optimizing cloud operations align with their strategies, ultimately improving their Net Promoter Score.

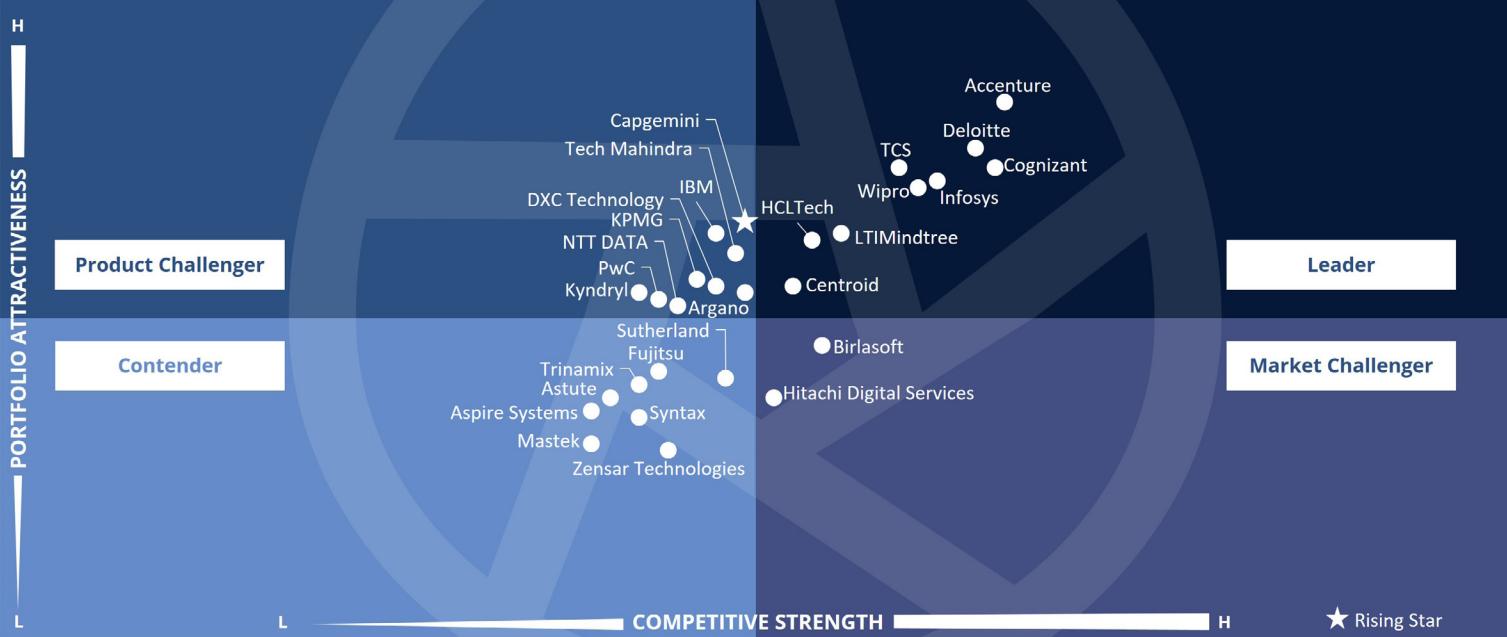
Technology leaders

Should read this report to gain insights into the performance and capabilities of service providers specializing in OCI through IaaS and PaaS models. The report highlights their adherence to security and governance standards, expertise in OCI data management, and innovative use of Generative AI services, enabling leaders to make informed decisions regarding partnerships that enhance enterprise efficiency and drive successful cloud strategies.

Governance and compliance officers

Should read this report to understand the capabilities of service providers in maintaining security and governance best practices within OCI environments. The report provides insights into how providers leverage OCI's data management services and advanced analytics to ensure compliance. These insights can empower governance and compliance officers to develop robust strategies that protect enterprise data while supporting organizational goals.





This quadrant assesses U.S. service providers' OCI solution expertise, with focus on their **cloud migration** capabilities, **multi-cloud and hybrid-cloud** competencies, generative **AI-driven innovation**, and effectiveness in operational optimization.

Siddharth Idnani



Definition

In this quadrant, ISG evaluates service providers specializing in OCI and offering support through IaaS and PaaS models. Key assessment areas include modernizing IT environments, optimizing cloud operations and driving digital transformation through OCI services.

Providers are assessed on their experience with cloud migrations, including multicloud and hybrid deployments, system integration capabilities and adherence to security and governance best practices.

Furthermore, their proficiency in OCI data management, particularly in leveraging autonomous services and advanced analytics to generate actionable insights, is also considered. Additionally, providers are evaluated on their experience with OCI's native Generative AI services, focusing on their capabilities in fine-tuning large language models (LLMs) and developing AI-powered applications that enhance enterprise efficiency.

Eligibility Criteria

1. **Multicloud strategy:** Demonstrate expertise in multicloud strategies to enhance flexibility and redundancy that include leveraging diverse cloud environments to ensure interoperability, resource optimization and regulatory compliance.
2. **Hybrid cloud strategy:** Skilled in integrating on-premises and cloud environments for hybrid cloud setups; optimizing workload distribution; and combining scalability with security to support data security, improved latency and transformation.
3. **Seamless integration:** Ability to integrate OCI with existing enterprise systems and third-party solutions.
4. **Security and compliance assurance:** Expertise in maintaining security, governance and compliance in OCI environments.
5. **Innovation with OCI:** Expertise in designing, developing and deploying cloud-native applications using OCI's microservices, Kubernetes and serverless computing.
6. **Industry-specific solutions:** Capable of delivering tailored OCI solutions for industry-specific needs.
7. **Expertise in cost optimization:** Ability to offer FinOps capabilities and cost management strategies to maximize cloud investment value.
8. **Leveraging OCI GenAI:** Demonstrate the ability to effectively leverage OCI GenAI services to drive measurable and impactful customer outcomes.



Observations

The year 2025 marked a pivotal year, elevating OCI's role as a key force in AI, multicloud and hybrid innovation.

AI infrastructure leadership

OCI solidified its position as a premier global AI infrastructure provider through GenAI integration and strategic partnerships. The flagship Stargate venture with OpenAI and SoftBank is delivering ultra-scale US data centers, starting in Texas, to power massive AI workloads. GenAI is now embedded across the Oracle stack, from Autonomous Database to the OCI Generative AI Service, establishing OCI as a foundation for enterprise AI adoption.

Multicloud expansion

In 2025, multicloud became the default enterprise model, strengthened by Oracle's interoperability with major hyperscalers. There are 12 Azure-OCI regional interconnect pairs (four in the U.S.), 14 Google Cloud-OCI pairs (four in the U.S.) and Oracle AI Database services available in two U.S. AWS regions, with three more planned. These links allow

enterprises to run Oracle workloads seamlessly across clouds with unified management and optimized performance.

Hybrid and sovereign cloud innovation

Oracle sustained hybrid cloud leadership through Cloud@Customer and Exadata Cloud@Customer, enabling secure on-premises deployment for critical workloads while maintaining cloud flexibility. OCI Dedicated Region and government cloud serve public sector and regulated industries, while Oracle Alloy empowers partners to deliver their own branded clouds, extending Oracle's reach.

To sustain momentum, partners must align closely with Oracle to position OCI as a strategic growth engine, strengthen alliances with hyperscalers and accelerate Oracle SaaS adoption through integrated, differentiated cloud solutions.

From the 32 companies assessed for this study, 28 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture combines industry-leading OCI certification, AI innovation on OCI and strategic multicloud integration across AWS, Azure and Google Cloud, enabling secure, scalable architectures and accelerated business outcomes for U.S. clients.

Centroid

Centroid blends a strong Oracle partnership, specialized U.S. OCI delivery and deep multicloud experience, offering agile execution, extensive migration credentials and advanced managed security to protect data, applications and hybrid environments.

cognizant

Cognizant enhances automated cost control and granular governance, accelerates migrations with provisioning and database automation, and designs multicloud and GenAI-aligned architectures, including private and hybrid OCI deployments.

Deloitte

Deloitte combines its deep Oracle partnership with AI-driven coinnovation, modernizing infrastructure and workloads on OCI, enabling portable GenAI across public cloud and dedicated region, and delivering tailored cost optimization integrated with operate services.

HCLTech

HCLTech combines recognized OCI expertise and CSPE status with U.S.-focused delivery, applying tailored assessment, operations optimization and migration frameworks, along with industry-specific AI solutions, to accelerate deployment, reduce risk and improve performance.

Infosys

Infosys brings legacy Oracle stack expertise, migrating EBS, Siebel and PeopleSoft to OCI and extending to non-Oracle databases and middleware. It leverages a banking install base to modernize on OCI and holds strong OPN-certified skills in security and analytics.

OCI Solutions and Capabilities



LTIMindtree expands its OCI capabilities with a growing certified talent base and strong North America delivery presence, accelerating data modernization to Oracle's AI Data Platform and turning fragmented environments into governed, AI-ready operations.



TCS integrates OCI with multicloud partnerships across AWS, Azure and Google Cloud, offering end-to-end advisory, migration and operations for complex workloads, while its enterprise AI platform on OCI accelerates GenAI adoption with governance and cost efficiency.



Wipro accelerates OCI adoption with a structured, low-risk migration approach, purpose-built tools, and GenAI use cases. Backed by a growing certified talent pool, it streamlines modernization, consolidates vendors and improves agility and performance.



Capgemini (Rising Star) modernizes OCI environments by leveraging cross-industry migration expertise, aligning multicloud architectures, using AI for workload optimization and unified governance, and codeveloping Oracle–Google Cloud interconnect solutions for mission-critical workloads.





"Capgemini is gaining significant ground as an OCI solutions provider in the U.S. by aggressively securing client references and aligning with Oracle on multicloud pursuits, effectively leveraging its status as a large system integrator."

Siddharth Idnani

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 340,000 employees worldwide. In FY24, the company generated €22.1 billion in revenue, with Applications and Technology as its largest segment. Capgemini delivers OCI solutions with strong Oracle implementation and integration, backed by strategic partnerships and an Oracle SaaS strategy focused on sustained innovation. Its Transformer AI assistant modernizes multicloud estates, applies GenAI to optimize OCI workloads and enables unified governance. In 2025, it acquired WNS to expand GenAI-enabled business process capabilities.

Strengths

OCI multicloud AI assistant: Capgemini's Transformer AI assistant is a purpose-built, next-gen, AI-powered solution that modernizes infrastructure and architecture across multicloud environments without vendor lock-in. It leverages GenAI for OCI workload optimization and offers unified visibility and governance across various cloud platforms.

Cross-industry success: Capgemini has built strong cross-industry references spanning OCI use cases over the last year, including successful migrations from AWS and other hyperscalers. This is a clear testimony to their growing capability and focus on the OCI market opportunity. It has built expertise in the efficient and secure migration of legacy Oracle technology to OCI.

Seamless multicloud integration: Capgemini is strategically collaborating with Oracle and Google Cloud to develop industry solutions that leverage Oracle Interconnect for Google Cloud. This partnership allows enterprises to seamlessly run mission-critical workloads and access best-in-class services across Google Cloud and OCI environments via a dedicated, low-latency private connection.

Caution

Capgemini must continue building expertise and customer references in critical areas such as OCI Business Analytics and Security to expand its market presence and remain relevant to a wider range of U.S. enterprise customers.



Appendix

The ISG Provider Lens 2026 – Oracle Cloud and Technology Ecosystem study analyzes the relevant software vendors/service providers in the APAC, U.S, Europe and Brazil 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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of December 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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





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Siddharth is a Distinguished Analyst at ISG with nearly 30 years of experience across the global IT landscape, specializing in Cloud, Software, and Services. A seasoned leader, he has held pivotal roles in General Management and Strategic Alliances, most recently serving as Head of Alliances & Channels at Oracle India. His career includes leadership tenures at Microsoft, IBM, Dell, and Sun Microsystems.

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capabilities in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise includes industry, logistics and market research.





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A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase
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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 partner 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.

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

ISG (Nasdaq: [ISG](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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