



**\*ISG** Provider Lens™

2021

Digital Business – Solutions  
and Service Partners 2021

imagine your future®

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# Definition

The COVID-19 pandemic has accelerated the adoption of digital tools and transformation services around the world and created a surge of new digital transformation initiatives. Many of these initiatives have helped businesses survive and thrive; hence, digital transformation has become the pathway to success for businesses across all industries. The use of information technology to change the customer journey, improve business agility or deliver digital products has helped businesses across all processes, including sales, trading, production, supply chain, product design and human resource management, among others, to deliver real benefits to the bottom line and enabled businesses to maintain the client experience during the ongoing pandemic.

In the past one and half years, many businesses have digitized their customer experience to continue servicing their clients, specifically in the industries where brick-and-mortar stores remained inaccessible due to the COVID-19 pandemic. While some of the businesses moved their customer journeys to online channels, some other businesses have leveraged innovative services such as the use of multiple emerging technologies to deliver better customer experiences, thereby moving from generation 1 customer experience (online channels) to generation 2 customer experience (innovative services).

One of the most disrupted segments during the COVID-19 pandemic has been the supply chain. The complexity involved in the supply chain emphasizes the fact that we live in a globally connected and highly interdependent world. The digitalization of the supply chain also brings in the aspect of the resilient supply chain. With increasing technology and infrastructure footprint due to an increase in digitalization, it is imperative for organizations to embrace the sustainability goals for a greener and livable planet.

This ISG Provider Lens™ study is focused on identifying the service providers that can support clients in these capabilities. Digital-ready service providers understand the full scope of digital services to provide constant innovation for 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 digitize any client organization.

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

- Transparency on the strengths and areas for improvement of relevant providers
- A differentiated positioning of providers by segment
- A perspective on different markets, including the U.S., the U.K., Germany, Nordics, Brazil, Australia and New Zealand

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

ISG Provider Lens™ study offers services providers insights on competitive landscape, key business drivers and opportunity to evaluate core competencies. ISG provides global focused Archetype study which highlights detail insights on client's requirement and align buy-side needs with provider-side capabilities to reduce costs for both sides.

# Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following six quadrants on Digital Business Solutions and Services:

Digital Business – Solutions and Services Partners 2021	
Digital Business Consulting Services	Digital Customer – Experience Services
Digital Supply Chain Transformation Services	Digital Customer Experience – Omnichannel Services
Blockchain Services	Sustainability and Decarbonization Services

Source: ISG 2021

## Digital Business Consulting Services

The Digital Business Consulting Services quadrant assesses the provider's capability to advise clients on the different facets of the digital journey, including strategy, design, data, technology, organizational change management, operations, digital culture and innovation.

Digital business consulting includes services provided to enterprises across customer and employee journeys, strategy and operations of digital business. These services help enterprises build new business models by capitalizing the existing capabilities across market opportunities. The services provided should create significant benefits for the client and drive growth. Providers in this space should be able to help organizations transform and optimize their operational environments through research, benchmarking, advisory and consulting with a focus on information technology, business process transformation, program management services and organizational change management.

The participating companies should be capable of helping their clients through the digital journey, from conceptualizing the vision to delivering the actions needed for the transformation across different industries.

### **Eligibility criteria:**

- Offer one or more of the consulting services across the digital journey
- Help clients formulate their digital roadmap and build the digital strategy in the short and long term
- Offer advice and guidance on process optimization to deliver tangible benefits
- Manage a geographically dispersed workforce for its service across geographies

## Digital Customer - Experience Services

This quadrant assesses a service provider's and digital agency's ability to deliver business model innovation, enabling enterprises to build competitive differentiation in today's digital economy. Providers in this quadrant should be able to provide consulting and implementation services to improve the customer experience for their clients.

Customer experience design is transforming how companies organize marketing, sales, delivery and post-sales processes. It is a customer-centric approach and changes all of the enterprise's business processes around the customer.

Digital customer experience indicates how digital companies design differentiation for the end customer journey. This quadrant involves conceiving customer journeys to create new business models and realizing the benefits using new technology and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product and a brand. The design process includes technology experts, sales, marketing and clients in a collaborative process. Leading firms use analytics to extract insights from user data. Cognitive computing extracts data from conversations, texts and social media. The experience is measured with simple A/B tests as well as complex sentiment analysis captured from customer interactions.

The customer experience involves real-time monitoring and measuring of various touch points that drive the customer journey and the supporting technology and business processes. The customer experience team produces a continuum change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy.

### **Eligibility criteria:**

- Should focus on user experience to design apps, web and product/services using advanced technologies such as AI, machine learning and IoT
- Should focus on delivering an end-to-end customer journey to provide a differentiated value proposition
- Should offer advisory, integration and managed services for innovative customer experience services
- Must showcase deep industry and customer knowledge for business transformations, changing channels, business structures and cultural shift
- Must have established CX governance framework
- Should have the capability to deliver services using innovative technologies such as augmented reality and virtual reality

## Digital Customer Experience – Omnichannel Services

The Digital Customer Experience – Omnichannel Services quadrant assesses a service provider's and digital agency's portfolio and capacity to move their clients' businesses from traditional services to deliver customer experience through omni-channel services.

An increasing number of enterprises leverage online channels to keep the lights on in their businesses and have moved their customer experience journey to online channel services. These enterprises are progressing toward omnichannel services while taking advantage of their customer base across each of their online channels.

The providers in this quadrant should have experience in implementing customer experience across channels such as web and mobile, including interaction using social media channels. The providers should have enabled the clients to quickly turn around their business during the COVID-19 pandemic and get the operations running in a short span of time. The providers are differentiated in terms of their agility and nimbleness toward the client's situation and their ability to deliver the required support for the business to move their services online and manage the technology infrastructure and digital platforms to sustain these services on online channels.

### **Eligibility criteria:**

- Should focus on user experience to design apps, web and product/services with an omnichannel approach
- Employ design thinking or alternative methodologies to involve the customer in designing products and services
- Offer advisory and integration services for client's end-to-end customer journey cycle
- Deliver services through virtual meeting platforms and envisage customer journey through creative ideas



## Digital Supply Chain Transformation Services

The Digital Supply Chain Transformation Services quadrant assesses service providers offering consulting, integration, support and managed services for the supply chain across planning, execution and insights. The providers should leverage a comprehensive framework or methodology to use digital technologies such as IoT, machine learning, AI and predictive analytics across the supply chain to enable the clients to optimize their entire ecosystem of suppliers, customers, employees and third-party partners to balance their business risk profiles.

The digital supply chain transforms a company's ability to anticipate and serve customer needs by managing the supply chain efficiently using digital technologies. It enables a company to move from cost savings to monitoring inventory based on customer needs, optimize the supply chain network, and create a predictive, self-adapting supply chain. To deliver these advanced features, the providers use sensors, predictive analytics, digital twins, blockchain, machine learning and AI solutions, giving it end-to-end real-time visibility across its integrated and networked supply chain. Due to the COVID-19 pandemic, many organizations have moved toward the digital supply chain. In addition, providers are helping clients to not only plan, transform and execute the technology aspect of entire supply chain, but also optimize the operations across the supply chain. In a future where trade wars, political unrest, pandemic, importance of having multiple production units and preference for domestic manufacturing might become a norm, providers need to re-architect their digital supply chain offerings to increase resilience, support for leveraging digital technologies and frameworks to enable minimal disruption and loss of economic value to their clients.

Service providers in this quadrant typically offer supply chain analytics, data management, demand and supply planning and forecasting, and order management integrated with digital technologies to deliver substantial benefits to their clients.

### **Eligibility criteria:**

- Ability to offer consulting and integration services for supply chains
- Focus on more than one specific industry across the county or region
- Should have executed advisory, consulting, or integration for the digital supply chain for one or more clients across the regions or for a specific geography
- Focus on one aspect of the digital supply chain or through end-to-end delivery of services across the supply chain by leveraging digital technologies
- Ability to integrate modern technologies such as IoT, blockchain, automation and deliver better user experience (UX)
- Strong regional partner ecosystem of ISVs and other certified partners
- Offer resilient digital supply chain services supported with local governance, regulation and compliance requirements

## Sustainability and Decarbonization Services

The sustainability and Decarbonization Services quadrant assesses service providers' ability and capability to deliver sustainability services for their clients either as a standalone service or as a packaged offering for digital contracts.

Technology powering digital transformation generates significant carbon footprint, however digitalization is also a means to achieve sustainability and decarbonization. With world leaders taking a pledge for climate change, it is imperative for the businesses to achieve net neutrality in carbon emission and remain sustainable to achieve the dual impact of sustainability goals and benefits of digital transformation.

Sustainable business innovation across the enterprises is aligned with the United Nation's 17 Sustainable Development Goals (SDG) targeted to be achieved by 2030. The Climate Pledge signed on mitigating climate change, signed in 2016 in Paris by around 196 countries has steered organizations to focus on net zero carbon emission and 100 percent renewable energy. With these imperatives, services providers are helping their clients in their sustainability efforts while addressing their digital transformation initiatives.

The providers in this quadrant should be able to help clients in achieving carbon neutrality and improve their environmental, social and governance (ESG) performance.

### **Eligibility criteria:**

- Providers should have helped their clients in at least one of the SDG and ESG goals
- Should have solutions for businesses to achieve their sustainability goals
- Should offer sustainability services as a separate offering or as a part of their digital services
- Should have helped clients achieve or have a target to achieve sustainability in the region of assessment
- Should be able to measure and report revenue from sustainability services delivered for clients

## Blockchain Services

The Blockchain Services quadrant assesses a service provider's competencies in consulting, designing, deploying, and operating blockchain solutions and providing services to manage these solutions.

Blockchain's decentralized, open and cryptographic nature allows enterprises to transact on a peer-to-peer basis, reducing the need for intermediaries. The technology is open source, providing full transparency and long-term continuity irrespective of the corporation behind the platform. Every transaction is registered in multiple databases and is encrypted by a common hash code that changes every few minutes, forming a data blockchain in multiple databases. Rather than having one database as the single source of truth, blockchain provides multiple sources for validating a single transaction.

Blockchain has proven viability with numerous use cases from service providers. The banking, financial services and insurance (BFSI) sector uses the technology to share information, improve security and reduce transaction costs such as in money transfers. Viable use cases are also found in supply chain, tracking, payment services, and document and contract processing.

### Eligibility criteria:

- Member of at least one blockchain consortium
- Offer consulting expertise to design viable solutions
- Demonstrate several blockchain use cases and provide a library that accelerates new deployments
- Backed by qualified and trained practitioners to deploy and operate the platform for customers
- Provide services with local expertise in the assessed region or country

# Quadrants by Region

Quadrants	Global	U.S.	U.K.	Germany	Nordics	Brazil	Australia
Digital Business Consulting Services	Overview	✓	✓	✓	✓	✓	✓
Digital Customer - Experience Services	Overview	✓	✓	✓	✓	✓	✓
Digital Customer Experience - Omnichannel Services	Overview	✓	✓	✓		✓	✓
Digital Supply chain Transformation Services	Overview	✓	✓	✓	✓	✓	✓
Blockchain Services	Overview	✓	✓				
Sustainability and Decarbonization Services	Overview	✓	✓	✓	✓	✓	✓

# Archetype Report

In this report, ISG identifies and classifies the typical buyers of digital business solutions and services, which are interested in and looking for transformational capabilities. This strategic report supports improved awareness, knowledge and decision-making on the capabilities and positioning of digital business services and solutions. The ISG Provider Lens™ Archetype studies provide a means to align sets of ISG-identified client requirements with known provider capabilities.

The report will identify four archetypes that represent buyer characteristics and buying requirements for digital business services and solutions lines:

- Globally focused
- Represent ISG advisor and analyst perception of client buying patterns
- Non-prescriptive nor rank based
- Help align buy-side needs with provider-side capabilities to reduce costs for both sides

Figure 1: Sample ISG Provider Lens™ Study Provider Listing

Traditional Archetype Archetype Leaders	Staff Augmentation Focus	T&M Pricing Focus	Packaged Technology Capabilities	Custom Development Focus
A				
B				
C				
D				
E				
F				
G				
H				

Score 4 out of 4    
 Score 3 out of 4    
 Score 2 out of 4    
 Score 1 out of 4

We have identified four major segments of buyers for digital business solutions and services:

### **Traditional and Conservative:**

Clients in this archetype are legacy heavy and have limited outsourcing experience and engage with service providers through selective outsourcing requirements. They look for advantages in terms of cost savings and operational efficiencies while applying cutting-edge technologies within digital transformation journeys. These clients are looking for outsourcing or staff augmentation assistance for basic monitoring and operations activities. They have undertaken digital transformation initiative to improve operational efficiency, creating new service line, and enhance customer relations. These clients focus on implementing a digital contract across one business function or across entire business process cautiously either through ideation, prototyping, or deploying ready, pre-built solutions. Outsourcing contract sizes are not large. Clients would only consider certain KPIs relevant for operational efficiencies and require basic expertise and assistance in digital transformation.

**Managed service focused:** Clients in this archetype are keen to move further in their digital transformation journeys and are focused on enhancing their end-user experiences by implementing digital technology stack. These clients have already witnessed successful execution of their smaller digital transformation initiative such as cost optimization or task automation and are now willing to transfer greater operational responsibility to an outsourcing service provider. These clients are willing to embrace digital transformation capabilities by investing in business process or function automation, cloud and user experience that can directly translate the business outcome. Clients in this archetype are exploring and evaluating tools and methodology that can assist them in transformation. These clients require strategy, consulting services and implementation and managed services from providers for their digital journey. However, budgets are constrained, and deal sizes are not large.

**Transformational:** Clients in transformational archetype view their entire IT ecosystem from a strategic perspective. Transformational buyers already have achieved a high level of virtualization and standardization and are looking to further transform their infrastructure. Budget is not a constraint for these buyers; hence, they are willing to undertake large transformation initiatives. They view service providers as strategic partners that would be willing to participate in outcome-based or gain-share deals. They are customer-centric and gain competitive advantage by utilizing current and emerging digital transformation methods, tools, delivery models, processes, and technologies. These companies often have multi-channel customer touchpoints and are focused on increasing revenue by utilizing IT rather than just reducing costs. The focus on increasing revenue is the major driver behind their strategy, coupled with improving flexibility, agility, competitive positioning, and speed of reaction to competitive pressure. They are comfortable with crowdsourcing and crowdfunding, user micro-service creation and continuous development and improvement. They are prepared, under specific circumstances, to adopt disruptive or new solutions through proofs of concept or pilot projects, but typically limit these to specific solutions, especially if deploying enterprise wide. Such a massive change requires mature service providers that have evolved over a period.

**Pioneering:** These clients are born digital and seek to extend their transformation initiatives with investments in niche technologies such as digital twin, augmented reality, virtual reality, edge computing, 5G and 3D printing. Their CIOs typically come from software companies or digitally transformed enterprise backgrounds. These clients are already involved with agile and lean developments and use software-defined and overlay-to-cloud networks. Buyers in this archetype are highly geared toward digital technologies, and innovation and budget constraint have a limited role to play in their business visions. Such companies have high R&D investment and are keen on collaborating to develop next-generation innovative solutions. They view service providers and hardware providers as strategic partners with a commitment to participate in gain-share deals that include business outcomes and assist them in their journey toward innovation. They create or defend against competition by using emerging, potentially disruptive methods, processes and technologies as early as possible. Buyers in this archetype prefer service providers that can manage digital business transformation with DevSecOps-oriented approach.

# Schedule

The research phase falls in the period between **August and September 2021**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **October 2021**.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Launch	July 7, 2021	
Survey Phase	July 7, 2021	August 5, 2021
Sneak preview	September 20, 2021	October 11, 2021
Press release	November 21, 2021	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2021 research agenda:

## **Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

## **Research Production Disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

# ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#)

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: [ISG.star@isg-one.com](mailto:ISG.star@isg-one.com)



# Partial list of companies being invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

247.ai	Blockshipping	Daitan
4all	Bluelab	Datacom
Accenture	Bridgei2i	Datacopier
Acciona	BRLink	DB1 Global Software
ACCT	BRQ	DBC Company
All-for-one	Buzzmonitor	Deal
Applied Blockchain	CANCOM	Dedalus
Arcadis	Capgemini	Deloitte
Armstrong	CGI	Devoteam
Arvato	CI&T	Dextra
ASG	Claranet	Diebold Nixdorf
Aspen Technology Inc.	Clavax	Digital First
Aspiresys	Cocus	Dinamize
Atos	Codecentric	DNV
Avanade	Coforge	Driven CX
Avenue Code	Cognizant	DX Solutions
Axians	Compasso UOL	DXC
Bain & Co.	Computacenter	ec4u
BCG	concentrix	Eccelerate
BearingPoint	Compass	e-Core
Beeders	CPqD	EDS – Extreme Digital Solutions
Birlasoft	CSS Corp	eInfochips
Black&Veatch	Customer Science	EloGroup
Blend IT	Cybage	Elumini IT
Blockchain Expert	Cybercx	Endeva

engie Impact	ICM	Mindminers
EPAM	Ilegra	Mindtree
ERM	Indra	Monitora Soluções
Escale	Infinite	Mooven
Everis	Infobip	Mphasis
Everymind	Infosys	Mutant
EY	Innominds	Mutant/Dextra
Fifth Quadrant	Innovations ON	MUUUH!
Fujitsu	Interchains	Nação Digital
FutureBridge	Isobar	Nama
GAVB	iTrack	Neoassist
GEP	JFOX	New Way
GFT	Kearney	Nexxer
GlobalBot	Keyrus	Nimbi
GlobalLogic	Kin + Carta	NNIT
GoBots	Kinetic Consulting	NTT
Group 50 Consulting	KMD	NTT Data
Grupo BExpert	KPMG	NTT/everis
Guidehouse	LimeBridge	Numen IT
HCL	Logicalis	Nuvini
Hexaware	LTI	OmniChat
HGS Digital	MadeinWeb e Mobile	OpenLedger
Hi Platform	McKinsey	Opinion Box
Huggy	Mckinsey&Company	Pac Blockchain
IBM	Mercos	Persistent
Icaro Tech	Microsoft	PIA (UDG)

Pitang	Smart-IT	Trainz
Programmer's	Softtek	T-Systems
Protiviti	SoluCX	TTEC
Publicis Sapien	Sonata Software	Twilio
PwC	Sonda	Ubots
Qintess	Sopra Steria	Unisoma
QSC	Sottelli	Unisys
Raccoon	Sprinklr	UST Global
Radix	SPRO IT Solutions	Valid
Reply	Squid	Valtech
Revelo/Daitan Group	Stefanini	Visagio
Rocket.Chat	TCS	Visionet
Samba Digital	Tech Mahindra	VMware
Semantix	Telstra	Vortigo
Sempre IT	Telstra Purple	VuNet Systems
Sensedata	Tesseract	Vuram
Sensedia	The Customer Experience Company	Winnin
Siemens Energy	Thoughtworks	Wipro
Sinqia	TietoEVERY	Zensar
SLK Group	TIVIT	Zenvia
Smarkio	Track.co	

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## Do you need any further information?

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