ISG Provider Lens™

ANNUAL PLAN

2021

imagine your future®

About ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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Message from the Global Head of IPL

In 2020, we have all experienced some of the most challenging and unprecedented circumstances of our careers and even in the histories of many of our companies. At the same time, we have seen some of the biggest movements towards cloud and digital adoption within enterprise client environments as well as the most impressive examples of support and innovation from the service provider and vendor communities. All of you have been true heroes and have defined a new level of partnership and collaboration with each other and with your clients.

The impacts of this year on ISG Provider Lens, have been difficult but ultimately positive. We have learned to work with all of you in new and innovative ways. Virtual Analyst Days have enabled more of our lead analysts to participate, which has resulted in improved understanding of your capabilities and differentiations. They have not been able to replace the personal connections that we have come to depend upon. We have continued to see a tremendous growth in the number of webinars, workshops, whitepapers, briefing notes, and custom research we are doing. The most positive change we have experienced in 2020 has been the increased participation from ISG Advisors in each of our IPL studies. Many of you have mentioned the improvements in quadrant design, survey questions, briefings and final report output and we attribute many of those changes to our advisor colleagues.

We are making several improvements to the content of our reports in 2021. We will be incorporating enterprise buying behavior and market trends into each of the quadrant reports. We will more effectively leverage output from the Star of Excellence program into our evaluations and leader pages. And we will incorporate benchmarking data into our Executive Summaries. All this information is proprietary and uniquely available within ISG.

Our program is also growing to better meet the needs of ISG Advisors and the various industries and service lines they are exposed to. We will increase the number of studies from 23 to 33, many of the new additions are either Industry or Ecosystem type studies. We will also increase our penetration into our core markets: Global, Europe, US, Germany, Australia, UK, France, Brazil, Switzerland, and the Nordics. We are not adding new markets in 2021.

Finally, we are growing our staff and specifically our sales team. We recently hired Lesley Ahern in the US to partner with Simran Arora. We will be making additional hires in Germany, the UK and other parts of Europe. I will distribute an organizational chart at the beginning of the year to introduce you to the full sales team as well as my leadership team.

We are extremely grateful for our relationships with so many of you, your feedback and pushback help us make continuous improvements. We hope to create and grow our relationships with many more of you in 2021. I wish you, your families, and your firms a happy holiday season and a safe, healthy and prosperous New Year.

Jan Erik Aase

(Partner and Global Head – IPL)

Research Calendar 2021

2021 Studies	Quarter	Launch Month	Publish Month	Archetype	Global	Europe	US	Germany	Switzerland	UK	Nordics	France	Brazil	Australia	North America
Salesforce Ecosystem	Q1	Oct 2020	Apr 2021				✓	✓					✓		
Microsoft Ecosystem		Oct 2020	Apr 2021				✓	✓					✓	✓	
Enterprise Service Management - ESM (CHANGED)		Oct 2020	Apr 2021				✓	✓							
ServiceNow Ecosystem (NEW)		Oct 2020	Apr 2021				✓	✓					✓		
Procurement BPO (NEW)		Oct 2020	Apr 2021		✓										
Procurement Platforms (NEW)		Oct 2020	Apr 2021		✓										
Retail Industry (NEW)		Oct 2020	Apr 2021				✓			✓					
Mainframe Services (NEW)		Oct 2020	Apr 2021				✓								
Network - Software Defined Solutions and Services	Q2	Dec 2020	May 2021	✓			✓	✓		✓	✓			✓	
SAP - HANA & Leonardo Ecosystem		Feb 2021	July 2021	✓			✓	✓		✓	✓	✓	✓		
Private Hybrid Cloud - Solutions and Services		Jan 2021	July 2021	✓			✓	✓	✓	✓	✓		✓		
Cyber Security - Solutions and Services		Feb 2021	July 2021				✓	✓	✓	✓	✓	✓	✓	✓	
IoT Services		Feb 2021	July 2021		✓	✓	✓								
Enterprise AaaS Platforms		Feb 2021	July 2021		✓	✓	✓								
Utilities/Energy Industry (NEW)		Jan 2021	July 2021												✓
Marketing Technology - Martech (NEW)		Feb 2021	July 2021										✓		

Research Calendar 2021

✓ New Geographies

2021 Studies	Quarter	Launch Month	Publish Month	Archetype	Global	Europe	US	Germany	Switzerland	UK	Nordics	France	Brazil	Australia	North America
Cloud Native/ Container	Q3	Apr 2021	Aug 2021		✓	✓	✓								
Contact Center/ Customer Experience (CHANGED)		Mar 2021	July 2021	✓	✓	✓	✓						✓	✓	
Contact Center as a Service (NEW)		Mar 2021	July 2021	✓	✓	✓	✓								
Next Gen ADM - Services		Apr 2021	Sep 2021	✓			✓	✓		✓	✓		✓		
Digital Workplace - Solutions and Services		Apr 2021	Sep 2021	✓			✓	✓	✓	✓	✓		✓	✓	
Finance and Accounting (FAO) BPO Services		Mar 2021	Aug 2021	✓	✓		✓								
Banking Industry BPO Services		Apr 2021	Sep 2021				✓	✓	✓	✓	✓				
Banking Technology/Platforms		Apr 2021	Sep 2021				✓	✓	✓	✓	✓				
AWS - Ecosystem Partners	Q4	Jun 2021	Nov 2021				✓	✓					✓	✓	
Digital Business Transformation		Jun 2021	Nov 2021	✓			✓	✓		✓	✓		✓	✓	
Public Cloud - Solutions and Services		Jun 2021	Nov 2021	✓			✓	✓	✓	✓	✓	✓	✓		
Analytics - Solutions and Services		July 2021	Dec 2021				✓	✓					✓		
Manufacturing Industry Services	Q4	July 2021	Dec 2021				✓	✓							
Insurance BPO Industry Services		July 2021	Dec 2021	✓	✓	✓	✓								
Intelligent Automation - Solutions and Services		Jun 2021	Nov 2021				✓	✓		✓	✓		✓		
Healthcare Industry (CHANGED)		July 2021	Dec 2021				✓	✓					✓		
LifeSciences Industry (NEW)		July 2021	Dec 2021		✓	✓	✓						✓		

Topic Descriptions

Analytics – Solutions and Services

Overview:

Data analytics that allows increased and early insights into customer experiences, products and service adoption is paramount to building resilient and future-ready businesses. Business leaders are demanding analytics reporting solutions that can deliver insightful visualizations, with capabilities to generate real-time reports across different platforms and devices.

Organizations are increasingly focusing on gathering, storing and analyzing data from varied sources. However, they lack the discipline and the expertise to build effective statistical models, leveraging strong scientific processes. This has led to the increased demand for data scientists capable of discerning complex business problems as well as extracting actionable insights and meaningful conclusions from large volumes of organizational data.

Business leaders struggle with traditional data-warehousing structures that lack the necessary scalability and processing capabilities, given the ever-increasing data volumes. Organizations rely on specialized data engineering service providers with capabilities to implement the necessary infrastructure to achieve efficient data pipelines and scalable data lakes that drive effective data analytics.

As an increasing number of businesses shift to digital operations, the cloud has become the inevitable investment option, which, in turn, has led to a demand for service providers with strong cloud consulting and integration capabilities and with partnerships with leading cloud providers. In addition, the growing dependence of organizational functions on data analytics, to improve operations and achieve business metrics, has warranted self-service analytics solutions. The drive toward cloud is also driving the need for platform-based solutions, where analytics is provided as-a-Service.

Also, the sheer volume of data also leads to continuous operational challenges in governance and management of data for organizations. Therefore, expertise in data handling and data lifecycle management are gaining importance as business decisions are increasingly relying on data analytics.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Data Science Services
- Data Engineering Services
- Data Infrastructure and Cloud Integration Services
- Data Lifecycle Management Services
- Self-Service-Analytics and BI Platforms As-a-Service Analytics Reporting Solutions

AWS – Ecosystem

Overview:

Enterprises strive for flexibility (or elasticity), innovation, security, and most importantly, cost reduction, with fewer commitments and owned assets. Optimizing digital technologies is driven by operational expenditure (OPEX) instead of capital expenditure (CAPEX). This shift, along with the COVID-19 pandemic and other trends such as the need for automation, standardization and seamless operations to enforce collaboration is driving the adoption of the Anything-as-a-Service (XaaS) model. Cloud providers such as Amazon Web Services (AWS) have benefited from the situation because of their ability to easily offer scalable infrastructure.

As AWS continues to expand its presence and influence as a global provider of IT-as-a-Service, the AWS Partner Network (APN) is, correspondingly, expanding as providers of technologies and services are leveraging AWS to develop and deliver an increasing array of enterprise IT and business services.

The ISG Provider Lens "AWS Ecosystem Partners" study analyzes the AWS partner landscape with regard to everyday service needs, emerging challenges, market changes and other important issues such as application migration and transformation services.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- SAP Partner
- Data Analytics and ML Partner
- IoT Partner
- Migration and Container Partner
- Consulting Partner
- Managed Service Partner

Banking Industry BPO Services

Overview:

Operational agility has become vital for both commercial and retail banks. However, established banks have a patchwork of legacy systems that adversely affect agility and can create hurdles in customer and client journeys. To address this, retail and commercial banks are evaluating next-generation core banking systems, both in terms of the digital capabilities of these systems as well as the service providers that can implement and scale them.

Banks also face stiff competition; they are no longer the only entities offering financial services. For example, in the payment space, 25 percent of all transactions are undertaken by non-banking financial institutions. Therefore, there is increasing interest in Payment Services that are faster and more cost effective, and leverage digital platforms preferred by financial services customers today.

Finally, regulatory pressures remain significant. However, the industry has moved from coordinated programs to recapitalize banks and ensure sufficient liquidity to more regulatory divergence driven by local market conditions. Such jurisdictional divergence is a particular challenge for global banks. Adding to this challenge is the outbreak of Covid-19, which is compelling them to increasingly opt for technology to automate risk-related services such as Anti-Money Laundering (AML) and Know-Your-Customer (KYC).

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Core Banking
- Payment Ecosystem Services (Banking)
- Payment Ecosystem Services (Merchants)
- KYC/AML

Banking Technology / Platforms

Overview:

Core banking upgrades continue to throw challenges periodically , primarily due to cost factors. Also, such upgrades are often perceived as risky due to the complex underlying architecture and data migration pain-points. This has led to "legacy spaghetti" or "museum of old technologies" across several large banks and financial institutions, arising from patch or progressive core upgrades. Among other upgrades, Payment and KYC/AML platforms are becoming a part of larger digital transformation initiatives, with changing market dynamics shifting to real-time and instant payments driving stricter compliance measures.

Core banking implementation service providers are being approached to untangle issues related to legacy systems and in response to the intensifying competition from neo and challenger banks equipped with the latest arsenal of emerging technologies. The evaluation of these providers is based on their core banking platform capabilities; in short, the ability to offer future-proof components and functionalities in their product portfolio and as well as their competence to co-exist on top of legacy systems. They are also assessed on their implementation services across functions and portfolio of products to determine their capability in alleviating concerns regarding costs and project completion time for banks.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Core Banking - Corporate
- Core Banking - Retail
- Payment Ecosystem Services (Banking)
- Payment Ecosystem Services (Merchants)
- KYC/AML

Cloud Native / Container Services

Overview:

In the past decade, new patterns and technologies have emerged for the development, deployment and operation of modern applications that can harness the benefits of a cloud infrastructure. This cloud native approach focuses on building applications that are highly modular, adaptable, fault-tolerant and with the capability to deliver value to end users.

Kubernetes, the open source container orchestration software originally released by Google, has become the foundation of the stack underpinning these applications. It provides software features that enable easier management of multi-container applications, including automatic scaling and management of container failures and for routing network traffic.

While Kubernetes solves many problems in application development and operation, it also creates a host of new, complex issues that enterprises need to contend with.

Shifting away from monolithic architectures means that monitoring, security and networking become significant challenges. New software and services have emerged to mitigate these issues; but this means that enterprises must not only figure out the way to adopt Kubernetes but also find ways to secure their cloud native applications, make best use service mesh to manage multi-container environments and monitor those applications and the increasingly complex fabric of connections and logic

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Managed Kubernetes
- Managed Service Mesh
- Managed Cloud Native Security
- Cloud Native Observability Solutions

Contact Center / Customer Experience

Overview:

The ISG Provider Lens™ quadrant report on Contact Center - Customer Experience Services focuses on outsourcing services and the associated aspect of enhancing customer experience. While assessing providers, it considers their service offerings; delivery centers; language capabilities; full-time equivalents (FTEs) and digital transformation elements such as consulting, artificial intelligence (AI) and analytics capabilities. Contact center service providers are using technologies and practices such as design thinking, omnichannel support, cloud offerings, analytics and automation to offer an end-to-end customer experience (CX).

In light of the COVID-19 pandemic and the resultant shift to remote working and digital communication customer service has become highly relevant. Enterprises are looking to serve their customers through digital channels while social distancing measures are in place. Contact centers take centerstage and will play a more critical role in helping enterprises drive customer experience.

This study on Contact Center - Customer Experience Services is aimed at understanding enterprise requirements and provider capabilities to meet their demands.

With respect to the given market and its requirements, ISG is going to focus on the following quadrant:

- Digital Operations
- AI & Analytics

Contact Center as a Service

Overview:

Cloud contact center solutions are embedded with a multitude of technologies and deliver considerable business benefits for contact centers. The omnichannel enablement has never been made easier, and enterprises that leverage technology to deliver a better customer experience will be able to clearly differentiate themselves in this space. Analytics and single-screen management functionalities have enabled agents to deliver highly personalized services, thus ensuring high customer satisfaction. With a range of benefits that cloud contact centers bring to enterprises, more enterprises are moving to cloud platforms and are taking full advantage of the available technology stack, including artificial AI and machine learning (ML) for redefining personalization. These solutions are available with a suite of workforce management capabilities that empower supervisors with information about their teams, making them more effective in terms of managing agents, coaching them and providing live training. With workforce management, agents are given quality and timely feedback, which allows them to seek opportunities for training and improvement.

With respect to the given market and its requirements, ISG will focus on the following quadrant:

- Contact Center as a Service (CCaaS)

Cyber Security – Solutions and Services

Overview:

Within the scope of digitalization and the Industrial Internet of things (IIoT), business processes are increasingly shifting to IT. With the growing need to protect IT and communication systems in companies, IT security has transitioned into business security.

Data and IT infrastructures are constantly exposed to cyber threats. Some threats are also the result of careless operations. IT executives often struggle to justify security investments to business stakeholders, particularly the CFOs. Unlike other IT projects, it is not always possible to measure and demonstrate the return on investments as well as quantify threat-related risks. Therefore, security measures are often at a low level and are not sufficient to address complex threats. On the other hand, the lack of suitable technology does not always result in vulnerabilities; many security incidents such as Trojan and phishing attacks are caused due to the carelessness of users or social engineering. Therefore, consulting and user trainings are continuing to play a key role, together with upgrades of ICT equipment.

Endpoint protection, network security, managed security services, identity and access management and SIEM, to a large extent, have become standard. Given the complexity and evolution in the nature of threats such as advanced persistent threats or zero-day threat, threat services/threat intelligence services, behavior related security and continuous monitoring have become increasingly important.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Identity & Access Management (IAM)
- Data Center Security Products
- Data Leakage/Loss Prevention (DLP), Data Security
- Technical Security Services
- Strategic Security Services
- Managed Security Services

Digital Business Transformation

Overview:

Digital technologies assist enterprise users in creating higher operational efficiencies, new product and service lines and new revenue stream with higher use of cognitive technologies and services. The use of IT to change customer journeys, improve business agility or deliver digital products causes a digital disruption across all business processes, including sales, trading, production, supply chain, product design and human resource (HR) management, among others.

Enterprise agility goes beyond software development and refers to the way organizations can adapt business, development and operations workstreams to survive and thrive in the face of competition and constantly changing customer requirements. This adaption and the speed at which it happens is relevant and critical for increasing business value.

ISG's Digital Cube™ is an interactive model of enterprise capabilities required for digital transformation. It illustrates the six capabilities that any business must have to fully realize its digital ambitions: digital backbone, emerging technologies at scale, enterprise agility, digital ecosystems, digital insights and business model innovation. It is the main reference model that ISG will be using to guide clients in digital transformation. This ISG Provider Lens™ study is focused on identifying the service providers that can support clients in these digital capabilities.

Digital-ready service providers understand the full scope of digital services to offer constant innovations in improving user experiences, accelerating business delivery and incorporating intelligent solutions. They partner with leading technology vendors and can articulate the use of cognitive computing and learning systems to digitalize any client organization.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Digital Business Consulting Services
- Digital Product Lifecycle Services
- Blockchain Services
- Digital Supply Chain Transformation Services
- Digital Customer Experience Services

Enterprise AaaS Platforms

Overview:

In 2019, ISG introduced the ISG Digital Cube™, an interactive model, to define the enterprise capabilities required for digital transformation. It includes six parameters, namely, digital backbone, emerging technologies at scale, enterprise agility, digital ecosystems, insights and business model innovation. The ISG Digital Cube™ is the primary reference model for ISG as it guides clients toward realizing their digital ambitions. This ISG Provider Lens™ study focuses on identifying the service providers that can support clients in achieving digital capabilities.

Enterprise clients looking for alternative ways of building a robust digital backbone may consider the cloud-based enterprise application software option. It is ready to use and can support end-to-end business processes such as market-to-order, recruitment-to-hire and procurement-to-pay. Application software includes technical, commercial and industrial programs, and codesets designed to automate specific sets of business processes for any of the following: for industry or business functions, to make individuals in organizations more productive, to support education or to support data processing in Individual activities.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Human Capital Management
- Enterprise Resource Planning
- Customer Relationship Management

Digital Workplace - Solutions and Services

Overview:

Digital workplace enables employees of an enterprise to improve digital dexterity and employee productivity, while enabling them to connect and collaborate with co-workers efficiently.

The COVID-19 pandemic has created an urgency among organizations to focus on the evolving needs of the workforce operating remotely. Service providers are sparing no effort to innovate and transform the remote or hybrid work culture and have a deep impact on the current digital workplace environment. The major roadblock in workplace digitalization is adapting quickly to the changing needs of end users. Enterprise clients are investing heavily in modernizing their workplace and are expecting to improve employee experience, add flexibility and increase profitability in keeping with strategic business goals. This requires significant investments in secure remote working tools and meeting and collaboration solutions to ensure employee productivity.

The digital workplace technology ecosystem comprises software solution vendors, offering solutions such as device and app/data management or collaboration/productivity-focused solutions, as well as system integrators and service providers that act as partners for enterprises. Partners help customers in their workplace transformation journeys to create or review workplace strategies based on best practices, to assess their workplace environment, manage the entire technical environment and provide support by leveraging the latest and emerging technologies.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Digital Workplace Consulting Services
- Managed Workplace Services
- Managed Mobility Services
- Unified Endpoint Management
- Enterprise Collaboration Solutions
- Meeting and Conferencing Solutions
- Workflow Management and Automation Solutions

Enterprise Service Management – Tools and Services

Overview:

Although digitalization enables organizations to integrate the enterprise and embrace their clients seamlessly, emerging technologies have helped IT organizations to automate and manage IT environments in an entirely service-oriented manner. Robust software solutions and extensive functionalities allow for better customer self-service management, predictive fault analysis, workflow-enabled and automated case handling. With all these technologies and expertise, IT teams are now tasked with managing more than just IT; they manage entire enterprise services. As a result, classical information technology service management (ITSM) is evolving into enterprise service management (ESM) by integrating other enterprise departments into existing IT processes such as on-boarding new employees.

The study examines various offerings around enterprise-wide service management issues and solutions. A basic distinction is made between consultative services and the tools to manage such services that cross organizational boundaries of a company or enterprise or even go beyond the boundaries of the firms. The consultative services are further categorized into services that prepare organizations to highly automate the execution of the underlying processes through the use of such tools (change the business) and services to implement and integrate these tools into sophisticated application landscapes.

In addition, the study examines service providers that offer managed application services, focusing on operational support for productive enterprise service management applications (run the business).

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- ESM Consulting & Transformation Services
- ESM Implementation & Integration Services Providers
- ESM Tool Providers
- ESM Managed Service Providers

Finance and Accounting (FAO) BPO Services

Overview:

Finance and accounting (F&A) services have evolved from FTE-based transactional services to digitalized services. Companies have come a long way from focusing on cost savings to now improving efficiency and accuracy. With the advent of digital technologies, the F&A outsourcing (FAO) landscape has changed and is defining the way services are currently being delivered. Cloud technologies have gained considerable traction and FAO services are being delivered on cloud platforms (Business Process-as-a-Service (BPaaS)). Automation has become an integral part of how FAO services are delivered today, thus reducing costs and improving accuracy.

In addition to technology adoption, enterprises are seeking to partner with providers to outsource not just transactional services but entire F&A services. This includes complex functions such as financial planning, budgeting and M&A.

This year, we also focus on value-added services, including analytics, by outsourcing partners and the benefits thereby achieved. With the significant influx of data, along with changing industry dynamics, insights should be derived from this data to help organizations become more proactive in finance management. This entails more of a strategic relationship between service providers and enterprises, to achieve these transformation goals.

This study on Finance and Accounting Outsourcing Services is aimed at understanding enterprise requirements and provider capabilities to meet their demands.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Digital Consulting
- Digital Operations

Healthcare Industry Services

Overview:

The Healthcare industry is, more than ever, under pressure to change. The COVID-19 pandemic and public demand for more effective outcomes are mandating the acceleration of actions needed to better meet care lifecycle requirements and build patient-centric business models. All segments of the industry are being compelled to comply with new regulations, integrate the changes associated with competitive M&A and adapt to the needs of an aging population. At the same time, blockbuster mergers have precipitated costly integration efforts. Also, consumers expect advanced and convenient digital service delivery. Concurrently, many companies are struggling to stay apace with growing demands for services and mounting competitive pressures. As new business approaches take centerstage, regulatory hurdles and cost pressures have never been higher and the competitive landscape has never been more dynamic and global.

Successful organizations in the Healthcare industry have been meeting these challenges by driving targeted investments and focusing on cost control, using advanced technologies and digital operating models, and focusing on improving and innovating on patient engagement. Digital transformation helps address many of the current and anticipated industry challenges. In the Healthcare industry in the U.S., digital transformation services help payer and provider segments evolve to better serve their constituents. As payers shift focus of purchase decisions to business outcomes, finance and other business leaders are driving digital transformation. While some enterprises do it themselves, others use business process-as-a-service (BPaaS) solutions.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Payer Digital Transformation Services
- Provider Digital Transformation Services
- Payer BPaaS Services

HPC & Mainframe – Services and Solutions

Overview:

Large enterprises require massive processing capacity, for instance, large volume transactions in retail banking, investment broking, pay/card processing, weather forecasting, scientific computing and computer-assisted design and simulation for automobile and aerospace engineering. In some cases, high scale airlines, retail stores, and other businesses may also have high transactions per second (TPS) requirements.

However, the cost per transaction ($/TPS) is a key decision factor, making high-performance computing (HPC) devices attractive for those large enterprises that can predict their TPS growth to invest upfront in HPC.

Mainframes have evolved and scaled to handle large TPS requirements at competitive costs because their architecture distributes tasks to cores that run in parallel, sharing the internal bus, memory and I/O, and providing superior performance in comparison to HCI.

Mainframe and HPC computers' performance can be measured in millions of instructions per second (MIPS) and teraflops (trillion floating-point operations per second). For instance, in 2019 a vendor announced a system with more than 172,000 cores on a cluster configuration for a 9 petaflops capacity. Another vendor offers 1,120 GPUs on a 5 petaflops capacity single device.

When an enterprise requires high TPS, it also requires robust storage systems. Having a fast transaction over a slow database would be pointless. Enterprises require high performing storage appliances to run large databases and big-data solutions on-premises. Security, privacy, I/O, data transfer speed and cost, and cost-effective $/GB are key decision factors to choose on-premise storage over public cloud PaaS options.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Mainframe Modernization & Transformation Services
- General-purpose HPC and Mainframes
- High-performance Storage
- Managed Mainframe and HPC Services
- Technical Server and Storage Service Partners
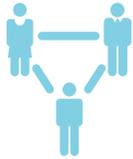
Insurance Industry Services

Overview:

At its most basic level, insurance is a contingency or a risk management plan for individuals or companies that pay premiums to offset financial exposure from a potential, unforeseen event or circumstance. Insurance companies are looking to streamline their products and service offerings, and provide a seamless experience to customers — beginning with purchasing and onboarding to after-sales services and claims. These companies are increasingly turning to outsourcing partners to help them realize their objectives.

Many insurance companies outsource technology and business processes that support their operations, whether they provide life and retirement (L&R) products, including individual and group supplemental products, or property and casualty (P&C) products. The outsourcing landscape is changing and is no longer limited to backend services. Instead, enterprises are strategically aligning/partnering with providers to transform and grow their businesses in the current digital world. With enterprises maturing and becoming more open to forming these long-term relationships, ISG is assessing insurance outsourcing using a holistic approach that includes:

- Strategy and management: Includes strategic management, pricing, product sales and marketing
- Front and middle office services: Includes research and analytics, actuarial and modeling, and investment management and sales support
- Back office/transaction processing: Includes underwriting, policyholder services and claims processing

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Life & Retirement Insurance BPO Services
- Property & Casualty Insurance BPO Service
- BPaaS/TPA Insurance Services

Intelligent Automation - Solutions and Services

Overview:

Enterprises strive for cost reduction and flexibility, which, in turn, encourages them to improve their automation capabilities. Many are still in the early stages of the automation journey — ISG estimates that a minimal double digits percentage of enterprises have progressed into robotic process automation (RPA) with intelligent automation. While RPA can automate simple, rules-based tasks, previously performed by humans, it needs structured data as input and can perform only standardized processes. Therefore, inability to handle unstructured data, lack of AI capabilities and in-house skills limitations are compelling enterprise clients to look for transformational sourcing options that include intelligent automation.

Intelligent automation enables software bots to interact with unstructured data and generally includes the following capabilities: image recognition, natural language processing (NLP), cognitive reasoning, and conversational AI. Enterprise clients worldwide are focusing on building intelligent automation capabilities into their RPA initiatives, with the growing need to stay apace with competition with next-generation technologies. Well-orchestrated intelligent automation technologies are enabling enterprises to automate processes once considered beyond the realm of automation, and deliver higher productivity, reduced costs, improved data accuracy and enhanced customer experience.

This study on Intelligent Automation Solutions and Services is aimed at understanding enterprise requirements and provider capabilities in meeting these demands.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Intelligent Business Automation – Proprietary Solutions and Services
- Artificial Intelligence for IT Operations
- Conversational Artificial Intelligence

IoT Services and Solutions

Overview:

IoT services are defined as a conglomeration of functions such as consulting and implementation (planning, cost analysis and business case development), technology integration and execution (device, platform, analytics, application and security) and overall IoT ecosystem management (managed services).

The interaction and exchange of a large volume of data through fast and active network connectivity and the analysis of such data produces meaningful insights that support decision-making. Sensors collect the data, and applications, software and platforms build on the data, in a secure way, to help make useful business cases across industries. IoT in industries such as Manufacturing, Healthcare, Real Estate and Automotive have been able to achieve huge cost savings, improved business decisions, operational efficiencies and better process management. A connected ecosystem can help run a business in an organized and consistent manner, while ensuring return on investments. Finally, IoT has changed from, a pure vision and arbitrary attempts to concrete scenarios. In the Manufacturing industry, the automated monitoring systems are now used in a very wide range of applications, from aircraft construction to sports equipment manufacturing. But there are also interesting projects in other sectors such as Logistics, Building Automation and Retail. An increasing number of providers are acting as brokers for IoT-generated data. Companies can evaluate their data, combine it with other data traded on the platform and share it with other companies. For instance, local authorities can monetize data on the state of air purity or traffic flows in their cities via the platform. In other sectors, the linking of external data is required. An example of this is the Automotive industry, where manufacturers of commercial vehicles have high interest in the processing of weather-related data.

The increasing digitalization of production, starting with Manufacturing Execution Systems (MES), through "intelligent" machines/systems to smart products, and the often discussed concept of digital twin, is leading to a change in all production-related areas. Therefore, IT/OT convergence refers to the integration of IT systems and the use of data-centric calculations with operational technology (OT) systems to monitor events, processes and equipment and to make changes in group/industrial divisions. Furthermore, the modernization of OT through IT integration raises new security concerns and the need for monitoring and data integration.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Consulting and Services
- Managed Services
- Connected Mobility Consulting and Services
- Artificial Intelligence on the Edge
- IoT Endpoint Security
- IT/OT Tech Data Convergence

Life Sciences Industry Services

Overview:

In Life Sciences, while there are managed and strategic services available for pharmaceuticals and research organizations, this study focuses on what ISG perceives as most critical in 2020 — clinical development, patient engagement, medical devices and manufacturing supply chain services.

The COVID-19 pandemic is pushing the need for tests, vaccines and treatments within short time frames. For instance, the U.S. Food and Drug Administration (FDA) issued Emergency Use Authorizations (EUAs) for tests, medical devices and therapeutics to prevent, diagnose and treat COVID-19. Service providers help companies align with the latest developments. Many aspects of the manufacturing supply chain rely heavily on collaborative engagements between companies, and technology often provides the most effective mechanism to engage across incompatible systems or processes. Also, Life Sciences companies are engaging directly with patients to improve their products as well as patient outcomes. The end goal is to improve patient experience during the development lifecycle all the way through outcomes in collaboration with providers.

Innovation is imperative in this context; for example, medical device companies are increasingly focusing on the efficiency of the supply chain and recognizing that innovation is the key to growth and survival.

With respect to the given market and its requirements, ISG will focus on the following quadrants:

- Clinical Development Digital Transformation Services
- Patient Engagement Digital Transformation Services
- Manufacturing Supply Chain Digital Transformation Services
- Medical Devices Digital Transformation Services

Manufacturing Industry Services

Overview:

The Manufacturing Industry Services study tracks and analyzes the offerings around several elements of manufacturing, from the intricacies of 3D simulation to shop floor robotics. Automation plays a significant role here, spreading across components such as manufacturing operations management (MOM) and manufacturing execution systems (MES), as well as capturing process data and storing it in the cloud or inside the new edge.

The study examines the role of service providers across the entire value chain of manufacturing engineering — from virtual layout or simulation of the shop floor, ergonomics for machinery and IT/OT convergence, to aftermarket services such as leveraging digital twin to check the condition of machinery while it reaches the wear-out period of the wear curve.

ISG sets out to deliver a comprehensive research program with a clear and extensive evaluation criteria, covering the developments and deliverables of service providers and equipment suppliers in this dynamic market. This study accounts for changing market requirements and provides a consistent market overview for the segments, along with concrete decision-making support to help user organizations evaluate and assess the offerings and performance of providers.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Smart Product Engineering – Automotive
- Smart Product Engineering - Hi-Tech/Semiconductors
- Production Automation
- Manufacturing Virtualization
- Manufacturing Connectivity and OT Security

Marketing Technology - Martech

Overview:

Digital technologies affect everyone, anytime, anywhere. The same applies to the marketing businesses, whether it is for those who need to hire a service or for those who sell a marketing service. Marketing Technology (Martech) is already a reality that offers many competitive advantages for all types of companies. Digital Marketing professionals are focused on "shaking" this market. With the combination of creativity and the ability to develop digital campaigns to meet the expectations of customers, with tools and methodologies like design thinking and agile processes, Martechs are growing with a wide portfolio of services.

Besides cost control, scale and growth, corporate executives expect more innovation. Concurrently, customers are changing their habits, lifestyle, ambition and immediacy of demands — Not to mention how COVID-19 has impacted many markets and created a new kind of consumer in just a few months.

ISG realizes that trends in Martech have a direct impact on agencies, brands and clients. Marketing 4.0 (Philip Kotler) represents the digital revolution for companies operating in this segment. New technologies and new consumer behaviors, who are already experiencing digital transformation in their daily lives, demand a new approach to marketing, which requires a transformation in mindset rather than just the tools.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Digital Presence & Digital Ads
- Social & Content
- Digital Experience
- E-commerce
- Analytics & Intelligence

Microsoft – Ecosystem Partners 2020
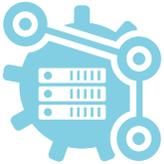
Overview:

Microsoft is one of the most system-relevant IT providers worldwide. The Microsoft ecosystem, one of the largest in the world, comprises thousands of partner companies that address enterprise clients of all sizes and industries across the globe.

Microsoft is focused on technology trends and growth markets such as AI or IoT, robotics, cloud computing with edge computing and HPC, however, without neglecting product and service areas that have been established over the last decades. For this purpose, Microsoft has restructured its development as well as sales and marketing teams to drive innovations with the goal of delivering differentiated value across the cloud portfolio, which, in turn, enables Microsoft to differentiate itself from its competitors, remain a relevant player in the market and achieve high cross-margins.

The partner ecosystem for Microsoft products/XaaS is increasingly expanding. The increasing complexity of integration, with expanding use areas, is leading to a dynamic market development for professional services in the areas of consulting, design, integration, implementation and managed services for Microsoft and its offerings.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Azure Managed Services
- SAP on Azure
- Office 365 and Modern Workplace
- Dynamics 365

Network - Software Defined Solutions and Services

Overview:

This ISG Provider Lens™ study examines the different kinds of global network offerings related to software-defined networking (SDN). These include SD-WAN, (consulting, Implementation and managed services) SD-WAN (DIY) equipment and service supply; it also includes core-branch, branch-edge core and mobile technology suppliers and service offerings related to those segments. The study also looks at the more traditional managed wide area network (WAN) market offerings and additional non-core mobile service offering in the 4G and emerging 5G spaces. For users, both traditional WAN and software-defined markets are very important.

Existing managed WAN services, MPLS, etc. currently form the backbone of revenues generated and most of the customer deployments by telcos and service providers worldwide. This, however, is changing rapidly. The SDN and SD-WAN) segments are evolving and rapidly increasing in market share and presence, as are several other related network services such as network function virtualization (NFV), mobility (LTE/4G/5G) additional services, with their triggers and influences and software-defined local area networks (SD-LAN). This is driven significantly by the ongoing digital transformation of business processes, organizations and business models to meet the requirements of a dynamic, globalized world in real time, by increasing agility and flexibility, boosting customer satisfaction and opportunity, strengthening competitive positioning for the enterprise and reducing overall network costs.

ISG sets out to deliver a comprehensive but defensible research program with clear and extensive evaluation criteria, covering the developments and deliverables of service providers and equipment suppliers in this dynamic marketplace. This study accounts for changing market requirements and provides a consistent market overview for the segments, along with concrete decision-making support to help user organizations evaluate and assess the offerings and performance of providers.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Managed WAN Services
- Transformation Services (Consulting & Implementation)
- WAN Equipment and Service Suppliers (DIY)
- Mobile Network (4G/5G) Additional (non-core) Services
- Technology Suppliers (Core to Mobile)
- Edge Cloud Connectivity and Security
- 5G Infrastructures

Next Gen ADM – Services

Overview:

Software is an important part of digital transformation projects and has a major impact on IT strategy that has now almost become the business strategy. Application outsourcing continues to evolve, and service providers are increasingly adopting agile development practices for their service delivery, driven by velocity, frequency of updates and feature-led intuitive and interactive digital applications. The incorporation of disruptive operating models continues to outpace the former, thereby making core development model a direct competitive advantage for many enterprises.

Typical application development and maintenance (ADM) services include application consulting, designing, custom development, packaged software integration, operations, quality assurance, security and testing. However, the elements related to speed and rapid releases in this traditional approach are from DevOps and agile methodologies. Service providers and enterprises are leveraging application programming interface (API) and microservices, and utilizing low code no code platforms, containers, and cloud native approach to build nimble, manageable applications and accomplish their quick release.

ISG has been witnessing contracts, where clients are looking at new ways to leverage software capabilities to solve business problems and gain competitive advantage, coupled with need for speed-to-market. Service providers are augmenting their traditional ADM base with these emerging methodologies, technologies and collaborative frameworks to meet clients objectives. ISG terms such contract types as next-gen ADM contracts. This study focuses on understanding client objectives and assessing provider capabilities to deliver on next-gen ADM contracts.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Next-gen ADM
- Application Maintenance Services – Midmarket / Niche
- Agile Development
- Continuous Testing – Large Accounts
- Continuous Testing – Midmarket and Expert Consulting
- DevSecOps Consulting
- No Code Development Platforms
- DevSecOps

Private Hybrid Cloud - Solutions and Services

Overview:

Data center outsourcing is the practice of outsourcing the responsibility of provisioning, monitoring and managing of computing and storage resources to a third-party provider. The data center may be owned by the enterprise, service provider or a third-party colocation provider. Monitoring services are usually delivered from the provider's location and are called remote infrastructure management (RIM) services.

A private cloud is an extension of the existing computing environment of an enterprise and leverages the investments made in virtual infrastructure and applications. Enterprises with strict security and governance requirements, large data volumes and the need for tight integration with other enterprise applications and workflows may prefer on-premise or private cloud deployments and operations. Service providers can implement cloud technology to create clouds with virtual compute, networking and storage resources running in their data centers or over a shared infrastructure, and configure it to isolate a private cloud or an integrated hybrid cloud.

A hybrid cloud combines the best of on-premises infrastructure, private and public cloud services. It connects the existing on-premises infrastructure services with a private or public cloud or both. The goal is to combine services and data from a variety of cloud models to create a unified, automated and well-managed computing environment with workload transparency and integration. Hybrid clouds allow businesses to leverage the capabilities of public cloud platform providers without offloading their entire data to a third-party data center. This provides greater flexibility, while keeping the vital components within the company's firewall.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Managed Services
- Managed Hosting
- Colocation Services
- Hyper-converged Systems

ISG Provider Lens™

Public Cloud - Solutions and Services

Overview:

The growth in public cloud adoption among enterprises and the maturity of the Cloud industry are creating a major impact on enterprises and IT service providers and business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-Service model, enterprises need to continuously evaluate cloud services and IT providers, globally.

ISG reports that the strong demand for digital transformation is driving global contracts for cloud products and services, including Infrastructure-as-a-Service (IaaS) and Platform-as-a-Service (PaaS). According to the latest 3Q20 ISG Index™, the global market has grown 3 percent in combined market annual contract value (ACV) to reach its current value of $14.6 billion, since Q3-2019, while the as-a-Service ACV has increased by 11 percent to reach $8 billion in the same period. The growth in numbers in the as-a-Service area indicates the shift to and preference for digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, improve service to end users and ultimately drive innovation.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Consulting and Transformation Services
- Governance, Risk and Compliance (GRC) Services
- Managed Public Cloud Services
- Hyperscale Infrastructure and Platform Services
- SAP HANA Infrastructure Services

Retail – Services and Solutions 2021

Overview:

The Provider Lens™ study on the Retail industry would identify, analyze and rate the leading technology firms (and their platforms) and IT service providers catering to retailers' technology requirements. The quadrants covering technology firms would delve into areas such as digital commerce, order management, retail planning and assortment, and supply chain management, whereas, the quadrant(s) covering IT service providers would evaluate their service competence, quality, and experience in areas including platform migration, managed services, omnichannel integration, performance engineering, data analytics, and custom development capabilities like building a microservices-based commerce platform, progressive web applications (PWAs).

There would also be a supplementary report, "Tech Innovators in Retail" showcasing upcoming and innovative tech firms providing sophisticated products and solutions in emerging areas including visual AI, augmented reality/virtual reality (AR/VR), blockchain-based solutions, warehouse automation, algorithmic retailing, IoT commerce and in-store analytics.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Digital/Ecommerce Platforms
- Assortment planning and management (retail assortment platforms)
- IT Transformation services
- Platform Migration Services
- Managed Services

Salesforce - Ecosystem

Overview:

Salesforce sees itself as a provider of SaaS and PaaS and specializes in CRM for companies of all sizes. Salesforce products are also designed to help companies connect employees, customers and products. With its cloud platform, Salesforce offers applications for customers in nearly all phases of the customer journey.

The "Salesforce Ecosystem" study examines various offerings around the Salesforce platform. It analyzes providers that act as implementation partners for Salesforce and design, and configure and implement solutions for clients of this platform. Within this group, a distinction is made between the providers that, apart from Salesforce related knowledge, are also capable of integrating Salesforce-based solutions into major system landscapes (system integrators) and the ones that specialized in the implementation of Salesforce itself. Furthermore, the study analyzes providers that offer services that support their customers in the operation of the implemented Salesforce solutions (managed support services).

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Implementation & Integration Services for Large Enterprises
- Implementation Services for Core Clouds (midmarket clients)
- Implementation Services for Marketing Cloud (midmarket clients)
- Managed Application Services (for large accounts and midmarket clients)

SAP - HANA Ecosystem

Overview:

SAP has thousands of customers in more than 180 countries, covering all continents. With over 18,000 SAP partner companies, it has a significant impact on the IT market, in terms of both innovation and the global IT spending share. This research study will identify the top SAP HANA partner companies that can provide differentiated enterprise client services and deliver the best results from S/4HANA investments. By leveraging the best partners to meet their requirements, they can optimize their operating expenses and achieve a superior return on investments in technology.

SAP faces resistance from current clients to upgrade to S/4HANA — its most modern enterprise resource planning (ERP) process. This novel solution offers superior performance by using in-memory technology, but transformation projects could involve steep costs. Clients should, thus, refine their partner selection process and criteria to find the best performers that can provide higher business value at a lower cost of transformation. The perfect partner can support clients and allay fears arising from the end of support for legacy SAP ERP by 2027.

For clients that have adopted S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including stability, availability and security. Cloud migrations and technology innovation are also assessed.

For support services, AI and machine learning have been incorporated into application maintenance and operations to predict incidents and automate troubleshooting, ticketing processes and provisioning, allowing for gains of scale that lower support costs. This study will identify service providers that effectively apply new technologies to support S/4HANA and HANA database.

Finally, the study will be enriched with customer experience services related to SAP's C/4HANA solution that deals with customer relationship management (CRM) to gain loyal customers with excellent customer services.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- SAP S/4 HANA System Transformation – Large and Mid-Markets
- Managed Application Services for SAP ERP
- BW/4 on HANA and BW on HANA Services
- SAP Cloud Platform Services
- Managed Platform Services for SAP HANA
- SAP C/4HANA Services

ServiceNow Ecosystem

Overview:

As a leading vendor of workflow-enabled service management software solutions, ServiceNow today is delivering functionalities far beyond IT. With software modules that support several enterprise services such as HR or facility management, the continuously growing base system is being equally implemented by end users and service providers. The broad acceptance of ServiceNow's product offerings in the user community has led to exponential growth for the company. For end users to fully utilize its broad functionalities, it requires professional services from process (re)design through software implementation and integration with application management services and training. Over time, ServiceNow has built an extensive, global, and complex partner network to better serve its customers. Various offerings and certification levels indicate the focus of the different partner companies, ranging from full-scale lifecycle support to focused services for specific tasks.

Apart from end-user service support, ServiceNow's offering is used by a variety of service companies to deliver managed services to companies that want to focus on managing their respective core business rather than running service management solutions. For these managed service providers , the ServiceNow platform is the ideal base for building additional functionalities or for integrating the platform into industry-specific frameworks to support enterprise operations. ISG's ServiceNow Partner Ecosystem market study analyzes consulting, integration and service companies that are certified to ServiceNow's partner network.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- ServiceNow Consulting Services
- ServiceNow Implementation & Integration Services
- ServiceNow Managed Services Partner

Strategic Procurement Software and Services

Overview:

Modern procurement software facilitates not only the streamlining, automation, integration, and management of traditional enterprise procurement functions and operations, but also enables wider, broader, and deeper engagement with suppliers outside the enterprise, and with business management software and organizations within the enterprise. When properly implemented and effectively used, modern procurement software supports and enables enterprise business agility, reduces the negative impacts of supply chain disruption, helps to improve processes and reduces the costs of doing business.

Traditional challenges for most enterprises are two, namely, relatively unique purchasing and procurement needs and variations between procurement software solutions. While core procurement functions tend to be similar across enterprises, we see a wide range of variations in how these functions are conducted and managed. Meanwhile, varying degrees of procurement solution robustness, automation, adaptability, standardization, integrability, and user experience complicate solution evaluation and use.

The above is also complicated by the recent, global, rapid and accelerating transition toward digital business as a result of COVID-19. Business structures, operations, workforces, and supply chain management have all been disrupted, likely permanently. Traditional operations and software are thus challenged even more to deliver sustainable value, let alone enhance and advance the business value of procurement to the enterprise.

With respect to the given market and its requirements, ISG is going to focus on the following quadrants:

- Software Solutions: Procure-to-Pay and Source-to-pay Process Optimization and Management
- Services: Procurement Transformation
- Services: Procurement Outsourcing

Utilities / Energy Industry Services

Overview:

Companies engaged in the Utilities industry are primarily focused on the generation, transmission, and distribution of electricity, water and natural gas to the residential, commercial, and industrial customers. The Utilities industry is undergoing a drastic transformation to a clean energy future, a more digital and distributed grid and an era of bespoke customer service. Companies need to make substantial capital investments to supplant aging infrastructure and discover new capabilities like smart grid, combined with taking into account climatic changes.

Key challenges, including increased competition, growing customer demands, rising costs from climate related disasters, cyber security risks, and stringent guidance from regulators are driving utilities companies to look for transformational sourcing options that would help them deliver superior business performance along with enhanced customer satisfaction. They are primarily looking for providers that demonstrates deep Utilities industry expertise along with domain understanding and strong digital, innovation capabilities.

This study on Utilities Solutions and Services is aimed at understanding utilities companies' requirements and provider capabilities in meeting these demands.

Important Note

1. Please note that the quadrant names mentioned in this plan are not final. Once again these are subject to change based on market dynamics, advisors' inputs and analysts' views. With the start of the research phase for each study, the launch e-mail will include a project brochure that will contain finalized quadrant names, descriptions of the topics and analyst names for each region.

2. The timeline is indicative and may change, but not significantly.

3. The dates of research phase will be included in the project brochure.

4. Project brochures will also contain the names of the project manager who will be the key liaison between providers and analysts. They will be the first points of contact for all providers during and after the research phase.

ISG Provider Lens™ - Research Coverage

1200+
Service providers and technology companies analyzed

20+
Service lines and technology topics covered

95+
Research reports published by geography

12
Geographies covered

75+
Quadrant reports

10+
Archetype reports

400+
Individual quadrants published

6
Months intense research cycle

12
Months annual publication

About ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research and consulting services across business processes, IT services and technology. These reports are focused on providing independent vendor/ service provider evaluations, outlining strengths and weaknesses of the companies that are positioned relative to their peers in the market. These reports provide influential insights to enterprises and are widely accessed by our large pool of advisors who are actively supporting enterprises to transform and optimize their operational environments.

Often a starting point of discussion, ISG Provider Lens™ reports play a vital role as decision influencers for enterprises looking to outsource to a suitable service provider or find the right technology partner. To enable these insights and decisions, the data captured from providers through primary or secondary research will translate into ISG Provider Lens™ Quadrant Reports and ISG Provider Lens™ Archetype Reports.

Why ISG Provider Lens™?

ISG Provider Lens™ is uniquely positioned to deliver a well-rounded research, leveraging a vast ecosystem of multiple stakeholders to gather intelligence and provide insights. Adopting a 360-degree approach, ISG Provider Lens™ gives several reasons for your company to participate in our research.

- Growing pool of well-connected and industry leading analysts

- 800+ ISG advisors bring practitioners' views and insights to complement our findings

- Country level research to help enterprises establish local partnerships and identify localized capabilities

- Reports are extensively leveraged by ISG advisors to support client engagements

- Vast coverage of topics spanning IT, BPO and industry verticals that helps highlight niche capabilities

- Create lasting impressions with our corporate marketing social presence that has 30k+ connections
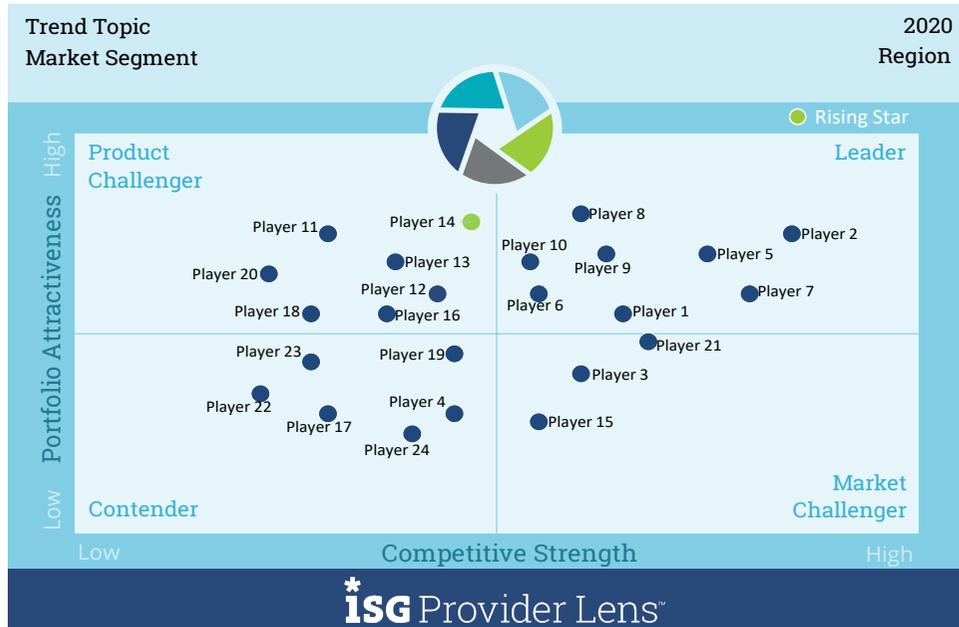
- Our new 'Star of the Excellence' program integrates with ISG Provider Lens™ and feeds our research with enterprise client insights and feedback

- Research leverages ISG's proprietary databases for provider evaluation and analysis

ISG Provider Lens™ Quadrant Reports

ISG compares and positions service providers in a graphical presentation based on the strength of their service portfolio and market competitiveness. Based on relative positioning, service providers are identified as Leaders, Challengers, Contenders or Rising Stars. These studies are conducted on multiple regions and for multiple service lines in IT, BPO and industry-specific domains.

Source: ISG Research 2020

ISG Provider Lens™ Archetype Reports

ISG's distinctive archetype reports examine outsourcing maturity in totality by identifying the changing buying behavior on the demand side and matching it with the evolving capability on the supply side. The archetype report segments the prevalent enterprise buying behaviors for various domains or service lines and represents enterprise preferences based on their maturity journey. These studies also highlight unique service providers best suited to serve each of these archetypes.

	Domain Expertise	Languages Supported	Scale of Operations	Traditional Pricing Models
Provider A	Score 4 out of 4	Score 3 out of 4	Score 2 out of 4	Score 4 out of 4
Provider B	Score 3 out of 4	Score 2 out of 4	Score 3 out of 4	Score 1 out of 4
Provider C	Score 1 out of 4	Score 4 out of 4	Score 3 out of 4	Score 4 out of 4
Provider D	Score 4 out of 4	Score 3 out of 4	Score 2 out of 4	Score 3 out of 4
Provider E	Score 2 out of 4	Score 3 out of 4	Score 4 out of 4	Score 4 out of 4
Provider F	Score 4 out of 4	Score 2 out of 4	Score 3 out of 4	Score 1 out of 4
Provider G	Score 3 out of 4	Score 4 out of 4	Score 3 out of 4	Score 2 out of 4
Provider H	Score 2 out of 4	Score 3 out of 4	Score 4 out of 4	Score 3 out of 4

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

QUADRANT REPORT CHARACTERISTICS

- Each report identifies a maximum of 5-6 quadrants

- Topics span across IT and BPO services and technologies

- Complemented with global overview summarizing global enterprise trends

- Transparent methodology that follows the market definition and criteria

- Region and country focus

- Highlights local and niche players effectively

ARCHETYPE REPORT CHARACTERISTICS

- Each report identifies 3-5 archetypes/buyer characteristics

- Globally focused reports

- Unique to ISG, archetypes derived represent ISG advisor perception

- Archetype reports are neither prescriptive nor rank-based

- Covers both ITO and BPO service lines

- Reports are capability driven and highlight emerging players

ISG Provider Lens™ - Our Data Sources

ISG Provider Lens™ research studies analyze relevant software vendors/service providers in a particular market, based on a multi-phased research and analysis process, and positions these providers based on the ISG research methodology. For both quadrant and archetype reports, the evaluation framework takes the following into consideration:

- Primary research: Survey input from service providers/vendors

- Secondary research: Desk research on publicly available data

- Advisory input: Thoughts/inputs of ISG advisors

- Star of Excellence*: Client feedback about the company on multiple parameters

- ISG internal, proprietary databases such as deal information

- Balance between qualitative and quantitative parameters
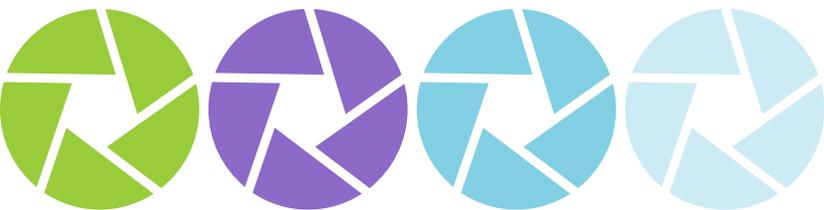
Quadrant Methodology

ISG Provider Lens™ quadrant evaluation framework is robust and adopts a systematic approach to arrive at the final scoring. Based on the scoring and relative positioning, the companies are identified as Leaders, Challengers, Contenders or Rising Stars.

Y axis = Portfolio attractiveness

- Scope of portfolio (breadth & depth of offering)
- Portfolio quality (technology/skills, USP and security)
- Strategy & vision (product roadmap, thought leadership and investments)
- Local characteristics (product support and infrastructure)
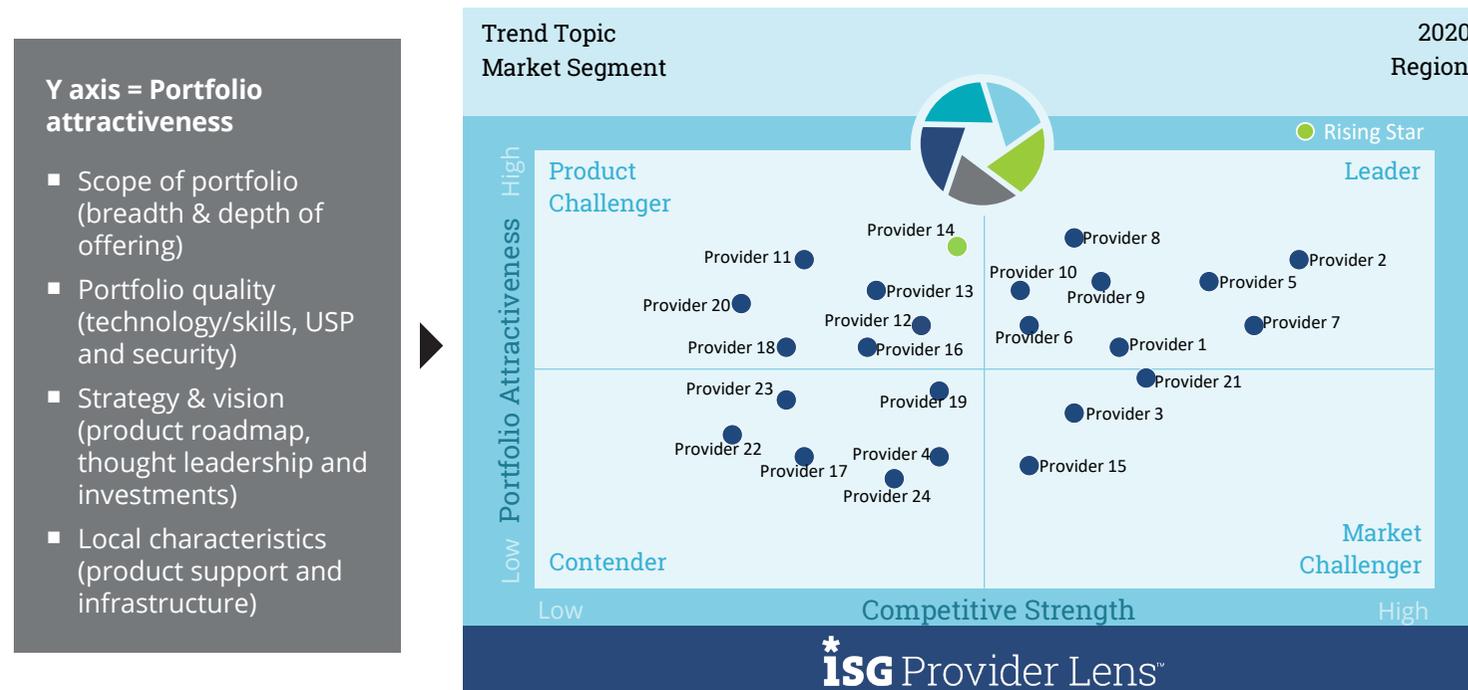
Source: ISG Research 2020

X axis = Competitive strength

- Market position (revenues, client, FTE & growth, contracts, recent deals won and delivery locations)
- Brand reputation (awareness, website, social media presence, awards and accolades, advisor inputs and customer satisfaction)
- Core competencies (innovative power, stability, ecosystem, business model and case studies)
- Go to market (sales, sales channel, marketing, partnerships and M&A)

NOTE: The key parameters are highlighted as per the standard methodology. There will be variations in parameters, depending on the topic of evaluation. ISG does not disclose the weightage for any of the parameters; it depends on individual analysts and studies.
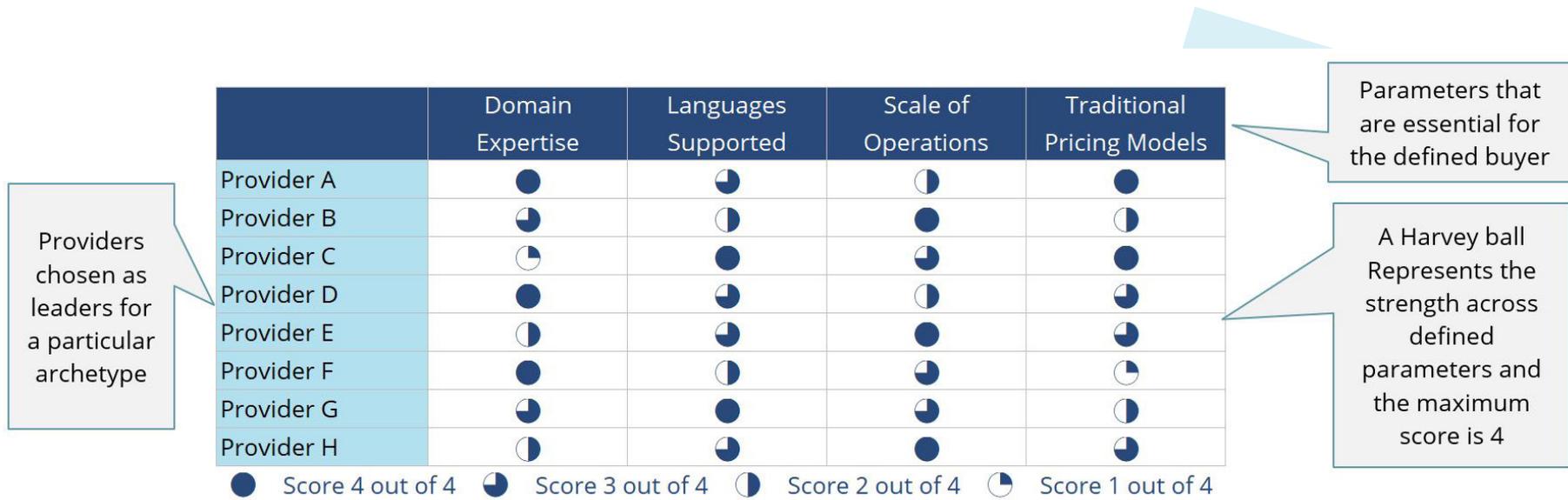
Archetype Methodology

An archetype report is ISG's distinctive report that examines outsourcing maturity in totality, by identifying changing buying behavior, on the demand side, and matching it with the evolving capabilities on the supply side. Broadly based on global capabilities of services companies, an ISG Provider Lens™ archetype report summarizes the relative capabilities of service providers and their ability to address the requirements of typical and frequently encountered categories of enterprise buyers (archetypes). Each archetype represents a unique set of business and technology needs and challenges.

Changing buyer behavior and evolving maturity

Crawl	Walk	Run	Transform
Traditional outsourcing mindset with basic requirements and point solutions	Evolving and more mature outsourcing requirements. Organizations are embracing technology and inclined towards digital transformation.		Highly mature organizations that are looking for holistic transformation and strategic partnerships

The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their service requirements and from working with services providers to understand how these buyer requirements influence the development of suitable solutions and go-to-market strategies. The characteristics of each archetype is not constant — while the core requirements rarely change, the relative importance of the requirements can vary based on business and/or changes in the technology environment.

	Domain Expertise	Languages Supported	Scale of Operations	Traditional Pricing Models
Provider A	●	◕	◐	●
Provider B	◔	◐	●	◐
Provider C	◔	●	◕	●
Provider D	●	◕	◐	◕
Provider E	◐	◕	●	◕
Provider F	●	◐	◕	◔
Provider G	◕	●	◕	◐
Provider H	◐	◕	●	◕

● Score 4 out of 4 ◕ Score 3 out of 4 ◐ Score 2 out of 4 ◔ Score 1 out of 4

Parameters that are essential for the defined buyer

A Harvey ball Represents the strength across defined parameters and the maximum score is 4

Providers chosen as leaders for a particular archetype

Largely based on portfolio and capability data such as vision, strategy, technology, service offerings, products, partnerships and pricing models, the Leaders chosen are the ones that qualify across all defined parameters for a particular archetype. The average score across various parameters are used to define the leaders of an archetype.

About ISG Provider Lens™ Portal

ISG Provider Lens™ launched the data collection portal that is designed to provide continuous access to companies responding to our surveys and enable increased collaboration. This uniquely designed portal allows users to respond to our surveys more effectively by giving them complete visibility and control over data through the year. In addition to enabling 800+ ISG advisors with the latest data points about your company, the portal is an important data repository for this program, offering multiple benefits to our client community.
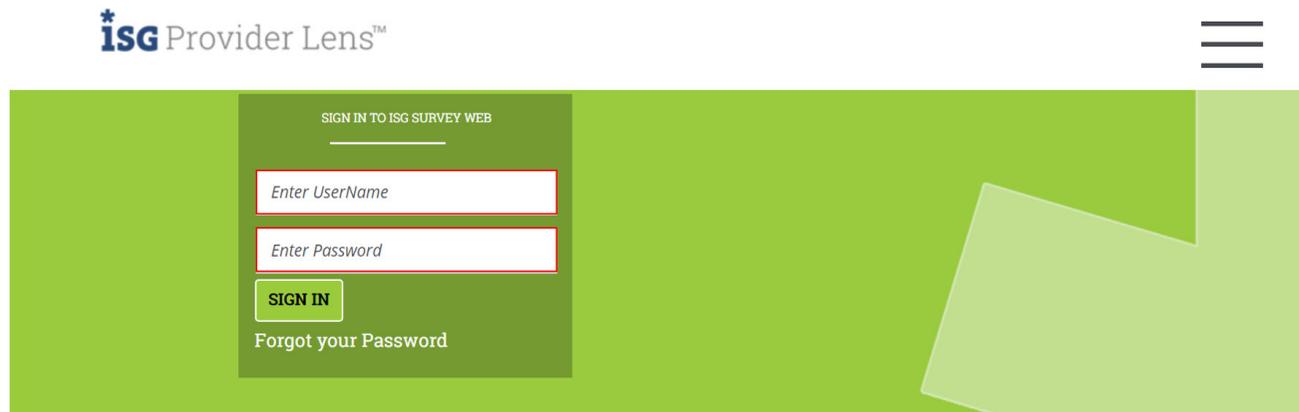
Click here to access the portal. Please refer the FAQ section for answers to some of the commonly asked questions.

NOTE:

Advisors do not access the portal: Our internal advisors do not have access to the portal. All data requests are channeled via CPQ and Provider Lens program. CPQ and ISG Provider Lens analysts work closely to address advisor requests in the most plausible way.

Access: By default, SPOCs registered with us are given access to the portal. Multiple users can be granted access and the same will be done upon request.

Research phase: The data entry window for a study is typically open for a period of six weeks. Once the submission of data is completed on the portal, the **SUBMIT** button changes to **UPDATE**. This implies that you are welcome to update any data point, any time of the year. However, the updated data will **NOT** be considered for evaluation post the closure of the research phase.

PORTAL BENEFITS

- **Access to excel questionnaires**

We understand that excel is still a critical survey instrument for the purpose of internal data collection. Thus, the excel questionnaires are made available for downloading upon login and can be used for internal distribution. However, the final submission of the responses must be done on the portal.

- **24/7 access**

Respondents can access the portal anytime through the year, and are also allowed to make changes to the survey through this period.

- **Visibility**

The IPL Portal dashboard is designed to give complete visibility about the studies, participation, and new launches

- **Preloaded data from last cycle**

For studies that are repeated year on year, responses from the previous cycle are made available to the respondents when the studies are launched again. This feature will save a user's time significantly by allowing them to update the data wherever necessary.

- **Latest and greatest data**

The portal allows users to update the data with latest information throughout the year. This helps us to provide the latest data to our advisors for their client engagements. This portal is a great medium to keep our analysts and advisors updated with the latest information about your company.

Candidate Provider Qualification CONNECTION

The Candidate Provider Qualification (CPQ) process is a key component of the ISG FutureSource™ methodology and ISG Provider Lens™ is a critical source of data for the CPQ program. As part of this program, ISG advisors are provided with a list of all applicable service providers to produce the initial recommendation or longlist for their enterprise engagements. Based on the requirements and maturity of enterprise clients, the CPQ team highlights the relevant strengths and weaknesses of the selected service providers along with their profiles, briefing materials and data point comparisons to support their recommendations.
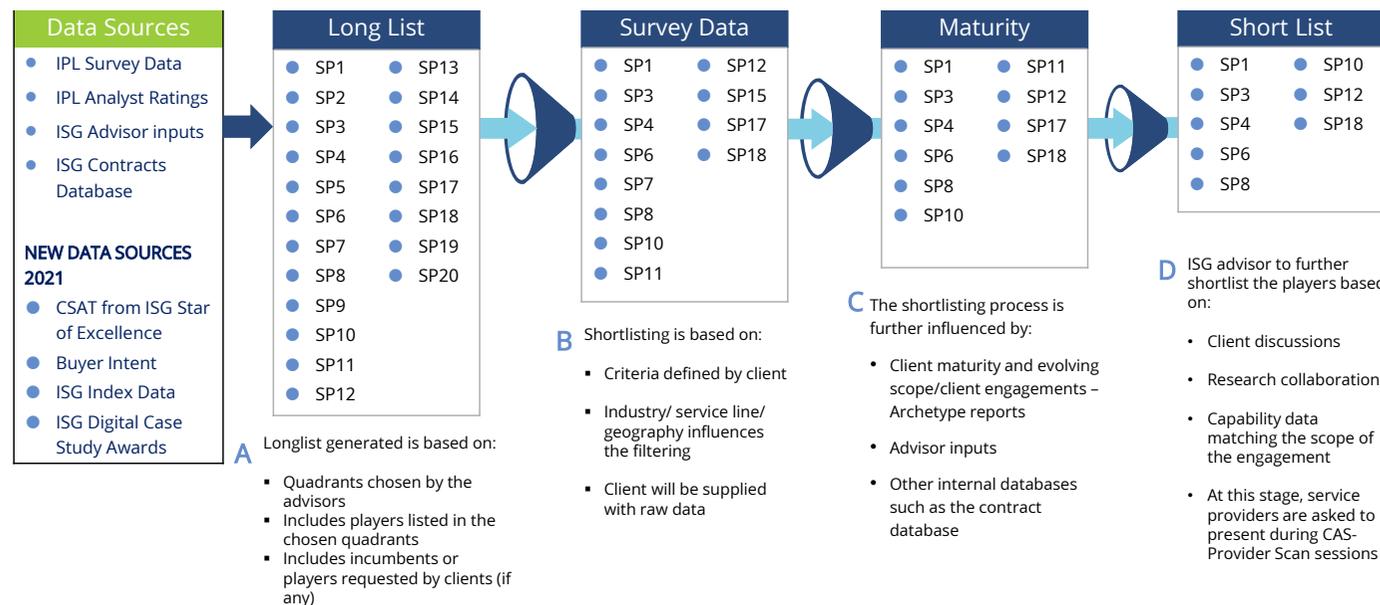
HOW DOES IT WORK

The data used to produce the initial recommendation long list, is a combination of data collected to create the ISG Provider Lens™ quadrant and archetype reports and proprietary ISG data assets (Contract KnowledgeBase, Star of Excellence, Advisory Awareness Survey data, ISG Quarterly Index, etc.). The CPQ process involves three phases

Phase 1: Initiating a request for the recommendation of the longlist

Phase 2: Filtering the longlist down (leveraging granular level data collected through ISG Provider Lens™ studies to narrow the list down (shortlist) match more closely with client requirements)

Phase 3: When applicable, requesting additional information and material from the shortlisted providers (as preparation to present the list to the client and when critical data is missing for certain providers)

CPQ and CAS - Selection Process Example

Data Sources	Long List	Survey Data	Maturity	Short List
● IPL Survey Data	● SP1 ● SP13	● SP1 ● SP12	● SP1 ● SP11	● SP1 ● SP10
● IPL Analyst Ratings	● SP2 ● SP14	● SP3 ● SP15	● SP3 ● SP12	● SP3 ● SP12
● ISG Advisor inputs	● SP3 ● SP15	● SP4 ● SP17	● SP4 ● SP17	● SP4 ● SP18
● ISG Contracts Database	● SP4 ● SP16	● SP6 ● SP18	● SP6 ● SP18	● SP6
	● SP5 ● SP17	● SP7	● SP8	● SP8
NEW DATA SOURCES 2021	● SP6 ● SP18	● SP8	● SP10	
● CSAT from ISG Star of Excellence	● SP7 ● SP19	● SP10		
● Buyer Intent	● SP8 ● SP20	● SP11		
● ISG Index Data	● SP9			
● ISG Digital Case Study Awards	● SP10			
	● SP11			
	● SP12			

A Longlist generated is based on:

▪ Quadrants chosen by the advisors
▪ Includes players listed in the chosen quadrants
▪ Includes incumbents or players requested by clients (if any)

B Shortlisting is based on:

▪ Criteria defined by client

▪ Industry/ service line/ geography influences the filtering

▪ Client will be supplied with raw data

C The shortlisting process is further influenced by:

• Client maturity and evolving scope/client engagements – Archetype reports

• Advisor inputs

• Other internal databases such as the contract database

D ISG advisor to further shortlist the players based on:

• Client discussions

• Research collaboration

• Capability data matching the scope of the engagement

• At this stage, service providers are asked to present during CAS-Provider Scan sessions

NOTE: ISG Provider Lens™ reports and data collected, actively feed into the CPQ long list process. Hence, participation in ISG Provider Lens™ research studies significantly increase your company's visibility among ISG advisors and enterprise clients. Participation also impacts inclusion on advisor longlists but does not guarantee inclusion in the final recommendations to enterprise clients. The shortlisting of companies is left to the discretion of advisors and enterprise clients. However, the data provided continues to influence the steps following longlisting.

All you need to know about the ISG Provider Lens™ Report process

Research Phase

ISG Provider Lens™ projects start with the research phase and following are the steps in chronological order followed during the survey and research phase.

- We send out mailers introducing the launch of a study. In this email, watch out for login details for the portal. Participants will be sent a project brochure containing all details pertaining to the project such as the research phase schedule, topics discussed, descriptions of quadrants and analyst bios.

- Clients are given about 3-4 weeks to submit the data. Excel questionnaires are made available on the portal.

- During this phase, the providers are also encouraged to proactively suggest dates for briefing to avoid delays.

- Once the data has been submitted on the portal, this represents the data that will be considered for evaluation.

Active participation increases the benefits for the participating company as well as for ISG, since a more comprehensive and detailed representation of products and services of the company in a particular technology/services area is achieved. However, this does not guarantee the evaluation/positioning of the service provider/vendor if they do not participate actively in the research process. In such cases, ISG's evaluation on existing market/public information of the company, internal ISG sources and ISG Advisory and secondary sources would be considered ultimate for the positioning of the Service Provider/vendor.

Sneak Previews

- Post the research phase completion, sneak previews will are conducted. Sneak previews are 30-minute telephonic conferences with the ISG analysts and account managers to explain the ISG Provider Lens™ study results for the respective quadrant or archetype leaders/Rising Stars.

- We also conduct sneak previews with any study participant on request to present second-window rights and related opportunities, based on the study. A fact check window will be open and each provider who is identified as a leader /Rising Star will be allowed to make any recommended changes for their content within 72-120 hours (3-5 days), post which the write-ups will be considered final and no further changes will be entertained after the window gets closed. ISG will then publish the content presented in the sneak preview data.

- All results, calculations and assumptions presented within the sneak previews are business secrets of ISG; they are protected accordingly, based on the Act Against Unfair Practices, and by copyright law. No content of such sneak previews may be disclosed to any third party, unless required rights and entitlements have been acquired accordingly; this also applies for quotations or copies of parts of the sneak preview and includes the respective company's advertising, promotional activities and press releases. No ISG content is allowed to be published on any company websites or in any marketing documents/events, etc. without intimation to ISG, IPL account managers and taking necessary permissions and adhering to the ISG norms.

For your reference -

- The primary purpose of the sneak preview is to announce and present the results of the study and ensure the textual facts about the vendor/ service provider are represented correctly.

Please note that SNEAK PREVIEWS ARE NOT INTENDED TO:

- Dispute the ratings / positioning on the quadrant or archetype.

- Provide additional data to complete the survey responses. This data will not be considered for evaluation; however, this will be updated in the provider profiles.

Please note that SNEAK PREVIEWS ARE NOT INTENDED TO:

- Dispute the ratings / positioning on the quadrant or archetype.

Non-leaders

- Non-leaders/Rising Stars will be notified with a draft report before the ISG press release.

Press Release and Media Publish

Upon completion, our ISG Provider Lens™ studies are published in the media through the following channels:

Press releases, ISG Insights™, ISG website, and social media

Providers can purchase reprint rights to the report and have the opportunity of being included in our Press Release via a landing page link. Copies of the full report can also be purchased for internal use. *(Please see appendix to get a sneak peak into our press releases showcases)*

Please reach out to your respective IPL account managers for being part of the ISG Press Releases.

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ISG Advisory and Client Testimonial

"Totally love the new IPLs you created. Such a rich ecosystem of providers shown in Germany with a very profound mix between the big international players and local providers. Thanks so much for this awesome piece of work that well help to strengthen out market perception in the Analytics space in Germany and everywhere else."

– Dries Ballerstedt, Consulting Manager at ISG

"Great job Manoj and ISG! We confirm ISG Provider Lens™ Quadrant reports provide valuable insights to enterprise buyers on the strengths, competitive differentiators and unique selling points of leading service providers serving each market. Enterprises will find wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners."

– Erwin Lutz, Director at Orange Business Services

"The Provider Lens program and participating in the FAO research was an enriching experience.
You differentiated with (a) Analyst visiting the campus for an in person briefing,(b) seeking feedback from industry advisors on capabilities, (c) recognizing a leader through the Provider Lens badge and (d) hosting a coveted award ceremony in US and UK to recognize performers. It was refreshing."

– Infosys

"Participating as an Advisor in various ISG Provider Lens reports over the past year has greatly increased my confidence in the IPL reports. Not only has the team done a great job in placing dozens of providers into the "grids", the team is always able to appropriately answer challenges from the Advisor community as to the placement of specific providers based upon Advisor experience in the marketplace. The Research team always has a very solid rationale for the placement and seems uncanny in their ability to remember details as to why a provider is placed where they have been placed. An additional factor contributing to my confidence was a fact that may have been overlooked by me in the past. The team is not just collecting data from the providers, they go through very detailed briefings with each provider where the Research team and Advisors are challenging the providers. These briefings are very informative and contribute greatly to the report and the credibility by providing the detail and the stories around the data provided."

– Scott Furlong, Partner at ISG

List of Analysts for 2021

Aase, Jan Erik
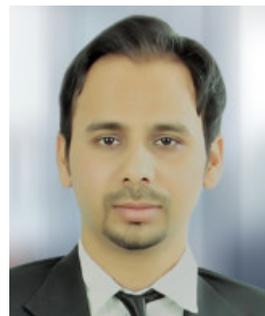Principal Analyst

Antons, Karen
Principal Analyst
US, UK

Basu, Avimanyu
Lead Analyst
Geography Coverage –
US, UK

Baty, Craig
Lead Analyst
Geography Coverage – Australia

Brito, Paulo
Lead Analyst
Geography Coverage – Brazil

Chandra Jha, Manoj
Lead Analyst
Geography Coverage –
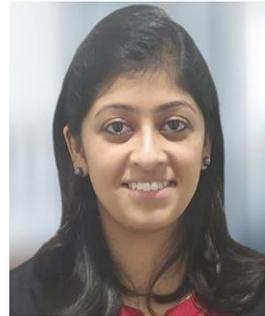UK, Nordics

Changulani, Amar
Principal Analyst
US, UK

Chaturvedi, Ashish
Principal Analyst
Geography Coverage – US, UK

List of Analysts for 2021

De Bhaumik, Manali
Lead Analyst
Geography Coverage – US

Darshan, Namratha
Principal Analyst
Geography Coverage – US

Dransfeld, Henning
Principal Analyst
Geography Coverage –
Germany, Nordics, UK

Exler, Ron
Principal Analyst
Geography Coverage – US

Guptill, Bruce
Principal Analyst
Geography Coverage – US

Hanley Frank, Blair
Principal Analyst
Geography Coverage – US

Harinarayan, Akhila
Lead Analyst
Geography Coverage –
UK, Nordics

Heinhaus, Wolfgang
Lead Analyst
Geography Coverage – Germany,
Switzerland

List of Analysts for 2021

Henkes, Heiko
Principal Analyst
Geography Coverage – Germany

Heuer, Frank
Lead Analyst
Geography Coverage - Germany, Switzerland

Jones, Stanton
Principal Analyst
Geography Coverage – US

Kendler, Peggy
Lead Analyst
Geography Coverage – US

Luís Bicudo Maschio, Pedro
Lead Analyst
Geography Coverage – Brazil, France

Landrock, Holm
Lead Analyst
Geography Coverage – Germany

Nickels, Oliver
Lead Analyst
Geography Coverage – Germany, UK

Ohtani, Mauricio
Lead Analyst
Geography Coverage – LATAM

List of Analysts for 2021

Peichert, Lutz
Lead Analyst
Geography Coverage – US and Germany

Rai, Mrinal
Principal Analyst
Geography Coverage – US

Rajmane, Shashank
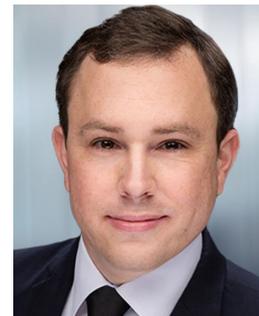Lead Analyst
Geography Coverage – US

Sampath, Gowtham
Lead Analyst
Geography Coverage – US

Steck, Ralf
Lead Analyst
Geography Coverage – Europe

Scheuber, Benoit
Lead Analyst
Geography Coverage – France

Siefke, Jonathan
Lead Analyst
Geography Coverage – Germany, Switzerland

Subramaniam, Kartik
Lead Analyst
Geography Coverage – US, Nordics

List of Analysts for 2021

Scheibmayr, Florian
Lead Analyst
Geography Coverage – Brazil

Suletzki, Rainer
Lead Analyst
Geography Coverage – Germany

Tabach, Marcio
Lead Analyst
Geography Coverage – Brazil

Vaid, Tarun
Lead Analyst
Geography Coverage – US

Walters, Kenn
Lead Analyst
Geography Coverage – US, Germany

Winkler, Dennis
Lead Analyst
Geography Coverage – US

A glimpse into ISG Provider Lens™ Award Ceremony