ISG Provider Lens™ – Program

2018 | ANNUAL PLAN

imagine your future®

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Contact:

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ISG Provider Lens™ – Study

ISG Provider Lens™ Research (Archetype & Quadrant) are dedicated studies of relevant offerings related to specific IT or BPO topics or service lines over multiple regions (see "IPL Project Plan" for details). Leading vendors and service providers are evaluated and positioned, based on a transparent methodology.

The studies provide IT vendors and providers an informed base of data and research to enable them to compare their own offerings with those of relevant competitors and to reveal strengths and weaknesses as well as competitive differentiators and unique selling points. Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG Advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

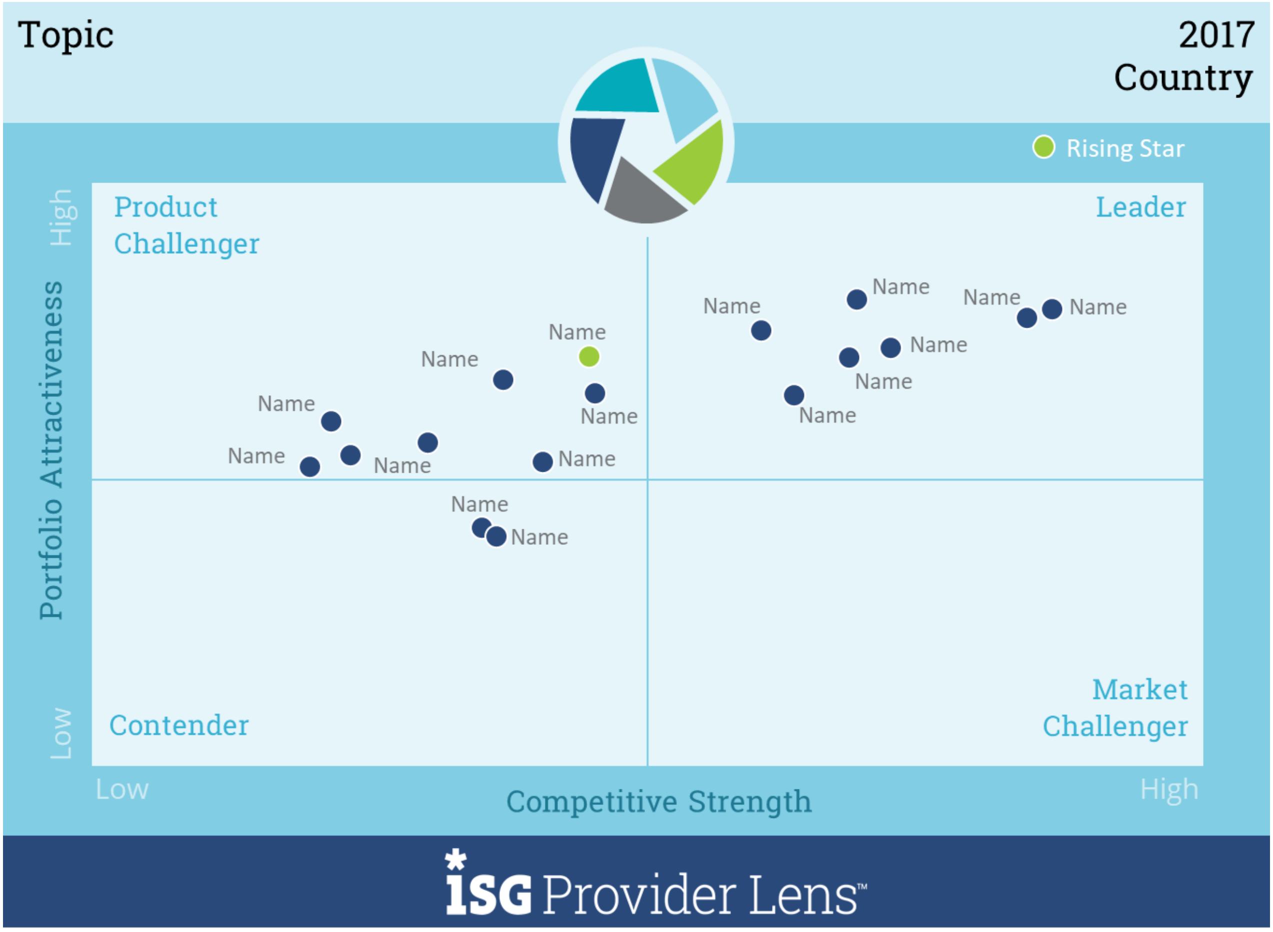
Vendor positioning is based on a neutral and independent research and evaluation process. Participation in the study is FREE OF CHARGE. Vendors can purchase reprint rights of the study for marketing, press and sales purposes only AFTER the study has been completed.

We create market transparency

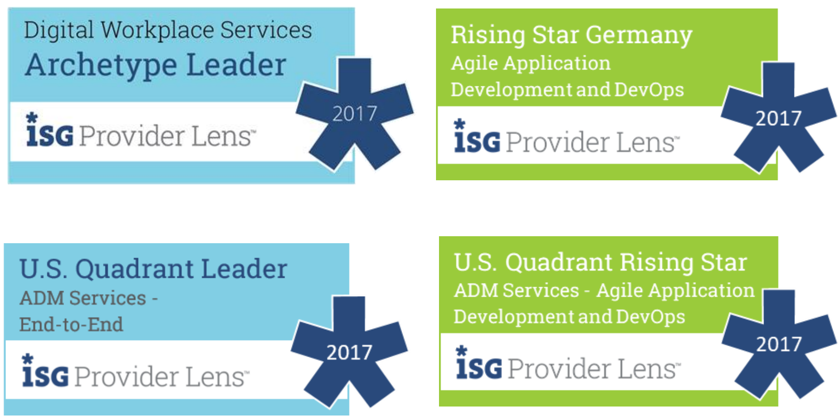
Independence	Self-funded Provider Lens; vendors may purchase the right to market the results at the same time or after the study is published.
Topical relevance	Cloud, Social Business, IOT, Security, Digital Workplace, etc. are covered.
Country-specific relevance	Allows local vendors to be included.
Practical relevance	The study includes a summary of the leading vendors' key information as well as the customer's specific experiences.
Length of research	Through an annual research process for each study. Over 4 – 5 months
Comparability	The research methodology allows us to position vendors by competitive strength and portfolio attractiveness while also factoring in information from various ISG data assets (e.g., contract knowledgebase).
Company-specific	For users, weightings based on priorities and individual demand can be adjusted for service provider and solution evaluation within a project.

ISG Provider Lens™ Quadrant Study – Global & Regional

The ISG Provider Lens™ Quadrant studies provide an excellent view of the top players in the defined country, region or globally.



Source: ISG Research 2017



ISG Provider Lens™ Archetype Study – Global

These strategic reports support improved awareness, knowledge, and decision-making regarding IT and business service providers' capabilities and positioning.

The new ISG Provider Lens™ Archetype studies provide a means to align sets of ISG-identified client requirements with known provider capabilities in such standard outsourcing areas as ADM, FAO, digital workplace etc.

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

Increased Visibility
This is a channel to increase the visibility amongst ISG advisors and enterprise clients.

Improved Reach
ISG advisors have worked on over 56,000 outsourcing contracts, valued at approximately $400 billion USD, during client engagements. This information is widely used during RFI/RFP engagements.

Increased Opportunity
Increased possibility of being shortlisted and getting invited to ISG advised deals.

Comparability
The ISG Provider Lens™ methodology allows us to position providers by competitive strength and portfolio attractiveness within each Archetype.

In these studies, client objectives are organized by "archetypes" that summarize key requirements typical for each point in an enterprise maturity lifecycle. Each report identifies between four and six archetypes that represent common circumstances which we encounter in our work with clients and with service providers.

ISG Provider Lens™ Archetype reports are not prescriptive, nor are they rank-based.

They provide a means to help align buy-side needs with provider-side capabilities to reduce costs for both sides. *These reports simply present service providers' known capabilities in the context of clients' typical engagement needs.*

Course of Project

Research Phase

ISG Provider Lens projects start with the **research phase**, which will be announced through a mailing. During the research phase, vendors can actively participate, complete the questionnaires and engage in briefing interviews with the analysts in charge of the respective project.

Active participation increases related benefits for the participating company as well as for ISG, since a more comprehensive and detailed presentation of products and services can be provided accordingly. However, this does not mean that no evaluation is given if a vendor does not participate actively in the research process. In such case, ISG will base their evaluation on existing information and secondary sources, which might be incomplete. Participation within the research phase is free of charge.

Sneak Previews

Once the research phase has been completed, **sneak previews** will be provided.

Sneak previews are 30-minute telephone conferences with our analysts and account managers to explain the ISG Provider Lens™ study results to only the respective vendor or service provider quadrant or archetype leaders/Rising Stars or at the request of any study participant and to present second-window rights and related opportunities, based on the study.

A fact check will be requested from each provider identified as a leader /Rising Star. A period of 72 hours will be given to return any factual or data changes.

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 also by copyright law. No content of such sneak preview 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 and promotional activities and press releases.

Press

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

Press releases, ISG Insights™, ISG Provider Lens Briefs, ISG Research Alerts, ISG Lens360 blogs, ISG website, and social media. Copies of the full report can also be purchased for internal use only.

Schedule 2018/2019

Research Plan 2018 / 2019	Regions										2017	2018												2019		
ISG Provider Lens Projects	Global Archetype	Global Quadrant	USA	Pan America	Germany	UK	Pan Europe	ANZ	Brazil	Others	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Infrastructure & Data Center / Private Cloud - Part A	1	1	1						1																	
Infrastructure & Data Center / Private Cloud - Part B				1	1	1	1	1																		
Fincance & Accounting Outsourcing Services	1	1	1																							
SIAM / ITSM			1		1																					
Software Defined/Traditional Networks & Telco Services			1		1																					
Next-gen Application Development & Maintenance (ADM) Services	1	1	1	1	1	1	1	1																		
Engineering Services			1		1																					
Digital Workplace of the Future 2019	1	1	1	1	1	1	1	1																		
Cyber Security Solutions & Services			1		1																					
Cloud Transformation/Operation Services & XaaS	1	1	1	1	1	1	1	1		CH																
Digital Business Transformation	1	1	1	1	1	1	1	1																		
Contact Center / Customer Experience Services	1	1	1																							
Data Analytics Services & Solutions			1		1																					
SAP/4HANA			1		1																					
Internet of Things (I4.0) Platforms, Services & Solutions			1		1																					
Cloud Platforms & Technology/Access Services			1		1																					
Social Business & Collaboration			1		1																					
Sales Phase																										
Research Phase																										

Agenda 2018/2019

Phase	Start survey	Finish survey	Start Sneak Preview	Press release
Topics				
Infrastructure & Data Center / Private Cloud 2018 *Global Archetype / Quadrant, USA, Brasil*		in progress	The week of March 5	The week of April 23
Infrastructure & Data Center / Private Cloud 2018	The week of Jan. 8	The week of Febr. 5	The week of April 16	The week of June 4
Finance & Accounting Outsourcing Services 2018	The week of Jan. 15	The week of Febr. 12	The week of April 30	The week of June 18
SIAM / ITSM 2018	The week of Dec. 11 / 2017	The week of Jan. 29	The week of March 12	The week of May 14
Software Defined/Traditional Networks & Telco Services 2019	The week of Jan. 8	The week of Febr. 5	The week of May 14	The week of July 2
Next-gen Application Development & Maintenance (ADM) Services 2019	The week of Febr. 26	The week of April 2	The week of July 2	The week of August 27
Engineering Services 2019	The week of Febr. 26	The week of April 2	The week of July 2	The week of August 27
Digital Workplace of the Future 2019	The week of April 2	The week of April 30	The week of July 30	The week of Sept. 24

Agenda 2018/2019

Phase	Start survey	Finish survey	Start Sneak Preview	Press release
Topics				
Cyber Security Solutions & Services 2019	The week of April 2	The week of April 30	The week of August 30	The week of Sept. 24
Cloud Transformation/Operation Services & XaaS 2019	The week of April 30	The week of May 28	The week of Sept. 3	The week of Oct. 29
Digital Business Transformation 2019	The week of June 4	The week of July 2	The week of Oct. 1	The week of Nov. 26
Contact Center / Customer Experience Services 2019	The week of June 4	The week of July 2	The week of Oct. 1	The week of Nov. 26
Data Analytics Services & Solutions 2019	The week of June 18	The week of July 16	The week of Oct. 15	The week of Dec. 10
SAP/4HANA 2019	The week of Sept. 3	The week of Oct. 1	The week of Jan. 7 / 2019	The week of March 4 / 2019
Internet of Things (I4.0) Platforms, Services & Solutions 2019	The week of Sept. 17	The week of Oct. 15	The week of Jan. 21 / 2019	The week of March 18 / 2019
Cloud Platforms & Technology/Access Services 2019	The week of Nov. 5	The week of Dec. 3	The week of March 4 / 2019	The week of April 29 / 2019
Social Business & Collaboration 2019	The week of Nov. 12	The week of Dec. 10	The week of March 18/2019	The week of May 13 / 2019

Descriptions

Infrastructure & Data Center / Private Cloud

Companies are moving away from running their own in-house data centers and hand them over to service providers. The customer's own data centers are becoming too small or no longer meet today's security standards. When considering upgrading the existing data center or building a new one, many companies decide to outsource all or part of their IT infrastructure to a colocation service provider or to move to the cloud. In many IT departments, there is a lack of suitable employees or appropriate specialists who can manage the complicated IT operations, and they cannot be recruited on the personnel market. One way out is to transfer the IT infrastructure to a service provider who takes over the management of part or the entire IT infrastructure.

Finance & Accounting Outsourcing Services

The finance & accounting outsourcing (FAO) market, though traditional in nature, is emerging as an innovative and technology-driven service segment. Increasingly, we see providers with diversified portfolios and capabilities catering to the expanding and varying needs of different enterprise clients in this space. However, rapidly-changing enterprise client needs make it increasingly difficult for service providers to build expertise and offer services around every aspect of F&A outsourcing. The report summarizes the relative capabilities of FAO service providers and their abilities to address the requirements of four typical, frequently-encountered categories of enterprise user types ("archetypes"). Each archetype represents a unique set of enterprise user business and technological needs and challenges.

SIAM / ITSM

Service integration & management (SIAM) is a collection of frameworks and best practices encompassing the people, processes & tools required to manage end-to-end services through their lifecycle (service strategy; business demand & interfaces; change delivery; operational management; supplier management), to deliver value to the business in a multi-supplier environment. In the past, many companies outsourced multiple towers to large system integrators and it required some coordination to ensure those service providers were well integrated into the technology landscape of the company, most often on the infrastructure side of the house. In today's environments, it's common to see multiple service providers, both large and small, and they are no longer just in the infrastructure space, but also in application development & maintenance (ADM), business process outsourcing (BPO) and in non-traditional spaces such as finance, marketing and legal.

Software-Defined/Traditional Networks & Telco Services

The network acts as enabler of many ICT topics that impact our increasingly digital economy. Software-defined networks (SDN) and innovative WAN offerings serve as basis for digital ecosystems and ensure that known bottlenecks occurring during data transport from A to B are reduced or eliminated and that increasingly dynamic network loads are balanced accordingly.

The network study examines two different market types. While the MPLS market is highly mature regarding technologies and vendors, the software-defined network and SD WAN segment is still a young and dynamic market. For users, both markets are extremely important now. MPLS and fixed lines may soon be relics of the past. SD WAN is more reliable and more cost-efficient. Cloud computing requires agile WAN connections, which cannot be supplied by traditional networks. Also, more and more LANs evolve into WANs, a development that is also driving the software-defined networking trend.

Next-Gen Application Development & Maintenance (ADM) Services

Like traditional application services, next-gen ADM includes consulting, design, custom development, packaged software integration, operations, and testing. However, the scope, delivery mechanism and outcome for such contract pivots around a value-based approach where the focus is on achieving enterprise agility and solving business problems. Next-gen ADM makes use of emerging technologies/methodologies like agile, DevOps, automation, and modernization techniques to deliver application outsourcing projects. Service providers are incorporating new approaches in how they develop and deliver applications via modular, component-based and container technology. Because an application gets broken down into workloads and microservices, its release and production cycles are short, which makes applications easier to modify and deploy.

Digital Workplace of the Future

Digital workspaces enable clients' end users to access their enterprise data and applications irrespective of their physical location and the device being used.

It involves end users' desktop and mobile device support constituting their workplace (or workspace (not confining it to a physical location), including, but not limited to, mobile device and application management, application deployment and accessibility as per roles and access policy, e-mail, peer to peer messaging, collaboration services, Level 1/2 technical service desk support, desktop virtualization/desktop as a service, remote support, VIP/executive support, software distribution, patch updates, software upgrades and migration, IT asset analytics, automation capabilities for self-help and other services for enhancing end-user experience in a secured and cost-effective way.

Cyber Security Solutions & Services

User organizations have realized the high relevance of the security issue, and security and privacy remain top priorities for the CIO. A key reason for the higher acceptance of this issue is the fact that the management board is increasingly responsible for ensuring adequate security measures within the company. Also, a significant increase of targeted, highly sophisticated attacks on IT systems must be expected, and CIOs must be ready to respond to better protect their company. IT projects covering topics such as cloud computing, big data, mobile computing, social business and Industrie 4.0/IoT always include central security components, and so, these IT trends will certainly increase the momentum and relevance of IT security.

Cloud Transformation/Operations Services & XaaS
Cloud Platforms & Technology/Access Services

The total market of traditional hardware, software, and services with an overall volume of about 100 billion EUR is increasingly shifting into the services segment, which is evolving towards the cloud, except for purely human-based services. As a result, the service segment is increasingly characterized by parallel structures that map the shift into the cloud. By 2030, the cloud market will account for more than one third of the overall ICT market. Provided that exponential growth is achieved, the cloud market might constitute a much larger share of the market by then.

Consequences of this development are manifold: Most business models must change, some will become obsolete and many new models will evolve. In the wake of increasing cloud maturity and both users' and vendors' increasing understanding, the market is experiencing significant changes.

Digital Business Transformation

Digitization refers to the seamless, robust and adjustable provisioning of integrated ICT services without media breaks. The goal is to ensure autonomous business processes. Digitization requires the metamorphosis of existing business processes, based on continuous digital transformation. The focus of this study is on full IT business transformation providers that offer a great variety of IT products as well as suitable services for the disruptive competitive markets of tomorrow.

The digital transformation mega trend, including automation, remains a top priority on corporate agendas. The focus is on enabling businesses to efficiently address individual customer expectations. This requires companies to strive for continuous change – both internally and externally.

Contact Center / Customer Experience Services

Contact center outsourcing is contracting out call center services to a third-party provider. Contact center outsourcing is primarily used for service customer queries and encompasses outsourcing of processes like collections, sales & services, product support and feedback, tracking of shipments, bill collections, IVR and voice services, web services, email, SMS, and chat services, integration into social networks, omni-channel services, and other services for enhancing end-user experience.

Data Analytics Services & Solutions

Big data analytics has quickly evolved from a hype into a commodity topic. Basic technologies, from hardware, network and middleware to databases, business intelligence software, business analytics software and apps, are highly advanced, and technologically, the market is already highly mature. Users have recognized that buzzword technologies such as Hadoop or in-memory alone will not ensure their success. Vendors have evolved their analytics offerings into highly mature solutions very quickly. Users can leverage available solutions and services to perform practically any tasks. Analytics is increasingly entering the markets both horizontally and vertically: Analytics and big data become more specific, on the one hand, on the application and process level, and on the other hand, on the industry-specific level of user organizations, for, after all, fintech companies' analytics requirements differ from the requirements of the manufacturing industry.

SAP/4HANA

For respective digital transformation projects, SAP's HANA in-memory database and the new generation of their S/4HANA software are strong vehicles to move into the digital age, especially for the provider's existing customer base. However, there are major related challenges for customers and service providers alike: They must build a bridge between IT and business. Only those who can balance technology with process, business and strategy aspects will be able to pursue the path towards the new digital age. Migration to or new implementation of SAP HANA or conversion to S/4HANA requires a broad scope of solutions, from distribution (licensing models) and technologies (hardware, software, infrastructure) to services (strategies, analyses, business case analyses) to actual transformation (implementation, migration, integration). On the technology side, many models are available (on premise, cloud, hybrid), and most companies need support by experienced consultants to help them develop and implement a strategy.

Internet of Things/Industrie 4.0 Platforms, Services & Solutions

The Internet of Things refers to the utilization phase of digitalized and connected devices and products, which allows the providers/vendors to communicate with their own products while they are used by the customers and to provide new "digital" customer services such as predictive maintenance. IoT creates new areas of business and consumer interactions with a connected ecosystem delivering continuous experience.

The Industrial Internet of Things (IIoT), sometimes called Industrie 4.0 (I4.0), focuses on the production process within what we call a smart factory, based on connected and automated machines.

Social Business & Collaboration

Social business refers to efficient, state-of-the-art enterprise cooperation, based on social networking principles (“collaboration”) as well as modern solutions for client interaction and retention within rapidly changing, increasingly competitive markets (“commercial”).

An interesting new aspect within this study will address artificial intelligence in the form of chatbots, since ISG identifies major potentials for interesting new opportunities and efficiency gains.

Engineering Services

Engineering services encapsulate conceptualization, design, development, integration, testing, support, maintenance, and customization services in the areas of embedded systems and mechanical. They also include product life cycle management, plant & manufacture engineering viz. design & consulting, prototyping, application engineering, value engineering, test and validation, engineering process services, sourcing support, maintenance, sustenance & after-market support, electrical and electronics hardware and software, technical publications, detail engineering, and asset information management.

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 75 of the top 100 enterprises in the world, 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; technology 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 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.