

Oracle Cloud and Technology Ecosystem

Comparison of Oracle service providers' portfolio
attractiveness and competitive differentiators

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Oracle is driving Europe's digital transformation in a dynamic era

As we venture into 2025, Oracle's position in the European market stands at a critical juncture, poised between opportunity and challenge. The tech giant navigates a complex landscape shaped by economic uncertainties, geopolitical tensions and rapid technological advancements.

Oracle's role in enabling digital transformation and innovation across Europe has never been more crucial. With the region grappling with a gradual economic recovery and the lingering effects of global crises, businesses and governments alike are turning to technology as a beacon of hope for increased efficiency, sustainability and competitiveness.

The European economy shows signs of resilience. The labor market, though tight, faces the paradox of skills shortages amid unemployment rates hovering around 6 percent.

Oracle's cloud and AI solutions are becoming increasingly pivotal in this context. The company's EU Sovereign Cloud initiative, launched to address data privacy and residency requirements, exemplifies Oracle's commitment to meeting the unique needs of European organizations. This move comes at a time when data sovereignty and regulatory compliance are at the forefront of EU digital policy.

Yet, Oracle faces its own set of challenges. The company must contend with fierce competition from other tech giants, navigate the complexities of EU regulations and address the growing demand for sustainable and ethical technology solutions. The recent layoffs in Oracle's cloud division hint at internal restructuring as the company aligns its resources with market demands.

As we delve deeper into Oracle's strategies and innovations for 2024 and 2025, it becomes clear that the company's success in Europe will hinge on its ability to provide advanced technology and adapt to the region's unique economic, social and regulatory landscape. Oracle's journey in Europe is more than a story of technological advancement; it is a narrative

Cloud, AI and
compliance must
converge to **drive**
innovation and **shape**
enterprise **growth**.



of resilience, adaptation and innovation in the face of unprecedented challenges.

Oracle's Cloud Infrastructure in Europe: Expansion of Oracle cloud regions

Oracle's cloud infrastructure in Europe has advanced significantly throughout 2024 and into 2025, solidifying the company's position as a major player in the European cloud market.

Oracle has continued its aggressive expansion of cloud regions across Europe. As of 2025, Oracle Cloud Infrastructure (OCI) is available in more locations than any other hyperscaler, with 85 regions live and 77 planned globally, according to Oracle.

In Europe, Oracle has expanded its presence by establishing new regions in several countries, including Spain, where a third cloud region was opened in Madrid in 2024. This expansion is part of a broader investment plan exceeding \$1 billion in Spain over the next decade.

Oracle's expansion allows businesses in Europe to leverage OCI's services while maintaining data residency within their preferred geographic locations.

Advancements of the sovereign cloud for EU

One of the most significant developments for Oracle in Europe has been the continued rollout and adoption of the Oracle EU Sovereign Cloud. Launched in 2023, this offering has gained substantial traction throughout 2024 and 2025.

The EU Sovereign Cloud is now being used in 15 countries across Europe, enabling commercial and public sector organizations to align with EU data privacy and sovereignty requirements. It is located entirely within the EU, supported by EU-resident personnel and operated by separate legal entities incorporated within the EU. The EU Sovereign Cloud offers the same services and capabilities as OCI's public cloud regions, with identical support and SLAs. This setup has made the offering particularly attractive for industries with stringent regulatory requirements, such as healthcare, financial services and government sectors.

Multicloud partnerships and integrations

A prominent trend in Europe is the rapid adoption of cloud migration and modernization. Enterprises are increasingly transitioning their Oracle workloads to the cloud to capitalize

on scalability, cost efficiency and enhanced security. Many businesses are opting for hybrid and multicloud strategies, which enable them to combine the best of on-premises and cloud-based environments. This approach ensures operational flexibility while ensuring compliance with stringent regulatory standards. Enterprises are also focusing on modernizing their databases, particularly by upgrading to the Oracle Autonomous Database, to improve performance, reduce costs and bolster security. Embracing hybrid setups enables enterprises to leverage advanced Oracle technologies while optimizing their existing IT infrastructures.

To meet this demand, Oracle has significantly expanded its multicloud capabilities in Europe through strategic partnerships with other major cloud providers:

- Oracle Database@Azure: This service has been expanded to additional regions in Europe, including France, Germany and Italy, with planned expansions to Spain, Sweden and the U.K.

- Oracle Database@Google Cloud: Launched in 2024, this service is now available in key European regions such as the U.K. and Germany Central.

These multicloud initiatives allow organizations in Europe to leverage Oracle's database technologies alongside services from other major cloud providers, offering greater flexibility and choice in their cloud strategies. Oracle's cloud infrastructure developments in Europe throughout 2024 and the plans for 2025 demonstrate a clear commitment to meeting the unique needs of the market in Europe.

By expanding its regional presence, offering sovereign cloud solutions and fostering multicloud partnerships, Oracle has positioned itself as a key player in Europe's digital transformation landscape.

Oracle's generative AI (GenAI) strategy

Data has become a strategic asset for enterprises in Europe, driving investments in analytics, business intelligence and data management solutions. Organizations are increasingly adopting AI and ML technologies to extract actionable insights, automate



operations and improve decision-making. Integrating AI and ML into Oracle services has helped businesses streamline workflows and boost productivity. However, the rise in data breaches has heightened concerns about data security and privacy. As a result, enterprises are dedicating substantial resources to implement robust security measures to safeguard sensitive information and comply with stringent European regulations such as GDPR.

Oracle has emerged as a leader in AI and ML integration across its product ecosystem, making significant strides in 2024 and early 2025.

These advancements transform enterprise workflows, enable automation, enhance decision-making and foster innovation across industries.

Oracle's GenAI capabilities have expanded significantly with the introduction of Oracle Cloud Infrastructure (OCI) GenAI services. These services integrate large language models (LLMs) such as Meta Llama 3.1 and Cohere Command R+, allowing enterprises to embed GenAI into their workflows securely and efficiently.

Key features include:

- **Retrieval-augmented generation (RAG):** Oracle's RAG capabilities enable enterprises to combine GenAI with their proprietary data, ensuring contextually accurate outputs while maintaining data privacy. This service is particularly useful for automating complex tasks such as customer support, content generation and decision-making.
- **AI Vector Search:** Integrated into Oracle Database 23ai, this feature allows businesses to store and search unstructured data, such as documents and images, as vectors, enabling advanced similarity queries. This technology is revolutionizing industries such as retail and healthcare by powering recommendation systems and predictive analytics.

AI embedded across Oracle Fusion Cloud Applications

Oracle has embedded over 50 new AI capabilities across its Fusion Cloud Applications Suite, covering finance, supply chain management (SCM), HCM, sales, marketing and customer service. These

capabilities include:

- **AI agents:** These are designed to automate routine tasks, provide actionable insights, and recommend next steps; for instance, in finance, AI agents can spot anomalies or generate predictive forecasts.
- **GenAI for business processes:** Features such as contract summarization, sales opportunity recommendations and personalized marketing campaigns are now powered by GenAI within Oracle Fusion Cloud CX and ERP applications.
- **Industry-specific applications:** Oracle has tailored its AI solutions for sectors such as healthcare (medical supply tracking) and manufacturing (real-time production insights), driving efficiency and innovation.

Oracle's AI advancements are driving transformation across industries. By integrating structured sales data with unstructured customer reviews in the Oracle Intelligent Data Lake, **retailers** can optimize stock levels in real time and personalize marketing campaigns using Oracle Analytics Cloud. Oracle's next-generation **electronic health record (EHR)**

system leverages AI for voice-driven navigation, predictive care plans based on patient data and automated documentation processes to enhance clinical workflows. Predictive maintenance powered by Oracle 23ai analyzes sensor data to forecast equipment failures, reducing downtime and improving operational efficiency in manufacturing.

Oracle's AI innovations are groundbreaking, but challenges persist

- **Data privacy compliance:** Balancing the use of advanced AI technologies with adherence to strict European regulations such as GDPR.
- **Competition:** Standing out in the crowded enterprise AI market dominated by hyperscalers such as AWS, Google Cloud and Microsoft Azure.
- **Adoption barriers:** Addressing enterprise concerns around the cost, complexity and workforce readiness needed for AI-driven workflows.

To address these challenges, Oracle plans to expand its integration of GenAI into applications while strengthening security features to meet data sovereignty requirements.



Its commitment to delivering industry-specific solutions positions Oracle as a key driver of digital transformation across Europe. In summary, Oracle's advancements in AI and ML highlight its dedication to empowering businesses with tools that enhance efficiency, foster innovation and provide a competitive edge in an increasingly digital economy.

Sustainability initiatives: Green cloud infrastructure

Sustainability has become a central theme in Europe's IT sector. Many enterprises are adopting green IT practices, such as energy-efficient data centers and cloud-based solutions, to reduce their carbon footprints. Service providers are supporting these efforts by offering tools and platforms designed to align with sustainability goals, reflecting companies' growing commitment to environmental responsibility and regulatory compliance.

Oracle has made substantial strides in integrating sustainability into its product offerings and operations across Europe. The company's efforts align with the growing demand for environmentally responsible

technology solutions and the EU's ambitious climate goals.

Oracle has invested heavily in making its cloud infrastructure more sustainable. The company's latest generation of cloud hardware, Oracle Exadata X11M, delivers significant performance improvements while maintaining the same price point as the previous generation. This advancement allows customers to run their workloads faster and on fewer systems, contributing to energy efficiency and sustainability goals.

Sustainability reporting and management tools

Oracle has enhanced its sustainability reporting and management tools to help businesses in Europe meet increasingly stringent environmental regulations and stakeholder expectations. These tools are integrated into Oracle's broader suite of enterprise applications, allowing companies to:

- Track and report on their carbon footprint across operations
- Manage and optimize energy consumption

- Monitor and improve supply chain sustainability
- Generate comprehensive sustainability reports aligned with EU reporting standards

By integrating sustainability features into its core products and aligning with EU green initiatives, Oracle is positioning itself as a key enabler of sustainable digital transformation across Europe. These efforts help Oracle's customers meet their environmental goals and contribute to the broader European agenda for a greener, more sustainable future.

Future outlook and challenges for Oracle in Europe

As Oracle deepens its footprint in Europe, it finds itself at the intersection of immense opportunities and formidable challenges. The company's forward-looking strategy is defined by innovative solutions tailored to meet Europe's unique regulatory, operational and sustainability requirements. Data sovereignty and privacy remain prime concerns for organizations in Europe, and Oracle is taking proactive steps to address these priorities:

Pioneering innovation in 2025 and beyond

Oracle is set to unveil advanced offerings that align with Europe's evolving digital landscape:

1. Expansion of EU Sovereign Cloud services:

Building on its existing presence in 15 European countries, Oracle aims to expand its EU Sovereign Cloud further. This expansion will likely encompass new regions and enriched services to meet the increasing demand for robust data sovereignty solutions.

2. Industry-specific cloud solutions: Digital transformation is a key driver of Oracle service adoption in Europe. Enterprises are leveraging Oracle solutions to enhance CX, streamline operations and achieve competitive advantages. Tailored industry-specific solutions have proven particularly effective in addressing the unique needs of diverse sectors. Service providers are delivering Oracle-based platforms designed to optimize operations in these industries while ensuring compliance with regulatory and business requirements. Oracle is actively developing bespoke cloud solutions for industries such as healthcare, financial services and the public sector. These offerings



will address specific regulatory and operational needs, cementing Oracle's role as a trusted partner in Europe's critical sectors.

3. Sustainable cloud infrastructure:

Demonstrating its alignment with the EU's green initiatives, Oracle is committed to powering 100 percent of its European data centers with renewable energy by 2025. The initiative includes adopting innovative cooling technologies and energy-efficient systems, underscoring Oracle's focus on sustainability.

Addressing data sovereignty and privacy

- **Investment in EU Sovereign Cloud:** Oracle's EU Sovereign Cloud is purpose-built to comply with European data privacy laws, ensuring that sensitive data stays within EU borders and is managed exclusively by EU-resident personnel.
- **Enhanced encryption and key management:** With the introduction of advanced services such as OCI Dedicated Key Management and OCI External Key Management, Oracle is offering customers control over their data encryption, reinforcing data security and mitigating unauthorized access.

- **Adapting to regulatory changes:** Oracle is staying ahead of the curve by aligning its services with new EU regulations, including the Digital Services Act (DSA) and the Digital Markets Act (DMA). Agility will be key as Oracle navigates the evolving regulatory landscape.
- **Transparency and trust:** To build confidence among clients in Europe, Oracle is expected to implement transparency measures, such as detailed audits and comprehensive reporting on data handling practices. These initiatives aim to enhance trust and foster long-term relationships with customers.

Oracle's strategic investments and innovations reflect a commitment to empowering European enterprises with advanced, compliant and sustainable solutions. While challenges such as intense competition and evolving regulations loom, Oracle's focus on sovereignty, transparency and industry-specific solutions positions it as a pivotal enabler of digital transformation in Europe. By combining AI innovation, regulatory agility and green cloud infrastructure, Oracle is poised to shape the future of Europe's digital economy.

Role of service providers

Service providers are integral to the success of Oracle service adoption in Europe. They facilitate cloud migration by simplifying the transition from legacy systems to modern, scalable cloud infrastructures. By implementing hybrid and multicloud strategies, providers help enterprises optimize operations while maintaining regulatory compliance. Service providers also enhance value by integrating AI and ML into Oracle solutions, enabling enterprises to leverage data for automation, informed decision-making and operational efficiency. They also support sustainability efforts by offering energy-efficient platforms that comply with EU green regulations.

Furthermore, service providers address the growing demand for skilled professionals by offering training programs that enhance workforce capabilities. This focus on workforce development ensures that enterprises in Europe have access to the expertise required to navigate the complexities of modern IT environments.

Rising focus on cybersecurity

The escalating threat of cyberattacks has driven enterprises in Europe to prioritize cybersecurity and risk management. The complex threat landscape necessitates advanced security measures to protect IT infrastructure and sensitive data. Oracle service providers are meeting this need by offering solutions that address vulnerabilities and enhance enterprise organizational resilience. Effective risk management strategies have become crucial for ensuring business continuity, particularly in industries where the cost of data breaches can be substantial.

Demand for skilled Oracle professionals

The growing reliance on Oracle services has created a significant demand for skilled professionals with cloud, database and application development expertise. Service providers are proactively addressing this need by investing in training and certification programs that enhance workforce capabilities. These initiatives ensure the availability of qualified professionals and enable enterprises to remain agile and competitive in the rapidly evolving IT landscape.



Unique features of the Oracle services market in Europe

The Oracle services market in Europe stands out due to its distinctive regulatory, cultural and technological landscape. The region's stringent regulatory framework is a critical data privacy and security differentiator. Compliance with GDPR and other regional regulations is non-negotiable, imposing significant compliance obligations on enterprises and service providers. Data residency requirements also influence the adoption of cloud solutions, as providers must offer region-specific services.

Cultural and linguistic diversity further distinguishes the market in Europe, necessitating tailored approaches to service delivery, communication and support to address clients' diverse needs across the region. Europe's mature IT infrastructure impacts the pace and complexity of cloud migration projects as many enterprises operate well-established legacy systems that require careful integration with modern cloud technologies.

The public sector also represents a significant segment of the Oracle services market in

Europe, demanding customized solutions due to its strict procurement processes and rigorous compliance standards. Moreover, Europe's innovation hubs foster collaboration among enterprises, research institutions and service providers, driving technological advancements and addressing complex challenges.

Factors driving demand for Oracle services

Several factors are propelling the demand for Oracle services in Europe. The regulatory landscape remains a key driver as businesses seek solutions that ensure compliance with stringent data protection and localization laws. Budget optimization is another critical factor, with organizations aiming to reduce operational expenses while reallocating resources for digital transformation initiatives. Industry-specific challenges and the need for customized solutions also contribute to the growing reliance on Oracle services.

Sustainability goals are increasingly shaping enterprise decisions, prompting businesses to adopt green IT practices in line with environmental standards. Service providers play a crucial role by delivering energy-efficient

solutions that align with regulatory mandates and corporate sustainability objectives. These drivers collectively highlight the strategic role of Oracle services in helping enterprises in Europe achieve their operational and business goals.

Conclusion

Europe's Oracle services market is defined by a unique blend of regulatory requirements, cultural diversity and technological sophistication. The demand for Oracle services continues to grow, driven by cloud migration, AI integration, digital transformation, sustainability and cybersecurity trends. Recent developments, including Oracle's strategic partnerships and innovative solutions, further highlight the dynamic nature of this market.

Service providers are pivotal in helping enterprises in Europe achieve their business objectives by delivering customized solutions, ensuring compliance and promoting innovation. These providers enable enterprises to thrive in an increasingly competitive landscape by addressing industry-specific challenges and supporting sustainability goals. As businesses seek to balance regulatory compliance with technological advancement, Oracle services

remain central to their journey toward digital transformation and sustainable growth.

Key themes and developments in the Consulting and Advisory Services quadrant:

1. Increased Demand for Industry-specific Solutions: Tailored strategies for sectors such as finance, healthcare and manufacturing are driving differentiation. Providers are aligning Oracle capabilities with unique industry challenges to deliver measurable business outcomes.

2. Focus on Sustainability and Compliance: Providers are incorporating sustainability metrics and governance frameworks to address growing regulatory and environmental concerns. Compliance with European data protection standards remains a priority.

3. Change Management as a Differentiator: Effective transformation frameworks that prioritize workforce alignment and user adoption are essential. Leaders in this quadrant employ proprietary change management tools to ensure seamless Oracle transitions.

4. Integration of AI and Analytics: Advanced data analytics and AI-driven insights enable



Executive Summary

providers to offer proactive advisory services, streamlining processes and enhancing decision-making.

Leading providers in this quadrant continue to emphasize innovation and strategic advisory excellence, helping enterprises achieve agility and competitive advantages through Oracle's evolving ecosystem.

Key themes and developments in the Implementation and Integration Services quadrant:

1. Integration with OCI and Multicloud Solutions:

Providers are enhancing their multicloud integration strategies to enable enterprises to manage workloads efficiently across multiple cloud platforms.

2. Adoption of AI-driven Migration Tools:

Increased focus on AI tools for data migration and system optimization reflects an industrywide move toward automation.

3. Vertical-specific Accelerators: Tailored solutions for key industries provide differentiation and expedite implementation timelines.

Leaders in this quadrant excel in delivering

comprehensive Oracle deployments, leveraging predefined solutions and reference architectures to significantly reduce time-to-market.

They demonstrate advanced capabilities in creating robust and scalable integration frameworks that ensure seamless interoperability between Oracle applications and third-party systems.

Their proactive focus on implementing stringent governance and security protocols ensures compliance across hybrid and multicloud environments, addressing evolving regulatory and enterprise standards.

These providers focus on establishing long-lasting digital partnerships with clients and distinguish themselves with innovative, AI-powered migration tools and proven methodologies that minimize business disruption while optimizing legacy system transitions.

Key themes and developments in the Managed Services quadrant:

1. Proliferation of Proprietary Platforms:

Providers are leveraging proprietary tools for

enhanced monitoring, issue resolution and cost savings. Examples include AI-powered dashboards, automated patch management and self-healing capabilities that drive operational efficiency.

2. Focus on ESG Alignment: ESG-integrated services, such as sustainability-focused OCI management and carbon-conscious SLAs, are emerging as competitive differentiators for providers aligning with enterprise sustainability goals.

3. Customized Offerings for Vertical Industries: Tailored solutions for sectors such as financial services, healthcare and retail are enabling in-depth enterprise engagements by addressing industry-specific challenges and compliance needs.

Enterprises are seeking providers that can deliver cost efficiencies without compromising on innovation or service quality. Providers must address challenges associated with ensuring seamless integrations across diverse cloud ecosystems while meeting unique enterprise needs.

Leaders in this quadrant excel in managing complex Oracle environments by integrating advanced AI-driven automation, multicloud governance and tailored solutions. Their focus on proactive optimization, cost efficiency and industry-specific compliance positions them as strategic partners for Oracle-driven enterprise transformations.

Key themes and developments in the OCI Solutions and Capabilities quadrant:

1. AI-powered OCI Innovations: Service providers are increasingly integrating Oracle's GenAI capabilities into OCI environments to deliver enhanced automation, predictive analytics and real-time decision-making. These innovations enable enterprises to improve operational efficiency and accelerate business outcomes.

2. Demand for Multicloud and Hybrid

Solutions: With enterprises adopting diverse cloud ecosystems, providers are leveraging multicloud frameworks, such as Oracle Azure Interconnect, to enable seamless workload distribution and interoperability across platforms.



3. Focus on Industry-specific Solutions:

Tailored OCI solutions addressing unique vertical requirements — such as healthcare compliance, real-time retail analytics and manufacturing operational efficiency — have become a critical differentiator for leading providers.

4. Enhanced Governance and Security:

Providers are addressing heightened regulatory and compliance demands with robust governance frameworks, data localization solutions and advanced security measures tailored to industries with stringent standards, such as finance and public sectors.

5. Sustainability and ESG Alignment: OCI-enabled solutions increasingly emphasize sustainability, with providers embedding carbon tracking, energy-efficient architectures and ESG metrics into their cloud strategies to meet the growing demand for environmentally conscious solutions.

6. Training and Workforce Development:

Leading providers strongly emphasize upskilling and certifying talent in OCI capabilities. Investments in structured training programs,

Oracle certifications and GenAI-specific learning initiatives ensure a future-ready workforce capable of driving innovation and delivering value.

Leaders in this quadrant exhibit comprehensive expertise in OCI architecture, delivering secure and scalable solutions that align with enterprise-specific needs. They stand out for their AI-driven innovations, multicloud integration expertise and tailored frameworks for addressing industry challenges. By embedding advanced governance, compliance mechanisms and sustainability into their OCI offerings, leaders enable enterprises to modernize IT operations, achieve cost-efficiency and drive transformative business outcomes.

Oracle solutions drive enterprise growth by linking AI-driven insights and compliance. Focused on sustainability, service providers offer scalable, localized strategies that modernize operations and accelerate digital transformation across Europe's complex landscapes. Businesses adopting AI and hybrid cloud strategies can enhance agility and gain a competitive edge with data-driven innovations while meeting stringent ESG and regulatory demands.





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
4i Apps	Contender	Contender	Contender	Contender
Accenture	Leader	Leader	Leader	Leader
Aspire Systems	Product Challenger	Product Challenger	Product Challenger	Not In
Birlasoft	Market Challenger	Market Challenger	Contender	Product Challenger
Capgemini	Leader	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Product Challenger	Leader
DSP	Rising Star ★	Rising Star ★	Rising Star ★	Rising Star ★
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
Eviden (Atos)	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Fujitsu	Leader	Leader	Leader	Product Challenger
HCLTech	Leader	Leader	Leader	Leader
Hitachi Digital Services	Contender	Product Challenger	Contender	Not In
IBM	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader	Leader
inlumi	Market Challenger	Contender	Contender	Not In
Kyndryl	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader





	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
Mastek	Product Challenger	Product Challenger	Product Challenger	Contender
Mphasis	Contender	Contender	Contender	Not In
PROMATIS software	Contender	Product Challenger	Product Challenger	Not In
PwC	Leader	Leader	Leader	Product Challenger
Quistor Enterprises	Product Challenger	Product Challenger	Contender	Not In
Steltix	Product Challenger	Product Challenger	Product Challenger	Not In
Syntax	Product Challenger	Product Challenger	Contender	Contender
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Not In





	Consulting and Advisory Services	Implementation and Integration Services	Managed Services	OCI Solutions and Capabilities
Timestamp Group	Product Challenger	Product Challenger	Product Challenger	Not In
Trinamix	Product Challenger	Contender	Contender	Contender
Version 1	Leader	Leader	Leader	Leader
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Product Challenger	Product Challenger	Product Challenger	Contender



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

Simplified Illustration Source: ISG 2024



Definition

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

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S., Europe, Brazil and Asia Pacific (APAC - a new region covering Asia Pacific, including ANZ, India and the ASEAN-6 (Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam), but excluding Japan, South Korea and China/Taiwan).

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



Definition

In 2024, the IT landscape has been evolving rapidly. Organizations are dealing with a complex and dynamic environment where technology presents both opportunities and challenges. Business and technology leaders need to utilize Artificial Intelligence and Machine Learning, Cloud Computing and Connectivity, along with other technologies, to drive Digital Transformation and Innovation.

While taking advantage of these rapid technological advancements, addressing evolving security threats and complex compliance requirements, and a heightened focus on sustainability are challenges that must be tackled.

In this context, Oracle has solidified its position as a leading force in the cloud ecosystem by enhancing its Cloud Applications and establishing a differentiated position in the Cloud Infrastructure space with OCI, especially with hybrid cloud options, compared to other hyperscalers.

Oracle's focus on technology partnerships with Microsoft and Google Cloud has made it easier for joint customers to migrate, modernize, and manage their Oracle-based applications in the cloud.

A comprehensive range of innovative solutions offered by partners and providers is crucial in enabling customers to achieve their business transformation goals through advanced Oracle solutions.

It's imperative that providers continue to invest, evolve, and innovate to harness the potential of Oracle's technological advancements and align solutions with enterprise clients' specific business objectives and unique digital transformation challenges.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Consulting and Advisory Services, Implementation and Integration Services, Managed Services and OCI Solutions and Capabilities.

This ISG Provider Lens™ Oracle Ecosystem 2024 study offers the following to business and IT decision-makers:

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

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





Consulting and Advisory Services

Consulting and Advisory Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe for evaluating the providers of Oracle consulting and advisory services.

In this quadrant, ISG highlights the current market positioning of these providers offering Oracle consulting and advisory services to enterprises in Europe and how each provider addresses the critical challenges faced in the region. The report also provides a comprehensive overview of the market's competitive landscape.

This quadrant addresses how Oracle empowers businesses with innovative cloud solutions, including Oracle Fusion Cloud Applications and Oracle Cloud Infrastructure (OCI) while leveraging technologies such as AI, ML, blockchain and IoT to create new opportunities. With the rising demand for these services — driven by the need for digital transformation and agility — top Oracle partners deliver comprehensive support by aligning solutions with enterprise goals, facilitating cloud migration and enhancing ROI.

The quadrant assesses providers offering expert guidance to organizations looking to optimize their use of Oracle solutions, ensuring operational efficiency and sustained growth through tailored strategies. Additionally, these providers play a crucial role in managing change and delivering ongoing support, enabling enterprises to adapt effectively to evolving technological landscapes.



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



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

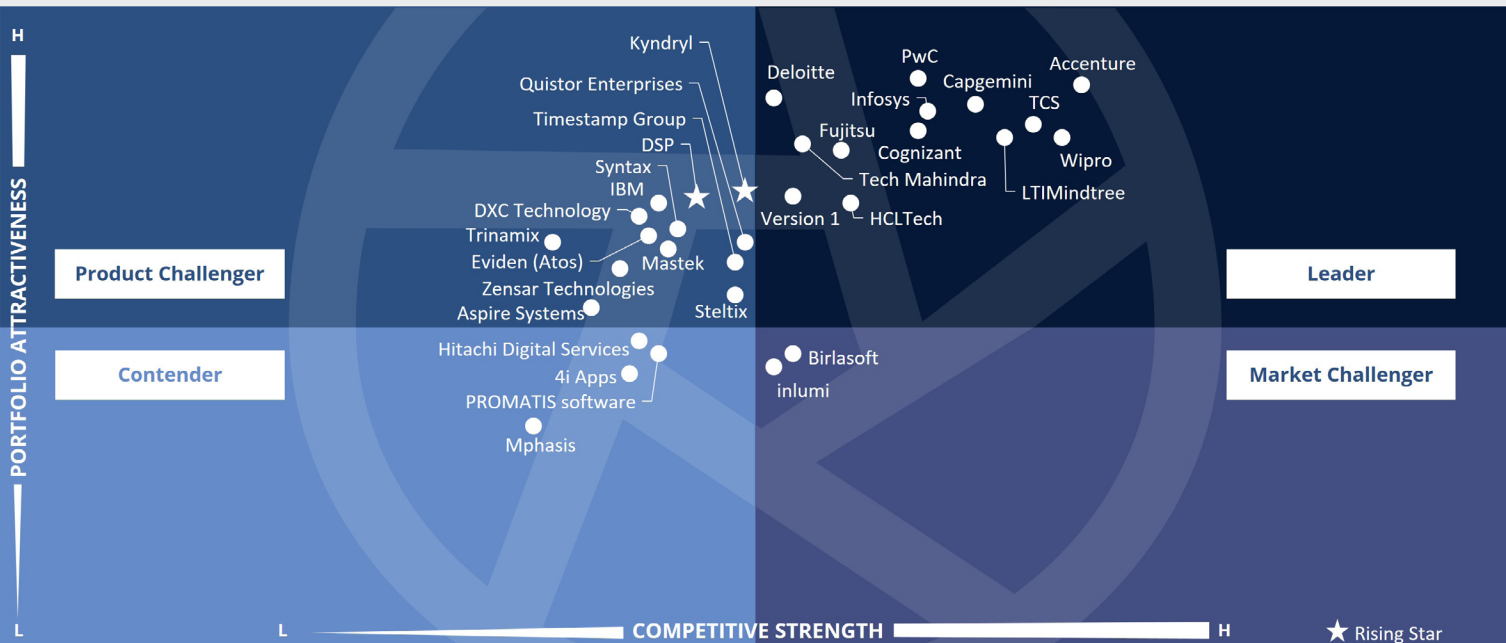


Digital transformation leaders should read this report to understand how service providers align Oracle solutions with the latest technologies to build resilient organizations.



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





This quadrant evaluates service providers that enable European enterprises to achieve business agility and maximize the value of their **Oracle investments** by delivering **strategic, tailored, and transformational consulting and advisory services.**

Roman Pelzel



Consulting and Advisory Services

Definition

This quadrant evaluates Providers offering Consulting and advisory Services and expert guidance to organizations seeking to leverage Oracle Solutions for business success. These providers typically help businesses evaluate their current technology landscape, identify opportunities for improvement, and develop strategic plans to address challenges and capitalize on emerging trends.

By leveraging industry best practices and technical expertise, they ensure that organizations adopt Oracle solutions that enhance operational efficiency, drive innovation, and support long-term growth. They also help maximize the value of existing and new Oracle investments.

Additionally, these providers help work closely with stakeholders to understand their needs and goals, crafting customized strategies aligned with business objectives. They also assist in managing change, ensuring smooth transitions, and providing ongoing support to adapt to evolving technological landscapes.

Eligibility Criteria

1. **Strategic guidance with best practices:** Uses reference assessment models, strategy, road maps and frameworks
2. **Tailored IT strategy recommendations:** Offers recommendations aligned with IT strategy, technical reviews, benchmark tools and templates
3. **Industry expertise:** Demonstrates industry knowledge and domain-specific practices
4. **Mastery of the Oracle Ecosystem:** Showcases in-depth understanding of the Oracle solution portfolio and related functionalities, processes, workflows, tools and platforms, along with industry expertise
5. **Comprehensive cloud advisory:** Implements the **Oracle Cloud Services Framework** by providing cloud strategy assessments, readiness assessments and architectural advisory services
6. **Differentiated customer experience through strategic consulting:** Possesses expertise in functional processes, contextual customer knowledge and strategy consulting to offer differentiated customer experience
7. **Transformation through change management:** Supports change management lifecycle to drive transformation through people, process, technology and strategic initiatives



Consulting and Advisory Services

Observations

The Consulting and Advisory Services quadrant focuses on providers demonstrating in-depth expertise in Oracle's comprehensive portfolio and their ability to guide clients through complex digital transformations by delivering strategic, tailored and transformational advisory solutions.

In 2024, strategic guidance and industry-specific innovation emerged as defining factors for Leaders in this quadrant. Providers excel by leveraging proprietary frameworks, accelerators and industry insights to craft tailored strategies aligned with enterprise objectives. Not surprisingly, AI- and ML-centered advisory is becoming integral, enabling enterprises to adopt advanced technologies while maintaining compliance with regional regulations such as GDPR.

A growing emphasis on change management reflects the importance of addressing workforce readiness during technology transformations.

Leaders distinguished themselves by demonstrating excellence in integrating Oracle solutions with business processes,

offering seamless adoption strategies and addressing region-specific challenges through localized expertise.

The Rising Stars show promising growth and advanced capabilities through innovative frameworks and a commitment to strengthening their Oracle advisory capabilities.

Product Challengers are recognized for their strong global capabilities but need increased local engagement.

Market Challengers demonstrate solid Oracle expertise but must evolve beyond technology-driven advice to remain competitive.

Contenders often lack comprehensive portfolios or proven reference cases to support Oracle transformations. Demonstrating localized success will be essential to advancing their position.

From the 66 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

Accenture leverages its proprietary myConcerto platform and localized expertise to deliver Oracle-driven transformation in Europe. The company's focus on compliance, workforce agility and innovation ensures Accenture's leadership in Oracle advisory services.



Capgemini excels in Oracle consulting and offers tailored solutions for industries in Europe. It combines its experience-centric change management capabilities with its CloudNow Framework and AI tools to enhance compliance, sustainability and workforce transformation.



Cognizant empowers enterprises in Europe with Oracle Cloud transformations by using its Cloud Map Advisory, Business Value Realization Framework and tailored industry approaches to modernize IT cores, optimize operations and align with regional compliance needs.

Deloitte.

Deloitte integrates Oracle advisory services with industry-specific frameworks and accelerators, such as its Ascent solution and holistic change management. The company's governance and compliance expertise and its ESG-driven Oracle strategies stand out in the market.



Fujitsu leads in the Oracle consulting and advisory space, leveraging over 30 years of experience. Its data-driven consulting approach, Uvance Wayfinders, empowers the company to deliver cross-industry and data-driven strategies for Oracle transformation at scale.

HCLTech

HCLTech combines its global Oracle expertise with deep industry knowledge and advanced frameworks, such as its Cloud Strategy and Roadmap Assessment, to excel in complex integrations across hybrid ecosystems, with a special focus on sustainability and change management.



Consulting and Advisory Services



Infosys drives Oracle-enabled digital transformations for clients in Europe by providing leading end-to-end consulting services through its CXO advisory. The company's extensive change management capabilities accelerate smooth Oracle transformations and adoptions.



LTIMindtree excels in Oracle consulting in Europe through its solutions and accelerators, such as Race2Cloud and Reimagination Studio. With extensive Oracle experience and tailored industry frameworks, LTIMindtree offers industry-leading adoption and advisory services.



PwC leads in the Oracle consulting space with its global advisory excellence, micro-vertical strategies and superior change management capabilities and frameworks. Its tailored, AI-driven capabilities empower businesses in Europe to adopt Oracle solutions sustainably.



TCS' leading Oracle advisory leverages innovative tools such as Crystallus™, its coinnovation hub Pace Port™ and integrated frameworks to deliver tailored services and manage the transition and cultural shift of Oracle-driven digital transformations in Europe.



Tech Mahindra stands out for its industry-specific Oracle consulting, enabling seamless digital transformations with tools such as its Digital Process Maturity Framework. With over 25 years of expertise in the Oracle domain, the company is a trusted partner in Europe.



Version 1 drives Oracle-enabled innovation with its EVOLVE framework, delivering tailored digital transformation strategies, including road map development, maturity assessments and change management that align with Europe's regulatory and workforce modernization needs.



Wipro specializes in Oracle-driven transformations, utilizing proprietary frameworks and accelerators such as Wings to Cloud to support European businesses with deep domain expertise, leading change management capabilities and tailored consulting strategies.

DSP

DSP (Rising Star) is recognized for its expertise in Oracle solutions and comprehensive advisory services. The company offers end-to-end consulting services to enterprises in Europe, leveraging its comprehensive consulting frameworks, including Oracle Carbon Assessments.



Kyndryl (Rising Star) has global Oracle advisory capabilities, supported by its Vital framework and extensive hybrid cloud expertise. With proven success across industries, it is a trusted partner for digital transformation in Europe.



DSP



"DSP's Oracle advisory blends technical mastery with innovation-focused frameworks. DSP reimagines Oracle solutions with client-centric strategies, enabling seamless, scalable and ROI-driven digital transformations that clients trust."

Roman Pelzel

Overview

DSP is a prominent provider of consulting, advisory and managed services for Oracle technologies. Headquartered in the U.K., DSP operates across the U.K. and North America and has over 250 employees. The company specializes in Oracle database management, OCI, engineered systems and Oracle applications, including E-Business Suite and Fusion. With more than 1,700 technical certifications, DSP has earned global recognition for its technical expertise and innovative solutions. Key recent accolades include the Business Impact and Innovation Awards at Oracle CloudWorld 2024, underscoring its strong advisory and consulting capabilities.

Strengths

Deep Oracle ecosystem expertise: DSP has developed expertise in Oracle's core technologies, including database management, OCI and engineered systems. Its functional and technical consultants specialize in E-Business Suite and Fusion applications, enabling DSP to deliver end-to-end consulting services for enterprises across industries. DSP's knowledge of Oracle's stack helps clients achieve maximum ROI from their Oracle investments, including license optimization.

Client-centric innovation: DSP has demonstrated a commitment to innovation with solutions such as its AI-driven invoice processing and sentiment analysis tools for enterprise clients such as the NHS. The company's GenAI portal, built on Oracle

Cloud, exemplifies its proactive approach to leveraging emerging technologies to address evolving client needs.

Comprehensive consulting framework: The company's consulting services focus on maximizing Oracle investments through strategy development, maturity assessments and change management. DSP's ISV Accelerator Program supports Oracle ISVs in transitioning to SaaS models, helping clients modernize their application landscapes. These structured, innovative frameworks incorporate sustainable practices and offerings, such as Oracle Carbon Assessment, and align DSP's offerings with Oracle's strategic goals.

Caution

DSP has been recognized as a Rising Star in this year's report, indicating its potential to become a Leader in the near future. Enhancing capabilities in organizational change management for large-scale digital transformations would complement DSP's technical expertise and accelerate this goal.





Implementation and Integration Services

Implementation and Integration Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe for evaluating the providers of Oracle implementation and integration services.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle implementation and integration services to enterprises in Europe and shows how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the market's competitive landscape.

This quadrant evaluates service providers' expertise in Oracle implementation and integration services, focusing on their ability to develop tools and components for effective deployments. Oracle's mission is to empower enterprises with innovative technology solutions, such as Oracle Fusion Cloud Applications and Oracle Cloud Infrastructure (OCI) while leveraging emerging technologies such as AI, ML, blockchain and IoT to create new opportunities. The European market for Oracle implementation and integration

services is poised for growth, driven by increasing demands for digital transformation. Oracle offers comprehensive solutions that enhance business processes and CX, and leading Oracle partners provide extensive implementation and integration services that align Oracle solutions with enterprise goals and ensure secure cloud migrations.

The evaluation encompasses providers' capabilities in designing implementation plans, data migration strategies, process modernization and deployment across various environments (on-premises, cloud, hybrid), and their competencies in managing integrations between Oracle solutions and third-party systems, ensuring that all deployed Oracle products work seamlessly together.



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



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

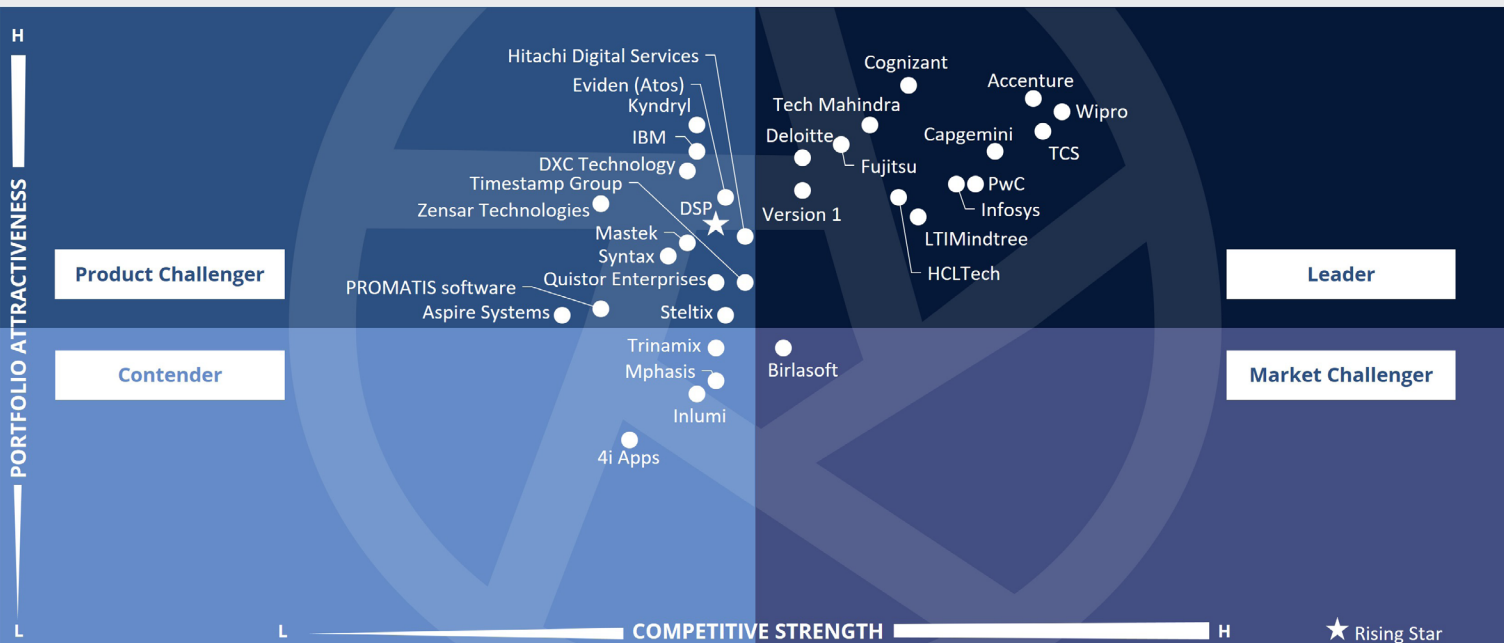


Marketing and sales leaders should read this report to assess service partners and improve software integration and decision-making.



Technology leaders should read this report to stay updated on Oracle's latest trends, features and integration insights.





This quadrant evaluates providers on their ability to **design** comprehensive and secure Oracle **implementation** and **transformation** strategies, modernize legacy systems and **integrate** Oracle applications **across** diverse hybrid cloud and multicloud environments.

Roman Pelzel

Implementation and Integration Services

Definition

This quadrant evaluates service providers' expertise in Oracle solution implementation and integration and examines their ability to develop accelerators and components that aid in effective deployments.

Providers' implementation capabilities cover designing the entire implementation plan, creating data migration strategies, modernizing processes, deploying solutions on-premises or on the cloud (hybrid and multicloud), ensuring data security and developing governance protocols.

Integration capabilities encompass the design, deployment and management of integrations between Oracle solutions, third-party systems and custom applications across various environments, including cloud, on-premises and hybrid setups.

The scope of this study considers that, in most cases, clients may have deployed various products from the Oracle portfolio, which need to coexist and complement one another.

Eligibility Criteria

1. **Use of predefined solutions, templates and expertise:** Experience in using prebuilt solutions and accelerators for successful Oracle stack deployment
2. **Integration and migration services:** Competencies in application development and migration, database migration and modernization, data migration, workload migration and testing services across the Oracle stack
3. **Maintenance and support capabilities:** Proficiency in installations, upgrades, new feature/module release management, migration, patching and lifecycle management
4. **Deployment speed:** Ability to quickly design solutions based on reference architecture and deploy new modules and enhancements
5. **Enabling technologies:** Expertise in using APIs, automation, data science and AI and ML to drive implementations and integrations with major hyperscalers



Implementation and Integration Services

Observations

This quadrant highlights a rapidly evolving landscape. Providers emphasize hybrid and multicloud strategies to align with enterprise demands for flexibility and scalability. Key trends include the adoption of prebuilt accelerators and templates to expedite Oracle solution deployments, particularly for cloud and hybrid environments. They increasingly leverage AI and automation to streamline migration processes and enhance integration efficiency. Market demands for cross-platform compatibility and secure data transfer drive innovation in integration capabilities, with providers focusing on seamless transitions between Oracle solutions and third-party systems.

Leading providers differentiate themselves through expertise in industry-specific solutions, with accelerators tailored to address vertical needs. They are prepared to meet the rising demand for real-time analytics integration with strong OCI data management and governance capabilities.

Rising Stars offers leading capabilities. Their ability to adapt quickly and deliver high-impact outcomes positions them as future leaders.

Product Challengers bring highly attractive portfolios and deep technical expertise in certain Oracle applications or integration solutions but have limited competitive strength in local markets.

Market Challengers offer consistent, reliable services, a strong local presence and well-established operational models. They can progress by introducing advanced tools, accelerators or innovative frameworks.

Contenders require significant investments in local strength and technology innovation, scalability and industry-specific accelerators to move beyond their current market position.

From the 66 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture's global expertise in Oracle implementations is backed by over 30 years of partnership with Oracle. Coupled with its advanced accelerators, such as myConcerto and myNav, the company supports clients in building future-ready digital cores using Oracle solutions.

Capgemini

Capgemini delivers rapid and scalable Oracle implementations through its ICON framework for hybrid and multicloud integrations. The company's industry-specific solutions and innovation-driven frameworks, such as ADMnext, which embeds AI, ML and automation, set it apart.

cognizant

Cognizant accelerates Oracle Cloud transformations in Europe by leveraging its Cloud Central Integration platform. Solutions such as Healthcare in a Box and the Franchise Collaboration Hub underline the company's ability to deliver rapid and reliable Oracle implementations.

Deloitte.

Deloitte stands out in scalable Oracle implementations with its ELEVAT framework and SuperLedger™, which accelerate deployment timelines and ensure multicloud adoption. The company embeds GDPR compliance and ESG frameworks, making it a strong Oracle partner in Europe.

Fujitsu uvance

Fujitsu's CloudScale framework simplifies Oracle implementations with automated workflows and tailored templates. A strong focus on hybrid integration and multicloud orchestration, supported by its localized expertise, ensures smooth transitions for enterprises in Europe.

HCLTech

HCLTech simplifies Oracle implementations and integrations across SaaS and PaaS ecosystems with its automation-focused tools and accelerators. The company's strong focus on real-time analytics and ESG compliance makes it a trusted partner for enterprises in Europe.



Implementation and Integration Services



Infosys' comprehensive Oracle Cloud Suite, with over 6,000 curated artifacts and proprietary solutions such as EzPatch, underscores the company's strong position in delivering fast and efficient implementations in complex multicloud and vertical environments across Europe.



LTIMindtree's expertise in Oracle solutions spans accelerated data migration with its One-Click Migration solution, SaaS optimization via Active Cost Control and industry-focused solutions that deliver tailored Oracle-empowered digital transformations in Europe.



PwC streamlines Oracle deployments using its Concourse Delivery Platform and proprietary accelerators such as OpKey. Preconfigured industry solutions with strong automation underline the company's expertise in driving seamless Oracle integrations for businesses in Europe.



TCS leverages accelerators such as Crystallus™ and DataSure to drive Oracle deployments, ensuring quick rollouts and accurate data migrations. Its regional strengths and integration capabilities empower businesses in Europe with tailored and efficient Oracle solutions.



Tech Mahindra's agile InStream methodology and accelerators, such as RACE for streamlined data migration, ensure fast, outcome-focused Oracle transformations. The company's Oracle expertise in multicloud and legacy environments makes it a trusted partner in Europe.



Version 1 stands out in Oracle migrations with its Cloudbridge accelerator and a strong workforce of Oracle-certified Experts. The company is a trusted partner with a proven track record of successfully delivering complex Oracle-based transformations in Europe.



Wipro focuses on accelerator-driven efficiency, using advanced solutions such as its Jumpstart Process Maps to streamline Oracle implementations. Its AI-first ecosystem and multicloud expertise ensure tailored and scalable solutions for diverse industries in Europe.

DSP

DSP's (Rising Star) expertise in Oracle Azure Interconnect and OCI enables seamless multicloud integrations. With prebuilt frameworks and fixed-price packages, the company delivers rapid, tailored Oracle transformations in Europe.



DSP



"DSP stands out for its ability to manage complex Oracle ecosystems. By leveraging its Oracle Azure Interconnect and rapid cloud migrations, DSP ensures seamless transitions, delivering scalable, high-performance Oracle multicloud environments."

Roman Pelzel

Overview

DSP is a prominent provider of Oracle implementation and integration services, known for its technical excellence and customer-centric approach. With over 250 employees and operations across the U.K. and North America, DSP specializes in Oracle database management, OCI and engineered systems. The company has achieved over 1,700 technical certifications and has received numerous awards, including the Business Impact and Innovation Awards at Oracle CloudWorld 2024. DSP focuses on delivering tailored solutions for Oracle environments while supporting hybrid and multicloud strategies at scale.

Strengths

Comprehensive implementation

expertise: DSP has mastered the full lifecycle of Oracle solution implementation, from designing tailored architectures to executing seamless migrations. Its technical teams specialize in deploying Oracle applications on OCI, integrating hybrid cloud environments and modernizing legacy systems. Notable projects demonstrate DSP's ability to handle large-scale, complex implementations, making DSP a valued enterprise partner.

Leading integration capabilities: DSP's expertise in Oracle Azure Interconnect positions it as an expert in multicloud integrations. By enabling seamless connectivity between OCI and Microsoft Azure, DSP delivers high-performance, scalable solutions that exemplify its ability

to address multicloud challenges with advanced solutions. DSP's customer-first approach is evident in its Elite Support services, which provide tailored, high-touch managed services.

Accelerated deployments with prebuilt

frameworks: DSP leverages prebuilt frameworks, accelerators and proprietary tools to speed up deployments. Its *Boost Your Cloud* offerings, which include fixed-price and time-boxed packages for OCI implementations, empower enterprises to adopt cloud environments quickly and efficiently. These offerings simplify processes such as data migration, application modernization and OCI onboarding.

Caution

DSP is recognized as a Rising Star. Its strong Oracle specialization is a key strength; expanding expertise in non-Oracle technologies would reinforce its ability to support enterprises with hybrid ecosystems. DSP should accelerate its efforts to align its growing expertise with a broader global presence.





Managed Services

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe for evaluating the providers of Oracle managed services.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle managed services to enterprises in Europe and shows how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the market's competitive landscape.

This quadrant evaluates specialized service providers offering turnkey, managed services for the entire Oracle portfolio, including cloud applications, Oracle Cloud Infrastructure (OCI), software and hybrid systems based on Agile, DevOps and IT infrastructure library (ITIL) frameworks. These MSPs assist organizations in managing and optimizing Oracle technology, enabling them to focus on core operations while receiving expert support. The evaluation considers service models (onsite, offsite and hybrid), training programs and partnerships with technology providers. It also assesses MSPs' expertise in handling complex multicloud

environments and their ability to tailor solutions to meet specific business needs. As demand for managed services in Europe rises, organizations seek enhanced IT efficiency and reduced costs. MSPs provide essential services such as hosting, integration and security while ensuring regulatory compliance. However, careful evaluation of MSPs is crucial, as variations in quality and terms can impact customer satisfaction and ROI.



Sourcing and procurement managers

should read this report to develop a clear understanding of the Oracle MSP landscape, facilitated by the comparative analysis of different providers.



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

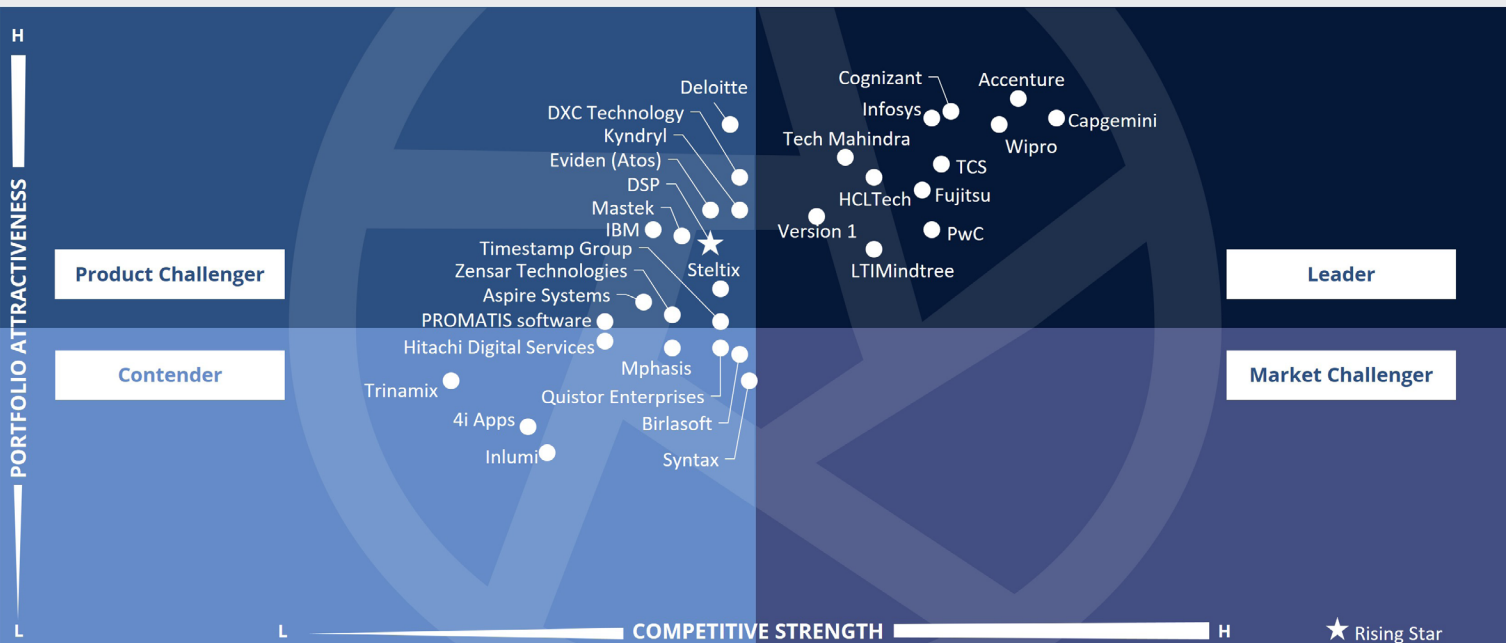


Delivery leaders managing key European accounts and focusing on CX and net promoter score (NPS) should read this report to understand how Oracle MSPs maintain credibility and excellence.



Technology leaders should read this report to stay updated on Oracle's latest trends, features and integration insights.





Providers in this quadrant specialize in turnkey solutions for the **ongoing management** and **optimization** of Oracle technologies. They empower enterprises by delivering **expert support, strategic advice** and **proactive service management** to ensure efficient operations.

Roman Pelzel

Definition

This quadrant analyzes specialized service providers that offer turnkey, managed services (based on Agile, DevOps and ITIL frameworks), covering the entire Oracle portfolio- Cloud Applications, OCI, Software and Hybrid systems.

These MSPs serve as partners in managing and optimizing Oracle technology, allowing organizations to focus on core operations while receiving expert support and strategic advice.

MSPs should provide onsite, offsite or hybrid service models and offer robust training programs on Oracle solutions. In addition, providers must maintain strong partnerships with technology providers and third-party vendors, covering a broad range of Oracle solutions.

MSPs should also have expertise in managing complex multicloud customer environments and be capable of addressing clients' key business requirements by leveraging their expertise in designing, deploying and optimizing customized solutions.

Eligibility Criteria

1. **Oracle stack support:** Expert in managing configurations, administrations and data management reporting security and applications
2. **Change and release management:** Expert in managing Oracle change and release processes, reducing errors, automating tasks, and optimizing functions
3. **Infrastructure management:** Experience in provisioning and configuring OCI resources (VMs, storage and networking), monitoring performance, capacity planning, scaling and ensuring disaster recovery and business continuity
4. **Application maintenance:** Experience in delivering Oracle maintenance support, developing technical solutions and maintaining a bug-free environment
5. **Database support:** Expertise in administering, upgrading, patching and optimizing Oracle databases, ensuring high availability and implementing DR plans
6. **Cost optimization:** Expertise in cost analysis, rightsizing resources and identifying cost-saving opportunities



Managed Services

Observations

The demand for Oracle managed services in Europe has surged due to the increasing complexity of hybrid and multicloud environments.

Clients prioritize providers with robust automation capabilities, AI-driven optimization tools and advanced cost-management solutions. Enterprises increasingly seek service providers with tailored localization capabilities to address regulatory compliance and operational nuances specific to markets in Europe. High availability, disaster recovery planning and consistent scalability are non-negotiable criteria for most organizations.

A shift toward ESG-aligned services has been observed, with some providers embedding sustainability metrics (e.g., carbon reduction) within their managed services frameworks.

Leaders in this quadrant demonstrate expertise in automated operational workflows, multicloud integrations and proactive issue resolution. Strong partnerships with Oracle and other hyperscalers significantly enhance their ability to manage cross-platform workloads.

They specialize in hybrid cloud and multicloud setups, offering seamless transitions between on-premises systems and cloud environments. They leverage advanced analytics to identify inefficiencies, optimize Oracle workloads and provide actionable insights into cost-saving opportunities. These providers stand out for their automation-first approaches, integrating AI and ML to predict and resolve issues before they impact operations.

Product Challengers have attractive portfolios but limited local reach or specialization in multicloud and hybrid environments.

Contenders often excel in niche areas but require broader offerings and strategic collaborations to compete effectively.

From the 66 companies assessed for this study, 32 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture's Oracle managed services excel with FinOps integration for cost-effective cloud operations and proactive governance. The company's expertise in complex hybrid and multicloud environments enables businesses to scale efficiently and innovate continuously.

Capgemini

Capgemini leverages 25 years of Oracle partnership and excels in managed services with industry-specific solutions. It uses frameworks such as ADMNext and AI-powered tools to ensure efficient, scalable and cost-effective operations for dynamic markets in Europe.

cognizant

Cognizant empowers Oracle environments with AI-enhanced lifecycle management and platforms such as iCMP and AppLens to simplify hybrid cloud operations, ensuring secure integrations, SLA compliance and enhanced scalability tailored to enterprises in Europe.

Fujitsu Uvance

Fujitsu integrates AI and automation in its CloudScale Framework to optimize Oracle workloads and enhance its end-to-end lifecycle management. Clients in Europe benefit from over 30 years of Oracle expertise in delivering managed services in complex environments.

HCLTech

HCLTech has been recognized by Oracle as an Oracle Cloud Managed Service provider and leverages proprietary AI-powered tools such as DRYICE iAutomate and DRYICE iControl to deliver tailored and scalable solutions with real-time monitoring and optimized workloads.

Infosys

Infosys enables Oracle managed services with proactive monitoring and business KPI alignment, leveraging its proprietary solutions, such as LEAP for Oracle and its Business Command Center, to ensure operational efficiency and seamless transitions for clients in Europe.



Managed Services



LTIMindtree's expertise of over two decades and its focus on automation-first operations, AI tools and the Digital Integration Command Center empowers enterprises in Europe with tailored Oracle managed services for large-scale, complex and multicounty deployments.



PwC's tailored managed services for Oracle are AI-embedded, ensuring GDPR compliance, multicloud integration and operational excellence across Europe. Its Concourse Delivery Platform automates critical processes and optimizes resource usage for superior performance.



TCS excels in Oracle managed services with comprehensive stack management, AI-driven cost optimization and agile and DevOps delivery methodologies. European businesses benefit from seamless operations, optimized workloads and compliance in dynamic hybrid environments.



Tech Mahindra's AI-powered tools, including TACTiX and GAiA, enhance its Oracle managed services with predictive insights for efficient and scalable operations. The company's expertise makes it a leading partner for tailored hybrid and multicloud environments in Europe.



Version 1's Oracle managed services leverage its comprehensive ASPIRE Managed Service Model and the advanced ENGAGE platform with advanced AI and automation. Value-level agreements and carbon-level agreements attract enterprises seeking innovation and efficiency.



Wipro delivers Oracle managed services through its Thrive in Cloud framework, combining ESG-aligned solutions, AI-driven tools and proactive optimization to enhance efficiency, reduce costs and support seamless Oracle transitions for diverse industries across Europe.

DSP

DSP's (Rising Star) Elite Support model combines proactive Oracle management, multicloud expertise and strategic advisory, positioning it as a trusted provider for secure and efficient operations tailored to critical Oracle workloads.



DSP



"DSP's managed services impress with its high-performance support through its Elite Support model, multicloud expertise and proactive management for seamless operations, offering customers peace of mind for their mission-critical Oracle workloads."

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 North America, DSP operates globally with an around-the-clock support model. The company has achieved over 1,700 technical certifications and has received numerous awards, including the Business Impact and Innovation Awards at Oracle CloudWorld 2024. Its Elite Support framework, multicloud expertise and focus on client-centric innovation have earned it recognition as a trusted Oracle Managed Services provider.

Strengths

Comprehensive managed services

framework: DSP's Elite Support model is tailored to provide end-to-end Oracle managed services, including proactive monitoring, incident resolution and performance optimization. This model extends beyond operational support to include strategic advisory services, ensuring continuous innovation and alignment with client goals. DSP's commitment to operational excellence is reflected in customer references attesting a 97 percent first-time resolution rate for database support and 100 percent first-time resolution for application support.

Oracle Cloud and multicloud

expertise: DSP's excellence in Oracle Cloud Infrastructure (OCI) managed services and expertise in Oracle Azure Interconnect position it as a prominent player in multicloud management. By integrating Oracle workloads with Azure and other cloud platforms, DSP ensures flexibility, scalability and cost efficiency for its clients. Its client-centric approach fosters long-term partnerships and establishes DSP as a trusted advisor for Oracle Managed Services.

Security-first approach: DSP strongly emphasizes security, implementing robust security dashboards and deploying Oracle's native tools, such as Cloud Guard and Data Safe, across all managed environments. This proactive approach to security helps mitigate risks and ensure compliance for critical Oracle workloads.

Caution

DSP is positioned as a Rising Star and offers superior managed services with support that may be better suited to large companies. DSP could consider diversifying its managed services offerings to gain new wins and address the needs of smaller enterprises or budget-conscious organizations.





OCI Solutions and Capabilities

OCI Solutions and Capabilities

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe for evaluating the providers of Oracle OCI solutions and capabilities.

In this quadrant, ISG highlights the current market positioning of providers offering Oracle solutions to enterprises in Europe and shows how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the market's competitive landscape.

This quadrant evaluates service providers with specialized expertise in aiding businesses in adopting and maximizing Oracle Cloud Infrastructure (OCI) and its comprehensive suite of cloud services. It highlights providers' capabilities in modernizing IT and facilitating digital transformation through OCI offerings, particularly in the European market, where digital initiatives drive demand for cloud solutions. The assessment focuses on providers' proficiency in IaaS and PaaS, showcasing their ability to design and manage complex, industry-specific environments while

complying with regulations such as GDPR. The key aspects include cloud migration strategies for multicloud and hybrid setups, system integration and adherence to security standards. It also examines the capabilities in OCI data management, analytics, cloud-native application development, customized solutions and enhancements in OCI's Generative AI (GenAI) services are examined. Providers should read this report to understand competitive positioning, identify best practices and address the unique challenges in the European market leveraging OCI.



Operations leaders should read this report to gain insights into various service providers' operational efficiencies and understand their capabilities in effectively managing cloud environments.



Delivery leaders managing key European accounts and focusing on CX and net promoter score (NPS) should read this report to gain insights into how various service providers approach OCI adoption and digital transformation. This will aid them in overseeing the effective implementation and delivery of cloud solutions.

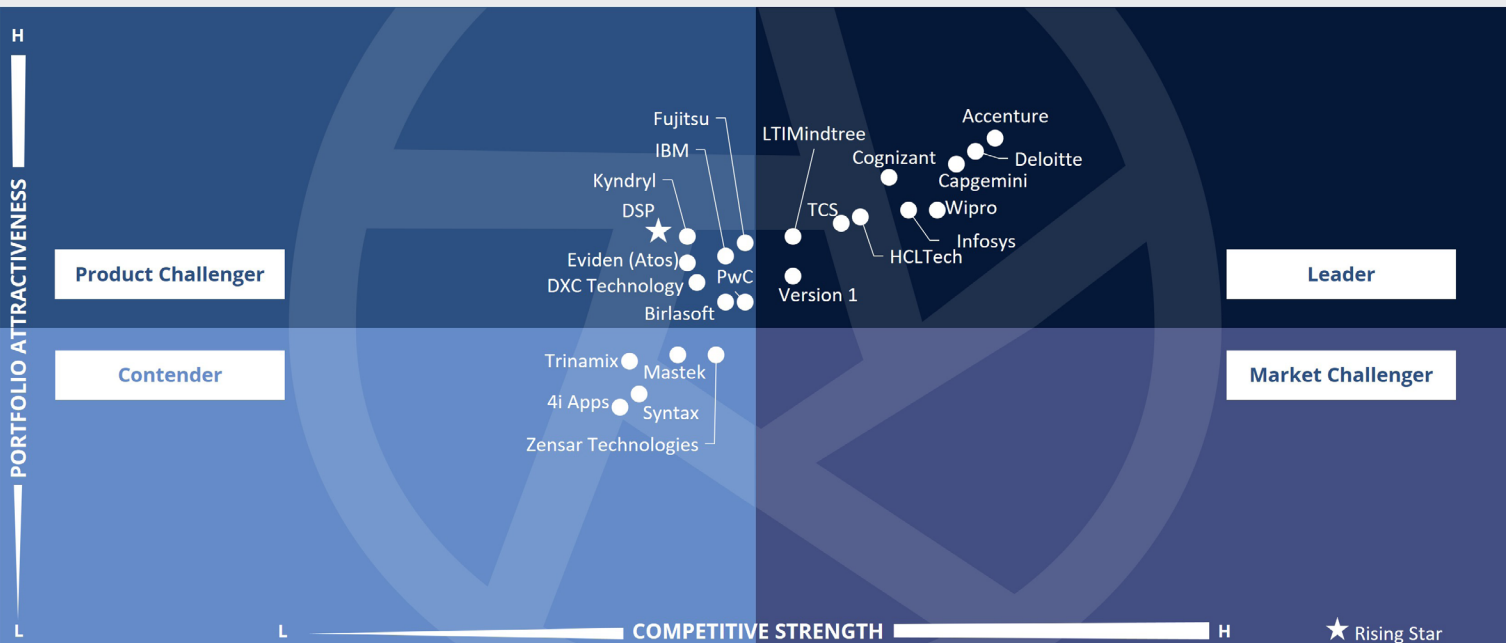


Governance and compliance officers should study this report to gain insights into the Oracle MSP landscape and evaluate providers' capabilities in maintaining security and compliance standards.



Technology leaders should read this report to evaluate how different service providers align with their initiatives for modernizing IT and optimizing cloud operations, ensuring they stay informed about the strategic direction of their organizations.





This quadrant evaluates providers' expertise to **drive digital transformation** by enabling businesses to leverage **AI-driven, secure, scalable innovations** and **tailored industry solutions** based on the latest **Oracle Cloud Infrastructure (OCI)** capabilities.

Roman Pelzel



OCI Solutions and Capabilities

Definition

This quadrant assesses service providers' with specialized expertise and solutions that help businesses effectively adopt and leverage OCI's comprehensive suite of cloud services. Their capabilities include modernizing IT, optimizing cloud operations and facilitating digital transformation through OCI offerings. These providers stand out for their OCI IaaS and PaaS expertise, with proven capabilities in designing and managing complex, industry-specific environments.

They will be assessed on their cloud migration approaches, including multicloud and hybrid setups, system integration and compliance with security and governance standards.

Capabilities in OCI data management, analytics, cloud-native application development and customized industry solutions will also be evaluated.

For AI, providers will be assessed on the basis of their experience and expertise in complementing OCI's GenAI services to drive innovation.

Eligibility Criteria

1. **Mastery of OCI architecture:** Expertise in **OCI architecture, deployment and management** across infrastructure and platform services
2. **Strategy for cloud migrations:** Proven experience in **cloud migration strategies**, including multicloud and hybrid cloud deployments
3. **Seamless integration:** Ability to **integrate OCI with existing enterprise systems** and third-party solutions
4. **Data-driven insights:** Proficiency in utilizing **OCI's data management services** to drive data-driven insights and business intelligence
5. **Security and compliance assurance:** Expertise in ensuring **security, governance and compliance** within OCI environments
6. **Innovation with OCI:** Ability to **design, develop and deploy** cloud-native applications using OCI's microservices, Kubernetes and serverless computing offerings
7. **Industry-specific solutions:** Ability to offer **tailored OCI solutions** to address **industry-specific** needs
8. **Smart optimization:** Use of automation, AI and ML tools, **GenAI** and cost-optimization strategies



OCI Solutions and Capabilities

Observations

Oracle Cloud Infrastructure (OCI) is a comprehensive suite of cloud services offering high-performance computing, storage, networking and tools for building and deploying AI-empowered cloud-native applications and services. In today's digital landscape, OCI is pivotal in enabling businesses to modernize their IT infrastructure and drive innovation.

Designed to support enterprise-grade workloads, OCI stands out for its ability to handle complex, mission-critical applications with great scalability, reliability and cost-efficiency. Its multicloud and hybrid deployment options, enhanced security features and seamless integration capabilities make it a preferred choice for enterprises navigating digital transformation.

This newly introduced quadrant captures the evolution of OCI solutions, emphasizing providers that excel in delivering tailored, industry-specific innovations and AI-powered tools. The focus has shifted from basic infrastructure services to enabling enterprise-specific transformations, underscoring OCI's critical role in aligning technology with

business objectives. With the integration of Oracle's GenAI services into OCI, providers offer enhanced automation and analytics to drive real-time insights and decision-making.

Leaders have comprehensive expertise in OCI's IaaS and PaaS capabilities, ensuring secure and scalable deployments. They excel at integrating OCI and multicloud strategies to cater to industry-specific needs. These providers prioritize compliance and governance within European legal frameworks and data sovereignty requirements. Their expertise in optimizing OCI environments ensures cost-effective and agile digital transformations for enterprises.

From the 66 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture empowers European businesses with advanced OCI solutions, supported by significant global investments in AI. Tailored industry solutions, advanced governance frameworks and the company's deep multicloud expertise enable seamless digital transformation.

Capgemini

Capgemini leverages OCI to drive innovation with solutions such as Intelligent Restaurant Operations, enabling better inventory management and predictive staffing. With deep expertise in migrations and automation, the company delivers scalable and cost-efficient outcomes.

cognizant

Cognizant accelerates OCI adoption with its Bluebolt™ innovation movement, integrating industry solutions and AI-powered automation. Its workforce empowerment programs and Oracle certifications drive scalable, compliant and AI-enhanced digital transformation at scale.

Deloitte.

Deloitte enhances OCI adoption with its Cloud Sovereignty Framework for GDPR compliance and AI Factory as a Service for fast AI workflows, delivering secure, scalable and ESG-aligned cloud solutions and operations tailored to European enterprise needs.

HCLTech

HCLTech's OCI expertise, highlighted by its Oracle Cloud Managed Service Provider status, GenAI services, GenAI Playground, cloud-native tools and Advantage SPADE platform, enables the delivery of compliant, secure and innovative digital transformations across Europe.

Infosys

Infosys, recognized by Oracle as a 2024 Continental Europe Innovation Partner, excels in OCI adoption with Cobalt's extensive blueprint library and platforms such as Topaz. The company's tailored solutions and expertise in integrating OCI across hyperscalers stand out.



OCI Solutions and Capabilities



LTIMindtree combines AI innovation and OCI expertise with Infinity for OCI, accelerating migrations and providing tailored industry solutions with preconfigured blueprints. The company's AI-Native Oracle Cloud Vision underscores its leading ambition in this field.



TCS delivers comprehensive, industry-specific OCI solutions by leveraging advanced frameworks, such as Crystallus™, for public sector transformations. The company's AI-powered predictive analytics and fraud detection tools enhance operational efficiency across industries.



Version 1 excels in OCI with its AI Labs, accelerating AI-empowered business innovations with predictive insights and recommendation systems while embedding sustainability through Carbon Level Agreements for greener, cost-efficient cloud transformations in Europe.



Wipro delivers advanced OCI solutions supported by its Digital Cloud Command Centre and AI-powered accelerators, such as InspectAI, the OCI Assessment Tool and Config Bots, to deliver tailored solutions with automation and predictive analytics across sectors in Europe.

DSP

DSP (Rising Star) accelerates OCI adoption with its Boost Your Cloud frameworks and enhanced multicloud integrations through its expertise in Oracle Azure Interconnect. The company's tailored configurations and secure OCI landing zones stand out.



DSP



“DSP emphasizes sustainability with Oracle Carbon Assessments. Its advanced OCI solutions include tailored approaches, such as *Boost Your Cloud*, which accelerate migrations and ensure smooth transitions to Oracle’s advanced cloud infrastructure.”

Roman Pelzel

Overview

DSP, headquartered in the U.K., is a recognized OCI solutions provider specializing in cloud migrations, multicloud integrations and AI-driven innovation. DSP expanded its global footprint by acquiring Canada-based Oracle-certified cloud solution provider Eclipsys in 2023, expanding its global footprint and enhancing its OCI capabilities. DSP now operates with approximately 250 employees across the U.K., Ireland and North America. The company’s expertise in OCI spans advanced workloads, security and performance optimization, positioning it as a trusted advisor for organizations seeking to modernize and scale their IT environments.

Strengths

Portfolio enhancements and global reach:

DSP’s acquisition of Eclipsys, a Canada-based leader in Oracle Cloud solutions, reinforced its North American presence and expanded its global capabilities in managing, optimizing and modernizing enterprise-grade Oracle Cloud Infrastructure. Eclipsys’ expertise aligns with DSP’s growth strategy and customer-centric approach, capitalizing on transformational requirements through AI, ML and DevOps innovations.

Smooth multicloud integration and innovations:

DSP is a leader in integrating OCI with other cloud platforms through the Oracle Azure Interconnect. This expertise enables clients to deploy workloads seamlessly across Oracle and Microsoft environments, delivering high-performance

and scalable solutions. Its Boost Your Cloud frameworks streamline OCI adoption by providing fixed-price, time-boxed migration packages. These packages include tailored configurations, such as secure OCI landing zones and performance-optimized architectures, ensuring rapid and risk-free cloud transitions.


Security-first OCI deployments:

DSP embeds robust security practices in its OCI solutions, utilizing tools such as Cloud Guard, Data Safe and vulnerability scanners. DSP’s proprietary security dashboards ensure proactive monitoring and compliance, making it a reliable partner for handling critical Oracle workloads.

Caution

DSP, named a Rising Star, is dedicated to ensuring that Oracle environments run seamlessly. It provides strategic consulting services that drive long-term innovation and value for its customers. DSP should expand its presence in Europe to attract businesses within the EU and secure new wins for sustainable growth.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – Oracle Cloud and Technology Ecosystem study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of December 2024 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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



Author & Editor Biographies

Lead Author



Roman Pelzel
Assistant Director & Principal Analyst

Roman Pelzel is a thought leader and trusted advisor with 30 years of experience leading and facilitating outcome-centric digital workplace strategies and technology transformations across different industries, including cloud adoption and ITIL-based service management.

As a Principal Analyst and Advisor at ISG, he is dedicated to transforming digital work in the DACH region. He frequently speaks on human-centric digital work, employee experience and digital experience management.

He is presently contributing as a Lead Analyst and Author with the ISG Provider Lens for Future of Work, Oracle Ecosystem and Salesforce Ecosystem.

Enterprise Context and Overview Author



Sandhya Kattimani
Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over six years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in competitive intelligence, customer journey analysis, battle cards, market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, highlighting

regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other ad hoc business research assignments.



Author & Editor Biographies

Study Sponsor



Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

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.



iSG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

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

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iSG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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