ISG Provider Lens®

Oracle Cloud and Technology Ecosystem

Comparison of Oracle service providers' portfolio attractiveness and competitive differentiators

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Oracle's AI shift creates a two-speed EU market: AI-natives thrive, legacy partners face challenges

The Oracle ecosystem in Europe has pivoted fundamentally in the last 12 months. The dominant narrative has shifted decisively from cloud migration to AI-driven process rearchitecture. Oracle solidified this strategic redirection by rebranding its flagship conference from CloudWorld to AI World and the general availability (GA) of a new AI-native technology stack. This stack includes the AI-native version of Oracle's flagship database, namely Oracle AI Database 26ai, the unified Oracle AI Data Platform, and, critically for the partner ecosystem, Oracle AI Agent Studio and the corresponding AI Agent Marketplace for Oracle Fusion Cloud applications. This shift moves AI from a theoretical add-on to being the central, embedded driver of value across Oracle's portfolio.

Source: ISG Agentic and Generative AI Buyers Guide 2025

What it means for Europe

For the European market, this AI pivot intersects with two other powerful, region-specific forces, creating a triad of opportunity: AI adoption, multicloud integration and sovereignty compliance. Oracle's aggressive expansion of its multicloud services, most notably Oracle Database@Azure, which is now generally available in 28 regions, including key European hubs such as France, Germany and Italy, has become a primary differentiator and, combined with Oracle EU Sovereign Cloud, directly addresses regulatory demands in Europe.

Oracle **AI Agent Marketplace** enables providers to **shift** from services **to scalable proprietary assets.**

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This triad is bifurcating the European partner landscape into two categories: Firstly, the AI-native partners that can offer consultation on and build monetizable solutions, such as AI agents and Digital Operational Resilience Act (DORA)-compliant architectures, enabling them to capture the new, high-growth, high-margin market; secondly, partners that do not invest in these new competencies and are, therefore, relegated to the low-margin, commoditized business of legacy application management and basic lift-and-shift migrations.

Top five takeaways

1. **The AI agent marketplace is the new go-to-market (GTM) approach:** The GA of the AI agent marketplace is the most significant European ecosystem change in a decade. It fundamentally shifts the partner model from pure professional services (billable hours) to a hybrid model that includes monetizable, repeatable intellectual property (IP) assets (product-based revenue).
2. **Multicloud is the default architecture:** Oracle's strategy is no longer just OCI-first but multicloud by design. The rapid expansion and new partner resell program for Database@Azure is a counter move to place Oracle's core database strength directly inside a competitor's cloud, strategically targeting Microsoft-centric European enterprises.
3. **Sovereignty is the key to regulated industries:** Oracle's EU Sovereign Cloud is its moat in Europe. Its unique architecture, operated by EU entities and physically separate from commercial regions, can run advanced GenAI and the full Fusion SaaS suite, while addressing the strictest data residency and sovereignty mandates, such as Schrems II, serving as guardrails for the German public sector and DORA-regulated financial services sector.
4. **GSIs are codeveloping and not just implementing:** The partner model has evolved. Global system integrators (GSIs) are no longer just implementers but are codevelopers, building their own AI factories and accelerators with Oracle.
5. **U.K. Synergy Programme is the public sector blueprint:** The massive over £850 million win in 2024 for Oracle Fusion, IBM and Deloitte, to create a single shared services platform for four major U.K. government departments, namely DWP, MoJ, DEFRA and Home Office, serves as the definitive European blueprint for large-scale, partner-led public sector transformations.

Top five risks

1. **Partner AI skills gap:** The rapid pivot to AI has created an immediate, massive skills gap. Partners lacking certified OCI generative AI (GenAI) professionals and developers, trained on the AI Agent Studio, will be unable to compete for the new wave of AI-driven projects.
2. **Multicloud margin dilution:** The new Database@Azure resell program is an opportunity, but it carries the risk of margin compression compared with pure-play Oracle Cloud Infrastructure (OCI) deals. Partners must build high-value managed services, such as FinOps and SecOps, on top to maintain profitability.
3. **OCI AI infrastructure capacity constraints:** Oracle's massive AI infrastructure announcements, namely Zettascale10 and AMD partnership, are global. A significant risk for European customers and partners is whether sufficient high-end GPU capacity, such as NVIDIA Blackwell, will be deployed inside the EU Sovereign Cloud regions to meet regulated AI demand.
4. **NIS2/DORA compliance complexity:** DORA and the Network and Information Security Directive 2 (NIS2) are complex. Partners that are unable to provide credible, integrated advisory and technical managed security services in tandem with these regulations risk losing their managed services contracts in regulated industries.
5. **Sovereignty is a double-edged sword:** Oracle's EU Sovereign Cloud is a key differentiator, but its strict physical and logical separation means it may lag behind commercial regions in the availability of all (more than 200) services, especially the ones involving cutting-edge AI features. Partners must manage customer expectations regarding the velocity gap for potential features.

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Oracle's 2025 market in Europe: the AI and data specialist hyperscaler

In 2025, Oracle is not competing with AWS, Azure and Google Cloud to be the everything cloud. Its share in the global infrastructure-as-a-service (IaaS) market remains in the low single digits, with the Big Three accounting for over 60 percent of the market. Instead, Oracle has successfully repositioned OCI as a high-performance, cost-effective specialist cloud for two key, high-value areas: enterprise data and AI.

Oracle builds competitive differentiation on three pillars:

1. Database supremacy: Delivering its flagship Oracle Database (particularly Exadata), including the new Autonomous AI Database with robust performance, features and automation
2. AI infrastructure: Aggressively building large-scale, next-generation AI infrastructure, such as the OCI Zettascale10 cluster and new NVIDIA Blackwell deployments, at a price-performance ratio that consistently challenges competitors
3. Multicloud integration: Acknowledging customer reality by placing its core database products inside rival clouds, for example, Oracle Database@Azure and Oracle Database@Google Cloud; this approach turns a potential weakness of customers not wanting to move applications to OCI into a bold strategy by bringing the database to where the application resides.

The European policy moat: NIS2, DORA and sovereignty

Europe-wide regulations are no longer just compliance checkboxes; they are primary buying triggers and active drivers of IT architecture decisions. Oracle's strategy in the region is uniquely tailored to address its regulatory landscape, creating a policy moat that differentiates it from U.S.-based hyperscalers.

- **Data residency and sovereignty:** Oracle EU Sovereign Cloud is Oracle's key differentiator in Europe. Unlike EU-based regions from competitors, which are often standard commercial regions with policy controls, Oracle's offering is fundamentally different in the following ways:
  - It is physically and logically segregated from all other commercial cloud regions.
  - It is operated by separate, EU-based legal entities that are headquartered in Germany and Spain.
  - It is supported by EU-resident personnel.

This architecture is specifically designed to meet the strictest interpretations of data sovereignty and Schrems II, supports the complete Oracle Fusion Applications suite and is gaining tangible traction.

- **NIS2 directive:** The expanded scope of NIS2, which EU member states were required to transpose into national law by October 2024, now applies to a wider range of essential and important entities, including cloud providers. It mandates stringent cybersecurity and 24-hour incident reporting, creating a significant new service line for managed security service providers (MSSPs) and GSIs in the Oracle ecosystem. Partners are explicitly building Governance, Risk and Compliance (GRC) practices to help clients map NIS2 controls to OCI and Fusion security services.
- **DORA:** Effective January 17, 2025, DORA mandates verifiable operational resilience for all EU financial entities. It has introduced a new oversight framework for critical ICT third-party providers (CTTPs), which will include hyperscalers. For the Oracle ecosystem, DORA is a primary driver for modernizing mission-critical database architectures. Partners can now lead DORA-specific workshops, architecting solutions such as Oracle's zero data loss recovery service and leveraging multicloud, multizone deployments such as Database@Azure to meet DORA's stringent resilience testing requirements.

Key European industry traction signals

Oracle's Europe-first strategy, combining its AI and data specialization with a strong sovereignty and regulatory posture, is showing clear traction in key industries in the region.

- **Public sector:** This is Oracle's flagship industry in Europe, where sovereignty and data security are paramount.
  - **The U.K.:** The Synergy Programme, which is a massive transformation effort, is at the heart of the U.K.'s aim to create a

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single, shared services platform. It covers almost 250,000 civil servants, provides standardization on Oracle Fusion Cloud (ERP, HCM and SCM) and is being implemented by a joint consortium of OPN members IBM and Deloitte.

  - **Germany:** Oracle's planned $2 billion investment in Germany over the next five years is explicitly focused on AI and cloud infrastructure for the public sector and other strategic industries. This investment, combined with the Frankfurt-based EU Sovereign Cloud region, has encouraged adoption among German public and private organizations.
  - **Defense:** The NATO Communications and Information Agency's selection of OCI represents a significant win in Europe's defense and national security domain.

- **Financial services:** In this industry, DORA compliance, AI-powered risk management and data platform modernization are driving traction. Some notable developments in the industry are:
  - Oracle was ranked #1 in the inaugural Chartis RiskTech AI 50 report, recognizing its innovative AI technology for financial institutions.
  - Partners are building GenAI solutions, based on Oracle technology, specifically for the European banking sector.
- **Retail, manufacturing and telecommunications:** These industries are seeing traction primarily because AI is embedded in Oracle's SCM and industry-specific applications. Some notable developments in the industry are:
  - **Retail:** Answear.com, a leading fashion e-commerce retailer in Poland, is modernizing its merchandise financial planning with Oracle's AI-enabled retail solutions.
  - **Hospitality/retail payments:** Oracle Payments Cloud Service , powered by European fintech partner Adyen, is gaining significant traction with over 2,500 organizations, including strong adoption in the U.K. hospitality and sports industries.
  - **Manufacturing:** In a key multicloud move, Oracle announced a collaboration with Microsoft to integrate Oracle Fusion Cloud SCM with Microsoft Azure IoT Operations and Microsoft Fabric, a critical development for European manufacturers.

The new strategic imperative: Oracle's AI World 2025

The rebranding of Oracle's flagship customer conference from CloudWorld to AI World has been a definitive statement of its 2025 strategy. The event's focus was on demonstrating that AI is embedded end-to-end in every layer of the Oracle stack, from infrastructure to applications.

Oracle's portfolio updates are defined by a dual-pronged strategy: embedding AI at every layer and aggressively expanding multicloud capabilities. This has been headlined by the launch of an AI-native stack, including new OCI Zettascale10 infrastructure; a major partnership with AMD; and the rebranded Oracle AI Database 26ai with built-in vector search. For the SaaS ecosystem, Oracle has released the AI Agent Studio and AI Agent Marketplace, creating a partner-driven GTM for AI. This AI push has been matched by a *multicloud-by-default* push. These core initiatives are supported by the new Oracle AI Factory to accelerate partner enablement and specific industry cloud updates in healthcare and payments.

For European partners, four announcements from AI World are paramount:

1. **AI Agent Marketplace:**
   - **What it is:** An online store for prebuilt, validated AI agents from Oracle and over two dozen launch partners, including GSIs such as Accenture, Deloitte, Infosys, PwC, IBM and Wipro, as well as ISVs such as Box and Stripe
   - **Why it matters:** This is the single most important development for the SaaS partner ecosystem. It creates a new, scalable GTM motion. Partners can now productize their deep industry and process-specific intellectual property (IP) assets, such as DORA Compliance Monitoring Agent for ERP, and offer

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the same as a subscription via the marketplace. This approach shifts the partner business model from 100 percent services (billable hours) to a hybrid of services and high-margin, repeatable proprietary offerings. GSIs such as Infosys have dedicated launch sessions for their codeveloped Agentic Studio solutions.

2. **Oracle AI Data Platform:**
   - **What it is:** A unified platform combining OCI, autonomous AI database and OCI GenAI services into an end-to-end workbench for data-to-AI workflows
   - **Why it matters:** Positioned as a strategic competitive offering against Databricks and Snowflake, it creates a new, high-value practice area for partners with a focus on unifying enterprise data for AI. The commitment from GSIs has been significant; Accenture, Cognizant, KPMG and PwC, collectively, have pledged over $1.5 billion to enable training for over 8,000 practitioners and build more than 100 industry-specific use cases on this platform.
3. **OCI Zettascale10 and AMD partnership:**
   - **What it is:** A massive scaling of AI infrastructure and a major new partnership with AMD for a 50,000-GPU supercluster
   - **Why it matters:** This development signals that Oracle is keen on providing AI infrastructure beyond just NVIDIA. For European partners and customers, this diversification is critical as it may ease GPU capacity constraints. It also creates a new technical specialization for partners with expertise in the AMD ROCm software stack.
4. **GoldenGate 26ai (GA):**
   - **What it is:** A new AI-centric release of GoldenGate, fully certified for the AI Data Platform and Autonomous AI Lakehouse
   - **Why it matters:** This update embeds GenAI services into real-time data replication. Oracle also announced the GA of OCI GoldenGate on Azure, further strengthening the multicloud data fabric that partners must support.

3.3. What to monitor next (validating key questions)

The announcements at AI World 2025 raise several critical questions for the next 6-12 months:

1. **Marketplace adoption:** Will customers buy partner-built agents from the AI Agent Marketplace, or will they expect them as free accelerators bundled with larger implementation contracts? Monitoring the actual revenue and adoption metrics from this marketplace is, therefore, the top priority.
2. **Sovereign AI capacity:** Will Oracle deploy its next-generation NVIDIA (Blackwell) or AMD (MI450) AI infrastructure inside the EU Sovereign Cloud regions in Frankfurt and Madrid? This is the critical missing piece to unlock the potential of large-scale, regulated GenAI workloads in Europe.
3. **Multicloud partner margins:** How profitable is the new Database@Azure resell program? Will partners embrace it as a new revenue stream, or will margin concerns limit its channel potential, leaving it as a direct-to-customer motion?
4. **GSI versus boutique competition:** Will the AI Agent Marketplace be dominated by the large GSIs that were launch partners, or can specialized European boutique partners such as Technology Reply or De Novo Solutions successfully compete by offering niche, high-value agents?

European Oracle ecosystem at an important inflection point

The convergence of AI, multicloud and sovereignty has created a new, high-stakes market. The partners and customers that act decisively in the next 12 months will secure a significant competitive advantage.

Takeaways for European CIOs/CTOs/ procurement leaders

- **Reevaluate partner portfolio:** The top partner from 2023 is not likely the best partner for 2025. Leaders must assess incumbent partners based on their certified expertise in the new Oracle stack. A partner's legacy credentials are less important than its current capabilities.

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- **Mandate new competencies:** When issuing RFPs, leaders must demand tangible evidence of new competencies:
  - AI certification: Enquire about the number of OCI GenAI professionals in Europe
  - AI Agent Studio expertise: Demand live demos of AI agents that partners have built and are willing to deploy by going beyond PowerPoint slides
  - Sovereignty/regulatory expertise: Enquire about their service model for the EU Sovereign Cloud and how their managed services ensure DORA/NIS2 compliance
- **Embrace multicloud architectures:** For a Microsoft-centric organization, the default path is no longer to *migrate everything to OCI*. It is advisable to start a PoC for Oracle Database@Azure to test its low-latency performance and integration with existing Azure-native applications.
- **Demand a FinOps model:** It is advisable for leaders in an enterprise not to sign a new managed services contract without a dedicated FinOps service wrap. They need to demand KPIs based on continuous cost optimization and value realization, and not just system uptime.

Takeaways for European Oracle partners

- **Invest or be relegated:** Partners must make an immediate, non-negotiable investment in AI or accept relegation to the low-margin legacy business. The *wait-and-see* approach is unlikely to succeed.
- **Mandate certification:** Partner business plans must include a budget for OCI Generative AI Professional and AI Service Expertise certifications for their consulting workforce as the new, non-negotiable baseline.
- **Build AI Factory:** The GTM strategy must include a practice built on the Oracle AI Agent Studio and a plan to publish monetizable agents on the AI Agent Marketplace to accrue higher margins and differentiation.
- **Become a multicloud expert:** With hybrid as the default, partner OCI teams must also become proficient in Azure. They must build a managed service offering for Oracle Database@Azure that emphasizes their value beyond resell, including hybrid security, FinOps, integration and performance tuning.
- **Specialize in sovereignty:** Partners must pick a regulated industry, such as financial services, public sector or healthcare, and become the definitive go-to expert for sovereign AI. It is advisable for them to build reference architectures and compliance playbooks for the Oracle EU Sovereign Cloud. This is a high-barrier, high-margin market that will have limited competition.

European Oracle partner ecosystem is at a crossroads

The old methods of partner evaluation are obsolete. The urgent recommendations for both enterprise buyers and partners are to reevaluate portfolios, mandate new AI and sovereignty competencies, invest in proprietary offerings via the AI Agent Marketplace and master complex multicloud architectures. These are the new, non-negotiable criteria for success, and the **ISG Provider Lens® Oracle Cloud and Technology Ecosystem 2025** report for Europe helps buyers and partners move forward, together, in this direction.

Quadrant 1: Professional Services — Observations

The professional services market in Europe is in a state of flux. The primary disruptor is Oracle's commercial strategy of embedding over 600 new AI agents directly into its Fusion Applications as a part of the base subscription. This move has rewritten the business case for AI, shifting it from a speculative, metered cost to a predictable subscription entitlement. Consequently, the competitive battleground for partners has moved from the *ability to implement AI* to the possession of proprietary, industry-specific AI agents, showcased in the new Fusion Applications AI Agent Marketplace.

Concurrently, the mainstream adoption of the Oracle EU Sovereign Cloud has removed the final barrier to cloud migration for Europe's public sector and regulated industries, creating a definitive market bifurcation of two distinct

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classes of providers:

1. Sovereign capable: The providers with the scale and structure to offer services through EU-based personnel employed by regional EU legal entities
2. Non-sovereign: The providers are primarily dependent on global or offshore delivery models that are now structurally barred from competing for sensitive contracts in the EU.

The competitive landscape is also evolving. While GSIs continue to lead in terms of scale, they face a new and highly credible challenger category, namely the globally unified specialists. The formation of Broadpin, a merger of four regional experts, including Quistor and PROMATIS, exemplifies this trend and represents a blend of deep niche expertise and a global delivery capacity to challenge the GSIs on large-scale deals. However, Broadpin must now prove that it can deliver on its promise.

Characteristics of a Leader

A Leader status in the Professional Services quadrant is no longer defined by the number of certified consultants. Instead, it is determined by a partner's ability to demonstrate capabilities across four critical, future-focused dimensions:

1. **Proprietary offerings and asset-based strategy:** Leaders have moved beyond billable hours to an asset-based consulting model. The primary measure of this is the quality and utility of their proprietary agents in the AI Agent Marketplace. Leaders such as Deloitte are key launch partners, while Accenture (AI Refinery™ Platform) and PwC (finance-specific agents) are competing through their own distinct AI frameworks.
2. **Demonstrable sovereign cloud readiness:** This is a non-negotiable barrier to entry. A Leader must be sovereign-capable, with deep expertise in navigating the specific operational controls and contractual nuances of the EU Sovereign Cloud. They must also have a corporate structure to deliver services via EU-based personnel.
3. **Multicloud architectural expertise:** Modern enterprises are heterogeneous. Leaders must have deep, certified alliances and architectural expertise across OCI, Azure and AWS, reflecting the reality of multicloud strategies and Oracle's Database@Azure offerings.
4. **Strategic advisory and change management:** Engagement models are now advisory-first. Leaders must provide strategic guidance on AI governance, build a business case and — most critically — have mature frameworks for managing the significant organizational and cultural change required to become an agentic enterprise.

Key takeaways for enterprise buyers

- **Reevaluate partner portfolio**: The selection criteria of the past are no longer sufficient. An incumbent SI that handled on-premises systems may lack the AI governance, multicloud and sovereign compliance skills required in this new era.
- **Prioritize time to value over on-time/on-budget:** The traditional success metric is being superseded by the time until the *first value* is realized. It is advisable for buyers to use tangible benchmarks such as business-as-usual in three months, 102 percent of revenue target met in Q1 and accelerated outcomes.
- **Analyze partner intellectual property assets:** When seeking RFPs, buyers must demand evidence of a partner's proprietary AI agents in the new marketplace. These assets are a direct measure of a partner's investments and innovations.
- **Structure agile contracts:** Buyers need to avoid monolithic, fixed-scope contracts in favor of phased, agile approaches that deliver value to a core business area first. This, in turn, will create momentum and a self-funding model for the broader enterprise transformation.

Key takeaways for IT leaders

- **Develop an EU Sovereign Cloud strategy:** For any public sector entity or an organization in a regulated industry, this is an urgent priority. Such an approach is the definitive solution for GDPR and Schrems II

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compliance. IT leaders would lose their first-mover advantage if they are penalized for non-compliance.

- **Recalibrate AI business case:** Oracle's *no additional license fee* model provides a predictable TCO for the AI functionality, giving CIOs and CFOs budget certainty. However, IT leaders must plan for the resulting increase in OCI platform consumption (compute, storage and API calls) that will be driven by these free agents.
- **Build for a multicloud reality:** Enterprises are increasingly adopting multicloud strategies. An IT partner must be able to design, manage and secure complex solutions that span OCI, Azure and AWS.
- **Focus on a unified digital core:** The future vision of an *internet of agents* is only possible with a reinvention-ready digital core built on an integrated platform such as Oracle Fusion. Legacy, siloed systems cannot support this new agentic architecture.

Key takeaways for providers

- **Attain a sovereign-capable status:** A provider must note this as a market differentiator. A lack of investment in EU-based legal entities and delivery teams implies an existential threat, as it would mean exclusion from the public sector and regulated industries.
- **Shift from services to assets:** The AI Agent Marketplace is the new competitive battleground. Partners must productize their intellectual property assets, focusing on high-value, proprietary agents for specific industry challenges, as basic automation will be commoditized.
- **Compete on a new axis:** The GSI-dominated market is being challenged by unified specialists such as Broadpin. This trend is compelling GSIs to ensure the accessibility of their own top-tier experts for midmarket deals, creating an increasingly expert-driven market for clients.
- **Develop new, recurring revenue models:** The future lies beyond project-based engagements. Providers must innovate new subscription-based offerings such as transformation as a service (TaaS), continuous workforce transformation services and specialized ethical AI advisory practices.

Outlook and market evolution

The trends of 2025 are precursors to a more lasting, long-term shift. The AI Agent Marketplace will evolve into a complex *internet of agents* ecosystem, where partners, customers and Oracle agents would collaborate autonomously across multicloud environments to execute end-to-end business processes. As foundational AI becomes increasingly commoditized, the competitive advantage will shift to hyperspecialization. The most valuable partners will be the ones that can develop agents for microverticals, such as the Swiss private banking compliance, and the ones that create certified, regulated industry agents specifically for the EU Sovereign Cloud.

Ultimately, as Oracle and its partners commoditize AI models, an enterprise's unique, proprietary data will become the final, defensible differentiator.

Partner roles will strategically evolve from being implementers of software to being architects of their clients' data moats, where they would use the Oracle AI Data Platform to build custom, fine-tuned agents that competitors would not be able to replicate.

Quadrant 2: Managed Services — Observations

A next-generation paradigm is actively supplanting the traditional market for reactive database administration and application support. Traditional managed services are transforming into value realization and optimization services.

The convergence of three powerful forces drives this change in the Oracle ecosystem:

1. **AI-first strategy:** Embedding hundreds of autonomous AI agents into Fusion Applications at no additional license fee has commoditized basic automation. This

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approach compels MSPs to shift their value proposition from technical support to business process orchestration.

2. **Strengthening of sovereignty mandates:** The maturation of the Oracle EU Sovereign Cloud and the enforcement of directives such as NIS2 and DORA have created non-negotiable compliance guardrails. Concurrently, they have bifurcated the market, creating a protected, high-value segment for sovereign-capable providers.
3. **Multicloud reality:** Oracle's deep integration with other hyperscalers, particularly the Oracle Database@Azure offering, has made complex multicloud environments a standard architecture.

This confluence has created what this report terms as the *complexity dividend*, a significant, high-margin opportunity for sophisticated MSPs that can take over this immense technical, operational and regulatory complexity from their clients. The market is consequently splitting into two tiers: elite providers that can capture this dividend and legacy providers that will face significant margin pressure on commoditized services.

Characteristics of a Leader

In this new market, a Leader status is no longer based on the size of a provider's support team, but on its successful evolution from a technical implementer to a strategic orchestrator. Leading providers are differentiated through four key capabilities:

1. **Mastery of the SRE, FinOps and SecOps trifecta:** For MSPs, this is the new baseline. Leaders demonstrate mature practices in SRE for proactive reliability; FinOps for managing complex Oracle Universal Credit and multicloud spend; and SecOps for continuous, unified security and compliance monitoring.
2. **Sovereign compliance-as-a-service offering:** This is a non-negotiable capability for regulated markets. Leaders must possess the legal and operational structure to deliver services through EU-based legal entities and personnel, ensuring auditable compliance with the EU Sovereign Cloud mandates.
3. **Multicloud governance:** Leaders are not focused on only OCI. They play the role of a general contractor for a client's cloud estate, offering a single point of accountability, a unified bill and a consolidated SLA for complex environments such as Oracle Database@Azure.
4. **AI agent orchestration:** As Oracle commoditizes basic automation, Leaders are pivoting to become AI agent experts. They provide high-value services in designing, building, managing and integrating fleets of AI agents to automate end-to-end business processes.

Key takeaways for enterprise buyers

- **Select partners as a strategic business decision:** The selection of an MSP is no longer just a tactical IT decision but will directly impact a business' agility, compliance and ability to innovate.
- **Reevaluate incumbents against the new framework:** Buyers must not assume that their long-standing partner is equipped for this new paradigm. It is necessary to assess the partner's capabilities in SRE (beyond basic SLAs), FinOps (managing Universal Credits), and SecOps (NIS2/DORA readiness).
- **Use complexity as the litmus test:** Buyers must ask potential partners to architect a solution for the high-complexity scenario, namely an Oracle Database@Azure environment that is governed by the stringent controls of the EU Sovereign Cloud. A provider that can confidently address this challenge can handle the future as a partner.
- **Structure contracts for business outcomes:** Buyers are advised to move away from legacy contracts that pay for effort. They must insist on business-level KPIs with requirements such as reduction in call handling time and financial close time, and explore shared risk/reward models or coinnovation funds.

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Key takeaways for IT leaders

- **Recognize that internal teams alone cannot handle this complexity:** The new multicloud, sovereign and AI-driven environment is beyond the capacity of most in-house IT teams. Engaging an expert MSP is essential for handling this complexity, thus freeing internal resources to focus on strategic innovation.
- **Free AI to drive platform costs:** Oracle's strategy is to use free application-level AI agents to fuel the consumption of paid infrastructure-level services. IT leaders must have a robust FinOps practice, either internally or from their MSP, to manage, forecast and optimize this consumption against their Oracle universal credit contracts.
- **Place sovereignty at the heart of business strategy:** Data security and compliance are the top enterprise concerns . The Oracle EU Sovereign Cloud is the definitive technical and operational solution. IT leaders in regulated industries must, therefore, make this a central part of their strategy.
- **Drive an SRE culture:** The traditional, reactive IT Infrastructure Library (ITIL)-based culture is not well suited for the cloud. IT leaders must champion a shift, both internally and with partners, to a proactive, engineering-led SRE culture that focuses on factors such as error budgets to balance stability and innovation.

Key takeaways for providers

- **Evolve to stay relevant:** The traditional MSP model is being automated by Oracle's platform s. Providers must evolve to capture the complexity dividend or face significant margin pressure on commoditized services.
- **Master the complexity dividend:** Providers must recognize this factor as the single largest, highest-margin opportunity. It would require investment in rare, elite talent with certified, cross-platform expertise in OCI, Azure and sovereign cloud controls.
- **Productize intellectual property assets in the AI agent economy:** The AI Agent Marketplace creates a greenfield opportunity. The future is not just in offering support services for Oracle's AI, but developing, certifying and monetizing proprietary, industry-specific AI agents, thus shifting revenue from pure services to high-margin, recurring assets.
- **Invest in compliance as a service:** The EU Sovereign Cloud and regulations such as NIS2 and DORA create a distinct and protected sub-market that is characterized as one with a high barrier to entry. Providers must make the necessary legal and operational investments, such as EU-based legal entities and staff, to compete for these premium contracts.

Outlook and market evolution

The future role of a leading MSP will be that of a master orchestrator in an agent-orchestrated enterprise. The MSP will not manage servers, but a federation of autonomous AI agents executing end-to-end business processes, such as procure-to-pay, across multiple clouds — all under a single, outcome-based SLA.

Three new high-value service lines are now emerging in this area:

1. **Sovereign AI as a service:** A high-margin offering that combines pretrained, industry-specific AI models with the compliance guarantee of the Oracle EU Sovereign Cloud
2. **GreenOps and sustainability as a service:** Extending FinOps principles to monitor, report and optimize the carbon footprint of cloud workloads, helping clients meet ESG goals
3. **Multicloud business process assurance:** The evolution of monitoring from tracking technical uptime to guaranteeing the performance of an entire business process, such as order-to-cash, as it traverses a hybrid cloud landscape

The partner-client relationship will evolve into one of coinnovation, formalized by constructs such as dedicated coinnovation funds. Ultimately, the new strategic high ground will be captured by a partner that manages a client's core AI Data Platform — it will be best positioned to deliver continuous, data-driven business improvement.

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Quadrant 3: OCI Solutions and Capabilities — Observations

The OCI market in Europe is evolving due to the convergence of two powerful forces, namely agentic AI and data sovereignty. As showcased at AI World 2025, Oracle's AI-first strategy is designed to drive OCI consumption through a vast ecosystem of free-of-cost embedded AI agents. This approach has shifted the partner value proposition away from simple implementation and toward the creation of intellectual property assets. The new battleground is the Fusion AI Agent Marketplace, where partners can monetize their deep industry knowledge by building and selling specialized agents.

The operational status of the Oracle EU Sovereign Cloud has bifurcated the competitive landscape, creating a distinct, lucrative and protected market segment for which many global partners lack the requisite capabilities. Success in this space requires not just a European office, but verifiable EU-based delivery teams and legal entities; these are high barriers to entry that give qualified partners substantial first-mover advantages.

Characteristics of a Leader

In the 2025 European market, a Leader status is no longer determined by partner size or the number of certified consultants. It is defined by the ability to make a successful transition from a service-centric to a proprietary-asset-centric business model.

Leading providers are differentiated by the following:

1. **Proprietary assets and accelerators**: Providers are productizing their expertise, as demonstrated by their portfolio of prebuilt, repeatable assets in the Oracle Cloud Marketplace.
2. **Verifiable sovereign capability:** This is a non-negotiable requirement for the public sector and regulated industries. Leading providers must have proven legal, operational and HR capabilities (EU-based staff) to deliver services that are compliant with the strict mandates of the EU Sovereign Cloud.
3. **Demonstrable AI and multicloud expertise:** Leaders have moved beyond infrastructure to cocreate intelligent business processes. This includes building solutions such as Deloitte's Zora AI™ platform for OCI and mastering complex, heterogeneous environments with solutions such as the Oracle Interconnect for Azure .

Key takeaways for enterprise buyers

- **Embrace a portfolio approach to a partnership:** The era of selecting a single, monolithic strategic partner is coming to an end. A future-ready strategy involves engaging multiple partners, such as a Tier 1 GSI for business strategy, but a Tier 3 specialist for the highly technical sovereign cloud or multicloud implementation.
- **Prioritize demonstrable intellectual property assets over pitches:** Buyers must move their evaluation beyond reviewing PowerPoint presentations and demand live demonstrations of a prospective partner's proprietary automation tools, migration accelerators and active solutions on the Oracle Cloud Marketplace. These tangible assets would be the clearest and most reliable indicators of their expertise.
- **Make sovereign capability a non-negotiable gate:** For any project involving EU data, buyers must rigorously verify a partner's claims. They should also demand verifiable details on EU-based legal entities and the residency of their actual delivery team.
- **Demand a strong, quantifiable business case:** A partner-led migration should be evaluated as a value driver and not just a cost center. Independent data confirms that these transformations can deliver a significant five-year ROI and achieve deep, double-digit TCO reductions for core legacy applications. The benchmark for success, as demonstrated by a recent, complex global engineering transformation, is not merely a smooth go-live but has direct, positive impacts on top-line revenue within the first quarter of operation.

Key takeaways for IT leaders

- **Reframe migration as the first step and not the goal:** The initial migration is not the destination but the foundational step. The strategic narrative and focus must be on

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finding a partner that can help leverage OCI as a platform to fundamentally reinvent core business processes using AI.

- **Understand the AI flywheel and mandate FinOps:** Oracle's free AI agents are strategically designed to consume underlying metered OCI platform services. The widespread adoption of these free tools will increase an enterprise's monthly OCI bill. Therefore, a provider partner's role must extend beyond go-live to provide continuous FinOps and ValueOps, which includes monitoring consumption and meticulously mapping the same to the specific business value being generated.
- **Address legacy debt urgently:** There is a clock ticking on legacy debt, with an estimated 80 percent of application customers still in on-premises environments. The *move-and-improve* modernization of these environments is the single most urgent market imperative.
- **Prioritize the human element:** The ultimate success for IT leaders will depend more on a partner's ability to effectively manage the human and cultural aspects of a transformation than on their technical prowess. Therefore, the RFPs must weigh a partner's change management capabilities as critically as their technical certifications.

Key takeaways for providers

- **Evolve from service provider to a micro-ISV**: The AI Agent Marketplace for Oracle Fusion Applications has created a new and powerful revenue stream. The primary opportunity here is to productize deep industry expertise into specialized, high-value AI agents that can be offered at scale. This approach shifts the business model from billable hours to scalable, IP-led recurring revenue.
- **Invest in sovereignty to avoid becoming marginalized:** The EU Sovereign Cloud is a greenfield market. One primary weakness for many partners is their dependence on global/offshore delivery models. Investing in verifiable, EU-based delivery teams is the only way to access this premium market segment.
- **Focus on industrialized legacy modernization:** The 80 percent of customers that remain on-premises represent a vast addressable market. Partners with proven migration playbooks and accelerators for ERP solutions, such as E-Business Suite, PeopleSoft and JD Edwards, will have a competitive advantage.
- **Master multicloud:** Oracle's Database@Azure strategy confirms that multicloud is the default architecture. It represents a significant premium for partners with the sophisticated skills required to architect, integrate, manage and secure workloads across OCI and other hyperscalers.

Outlook and market evolution

The future of this market is a composable enterprise, which is a fundamental architectural shift from monolithic applications toward a flexible model where business capabilities are delivered as discrete AI agents sourced from the marketplace.

The ultimate innovation pathway for partners is to transcend the services category entirely. The next frontier lies in the following:

1. **Oracle Alloy:** This enables a partner to transform itself into a cloud provider in its own right. A partner can use Alloy to set up its own fully branded, in-country cloud service on its own data centers, thus capturing the entire value chain.
2. **OCI-dedicated region:** This allows partners to manage the full power of the OCI public cloud inside a client's own data center, addressing the strictest data residency and latency requirements.

The end game is for partners to create value with the Oracle platform as the foundation, evolving from service providers into technology companies in their own right.

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AI Agent Marketplace and AI Agent Studio mark the most significant GTM shift in 10 years. Partners' business models are shifting from solely professional services to hybrid offerings, where they must productize and offer their deep industry assets through the Marketplace. Failure to invest in this scalable, IP-led recurring revenue model risks them being pushed into a low-margin business, which is encouraging providers to act as micro-ISVs.

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Provider Positioning

Page 1 of 4

	Professional Services	Managed Services	OCI Solutions and Capabilities
4i Apps	Contender	Contender	Contender
Accenture	Leader	Leader	Leader
Aspire Systems	Contender	Product Challenger	Contender
Birlasoft	Product Challenger	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Product Challenger	Leader
DSP	Product Challenger	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
EY	Not In	Not In	Market Challenger

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Provider Positioning

Page 2 of 4

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

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Provider Positioning

Page 3 of 4

	Professional Services	Managed Services	OCI Solutions and Capabilities
Logicalis	Contender	Market Challenger	Contender
LTIMindtree	Leader	Leader	Leader
Mastek	Product Challenger	Product Challenger	Product Challenger
Mphasis	Contender	Contender	Contender
PROMATIS software	Contender	Contender	Not In
PwC	Leader	Leader	Product Challenger
Quistor Enterprises	Contender	Contender	Not In
Reply	Product Challenger	Rising Star ★	Rising Star ★
Steltix	Contender	Contender	Not In
Syntax	Product Challenger	Contender	Contender

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Provider Positioning

Page 4 of 4

	Professional Services	Managed Services	OCI Solutions and Capabilities
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger
Timestamp Group	Contender	Contender	Not In
Trinamix	Product Challenger	Product Challenger	Product Challenger
Version 1	Leader	Leader	Leader
Wipro	Leader	Leader	Leader
Zensar Technologies	Product Challenger	Product Challenger	Product Challenger

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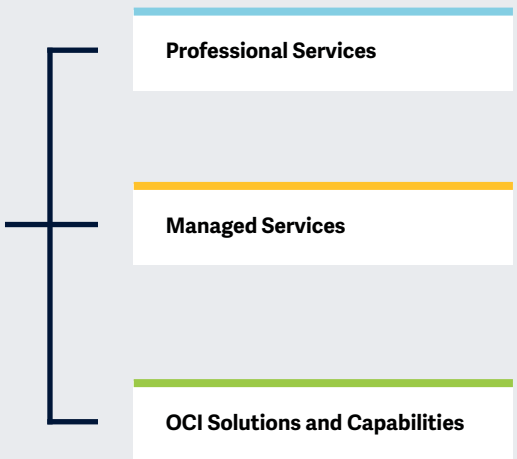
The Oracle Cloud and Technology Ecosystem 2025 study evaluates the service maturity level and technical competence of Oracle's top-performing partners.



Simplified Illustration Source: ISG 2025

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.

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Scope of the Report

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

This ISG Provider Lens® study offers IT and business decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- Focus on the markets in the U.S., Europe, Brazil and Asia Pacific (APAC)

Our study serves as the basis for important decision-making by covering providers' 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 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).

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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.

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Professional Services

Who Should Read This Section

This report is valuable for service providers offering **Oracle professional services** in **Europe** 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.

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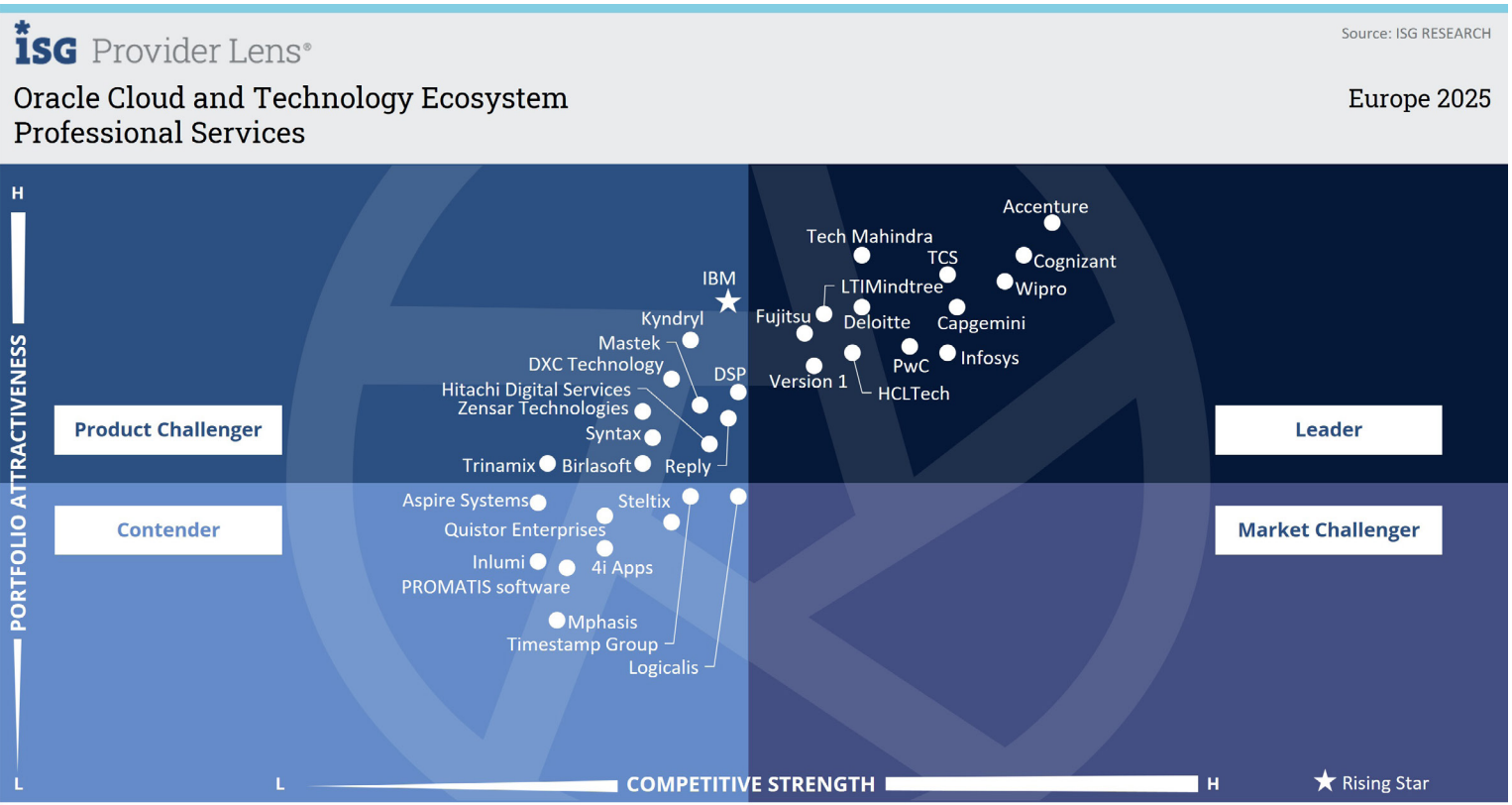

This quadrant assesses providers' ability to **guide** European enterprises through **Oracle-driven transformations** by combining **advisory, implementation and change enablement** to achieve sustainable **workforce adoption** and measurable **technology integration**.

Roman Pelzel

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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 the 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.

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Observations

In 2025, ISG merged the 2024 Consulting and Advisory Services and Implementation and Integration Services quadrants into a new Professional Services quadrant, reflecting a structural shift in the Oracle ecosystem. As AI, automation and regulatory compliance accelerate, successful transformation increasingly depends on integrating strategy and execution, where advisory insight, delivery excellence and change enablement operate as a continuum to achieve measurable business outcomes.

The embedding of more than 600 AI agents into Fusion Applications has redefined partner economics, shifting differentiation from implementation speed to ownership of proprietary, industry-specific AI agents and composable, agentic architectures. The rise of the Oracle EU Sovereign Cloud has created a new class of *sovereign-capable* providers delivering services from EU-resident personnel and legal entities. Advisory and implementation excellence now hinge equally on AI governance, data sovereignty and OCM.

Leaders differentiate themselves by combining strategic advisory depth, IP-rich accelerators and verified sovereign delivery models with multicloud design and ROI frameworks. Product Challengers have mature portfolios and AI credentials, but they need enhanced visibility and a strong consulting influence. Contenders demonstrate niche or regional strengths but must expand certifications, deepen automation capabilities and integrate governance to scale.

IBM has been recognized as a Rising Star for its AI-infused Consulting Advantage offering, its extensive Oracle-certified workforce and a proven record of successful go-lives, positioning it to challenge established Leaders.

From the 38 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture delivers Oracle consulting and transformation services across Europe, aligning strategy and data to accelerate AI-enabled core modernization. The firm combines advisory strength with a strategic global AI roadmap to enable sustainable value creation.

Capgemini

Capgemini enables data-centric and human-aware Oracle change journeys across Europe, blending strategic insight with process intelligence and AI automation. The company's AI-enabled accelerators and industry-aligned solutions accelerate time to value.

cognizant

Cognizant's Oracle services portfolio blends lifecycle advisory, embedded OCM and industry-ready solutions to guide complex transformations in Europe. The firm's CloudMap and Catalyst frameworks accelerate adoption while anchoring value to defined transformation goals.

Deloitte.

Deloitte delivers advisory-led Oracle transformation across Europe, linking ERP and cloud programs to corporate strategy. Its IP ecosystem, including Ascend™ and SuperLedger™, reduces risk and drives adoption while aligning delivery with measurable business value.

FUJITSU

Fujitsu grounds its Oracle services portfolio on deep technical expertise with change-ready delivery. Backed by more than 40 years as an Oracle partner, the company's automation and GenAI innovations shorten deployment cycles while sustaining feature adoption.

HCLTech

HCLTech enables secure Oracle transformation in Europe through structured frameworks, such as 5D and Advantage PACE. The company's integrated OCM and self-paced learning ensure user readiness, while AI Force accelerates solution design and de-risks execution.

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Infosys drives Oracle-led business change across Europe through proven governance, agile execution and turnaround capabilities. The company's AI-empowered platforms, such as Cobalt and Topaz, accelerate secure transformation in high-stakes and regulated environments.

LTIMindtree enables predictable Oracle transformation with an AI-infused accelerator stack that spans strategy through change and scalable frameworks. Its vertical solutions and multilingual capability support sector rollouts and fast value realization.

PwC delivers Oracle-enabled business transformation using GenAI-ready platforms, tax-aware delivery and industry accelerators. The firm's internal adoption of Oracle Fusion ERP provides a proven roadmap for European clients seeking to scale and gain control.

TCS' Oracle consulting connects innovation and delivery through OCI-native platforms and codeveloped industry assets. Its PacePort™ London hub transforms prototypes into scalable solutions for European enterprise transformation.

Tech Mahindra's Business and Strategy Consulting enables Oracle transformations through CoE-driven delivery, AI-powered automation and multilingual enablement. The firm's *modernize-and-optimize* approach helps enterprises reduce project risk and achieve sustainable success.

Version 1 enables Oracle-centric transformation in Europe by combining change leadership, automation and governance through multidisciplinary fusion teams and the *Business and Tech Together* model, which reduces rework, aligns KPIs and accelerates time to value.

Wipro's Oracle transformation services guide enterprises in Europe from strategy to adoption through Zoom to Cloud, Digital Navigator and Config Bots. This accelerator-driven approach reduces time to value and supports compliant execution across diverse industries.

IBM (Rising Star) combines Oracle-aligned consulting with proprietary AI ecosystems, embedding GenAI and agentic AI into advisory, automation and delivery services. Clients in Europe gain go-live confidence, optimization and measurable transformation outcomes.

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Managed Services

Who Should Read This Section

This report is valuable for service providers offering **Oracle managed services** in **Europe** 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 European 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.

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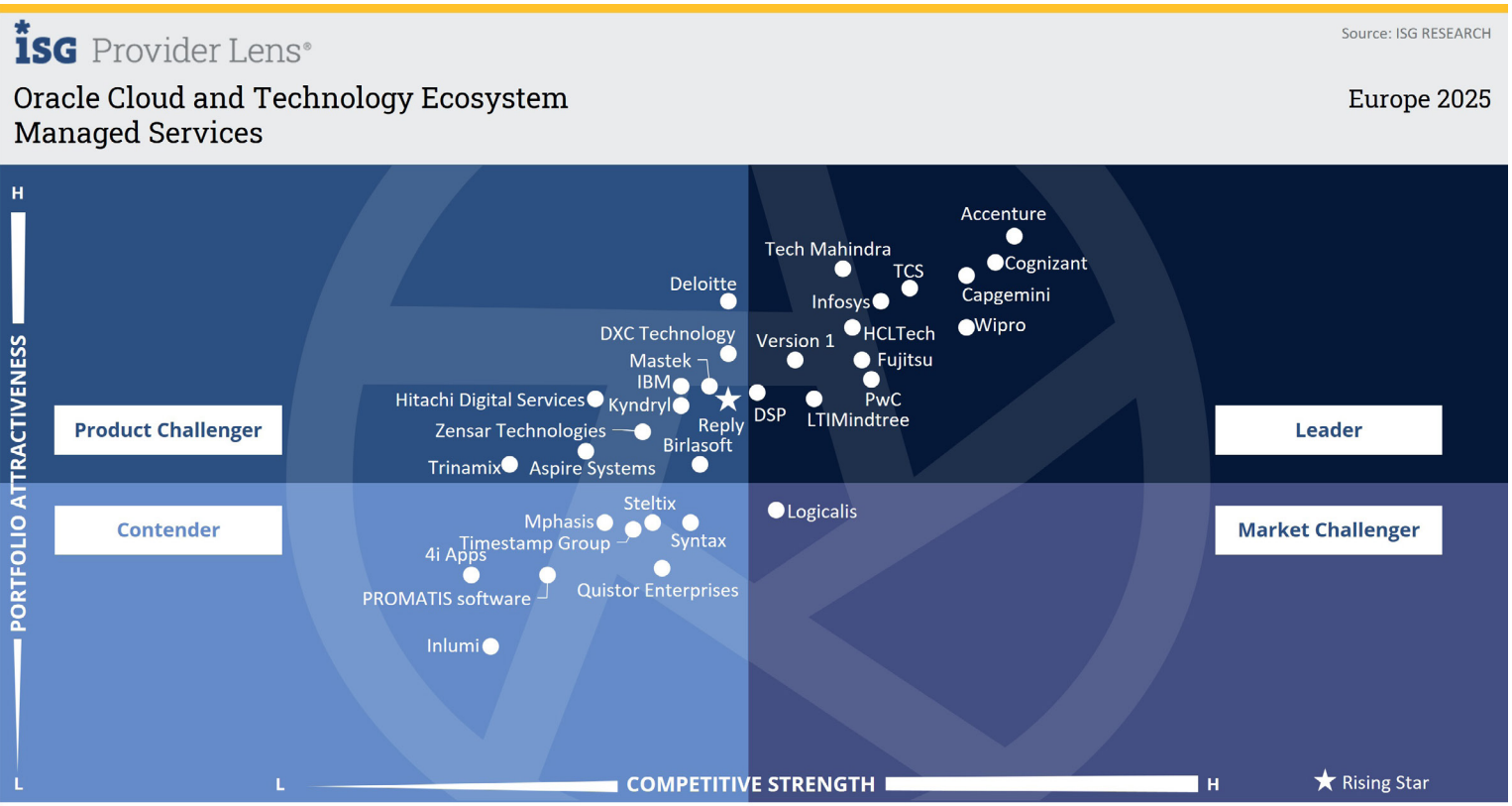

This quadrant assesses Oracle **managed services** providers that transform run operations into **AI-orchestrated, secure and outcome-driven continuous modernization,** as **data sovereignty and compliance mandates** reshape how operations are delivered in Europe.

Roman Pelzel

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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.

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Observations

This quadrant highlights a maturing ecosystem where success transcends maintaining run operations and is defined by the capacity to deliver agent-ready, sovereign and value-tracked services that turn operations into continuous transformation. Europe's Oracle managed services market is evolving from reactive AMS to continuous value realization with AI-orchestrated, outcome-based operations governed by SRE, FinOps and SecOps principles.

Leaders distinguish themselves through mature AI-enabled automation, sovereign operations compliance and multicloud governance across OCI, Azure and AWS. They deliver measurable business results, continuous innovation and sustainable integration of Oracle innovations, such as the AI Agent Studio, leveraging OCM capabilities.

Product Challengers display strong innovation in AI-agent orchestration and automation, but often lack the geographic scale or reference visibility of top-tier competitors. Market Challengers demonstrate strong regional or industry execution but must invest in portfolio breadth and AI-driven capabilities to achieve Leader-level status. Contenders have solid technical credentials but limited differentiation; to progress, they must strengthen client storytelling and prove AI-driven operational excellence on a European scale.

In 2025, DSP's progression to Leader status reflects its leap from a niche database specialist to a trusted transformation partner. Conversely, Reply (Rising Star) embodies the next generation of European champions, leveraging Red Reply, Shield Reply and Technology Reply to deliver sovereign, secure and AI-enabled OCI operations, earning Oracle's 2025 EMEA MSP Partner of the Year Award.

From the 38 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture delivers AI-driven Oracle managed services across OCI and hyperscalers, integrating performance, compliance and modernization. The company's AI Refinery™ and Frankfurt Innovation Hub embed intelligence and automation into daily operations.

Capgemini

Capgemini provides end-to-end Oracle AMS and transforms run operations into intelligent managed services through its Zero Ops model and ADMnext platform. Embedded AI and proactive analytics enable European clients to sustain compliance, agility and innovation.

cognizant

Cognizant enables continuous Oracle operations and manages Oracle and adjacent ecosystems with AVMplus®, integrating SaaS audits, FinOps insights and multicloud automation. The result is stable, compliant and data-driven operations across Europe's hybrid landscapes.

dsp

DSP's Oracle managed services integrate predictive analytics, Cloud Guard-enabled monitoring and license governance, leveraging the firm's Oracle VSAM-accredited compliance and Cloud Management Portal for real-time insights and secure, predictable operations.

FUJITSU

Fujitsu delivers Oracle managed services focused on sovereignty, compliance and sustainability. Using its global Oracle partnership, Uvance framework and public sector accelerators, along with audit-ready controls, the firm ensures secure and efficient operations across Europe.

HCLTech

HCLTech's Oracle managed services portfolio combines automation excellence with compliance-by-design frameworks and global delivery expertise. The company's AI-powered tools and vertical accelerators speed up resilient, outcome-based operations across ecosystems.

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Infosys transforms Oracle operations using its multicloud expertise and AI-first Cobalt and Topaz platforms to drive automation, compliance and resilience. Nearshore CoEs and multilingual delivery sustain continuous modernization across industries in Europe.

LTIMindtree enables AI-driven Oracle managed services through its Novigo.AI framework and Infinity platform, integrating more than 450 bots and 80 GenAI assets. Its Operate-to-Transform model ensures continuous and compliant transformation of Oracle estates in Europe.

PwC integrates tax, risk and sustainability expertise into AI-driven Oracle AMS, automating regulatory updates and quarterly releases. The firm's sovereign-cloud operations, in partnership with Oracle and other cloud providers, enable trusted operations across European industries.

TCS offers Next-gen AMS services for Oracle, leveraging AI-orchestrated service automation, AIOps and analytics to modernize operations. Platforms such as Crystallis™ and ignio™ deliver predictive governance and industry-specific optimization across Europe.

Tech Mahindra's Oracle AMS portfolio unites ADMS NXT, DevSecOps and AI-powered automation to achieve self-healing, compliant operations. The company links predictive analytics with OCM to sustain compliance, adoption and innovation across European enterprises.

Version 1 transforms Oracle operations in Europe with AI-native automation and ethical governance. The firm's ASPIRE and ENGAGE offerings accelerate managed services, while structured playbooks ensure measurable value, stability and transparency across industries.

Wipro delivers Oracle managed services across Europe through its end-to-end to-cloud continuum approach that links consulting, modernization and adaptive run. Frameworks such as Digital Navigator and Thrive-in-Cloud ensure compliant, AI-enabled operations.

Reply

Reply (Rising Star) transforms OCI operations into secure, compliant and intelligent managed services. Recognized by Oracle's 2025 MSP Partner of the Year Award, its specialized subsidiaries embed resilience and sovereign control to manage defense-grade OCI environments in Europe.

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DSP

Leader

"Recognized with two Oracle 2025 Partner Awards, DSP combines Oracle VSAM compliance, automation-led Elite Support and FinOps-driven cost control to help European enterprises achieve secure, predictable and continuously optimized, managed operations."

Roman Pelzel

Overview

DSP is a prominent provider of managed services for Oracle technologies, specializing in database management, cloud solutions and enterprise applications. Headquartered in the U.K., with a presence in Ireland and North America, DSP operates globally with a 24/7 support model. Recognized at Oracle AI World 2025, winning Regional Best in Class Service Partner Technology/Cloud and the EMEA Customer Success Partner Award, and as a finalist for EMEA Cloud MSP, DSP demonstrates that its managed services deliver innovation, measurable value and customer success for enterprises that require resilient cloud operations and continuous optimization.

Strengths

Continuous compliance excellence: As one of nine Oracle Verified Software Asset Management (VSAM) partners, DSP integrates license governance and audit-safe management into its service lifecycle. This structured approach ensures compliance during migrations and operations, mitigates licensing risk and improves cost control. Enterprises benefit from assured software governance and optimized resource allocation.

Intelligent cloud governance platform: DSP's Cloud Management Portal delivers unified visibility, automation and financial intelligence for Oracle managed service customers. Integrated with Oracle Cloud Guard, the portal monitors compliance, performance and spend in real time and triggers automated tickets and budget alerts. This end-to-end control approach helps clients anticipate risks, optimize usage and achieve predictable cost efficiency.

Predictive system reliability: DSP's proprietary Health Check Service delivers predictive reliability for Oracle environments through 93 automated assessments covering performance, security and configuration. Integrated with the firm's Cloud Management Portal, it provides continuous visibility, triggers proactive remediation and eliminates manual audit effort, saving significant engineering hours annually while driving stability, compliance and operational excellence.

Caution

DSP's Oracle managed services are well recognized in the market. To accelerate continental expansion, the firm should strengthen its presence and partnerships across Europe and increase the visibility of its OCM capabilities to underscore its ability to lead holistic Oracle-driven transformation.

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OCI Solutions and Capabilities

Who Should Read This Section

This report is valuable for service providers offering **OCI solutions and capabilities** in **Europe** 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 European 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.

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ISG Provider Lens®

Source: ISG RESEARCH

Oracle Cloud and Technology Ecosystem
OCI Solutions and Capabilities

Europe 2025

Providers assessed in this quadrant leverage **Oracle Cloud Infrastructure** (OCI) as the **digital core for enterprise reinvention,** integrating GenAI, sovereign multicloud connectivity and governance to drive compliant, **high-performance transformation**.

Roman Pelzel

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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.

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Observations

In 2025, OCI solutions and capabilities define the new operational core of digital transformation. Oracle's shift to an AI-first and sovereign-ready cloud has elevated partners from infrastructure implementers to orchestrators of agentic enterprises. Providers now combine hybrid and multicloud design, data platform modernization and automation to transform OCI from infrastructure into intelligence. Demand centers on secure, auditable solutions that unify compute, data and AI under governance by design.

Leaders demonstrate the ability to transform OCI into a governed, data-centric modernization platform that spans infrastructure, data and AI. They combine deep OCI engineering expertise with advisory acumen, building hybrid cloud and multicloud architectures that interoperate across ecosystems. They differentiate themselves through productized IP, FinOps, observability and agentic automation, ensuring that every workload migration delivers measurable cost efficiency and resilience.

DSP's rise to the Leader status reflects its evolution from an Oracle specialist to a trusted partner for OCI-driven transformation. Reply has achieved the Rising Star status for delivering secure, high-impact OCI transformations that demonstrate trust, scale and engineering excellence.

Product Challengers deliver mature OCI modernization portfolios but need enhanced visibility and industry specialization in Europe. Market Challengers hold strong client trust and competitive presence yet exhibit narrower OCI portfolios. Contenders meet ISG inclusion criteria with focused OCI expertise and credible certifications. To progress, they must expand their solution portfolios and demonstrate increased visibility and scalability across Europe.

From the 38 companies assessed for this study, 33 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture pioneers GenAI innovation on OCI with NVIDIA acceleration, AI Refinery™ and agent-orchestration excellence. Backed by its global AI strategy , the firm's approach ensures secure, interoperable and compliant AI operations for enterprises in Europe.

Capgemini

Capgemini is recognized for its expertise in VMware migration and provides a clear modernization path to OCI. Its AI-guided blueprints, OCI-native orchestration and governance tools accelerate transformation while maintaining operational continuity.

cognizant

Cognizant transforms enterprise operations through AI-enabled OCI foundations. With Exadata engineering, GenAI agents and sovereign-by-design architectures, it delivers measurable modernization and regulatory assurance for enterprises in Europe.

Deloitte.

Deloitte combines OCI and NVIDIA strengths with its Zora AI™ platform to industrialize agentic AI for industries in Europe. The firm's sovereign innovation model ensures secure, compliant and interoperable cloud operations across Europe.

dsp

DSP transforms Oracle estates through AI-enabled governance, engineering excellence, advanced automation and sector-specific OCI architectures. Recognized by multiple Oracle awards, it provides compliant, resilient and data-driven modernization for clients in Europe.

HCLTech

HCLTech transforms Oracle Cloud operations through its Advantage PACE and Unified Integration Insights platforms. Embedded AI, real-time observability and full-stack OCI coverage enable resilient, compliant modernization at scale for enterprises in Europe.

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IBM leverages its partnership with Oracle to combine the firm's watsonx.ai offering, Granite models and OpenShift to power agentic AI on OCI. Its industry accelerators and transition-intelligence tools drive secure, data-driven transformation across Europe.

Infosys accelerates OCI adoption in Europe through the firm's AI-powered platforms Topaz and Cobalt, integrating predictive analytics, automation and industry-specific blueprints. Its advisory-to-operations model delivers secure, outcome-based modernization.

LTIMindtree delivers AI-driven Oracle Cloud modernization through its Canvas.AI offering, Infinity and Enclose accelerators. Its automation frameworks and governance tools ensure compliant, cost-efficient OCI migration and transformation for enterprises in Europe.

TCS combines OCI automation and analytics through Crystallis™ and WisdomNext™, enabling secure, agentic AI-based transformation. The firm's PacePort™ London innovation hub empowers clients in Europe to prototype and operationalize OCI-native AI solutions.

Version 1 combines OCI scalability, hybrid cloud design, AI-driven organizational change management (OCM) and AI governance services to help enterprises in Europe modernize securely. The company's certified expertise and its Credo AI-based framework ensure compliance while sustaining business value.

Wipro helps enterprises in Europe turn OCI modernization into measurable value creation. Its AI-driven CloudShift, C3MT and Disaster Recovery as a Service frameworks automate migration, optimize consumption and ensure resilient and compliant operations.

Reply

Reply (Rising Star) engineers OCI and multicloud solutions that combine security, automation and compliance. The firm's sovereign-ready blueprints, AI-driven operations and workload-migration accelerators help enterprises modernize regulated environments confidently.

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Leader

"DSP's leadership in OCI stems from its proven technical mastery, multiple awards and proven experience in enterprise integration. The company has evolved into a strategic modernization partner, enabling enterprises to benefit from OCI."

Roman Pelzel

DSP

Overview

DSP is a prominent provider of managed services for Oracle technologies, specializing in database management, cloud solutions and enterprise applications. Headquartered in the U.K., with a presence in Ireland and North America, DSP supports enterprises in Europe through comprehensive OCI migration, modernization and multicloud integration services. Its award-winning Oracle partnership, GenAI innovation and FinOps-led governance combine to deliver efficiency, transparency and continuous improvement in regulated, mission-critical cloud environments while strengthening resilience, security and long-term digital agility.

Strengths

AI-driven service insights: DSP's AI-powered Sentiment Analysis tool leverages Oracle AI Language on OCI to transform unstructured ticket and email data into actionable service intelligence. Integrated with ITSM systems, it detects customer sentiment in real time, enabling proactive response and improved experience outcomes. This automation enhances service quality, operational agility and client retention while demonstrating DSP's applied AI innovation within its broader Oracle-aligned cloud ecosystem.

End-to-end cloud migration expertise: DSP's Oracle Cloud Migration service delivers a comprehensive process from assessment to optimization, enabling secure, low-disruption transitions of Oracle and non-Oracle workloads to OCI. Using proven methodologies, certified expertise and hybrid cloud readiness, DSP ensures continuity, compliance and performance throughout the migration lifecycle.

Industry-tailored OCI solutions: DSP applies OCI to address sector-specific challenges, designing architectures that fulfill the regulatory, operational and performance needs of industries such as public services, transportation and manufacturing. Its experience allows for rapid deployment of compliant, scalable and resilient environments that align with mission-critical workloads, enhance agility and meet evolving digital and governance standards.

Caution

Having moved to this year's Leader quadrant, DSP should broaden its portfolio of AI agent solutions on OCI, demonstrating measurable outcomes and compliance with evolving AI regulations in Europe. Publishing quantifiable business results, audit-ready governance and use cases will help strengthen its position in this quadrant.

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Appendix

The ISG Provider Lens® 2025 — Oracle Cloud and Technology Ecosystem study analyzes the relevant software vendors/service providers in the European 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 <the month and year when the fact check stage is closed> 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 the portfolio of services offered
   * advancements

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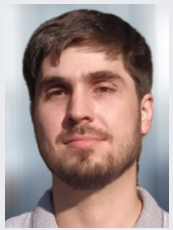
Lead Author

Roman Pelzel,
Assistant Director & Principal Analyst

Roman Pelzel is a thought leader and trusted advisor with more than 25 years of experience in leading and facilitating digital workplace strategies and technologies as well as ITIL/value-driven service management in different business areas (insurance, automotive, utilities, e-commerce). He has made it his mission to sustainably connect talent and technology by helping organizations transform their digital workplaces into a digital work state experience that put people first.

Roman is a recognized expert in workplace management technologies as well as hardware and software rollouts. He contributes to his clients' success with his comprehensive expertise gained in various roles, combining leadership, coaching and technical skills.

Research Analyst



Gabriel Sobanski
Senior Research Analyst

Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on ServiceNow Ecosystem, Salesforce Ecosystem, Microsoft Ecosystem, Cybersecurity Solutions and Services, SAP Ecosystem, Public Cloud, Private Hybrid Cloud Data Center Services, Future of Work, AWS Ecosystem and Oracle Ecosystem. He supports the lead analysts in the research process and co-authors the global summary report with market trends and insights. Gabriel also develops content from an enterprise perspective. Gabriel has helmed his current role since 2021. Prior to this role, he has worked as an IT consultant, where he acquired experience and technical capabilities in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise includes industry, logistics and market research.

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Study Sponsor

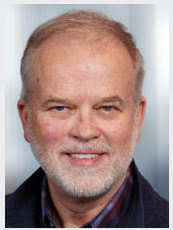
Aman Munglani

Diretor, Pesquisa

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

Partner and Global Head – ISG Provider Lens®/ISG Research

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.

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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: III) 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.

For more information, visit isg-one.com.

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ISG Provider Lens®

JANUARY, 2026

REPORT: ORACLE CLOUD AND TECHNOLOGY ECOSYSTEM

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