

*ISG Provider Lens™

Annual Plan

2024



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About ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the 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 1,600 digital ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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Research Calendar 2024

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	U.S.	U.S. Public Sector	U.K.	Others	IPL Insights Report
Digital Engineering Services	Nov-23	Mar-24				✓							✓				
Chemical Industry Services and Solutions **	Dec-23	Mar-24				✓							✓				✓
Finance and Accounting (FAO) Platforms *	Nov-23	Mar-24							✓								
HR Outsourcing and Transformation Services *	Nov-23	Mar-24											✓				
Mainframes – Services and Solutions	Oct-23	Mar-24	✓			✓							✓	✓			
Microsoft Cloud Ecosystem	Nov-23	Mar-24		✓	✓			✓			✓		✓	✓	✓	Mexico	
Procurement BPO and Transformation Services	Nov-23	Mar-24							✓								
Procurement Software Platforms and Solutions	Nov-23	Mar-24							✓								
Salesforce Ecosystem Partners	Oct-23	Mar-24			✓		✓	✓					✓		✓		
SAP Ecosystem Partners	Nov-23	Mar-24			✓			✓	✓	✓			✓		✓		
ServiceNow Ecosystem Partners	Nov-23	Mar-24		✓	✓	✓							✓				
Cyber Security - Services **	Jan-24	Jun-24		✓	✓		✓	✓				✓	✓	✓	✓		✓
Cyber Security - Solutions	Jan-24	Jun-24							✓								
eMobility *	Jan-24	May-24							✓								

* New study ** Strategic Industry Report included

■ New region

Research Calendar 2024 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	U.S.	U.S. Public Sector	U.K.	Others	IPL Insights Report
Google Cloud Partner Ecosystem	Jan-24	Jun-24	✓		✓	✓							✓				
Insurance Platforms	Jan-24	Jun-24	✓			✓							✓				
Life Sciences Digital Services **	Jan-24	Jun-24							✓								✓
Network — Software Defined Services and Solutions	Jan-24	Jun-24	✓					✓					✓		✓		
Private/Hybrid Cloud - Data Center Services**	Jan-24	Jun-24	✓		✓		✓	✓	✓	✓		✓	✓	✓	✓	Netherlands	✓
Vertical Analytics 1 *	Jan-24	Jun-24							✓								
VMWare Ecosystem *	May-24	Nov-24	✓										✓		✓		
AWS Ecosystem Partners	Apr-24	Sep-24	✓		✓			✓					✓			Mexico	
Contact Center — Customer Experience Services	Mar-24	Sep-24		✓	✓	✓			✓				✓				
Finance and Accounting Outsourcing Services	Apr-24	Sep-24							✓								
Future of Work (Workplace) - Services **	Mar-24	Sep-24		✓	✓			✓				✓	✓		✓		✓
Future of Work (Workplace) - Solutions	Mar-24	Sep-24							✓								
Generative AI Services and Solutions *	Apr-24	Sep-24			✓				✓								
Payroll Services and Solutions	Apr-24	Sep-24											✓				

* New study

** Strategic Industry Report included

■ New region

Research Calendar 2024 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	U.S.	U.S. Public Sector	U.K.	Others	IPL Insights Report
MarTech Service Providers	Apr-24	Sep-24			✓												
Next-Gen ADM Services	Apr-24	Sep-24	✓		✓	✓							✓				
Next-Gen ADM Solutions	Apr-24	Sep-24							✓								
Retail & CPG Services	Mar-24	Sep-24											✓				
Supply Chain Services	Apr-24	Sep-24			✓								✓				
Vertical Analytics 2 *	Mar-24	Jul-24							✓								
Vertical Analytics 3 *	Mar-24	Aug-24							✓								
Workday Ecosystem Partners	Mar-24	Sep-24				✓							✓				
Advanced Analytics and AI Services	Jul-24	Nov-24			✓	✓							✓				
Digital Business and Innovation Services	Jul-24	Nov-24			✓												
Environmental, Social and Governance (ESG) Services **	Aug-24	Jan-25			✓	✓							✓				✓
Healthcare Digital Services **	Jul-24	Dec-24			✓								✓				✓
Insurance Industry Services	Jun-24	Dec-24				✓							✓				
Intelligent Automation - Platforms IDP	Jul-24	Dec-24							✓								

* New study

** Strategic Industry Report included

■ New region

Research Calendar 2024 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	U.S.	U.S. Public Sector	U.K.	Others	IPL Insights Report
Intelligent Automation - Platforms Process Mining	Jul-24	Dec-24							✓								
Intelligent Automation Services and Solutions	Jul-24	Dec-24				✓							✓				
Managed Network Services (MNS) *	Jul-24	Dec-24	✓					✓					✓				
Manufacturing Industry Services **	Jul-24	Dec-24				✓							✓				✓
Oil and Gas Industry — Services and Solutions **	Jul-24	Dec-24				✓							✓				✓
Oracle Cloud and Technology Ecosystem	Jun-24	Dec-24			✓												
Power and Utilities Industry — Services and Solutions **	Jul-24	Dec-24		✓		✓							✓				✓
Multi Public Cloud Services	Jun-24	Dec-24	✓		✓		✓	✓		✓		✓	✓	✓	✓		✓
Multi Public Cloud - Solutions	Jun-24	Dec-24							✓								
Telecom, Media and Entertainment Services	Jul-24	Dec-24											✓				

* New study ** Strategic Industry Report included ■ New region

Study Descriptions (alphabetical)



Advanced Analytics and AI Services

Overview

The ISG Provider Lens™ Advanced Analytics and AI Services report focuses on technologies such as cloud computing, IoT, data science, machine learning and deep learning that foster improvements in business performance. With large volumes of data being generated, businesses seek service providers with the expertise to maximize the value of their data by simplifying complexity and extracting valuable insights, ultimately fostering business success.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Advanced Analytics and AI Services study:

- Data Science Services
- Data Engineering Services
- Data Management Services
- Advanced BI and Reporting Analytics Services



AWS - Ecosystem Partners

Overview

The ISG Provider Lens™ AWS Ecosystem Partners report focuses on providers of technologies and services that use AWS to develop and deliver an array of enterprise IT and business services. This group of certified partners addresses all types of customer queries related to architecture and strategy consulting, implementation, migration and the professional use of solutions based on AWS infrastructures and platforms.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the AWS Ecosystem Partners study:

- AWS SAP Workloads
- AWS Data Analytics and Machine Learning
- AWS Brazil Public Sector — -Technology Services
- AWS Migration Services
- AWS Managed Services
- AWS Consulting Services



Chemical Industry Services and Solutions

Overview

The global chemicals industry is in the midst of a very tough year, as geopolitics, commodity price volatility, overall demand and supply chain issues plague the entire industry value chain. The industry also faces challenges around energy transition, carbon reduction and the adoption of new technologies. Automation, AI and other new technologies are influencing the overall production processes and driving the production and development of new materials, while helping chemical companies reduce emissions.

The ISG Provider Lens™ Chemical Industry Services and Solutions report aims to understand some of these key industry challenges and assess service providers' capabilities to address the unmet needs of enterprises.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Chemical Industry Services and Solutions study:

- Technology and Operations Services
- Supply Chain and Logistics
- Energy Trading and Risk Management (ETRM)

Study Descriptions (continued)



Contact Center — Customer Experience Services

Overview

The ISG Provider Lens™ Contact Center — Customer Experience Services report focuses on providers of outsourcing services and the associated aspects of contact centers, including strategies and technologies that improve end-to-end customer experience (CX).

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Contact Center — Customer Experience Services study:

- Digital Operations
- Work From Home Services
- AI and Analytics
- Social Media CX Services
- Debt Collection Services

With respect to the mentioned market and its requirements, ISG will be focusing on the following “global” quadrant for the Contact Center — Customer Experience Services study:

- Contact Center as a Service (CCaaS)



Cybersecurity — Services

Overview

The ISG Provider Lens™ Cybersecurity — Services report focuses on providers of professional services and related technologies involved in securing IT/OT systems; these systems are frequently horizontally integrated and are progressively interconnected with public networks. The study covers strategy development and specialized technical competencies, maintenance and management of security technologies, and enterprise-grade services for threat intelligence, attack surface management, vulnerability management, forensic response and detection, and recovery capabilities within the framework of risk and compliance management.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Cybersecurity — Services study:

- Strategic Security Services
- Technical Security Services
- Managed Security Services - SOC



Cybersecurity — Solutions

Overview

The ISG Provider Lens™ Cybersecurity — Solutions report focuses on vendors offering off-the-shelf cybersecurity technology products and independent software vendors engaged in securing IT/OT systems, endpoints, networks, identities and cloud environments. The vendors develop and offer both point solutions and integrated solutions that address user authentication, data loss prevention, and threat detection and response, as well as enterprise-grade solutions that mitigate sophisticated threats, thwart attackers and prevent cybercrimes. This is executed with careful consideration of pertinent regulations and compliance requirements.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Cybersecurity — Solutions study:

- Identity and Access Management (IAM)
- Data Leakage/Loss Prevention (DLP) and Data Security
- Extended Detection and Response (XDR)
- Security Service Edge (SSE)

Study Descriptions (continued)



Digital Business and Innovation Services

Overview

The ISG Provider Lens™ Digital business and innovation services include services provided to companies in their customer and employee journeys, digital business strategy and operations across their digital journey. These services help companies build new business models using existing resources, taking advantage of market opportunities. The services provided must generate significant benefits for customers and drive growth. Service providers in this quadrant must be able to help organizations transform and optimize their operating environments through research, benchmarking and consulting, focusing on information technology, business process transformation, program management services and organizational change management.

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

- Digital Transformation Services
- Customer Journey Services
- Extended Reality Services



Digital Engineering Services

Overview

The ISG Provider Lens™ Digital Engineering Services report focuses on service providers engaged in all the relevant phases of product lifecycle management and engineering. Digital engineering services encapsulate conceptualization, design and consulting, prototyping, application engineering, value engineering, test and validation, engineering processes, sourcing support, maintenance, sustenance and aftermarket support, electrical and electronics hardware and software, technical publications, detail engineering and asset information management. Digital aspects include efficient leveraging of digital technology stacks, such as machine learning algorithms and digital twins for rapid prototyping. This aids in determining a rapid go-to-market approach and progressively enhancing features and functions.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Digital Engineering Services study:

- Design and Development (Products, Services and Experiences)
- Integrated Customer/User Engagement
- Platform and Application Services
- Intelligent Operations



eMobility

Overview

eMobility serves as the overarching term encompassing all forms of electricity-powered transportation, spanning both public and personal means of travel. In the business world, the predominant advantage of eMobility lies in the ubiquitous availability of electricity. Given that electricity is accessible nearly everywhere, installing charging stations for EVs is significantly more feasible than establishing refueling stations for traditional vehicles. This implies that businesses, or essentially anyone with property, can easily set up charging stations and actively contribute to the eMobility movement.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the eMobility study:

- Mobility as a Service (Interface, Multimodal, User Controlled)
- Electric Mobility Systems (Infrastructure, Technologies, Ecosystem Players)
- Shared Electric Mobility Services (Mass Transit, Business Models)

Study Descriptions (continued)



Environmental, Social and Governance (ESG) Services

Overview

The ISG Provider Lens™ Environmental, Social and Governance (ESG) Services report focuses on providers' capabilities to deliver quantifiable improvements in their clients' ESG targets — a consideration gaining growing importance among diverse stakeholders. Service providers have to offer added value and support in the areas of IT, innovation, management and strategy, as well as organization and process consulting, with the aim of establishing sustainable business models in these connected areas. Sustainable enterprises need to be aligned with the UN's 17 Sustainable Development Goals (SDG), targeted to be achieved by 2030. Providers' services need to be highly integrated to collect data as a part of an organization's ESG program that includes various metrics to calculate impact, generate reports, share data for analysis and provide actionable insights.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Environmental, Social and Governance (ESG) Services study:

- Strategy and Enablement Services
- Technology Solutions and Implementation Services
- Data Platforms and Managed Services
- Rating and Benchmarking Services



Finance and Accounting Outsourcing Services

Overview

The ISG Provider Lens™ Finance and Accounting Outsourcing Services report focuses on providers involved in finance and accounting outsourcing (FAO) engagements, tracking their evolution from transactional to comprehensive services in alignment with evolving business and technological requirements. Service providers work with enterprises wanting to transform their finance and accounting (F&A) operations and embrace digital technologies to make their processes efficient, increase productivity, improve data accuracy, reduce costs and enhance customer experience. Automation and analytics have been an integral part of every contract signed in the FAO services space in the last two years. This empowers CFOs with real-time insights to enable quick decision-making and, subsequently, help finance departments function more efficiently.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Finance and Accounting Outsourcing Services study:

- Procure to Pay (P2P)
- Order to Cash (O2C)
- Record to Report (R2R)
- Financial Planning and Analysis (FP&A) Services



Finance and Accounting Platforms

Overview

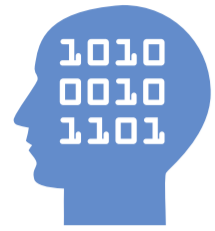
Finance and accounting (F&A) platforms are revolutionizing the way businesses manage their finances. These platforms provide efficiency, strategic insights and agility, allowing companies to navigate the complexities of the financial world with greater ease. The latest trends incorporate technologies like AI, machine learning and blockchain, further enhancing their capabilities. Cloud-based solutions have democratized access to these platforms, providing even small enterprises with access to advanced financial tools. This has fostered a level playing field where data-driven decision-making and operational efficiencies have become the norm.

The ISG Provider Lens™ Finance and Accounting Platforms study focuses on understanding F&A platform providers' strengths, weaknesses and market positioning for any enterprise looking to harness the full potential of financial technology.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Finance and Accounting Platforms study:

- Procure to Pay (P2P)
- Invoice to Cash (I2C)

Study Descriptions (continued)



Future of Work (Workplace) — Services

Overview

The ISG Provider Lens™ Future of Work (Workplace) — Services report focuses on service providers facilitating enterprises to improve digital dexterity and employee productivity. This empowerment enables efficient connection and collaboration among co-workers, particularly in the context of an increasingly prevalent remote/virtual work model. In this context, service providers support clients with their workplace transformation journeys by creating or reviewing workplace strategies based on best practices. They also assess clients' workplace environments and manage the technical aspects, offering support to harness the latest and emerging technologies, such as AR/VR.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Future of Work (Workplace) — Services study:

- Desktop as a Service (Cloud VDI)
- Managed Workplace Services — End-User Technology
- Digital Service Desk and Workplace Support Services
- Employee Experience (EX) Transformation Services



Future of Work (Workplace) — Solutions

Overview

The ISG Provider Lens™ Future of Work (Workplace) — Solutions report examines two categories of providers. The first category includes the ones that offer technology solutions and platforms that enable enhanced collaboration among end users. The second category of providers are those that offer solutions to manage the technology ecosystem, along with required observability and experience measurement.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Future of Work (Workplace) — Solutions study:

- Digital Employee Experience (DEX) Solutions
- Unified Endpoint Management (UEM) for SMBs
- Unified Communications and Collaboration as a Service
- Productivity and Collaboration Solutions for SMBs



Generative AI Services and Solutions

Overview

The ISG Provider Lens™ Generative AI Services and Solutions report focuses on providers of technologies and services that utilize generative AI to develop and deliver solutions for diverse enterprise IT and business service use cases. These service providers address the challenges enterprises encounter in deploying and scaling generative AI solutions, covering aspects like use-case identification and prioritization, architecture and strategy consulting, selection of foundation models and tools, data comprehension, implementation, testing, and scaling across an enterprise. Additionally, these providers are expected to assist enterprises with AI-related concerns, such as ethics, responsibility, sustainability and explainability in the context of regulatory compliance, security and privacy.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrant for the Generative AI Services and Solutions study:

- Generative AI Services and Solutions

Study Descriptions (continued)



Google Cloud Partner Ecosystem

Overview

The ISG Provider Lens™ Google Cloud Partner Ecosystem report focuses on providers that can serve as leading partner companies, providing differentiated services on Google Cloud. The study emphasizes providers' partnership with Google Cloud, their specialization, certification and industry background, which would help them enable clients to unlock the next level of business growth. The report considers partners that have achieved specialization in a solution area, have an established Google Cloud services practice, have seen consistent customer success, have proven technical capabilities, and employ certified personnel that have the technical knowledge and advanced skills to address clients' needs by implementing Google Cloud technologies.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Google Cloud Partner Ecosystem study:

- Implementation and Integration Services
- Data Analytics and Machine Learning
- Managed Services
- SAP Workloads
- Workspace Services



Healthcare Digital Services

Overview

The ISG Provider Lens™ Healthcare Digital Services report focuses on service providers working across segments of the healthcare industry. These providers navigate new regulations, integrate changes resulting from competitive mergers and acquisitions, and adapt to the needs of an aging population. These providers also offer guidance on and undertake necessary but high-cost integration efforts. Consumers increasingly anticipate advanced and convenient digital service delivery, and digital transformation services play a crucial role in helping payer and provider segments evolve to better serve their constituents.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Healthcare Digital Services study:

- Payer Digital Transformation Services
- Provider Digital Transformation Services
- Healthcare Interoperability Services and Solutions
- Value-Based Care Services and Solutions



HR Outsourcing and Transformation Services

Overview

The ISG Provider Lens™ HR Outsourcing and Transformation Services report focuses on providers offering managed services that include advanced cloud HCM technologies with the intent of transforming HR operations. Employers, globally, are increasingly seeking transformative solutions for the operational effectiveness of HR functions and organizational agility and resiliency. Therefore, HR transformation has become a key strategic investment area across sectors, with firms seeking to engage with managed HR service providers capable of supporting large-scale transformations by leveraging advanced cloud HCM technologies through a consult-to-operate service model.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the HR Outsourcing and Transformation Services study:

- HR Transformation Services and Solutions
- Multiprocess HR Services and Solutions
- HCM Technology Platform Deployment and Support Solutions

Study Descriptions (continued)



Insurance Industry Services

Overview

The ISG Provider Lens™ Insurance Industry Services report focuses on service providers addressing the rapidly growing demand for core system capabilities, including operational efficiencies, straight-through processing (STP) and the transition to digital operations. This addresses the need of insurance companies striving to enhance both employee and customer experiences.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Insurance Industry Services study:

- Life and Retirement Insurance BPO Services
- Property and Casualty Insurance BPO Services
- Insurance ITO Services
- Life and Retirement Insurance TPA Services
- Property and Casualty Insurance TPA Services



Insurance Platforms

Overview

The ISG Provider Lens™ Insurance Platforms report focuses on vendors offering relevant platform solutions to insurance companies. The insurance platform solutions landscape has changed significantly in the last couple of years; it is no longer limited to on-premises policy admin, claims, billings modules or simply integrated core systems suites. Instead, an increasing number of insurance companies are seeking cloud-native, low-code/no-code capabilities to improve their time and speed to market. This includes seamless API integration and the use of built-in deep analytics and AI/ML tools. The goal is to achieve precise data visualizations and create a unified view of customer and risk portfolios. This can facilitate the seamless utilization of ecosystem advantages, leading to a gradual reduction in the total cost of ownership (TCO) and fostering sustainable growth in the current digital landscape.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Insurance Platforms study:

- Life and Retirement Insurance Platform Solutions
- Property & Casualty Insurance Platform Solutions (U.S. and Europe markets)



Intelligent Automation Platforms and Products

Overview

The ISG Provider Lens™ Intelligent Automation Platforms and Products study focuses on evaluating the functionalities and capabilities of software vendors and platform providers that have built offerings around conversational AI platforms, sometimes referred to as chatbots or virtual agents. These platforms utilize natural language processing (NLP) and machine learning to engage in human-like interactions with customers and employees.

Intelligent document processing (IDP) involves computer vision and image extraction capabilities to digitalize, analyze and automate large volumes of structured and unstructured data from electronic and paper-based sources. Process discovery and task mining encompass a range of tools to help enterprises better understand and optimize their processes and tasks, either through the analysis of log data or by tracking human actions.

This study aims to provide differentiated positioning for platforms and products based on competitive strengths and portfolio attractiveness.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Intelligent Automation Platforms and Products study:

- Intelligent Document Processing
- Process Discovery and Mining

Study Descriptions (continued)



Intelligent Automation Services and Solutions

Overview

The ISG Provider Lens™ Intelligent Automation Services and Solutions study focuses on the capabilities of automation service providers and global system integrators (GSIs) offering consulting and implementation support across enterprise portfolios. The report covers the ability of GSIs and service providers to harness automation to transform business services, corporate functions and the IT landscape, employing proprietary solutions and accelerators through a lifecycle management approach.

GSIs and service providers are enhancing their capabilities in areas such as ESG, innovation and futuristic solutions by aligning their resources accordingly. This study on intelligent automation services and solutions aims to understand enterprise requirements and provider capabilities in meeting these demands.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Intelligent Automation Services and Solutions study:

- Intelligent Enterprise Automation
- Artificial Intelligence for IT Operations (AIOps)
- Next-Gen Automation



Life Sciences Digital Services

Overview

The ISG Provider Lens™ Life Sciences Digital Services report focuses on service providers accelerating clinical development, ensuring patient engagement, providing manufacturing supply chain services, adhering to pharmacovigilance and regulatory guidelines, and offering medical devices and medtech products. Participating service providers are evaluated for their effectiveness as an extension of clients' technology organizations, including their ability to create blueprints, architecture frameworks and management processes. The evaluation also considers factors such as brand recognition, market reach, the number and quality of clients, and parameters like annual revenue, dedicated professionals (resources) and R&D investments.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Life Sciences Digital Services study:

- Clinical Development Digital Transformation
- Patient Engagement Digital Transformation
- Manufacturing Supply Chain Digital Transformation
- PVG and Regulatory Affairs Digital Transformation
- Medtech Digital Transformation



Mainframes — Services and Solutions

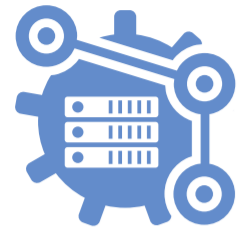
Overview

The ISG Provider Lens™ Mainframes — Services and Solutions report assesses service providers that modernize mainframe applications or convert applications to run in cloud environments and the ones that offer mainframe outsourcing and mainframe as a service (MFaaS). The report also evaluates software vendors of automation tools for refactoring, rehosting, replatforming, rewriting and re-engineering applications.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Mainframes — Services and Solutions study:

- Mainframe Optimization Services
- Application Modernization Services
- Mainframe as a Service (MFaaS)
- Mainframe Operations
- Mainframe Application Modernization Software

Study Descriptions (continued)



Managed Network Services

Overview

The ISG Provider Lens™ Managed Network Services report evaluates service providers whose service model involves delivering managed network services (MNS) within the context of enterprise-grade infrastructures or applications. Managed service providers (MSPs) plan, provision, and manage network services and offer a diverse range of services such as WAN or LAN network services, fully managed WLAN installations, managed firewalls, virtual private networks (VPNs) and VoIP services.

The scope of services provided encompasses on-site installations, remote monitoring, fault diagnosis, configuration management, update and patch management, disaster recovery and more.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Managed Network Services study:

- Fully Managed Network Outsourcing
- VPN / VoIP Managed Services
- NaaS (Network as a Service)



Manufacturing Industry Services

Overview

The ISG Provider Lens™ Manufacturing Industry Services report focuses on critical aspects of services and solutions offered to companies in the manufacturing industry. The report seeks to compare strengths, areas of development, capabilities/solution depth, industry coverage, and partnerships among participating providers. The services and solutions encompass offerings and capabilities for both discrete and process manufacturing companies. These may include, but are not limited to, design and development services; services related to PLM, MES, smart factory and supply chain; and aftermarket services.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Manufacturing Industry Services study:

- Agile Product Development and Design
- Digital Factory/Manufacturing Solutions
- Manufacturing Supply Chain and Procurement
- Aftermarket Services



MarTech Service Providers

Overview

The ISG Provider Lens™ MarTech Service Providers report is focused on examining the providers that work with digital marketing professionals to develop marketing technologies. New technologies and new consumer behavior (they are already experiencing digital transformation in their daily lives) require a new approach to marketing that involves a transformation of mindsets rather than just tools.

By combining creativity, the ability to develop digital campaigns, digital tools and methodologies such as design thinking and agile processes — to meet the expectations of digital customers — MarTech companies, with a wide scope of services, are growing worldwide.

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

- Strategic MarTech Services
- Digital Presence & Digital Ads
- Digital Experience & Content
- Social & Relationship
- Digital Commerce Optimization
- Analytics & Intelligence

Study Descriptions (continued)



Microsoft Cloud Ecosystem

Overview

The ISG Provider Lens™ Microsoft Cloud Ecosystem report focuses on service providers with expertise in Microsoft solutions, enabling them to provide well-founded consulting and services for implementation and integration, as well as managed services, for their clients' IT environments. The increasing complexity of integration, coupled with the expanding use areas, is driving a dynamic market for professional services. The Microsoft Cloud Ecosystem, one of the largest globally, encompasses thousands of partner companies that support enterprise users across various industries and sizes. This study specifically targets some regions, considering the required distinctions between industries and company sizes.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Microsoft Cloud Ecosystem study:

- Managed Services for Azure
- Microsoft 365 Services
- SAP on Azure Services
- Power Platform Services
- Generative AI Services for the Microsoft Clouds



Multi Public Cloud Services

Overview

The ISG Provider Lens™ Multi Public Cloud Services report focuses on evaluating service providers for their expertise in managing multi public cloud environments. The report evaluates the partners of hyperscalers for their consulting and managed services capabilities, and it evaluates the hyperscalers themselves for their infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS) offerings. There is a growing emphasis on industry-specific packages. ISG particularly examines the qualifications from the respective partner programs to ensure that they align with customers' multicloud requirements and demonstrate the necessary expertise across leading platforms.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Multi Public Cloud Services study:

- Consulting and Transformation Services
- Managed Public Cloud Services
- FinOps and Cloud Optimization Services
- Hyperscale Infrastructure and Platform Services
- Sovereign Cloud Infrastructure Services
- SAP HANA Infrastructure Services



Multi Public Cloud Solutions

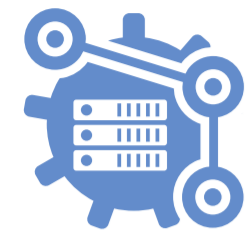
Overview

The ISG Provider Lens™ Multi Public Cloud Solutions report focuses on evaluating technology providers, specifically independent software vendors (ISVs), that offer platforms and solutions for multi public clouds. These solutions are centered around monitoring and managing platforms, including microservices, within agile and cloud-native environments. Additionally, the report assesses the ability of these solutions to map the expected costs of usage and their distribution across different business units. ISG places particular emphasis on vendors' native capabilities and technical tooling for public clouds across on-premises, multicloud, hybrid and edge environments.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Multi Public Cloud Solutions study:

- Multicloud FinOps Platforms
- Cloud-Native Observability Solutions
- Cloud-Native Security Platforms

Study Descriptions (continued)



Network — Software Defined Services and Solutions

Overview

The ISG Provider Lens™ Network — Software Defined Services and Solutions report examines provider offerings related to software-defined enterprise networks. These include managed SD-WAN services, consulting, and advisory services leading to implementation support, along with enterprise networks technology and services supply at the edge. A notable evolution of managed network services is network as a service (NaaS), where service providers offer network services on a subscription basis. This subscription includes hardware, software, management and licensing.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Network — Software Defined Services and Solutions study:

- Managed SD-WAN Services
- SDN Transformation Services (Consulting and Implementation)
- Enterprise Networks Technology and Service Suppliers
- Edge Technologies and Services
- Secure Access Service Edge (SASE) Services



Next-Gen ADM Services

Overview

The ISG Provider Lens™ Next-Gen ADM Services report focuses on evaluating providers and their capabilities to collaborate with enterprises embarking on a journey toward agile modernization and transformation. Service providers are augmenting their traditional application development and maintenance (ADM) offerings by integrating advanced technologies such as AI in operations or adopting microservices-based development. Additionally, they are creating customized road maps that combine digital, operational and technology goals to align with clients' objectives. The integration of applied AI results in more robust, intelligent and adaptable applications, leading to what ISG terms as next-gen ADM contracts.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Next-Gen ADM Services study:

- Agile Application Development Outsourcing
- Agile Application Development Projects
- Application Managed Services
- Application Quality Assurance
- Continuous Testing Specialists



Next-Gen ADM Solutions

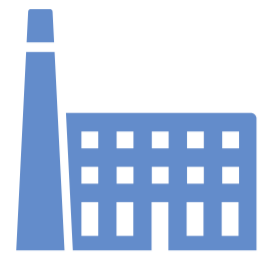
Overview

The ISG Provider Lens™ Next-Gen ADM Solutions report focuses on vendor low-code/no-code development platforms. These platforms and their use are not reliant on technical talent or trained developers; instead, they are designed for so-called citizen developers or line-of-business users. Forward-thinking, innovation-driven and highly advanced enterprises are adopting low-code/no-code development platforms to enable their employees to benefit from the ongoing democratization of IT and app development. The primary advantages include enhanced business agility, speed and implementation simplicity. Secondary benefits encompass the ability to work with legacy IT infrastructure; reduced development, testing and maintenance costs; and improved cross-team collaboration. In 2024, ISG will further delve into aspects of platforms for business processes and customer experience, in addition to the original focus on application development.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Next-Gen ADM Solutions study:

- Low-Code/No-Code Development Platforms
- Pure-Play No-Code Development Platforms

Study Descriptions (continued)



Oil and Gas Industry — Services and Solutions

Overview

The ISG Provider Lens™ Oil and Gas Industry — Services and Solutions report focuses on evaluating the offerings and capabilities of providers with profound expertise, including proficiency in related digital technologies and innovation, within the oil and gas industry. In response to challenges like rising oil and gas prices, a decline in global oil inventory and mounting geopolitical tensions, companies in this industry are making significant investments. Moreover, the industry has identified energy transition as a key focus area for 2023 and beyond. Many companies are transforming their portfolios by replacing maturing legacy assets with low-carbon resources. Additionally, there is an increasing emphasis on digital innovation and operational efficiency through the adoption of cloud, AI, machine learning, mobility, automation and operational technology (OT) security.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Oil and Gas Industry — Services and Solutions study:

- Enterprise Asset Management (EAM)
- Next-Gen IT/OT Services
- Capital Projects Management
- Data Management and Cloud Computing
- Energy Transition Services



Oracle Cloud and Technology Ecosystem

Overview

The ISG Provider Lens™ Oracle Cloud and Technology Ecosystem report focuses on identifying the leading and most relevant partners of Oracle. The expanded community of partners holds valuable expertise in areas such as enterprise performance management, enterprise resource planning (ERP), human capital management (HCM), Oracle Cloud Platform, Oracle E-Business Suite, Oracle Exadata Database Machine, and Oracle Supply Chain Management (SCM) & Manufacturing.

Given that this is the first time ISG will be covering the Oracle Cloud and Technology Ecosystem in an IPL study, the scope will be somewhat narrow, primarily focusing on the main implementation and integration work, as well as the managed services that clients typically avail from Oracle partners.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Oracle Cloud and Technology Ecosystem study:

- Consulting and Advisory Services
- Implementation and Integration Services
- Managed Services



Payroll Services and Solutions

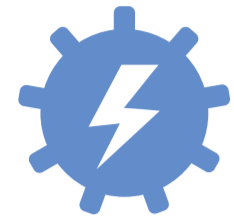
Overview

The ISG Provider Lens™ Payroll Services and Solutions report focuses on technology and managed service providers offering advanced digital solutions to enable payroll operational transformation globally. Companies of all sizes, across various sectors and geographies, acknowledge that payroll is a critical and foundational element of employee experience (EX) and a key asset for a business. Consequently, organizations are actively seeking advanced digital capabilities and managed services to elevate the critical payroll process, aiming to enhance organizational value and future-proof operations for greater agility, resiliency and continuity.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Payroll Services and Solutions study:

- Managed Payroll Services
- Global Managed Payroll Services (Multicountry)

Study Descriptions (continued)



Power and Utilities Industry — Services and Solutions

Overview

The ISG Provider Lens™ Power and Utilities Industry — Services and Solutions report focuses on evaluating the offerings and capabilities of providers with profound expertise in the industry, coupled with capabilities in related digital technologies and innovation. Companies in this industry are making significant investments to modernize aging infrastructure, transform distribution and storage systems, harness smart grid technologies and predictive analytics, transition to renewable energy and address climate change — all while emphasizing the need to reduce operational and maintenance costs. The pandemic has changed customer expectations, and concurrently, stringent regulatory guidelines are compelling the industry to seek transformative sourcing options to improve its processes.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Power and Utilities Industry — Services and Solutions study:

- Intelligent Business Process Management Services (IBPMS)
- Next-Gen IT Services
- Grid Modernization
- Enterprise Asset Management (EAM)
- Customer Information Systems (CIS) and Customer Experience (CX)
- Enterprise Asset Management Software Solutions



Private/Hybrid Cloud — Data Center Services

Overview

The ISG Provider Lens™ Private/Hybrid Cloud — Data Center Services study focuses on evaluating providers of outsourcing, hosting, colocation and managed services. The scope of their offerings aligns with security and governance requirements, large data volume management and the need for tight integration with other enterprise applications and workflows, spanning across various clouds. In this scenario, the data center may be owned by an enterprise, a service provider or a third-party colocation provider. A hybrid cloud combines the best of on-premises, private and public cloud infrastructures, with the goal of combining services and data from various cloud models to create a unified, automated, well-managed and distributed computing environment.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Private/Hybrid Cloud — Data Center Services study:

- Managed Services
- Managed Hosting
- Colocation Services



Private/Hybrid Cloud — Data Center Solutions

Overview

The ISG Provider Lens™ Private/Hybrid Cloud — Data Center Solutions study focuses on evaluating global technology providers and software vendors that design and offer data center operations and solutions. The scope of their offerings aligns with security and governance requirements, large data volume management and the need for tight integration with other enterprise applications and workflows, spanning across various clouds. A hybrid cloud combines the best of on-premises, private and public cloud infrastructures, with the goal of combining services and data from diverse cloud models to create a unified, automated, well-managed and distributed computing environment.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Private/Hybrid Cloud — Data Center Solutions study:

- Backup and Disaster Recovery (BDR) Software
- Hybrid Cloud Management Platforms

Study Descriptions (continued)



Procurement BPO and Transformation Services

Overview

The ISG Provider Lens™ Procurement BPO and Transformation Services report focuses on evaluating business process outsourcing (BPO) providers and their role in transforming enterprise-side procurement functions. This transformation involves moving from merely managing procurement and overseeing transactional activities to more holistic participation within an enterprise. The transition requirements are inclusive, particularly for digitally agile business environments, and are addressed through an approach that enables optimization and, ideally, future-proofing of enterprise procurement. This is achieved while minimizing direct enterprise investments in new software, infrastructure, tools and capabilities. The report, therefore, examines two types of service providers: procurement BPO providers that enable efficient and sustainable procurement functionalities and operations and providers of services that transform traditional procurement into future-ready, digitally agile functions providing improved value to enterprises.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Procurement BPO and Transformation Services study:

- Procurement BPO Services
- Transformation Consulting Services for



Procurement Software Platforms and Solutions

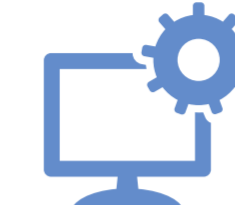
Overview

The ISG Provider Lens™ Procurement Software Platforms and Solutions study focuses on the providers of software platforms, solutions and tools that help enterprises improve their procurement processes and facilitate the transformation of procurement into digital business realities. The report assesses procurement software, emphasizing that when effectively implemented and used, it contributes to improved efficiency, fosters business agility, reduces the negative impacts of supply chain disruption, and consequently reduces operating and strategic business costs.

Top-tier solutions centralize procurement, ensuring transparency and real-time data analysis. They drive efficiency through automation, aligning business processes with suppliers and laying the foundation for continuous improvement in procurement.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Procurement Software Platforms and Solutions study:

- Software Platforms and Solutions for Large Accounts
- Software Platforms and Solutions for Midmarket



Retail and CPG Services

Overview

The ISG Provider Lens™ Retail and CPG Services report focuses on identifying, analyzing and rating the leading technology firms (and their platforms) and IT service providers catering to retailers' technology requirements. The quadrants covering technology firms delve into areas such as digital commerce, order management, retail planning and assortment, and supply chain management. On the other hand, the quadrants covering IT service providers evaluate their service competence, quality and experience in areas such as platform migration, managed services, omnichannel integration, performance engineering, data analytics, and custom development capabilities, including building a microservices-based commerce platform and progressive web applications (PWAs).

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Retail and CPG Services study:

- Omnichannel Commerce Platform
- Merchandise Planning and Management

Study Descriptions (continued)



Salesforce Ecosystem Partners

Overview

The ISG Provider Lens™ Salesforce Ecosystem Partners report focuses on leading Salesforce partner companies. ISG examines various offerings around the Salesforce platform, making a fundamental distinction between implementation services (the Change Business) and managed application services, which focus on operational support for productive applications (the Run Business). Within these segments, there is a further distinction between large enterprise clients and the midmarket, driven by the significantly greater need for Salesforce integration into the complex application landscape of large enterprise clients. Moreover, these clients predominantly have globally operating businesses, necessitating corresponding delivery capabilities from the service providers.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Salesforce Ecosystem Partners study:

- Multicloud Implementation and Integration Services for Large Accounts
- Implementation Services for Core Clouds for Midmarket
- Implementation Services for Marketing Automation
- Managed Application Services for Large Accounts
- Managed Application Services for Midmarket
- Implementation Services for Industry Clouds



SAP Ecosystem Partners

Overview

The ISG Provider Lens™ SAP Ecosystem Partners report focuses on identifying the top SAP partner companies capable of providing differentiated client services and delivering optimal results from S/4HANA investments. By engaging with these top partners, clients can optimize their operating expenses (OpEx) and achieve a high ROI. For clients that have adopted S/4HANA, this report assesses managed service providers that can contribute to superior application performance, including stability, availability and security. Cloud migrations and technology innovations are also assessed. Support services incorporate AI and machine learning into application maintenance and operations. The study is aligned with the latest SAP offerings, including SAP Business AI.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the SAP Ecosystem Partners study:

- SAP S/4HANA System Transformation
- Managed Cloud Services for SAP ERP
- SAP Business AI and Business Technology Platform (BTP) Services
- SAP HCM/SuccessFactors Partner Services
- SAP Application Managed Services
- RISE with SAP Implementation Partners
- Cloud Economics and FinOps Services for SAP



ServiceNow Ecosystem Partners

Overview

The ISG Provider Lens™ ServiceNow Ecosystem Partners report focuses on identifying and rating leading ServiceNow partner companies that offer workflow-enabled service management software solutions. Realizing the full potential of ServiceNow's extensive functionalities requires professional services, encompassing process (re)design, software implementation and integration, application management services and training. The diverse offerings and certifications of partner companies indicate their focus, ranging from full-scale lifecycle support to specialized services for specific tasks. For managed service providers, the ServiceNow platform serves as an ideal foundation for building additional functionalities or integrating it with industry-specific frameworks to support enterprise operations. Security-related capabilities to support the platform and tool for cloud management are also relevant aspects in this context.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the ServiceNow Ecosystem Partners study:

- ServiceNow Consulting Services
- ServiceNow Implementation and Integration Services
- ServiceNow Managed Services Providers

Study Descriptions (continued)



Supply Chain Services

Overview

The ISG Provider Lens™ Supply Chain Services report focuses on providers offering supply chain services and solutions. These encompass capabilities such as supply chain consulting, implementation and integration, managed services and digital transformation. The report also evaluates independent supply chain software vendors for their expertise in planning, execution, insights generation, and helping clients achieve ESG goals.

Providers leverage a comprehensive framework utilizing digital technologies such as the IoT, machine learning, AI, predictive analytics and data orchestration. This enables clients to optimize their ecosystem of suppliers, customers, employees and third-party partners to balance their business risk profiles, demand and supply management, operational revamp, continuous innovation and net carbon neutrality goals. In the realm of supply chain systems, content-rich real-time collaborations, continuous analysis of what-if scenarios, and tradeoffs between competing metrics and objectives are essential for taking data-driven actions in unplanned scenarios, both internal and external.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Supply Chain Services study:

- Supply Chain Advisory and Consulting Services
- Supply Chain Operations Services
- Supply Chain BPO Services



Telecom, Media and Entertainment Services

Overview

The ISG Provider Lens™ Media and Communication Services study focuses on key providers of information technology outsourcing (ITO) and business process outsourcing (BPO) services for end-users in the telecommunications, media and entertainment industries. The industries are characterized by rising customer expectations, low margins, low average revenue per user (ARPU) and a high level of customer churn. Consequently, end-users seek ITO/BPO services that can improve the agility of their networks and service in a cost-effective way and facilitate seamless migration to new services, such as 5G.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Media and Communication Services study:

- Communication (Intelligent) Business Services
- Communication Next-Gen IT Services
- Media (Intelligent) Business Services
- Media Next-Gen IT Services



Workday Ecosystem Partners

Overview

The ISG Provider Lens™ Workday Ecosystem Partners report focuses on identifying relevant, leading partner companies. Service partners enable efficient Workday deployments and the adoption of new capabilities, while implementation partners ensure seamless integration, allowing information to flow from Workday to internal systems, cloud applications and third-party services.

Beyond pure technology implementation, this ecosystem is critical for assisting enterprise clients in reducing the complexity of implementation and migration to next-gen solutions. This includes creating comprehensive road maps for implementations, streamlining internal business processes, managing internal and external stakeholder expectations, crafting new strategies to minimize disruption to critical business operations, and ensuring that the implementation of the solution stays within budget and time.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Workday Ecosystem Partners study:

- Workday Advisory services
- Workday Implementation & Integration
- Workday Optimization services
- Workday enterprise solutions

Points to Note:

1. Please note that the quadrant names mentioned in this plan may not be final. These are subject to change based on market dynamics, advisors' inputs, clients' inputs and analysts' views.
2. With the start of the research phase for each study, the launch email will include a project brochure that will contain the final quadrant names, descriptions of the topics and analyst names for each region.
3. The timeline is indicative and is subject to change.
4. The dates of research phase will be included in the project brochure.
5. Study 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 point of contact for all providers during and after the research phase.
6. For further details please visit [ISG website](#).



ISG Provider Lens

Service Provider Comparison

ISG Provider Lens™ is a practitioner-led service provider comparison, empowered by ISG's advisory experience and data-driven research. Research reports provide independent vendor evaluations and enterprise buying behavior segmentation. Provider positioning is based on a neutral and independent research and evaluation process; participation in the study is **FREE OF CHARGE**. Your participation in these studies is just a click away. You can now use our IPL Portal for submitting information. If you have not enabled your credentials, please use your email ID as UserName and generate your individual password by clicking "forgot password" option. If you haven't ever registered with ISG Provider Lens™, send an email to our project management team and we will contact you shortly to establish your credentials.

Service provider data, from primary and secondary research, translate into different outputs, categorized as:

- [ISG Provider Lens™ Quadrant Reports](#)
- [ISG Provider Lens™ Archetype Reports](#)

Our 2021 research agenda will provide continuous research and covers both ITO and BPO areas. To view and participate in this program, click [here](#) to download the 2021 Research Agenda.

- [Download Agenda](#)
- [Subscriber Reports](#)
- [Subscription Request](#)

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 focus 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™ Research Coverage

2,800+	50+	650+	20	600+	50+	2500+	6	12
Service providers and technology companies analyzed	Service lines and technology topics covered	Research reports published by geography	Geographies covered	Quadrant reports	Archetype reports	Individual quadrants and archetypes published	Months intense research cycle	Months annual publication

Practice Leaders Involvement

ISG Provider Lens™ research includes advisors and consultants from industry and technology practices worldwide. ISG advisors work with private and public sector clients to determine a future vision and lead rapid change, to realize the value of digital investments, at scale. The advisory practice helps clients achieve operational excellence and rapid growth. Advisor involvement in IPL supplements the primary and secondary research conducted on service and technology providers, with field experience. More than 100 advisors participate; hence, on an average, there are three advisors for each study. For each of these studies, the advisors collaborate with analysts to update market trends, define the study's scope, select suitable survey questions, validate the companies to be invited to participate in the study, and engage in briefings and review analyses.

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.

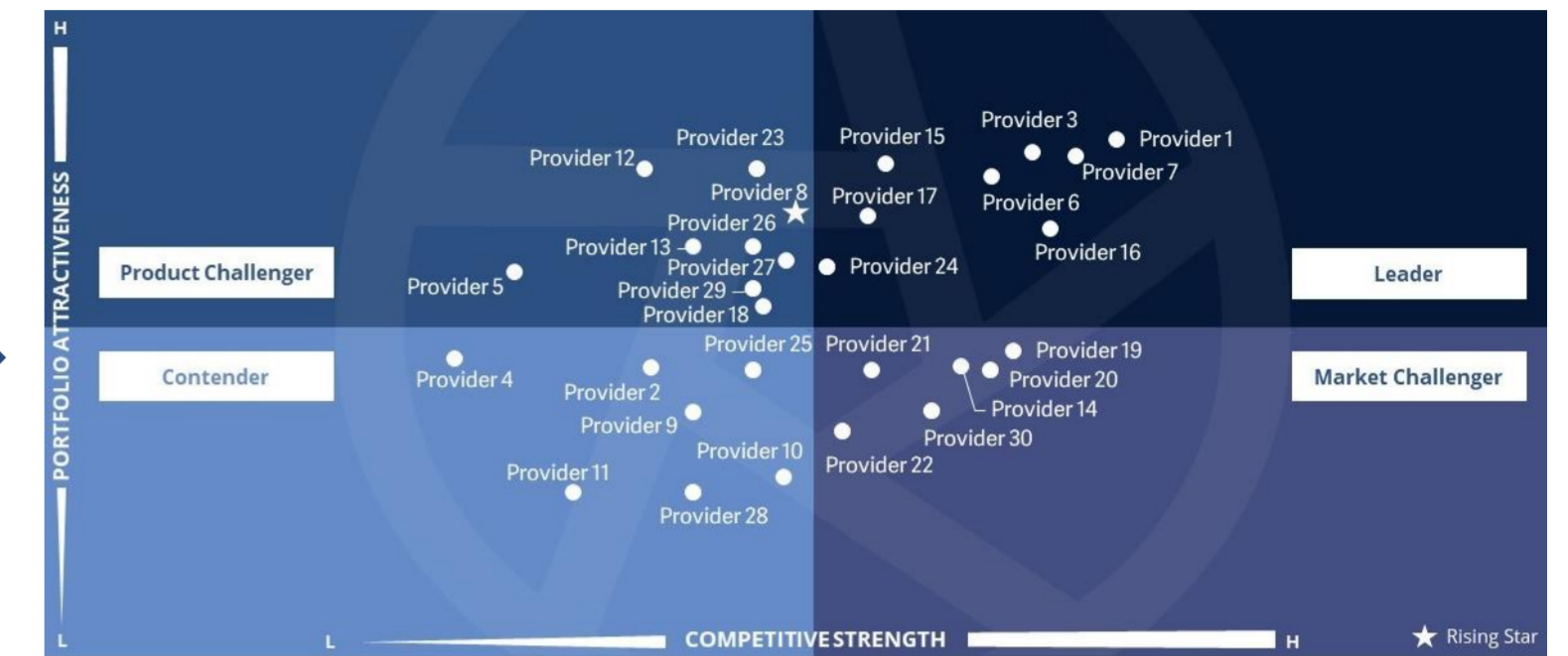
ISG compares and positions service providers in a graphical presentation based on the strength of their service portfolio and market competitiveness. These studies are conducted across multiple regions and encompass multiple service lines in the fields of ITO and BPO, spanning industry-specific domains and partner ecosystems.

NOTE: The key parameters are highlighted 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.

ISG Provider Lens™ Quadrant Reports

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)



X axis = Competitive strength

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

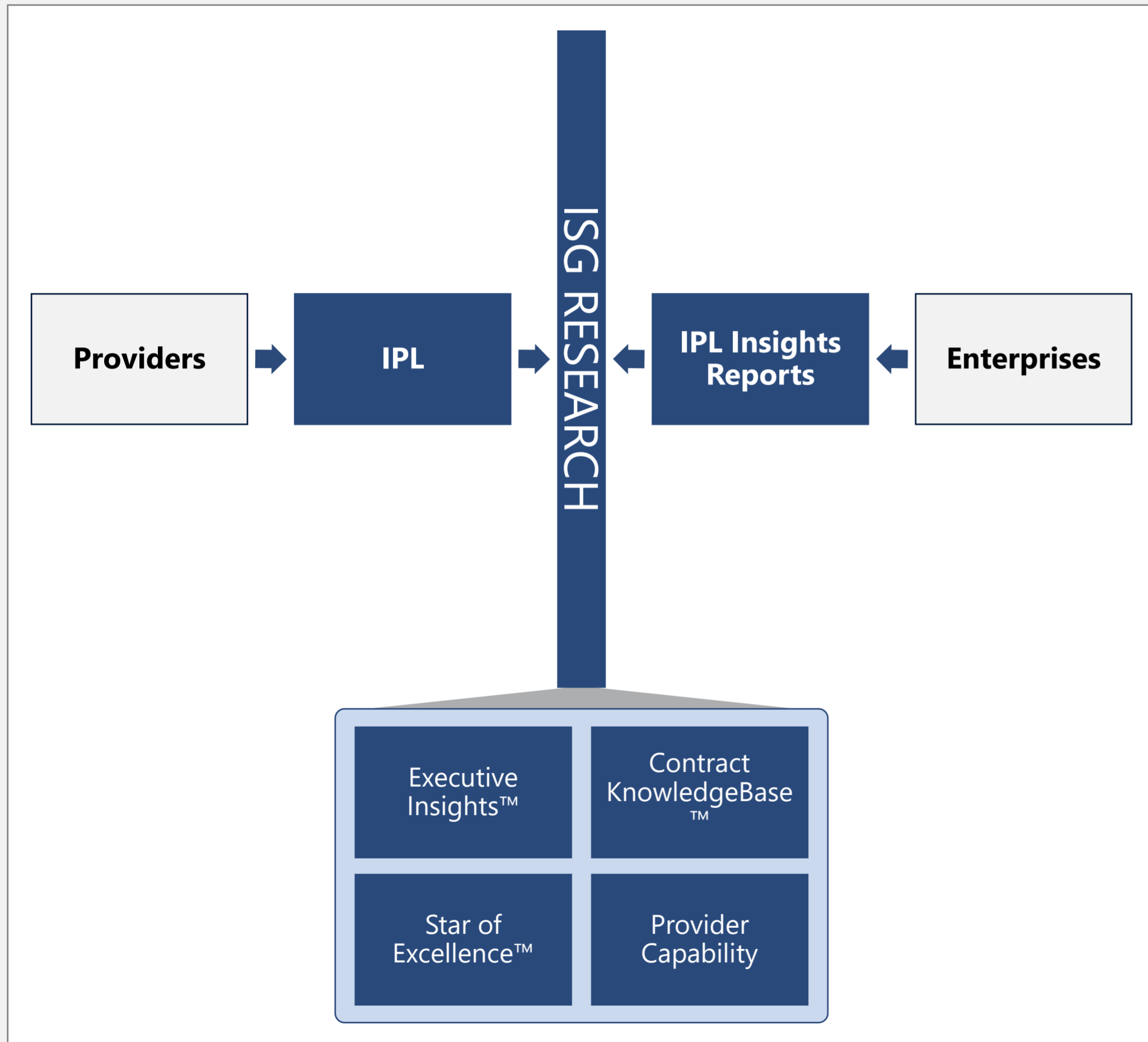
Quadrant Report Characteristics

- Each report identifies a maximum of 5–6 quadrants
- Topics span across ITO and BPO, encompassing industry-specific domains and partner ecosystems
- Complemented with a global overview summarizing global enterprise trends
- Transparent methodology that follows the market definition and criteria
- Focus on region- or country-specific nuances
- Emphasis on local and niche players

IPL Insights Reports

ISG IPL Insights Reports are a vast expansion of the old archetype reports. Addressing the requirements of both enterprises and service providers, the new report acts like a two-way mirror. It brings together ISG's research sources and provides readers with key insights on the topic in one place. Further, the report allows providers to understand enterprises' needs across the market and align their capabilities accordingly. It also enables enterprises to understand which providers are best suited to their needs. The online capabilities of this report are accessible through Executive Insights™.

The Industry Report Brings Enterprises and Providers Together



Strategic Industry Report Contents

- ### 1. Breakdown of Topic
- ### 2. Overview of the Market
- ### 3. Buyer Behavior Data
- ### 4. Market Renewal Data

Workplace Renewals – Next 2 Yrs

Workplace Renewals – By Industry

Public Sector	76.8%
Financial Services	7.4%
Manufacturing	4.4%
Energy	2.3%
Other	1.8%
Business Services	1.8%
Media & Telecom	1.7%
Travel, Transportation	1.4%
Healthcare &	0.6%
Consumer Packaged Goods	0.4%
Retail	0.3%
- ### 5. Enterprise Archetypes
- ### 6. Archetype Provider Ranking

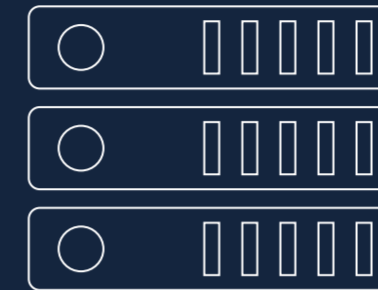
By addressing the needs of enterprises, the report brings vitality to the topic and broadens its scope, enabling readers to gain a comprehensive understanding of the market. It encompasses market trends, contractual aspects and buyer behavior and integrates various buyer types into a maturity curve of archetypes commonly observed in the market. Furthermore, the report segments the key components of the topic into a mosaic diagram, upon which the top ten providers are ranked "as recommended by ISG".

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 position 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 from ISG advisors
- Star of Excellence™: Client feedback about the company on multiple parameters
- ISG internal, proprietary database: For example, deal information

Some service providers/vendors may choose not to or are unable to provide primary data to ISG. Therefore, the research team must rely completely on the other four data sources to complete the analysis. ISG does not reveal the service providers/vendors that fall into this category.



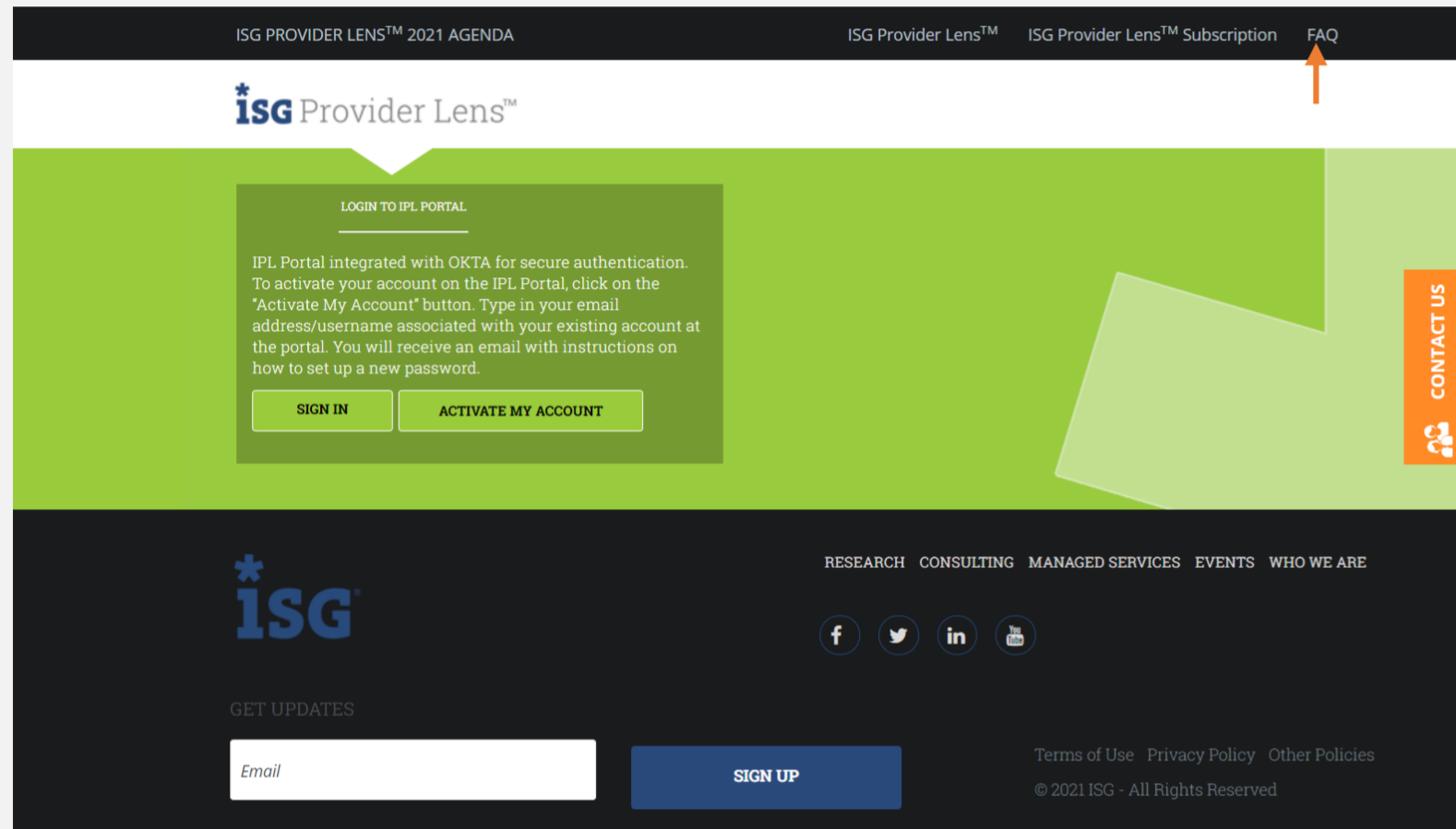
ISG Provider Lens™ – Our Data Sources



ISG Provider Lens™ Portal

ISG Provider Lens™ launched the data collection portal to provide continuous access to providers 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 throughout the year.

In addition to enabling over 800 ISG advisors with the latest data points, the portal also engages with and offers a self-service-platform that providers can use to submit or simply update IPL-study-related information in terms of revenue, team size, qualifications, service and product capabilities, case-studies-related references, and roadmap items.



Click on FAQ to learn about the portal and how to make the best of use of it. This page also answers 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 the Candidate Provider Qualification (CPQ) and Provider Lens programs. 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 on request 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 throughout the year and are also allowed to make changes to the survey during this period.

Visibility

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

Preloaded data from the 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 the latest information throughout the year. This helps us 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 Program

The Candidate Provider Qualification (CPQ) process is a key component of the ISG FutureSource™ methodology. The objective of the CPQ process is to identify providers qualified to provide in-scope services for a client and facilitate strong conversations between an ISG advisor and their clients on providers that should be included in the ISG FutureSource™ process. As a part of this program, ISG advisors are provided with a list of relevant service providers to create an initial recommendation or longlist for their enterprise engagements. Based on the requirements and maturity of enterprise clients, the CPQ team highlights the related strengths and weaknesses of the selected service providers, along with their profiles, case studies and market experiences, to support their recommendations.

How Does it Work

After gaining an understanding of clients' objectives via the CAS Outcome and Scope phase of the FutureSource™ process, the ISG Project Director submits a request to the CPQ team.

- The CPQ and ISG project teams collaborate to understand the nuances of the scope of work, incumbents and enterprise expectations.
- Providers with the right set of capabilities, market experience and track record of client success are identified using the research insights described on the right.
- Typically, a longlist includes approximately 20 service providers and serves as the base for subsequent discussions to create a shortlist.
- If required, the CPQ team conducts additional research to support the specific needs of a client — this may include reaching out to a provider's advisor relations team for additional information.

The CPQ team provides the ISG project team with a client-facing deliverable that is used to support shortlisting discussions with an enterprise client.

ISG Research has **rich data** to support longlisting and shortlisting discussions with enterprise clients.

ISG Research tracks more than **2,000 providers** across multiple service lines.

No one **knows** the provider market as well as ISG.



The CPQ Process Leverages a Variety of ISG Data Sources to Identify Qualified Providers and Answers 3 Primary Questions

	<p>Who has the capabilities to deliver for my client?</p>	<p>1</p>	<ul style="list-style-type: none"> ■ ISG Provider Lens™ research studies; 59 Studies planned for 2024 ■ Analyst and advisor briefings ■ ISG advisor experience and peer insights
	<p>How often and where have they delivered similar services?</p>	<p>2</p>	<ul style="list-style-type: none"> ■ ISG Contract KnowledgeBase™ ■ ISG Research tracks more than 190,000 contracts signed between enterprises and service providers
	<p>How well have they performed when delivering similar services?</p>	<p>3</p>	<ul style="list-style-type: none"> ■ Case Study Research and Awards ■ ISG Paragon Awards

References

Note: ISG Provider Lens™ reports and data collected actively support the initial qualifying phase of the CPQ process—identifying providers with the capabilities to deliver for a client. Participation in the ISG Provider Lens™ research studies significantly increases your company's visibility among ISG advisors and enterprise clients. Also, participation increases the probability of your inclusion in longlists, especially when your firm's capabilities align with a client's needs. Please note that participation does not automatically guarantee inclusion in the final recommendations to an enterprise client. The shortlisting of companies is left to the discretion of advisors and enterprise clients.

ISG Star of Excellence™ Program and IPL Influence

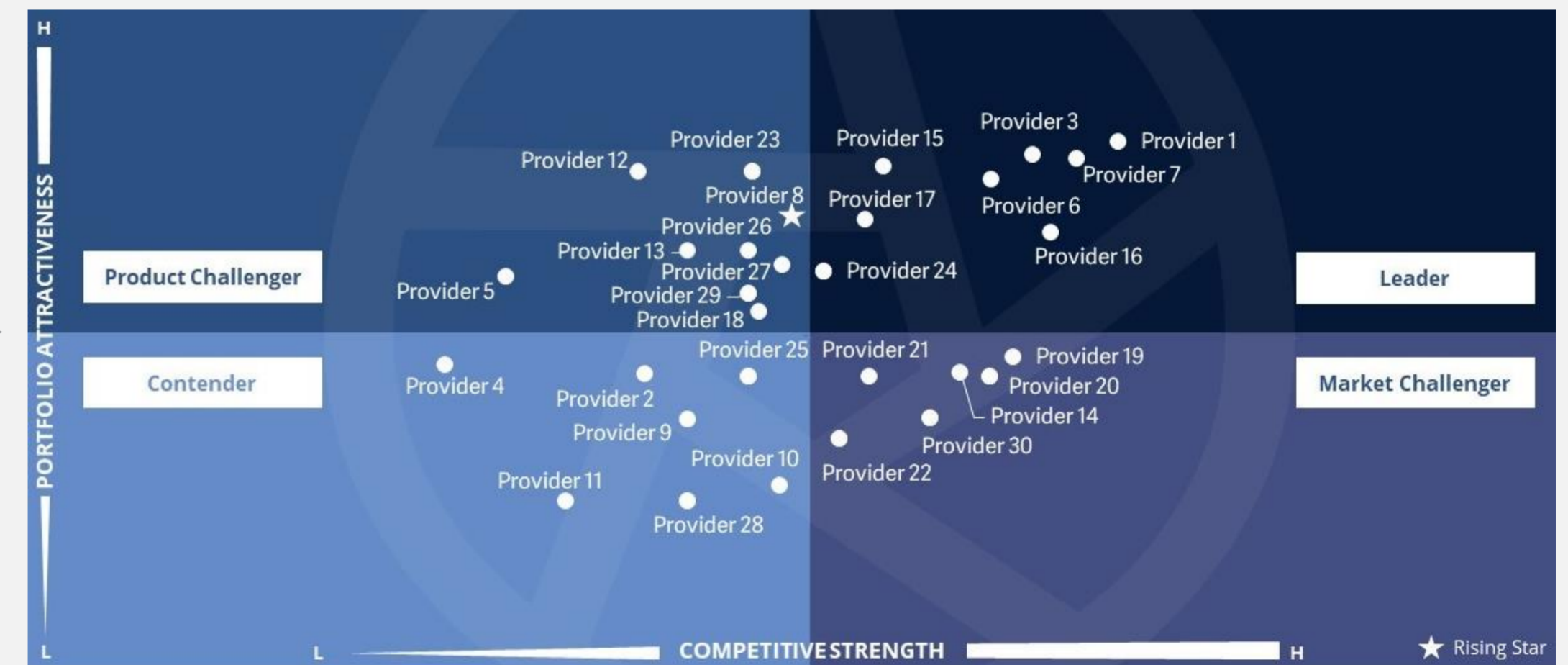
ISG Provider Lens™ studies leverage provider customer experience (CX) intelligence from the ISG Star of Excellence™ program as part of provider evaluation criteria. This independent survey of enterprise clients provides an in-depth look at their satisfaction and experience with IT/BPO and technology service providers.

As part of the program, ISG collects direct feedback from clients about their experience with service and technology providers and analyzes this information with respect to different IT/BPO and technology services, industries, regions, business roles, and delivery models. The CX information from this program is a quantitative measure of the customer satisfaction parameter on the X-axis of the ISG Provider Lens™ quadrant.

Cumulative provider score representing experience across six CX pillars and an overall client satisfaction rating



Final Positioning



The average impact of the CX scores on provider positioning is 3–5% on the X-axis. Maximum impact is around 9%.

ISG Star of Excellence™ Program and IPL Influence (continued)

Nominate your clients for the ISG Star of Excellence™ survey

Providers are invited to nominate their clients to take the ISG Star of Excellence™ survey and provide feedback on their services and solutions. This is in addition to ISG independently sourcing client feedback on providers.

Why nominate?

ISG Star of Excellence™ offers an independent view of a client's experience and provides actionable insights on client satisfaction, highlighting specific areas that can enhance providers' CX initiatives. Providers that nominate their clients for the program will have the opportunity to show diversity in client responses and have a slight advantage in their CX score calculation. The CX scores are also leveraged by ISG sourcing advisors in their Candidate Provider Qualification (CPQ) process while recommending providers to enterprise clients.

How to nominate?

Providers can nominate their clients to take the survey while responding to the IPL questionnaire. Alternatively, they can visit the [nomination page](#) and submit client details. ISG will send a customized email invitation for the survey to the clients and notify the providers. The responses submitted after the evaluation phase of the IPL report will be considered for evaluation only for the subsequent two years.

How many clients to nominate?

ISG encourages providers to nominate as many clients as possible for the survey. However, even a single client response is better than none for the X-axis evaluation in IPL quadrants and every response counts.

Providers aiming for the annual ISG Star of Excellence™ awards should nominate as many clients as possible. For a provider to be eligible for an award, ISG would have independently sourced 30% of responses. The only exception to this is made when a provider receives at least 60 client responses post nominations.

Data usage and privacy

Client data submitted as a part of the survey is confidential. ISG will not share provider data or client-related data with any third party. Only anonymized enterprise data will be leveraged for the IPL evaluation and CPQ process. ISG also leverages aggregated CX scores for its [quarterly enterprise CX Insights reports](#) and shares relevant CX scores as a part of the IPL sneak preview process with the respective providers.

ISG Star of Excellence™ Awards

At the end of each year, ISG recognizes providers with the highest CX scores, across different categories, with the annual ISG Star of Excellence™ awards. These prestigious awards are a hallmark in the industry for exceptional CX. The winners receive a trophy at a gala award ceremony at one of the ISG's annual industry events.



In addition, ISG also recognizes providers with the highest CX scores at the end of each IPL report cycle.

Additional deliverables that complement the ISG Star of Excellence™ awards: ISG Star of Excellence™ Briefing Note, Analyst-driven Insights Workshop, Lead Analyst CX Webinar, CX Benchmark Report and Advisor Spotlight CX Edition.

For more information, please visit <https://isg-one.com/providers/star-of-excellence>

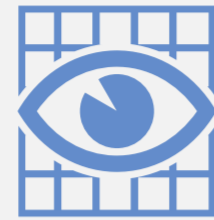
Or reach out to star@isg-one.com.

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



Kick-off and Research Phase

- ISG Provider Lens™ analysts, in collaboration with ISG advisors, determine the quadrant definitions and the eligibility criteria for the study with inputs from providers in the space.
- This collaboration exercise, called the Communities of Interest, involves ISG soliciting feedback from various communities.
- Launch emails are sent with login details for the portal, and study brochures are developed with all the details pertaining to the study like quadrant names, timelines, analysts and eligibility criteria.
- Providers are given 4 weeks to submit information via structured questionnaires.
- During this phase, the providers are encouraged to proactively suggest dates for briefing to avoid probable delays.
- Once the data has been submitted on the portal, this represents the data that will be considered for evaluation.
- Briefing calls and decks add significant value to research and report writing.



Sneak Previews

- The primary purpose of the sneak preview is to announce and present the results of the study and ensure correct representation of the textual facts about the vendor/service provider. A fact check window will be open, and each provider identified as a Leader/Rising Star will be allowed to make any recommended changes for their content within 72 to 120 hours (3 to 5 days), post which the write-ups will be considered final, and no further changes will be entertained after the window gets closed.
- Sneak previews are 30-to-60-minute telephonic conferences with the ISG analysts and account managers to explain the ISG Provider Lens™ study results for the Leaders/Rising Stars of respective quadrant or archetype.
- All results, calculations and assumptions presented within the sneak previews are ISG's confidential information, safeguarded under the Act Against Unfair Practices and copyright law. No ISG content is allowed to be published on any company websites or in any marketing documents/events, etc., without intimation to ISG and IPL account managers; taking necessary permissions and adhering to the ISG norms are important.

Please note that Sneak Previews are not intended to dispute the ratings/positioning on the quadrant or archetype or to provide additional data to complete the survey responses. Such data will not be considered for evaluation but will be updated in the provider profiles.



Press Release and Media Publish





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

- Press releases, IPL™ Enterprise Subscription, 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 reach out to your respective IPL account managers to be part of the ISG Press Releases.





Custom Research Offerings I

ISG Provider Lens™ Custom Research Program strives to address the bespoke enterprise/provider clients' research requirements. The clients get access to our experienced and market-facing analysts to achieve various objectives such as gain market and industry knowledge, ensure product/service validation, benefit from thought leadership, harness competitive intelligence, accrue knowledge from market surveys, and take advantage of joint point of view (POV) research.

The standard offerings under the ISG Provider Lens™ Custom Research Program include joint webinars, joint research papers, briefing notes, competitive/strategy workshops, podcasts and survey-based thought leadership papers. Details around some of the primary custom research offerings are given below:





	Briefing Notes	Thought Leadership	Thought Leadership with Survey	*Industry Studies	Competitive Workshop
 Product Offering	<ul style="list-style-type: none"> ISG’s assessment of a vendor’s/provider’s business focus or offering Analysis of provider offering(s), business initiative or focus area and the USP or differentiators at a vendor or offering level The ideal buyer and how it can benefit Guidance concerning the offering/solution 	<ul style="list-style-type: none"> Analysis of prevailing market dynamics for the selected topic Commentary around relevant industry/market/technology (adoption, opportunities, challenges, threats, etc.) Analysis of partnership and investment trends Analysis of consumer behavior and demands 	<ul style="list-style-type: none"> Analysis of prevailing market dynamics for the selected topic Commentary around relevant industry/market/technology (adoption, opportunities, challenges, threats, etc.) Analysis of partnership and investment trends Analysis of consumer behavior and demands Primary survey to gather intel about market dynamics 	<ul style="list-style-type: none"> Providing industry-specific insights for a particular technology. For example, Cloud for Manufacturing: The emerging adoption and need for cloud for manufacturing (such as design document management, lights out manufacturing, SCM, virtual floor management and equipment monitoring) and addressing security challenges (such as cloud-native data management) 	<ul style="list-style-type: none"> Key trends in that market Provider vs. competition participation level Provider vs. competition—Comparison on four key evaluation parameters each on the X- and Y-axis Pointers covered around strengths and continued efforts SWOT analysis
 Estimated Time	4 to 6 weeks	5 to 6 weeks depending on the scope	8 to 10 weeks depending on the survey scope	4 to 6 weeks depending on the scope	Min. 3 to 4 weeks of lead time
 Deliverable's Format	Word Document and PDF	Word Document and PDF	Word Document and PDF	Word Document and PDF	PowerPoint and PDF
 Length of Deliverable	<ul style="list-style-type: none"> 1,200 to 1,800 Words (4 to 5 pages) 	<ul style="list-style-type: none"> 2,200 to 2,600 words 8 to 10 pages (inclusive of charts/graphs) 	<ul style="list-style-type: none"> 2,500 to 3,500 words 10 to 14 pages (inclusive of charts/graphs) 	<ul style="list-style-type: none"> 600 to 1,200 words 2 to 13 pages (inclusive of charts/graphs) 	<ul style="list-style-type: none"> 120 to 150 minutes (3.5 hours/half day if it is delivered physically onsite)

Custom Research Offerings II

	*GTM Assessments	*Analyst Readouts	*Strategy Workshops	*ISV Partnership Strategy
 Product Offering	<ul style="list-style-type: none"> ■ Analysis of the current ecosystem ■ Assessment of Product–Market fit ■ PELT analysis ■ In-depth analysis of supply and distribution channels ■ Analysis of industry attractiveness ■ Definition of risk matrix ■ Location analysis ■ Analysis of existing startup ecosystem 	<ul style="list-style-type: none"> ■ Dedicated access to an hour-long session with ISG SMEs ■ Discussion on the core findings for that subject/IPL report ■ Analysts to provide an overview of your market positioning, brief competitor analysis, your geographical reach, future focus areas, emerging threats in the space (topic at hand), things that you need to do differently, etc. 	<ul style="list-style-type: none"> ■ Identification of clients’ needs ■ Analysis of the current ecosystem ■ Devising transformation strategies ■ Portfolio attractiveness ■ Internal SWOT analysis ■ Assessment of immediate focus areas ■ Creation of a roadmap and a long-term strategy 	<ul style="list-style-type: none"> ■ Scope of partnership: type and key focus area for partnership ■ ISV market landscape: market trends, innovations and opportunity, and analysis of startups ecosystem ■ Benchmarking/ Comparison of client’s ISV partnership ■ Identification of ISV partner: technology and ecosystem scan
 Estimated Time	4 to 5 weeks of lead time	3 to 4 weeks of preparation time	4 to 5 weeks of lead time	4 to 6 weeks (depending upon the scope)
 Deliverable’s Format	PowerPoint and PDF	PowerPoint and PDF	PowerPoint and PDF	PowerPoint and PDF
 Length of Deliverable	120 to 150 minutes (3.5 hours/half day if it is delivered physically onsite)	60 minutes + 30 minutes (Q&A)	90 to 120 minutes (3.5 hours/half day if it is delivered physically onsite)	Depends on the number of profiles (1 profile = 1 page = 500 words)

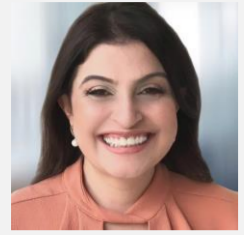
Note : * = New Offering

Custom Research Offerings III

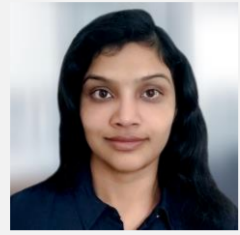
	*Partner Identification and Profiling	*Case Study Review	*Channel Satisfaction Studies	Sweet Spots	Webinars/Podcasts
 Product Offering	<ul style="list-style-type: none"> Client briefs ISG about the objective Technology and ecosystem scan Match and identify potential ISV partners: Top 10 recommendations Detailed capability assessment of target companies: Overview, key differentiators, solution spotlight, and key clients and impact 	<ul style="list-style-type: none"> Analysis of the case study content, themes and value Comparison between the provider and top competitor—What worked and what didn't Future initiatives and requirements Topline recommendations Demand vs. GAP analysis 	<ul style="list-style-type: none"> Assisting principal companies in analyzing their partner sentiments w.r.t comprehending market dynamics, ease of operations, competitive attractiveness, tangible benefits (Me vs. Them), etc. 	<ul style="list-style-type: none"> In the quadrant, there are no unfavorable positions Every provider has clients for valid reasons The power of them telling the right story 	<ul style="list-style-type: none"> Joint presentation, covering market dynamics/trends and vendor/provider narrative
 Estimated Time	4 to 6 weeks (depending upon the number of profiles)	3 to 4 weeks	4-6 weeks of lead time	2-3 weeks of lead time	3 to 4 weeks of preparation time
 Deliverable's Format	PowerPoint and PDF	PowerPoint and PDF	PowerPoint and PDF	PDF	PowerPoint and Video
 Length of Deliverable	Depends on the number of profiles (1 profile = 1 page = 500 words)	Depends upon the number of use cases	Subject to partner profiles	> 1 Page	60 minutes

Note : * = New Offering

List of Analysts for 2024



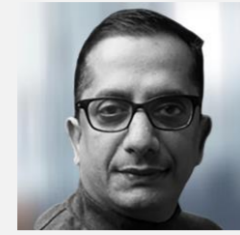
Adriana Frantz
Brazil



Akhila Harinarayan
Nordics, U.K.



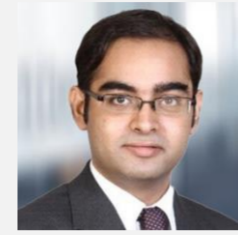
Ana Lin
Brazil



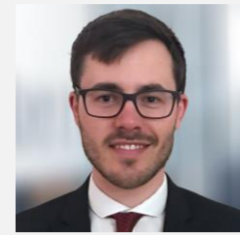
Ashish Jhaharia
Europe, U.K. and U.S.



Ashwin Gaidhani
Europe and U.S.



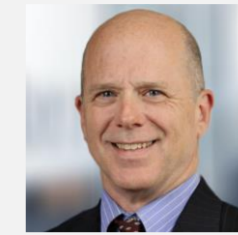
Avinav Chowdhury
U.S.



Benoit Scheuber
France



Blunk Markus
Germany



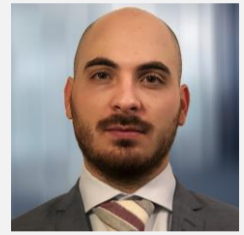
Bruce Guptill
U.S.



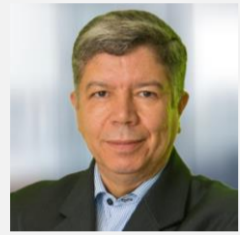
Colin Whalen
U.S.



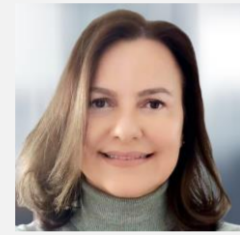
Craig Baty
Australia, Malaysia and Singapore



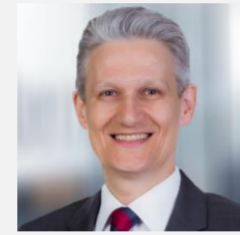
Dr Maxime Martelli
France



David Pereira
Brazil



Elaine Barth
Brazil



Frank Heuer
Germany and Switzerland



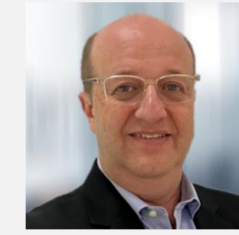
Gaurang Pagdi
U.S.



Gowtham Kumar
U.K. and U.S.



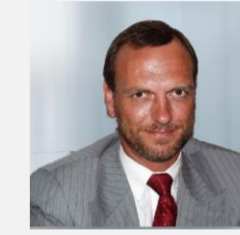
Harish B
U.K and U.S.



João Todari
Brazil



Jochen Steudle
Germany



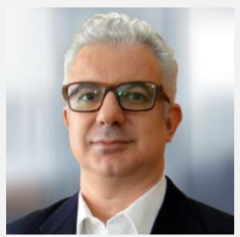
Kenn Walters
France, Germany and U.S.



Kevin Turner
U.K.



Manav Deep Sachdeva
Global



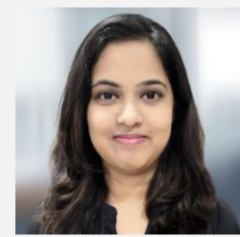
Marcio Tabach
France



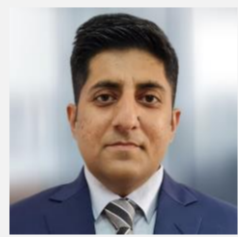
Mark Purdy
Nordics and U.K.



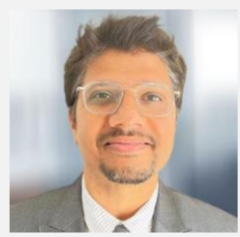
Mauricio Ohtani
Brazil



Meenakshi Srivastava
U.K. and Nordics



Mohammed Malik Aves
Europe and Nordics



Mrinal Rai
U.S.



Oliver Nickels
Europe, Germany and U.K.



Pedro L. Bicudo Maschio
Brazil, France and U.S.



Peter Crocker
U.S.



Phillip Carnelley
U.S. and UK



Phil Hassey
Australia



Rachel Anderson
U.S.



Reza Sarwari
Germany



Rodrigo Barreto
U.K.



Rohan Sinha
U.S.



Roman Pelzel
Germany



Shashank Rajmane
U.S.



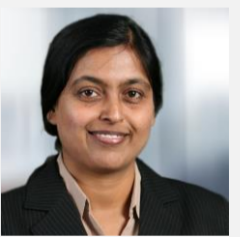
Sonam Chawla
U.K.



Srinivasan P N
Europe



Swadhin Pradhan
Europe and U.S.



Tapati Bandopadhyay
U.S.



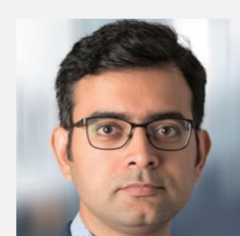
Tarun Vaid
U.S.



Ulrich Meister
Germany and Switzerland



Wolfgang Heinhaus
Germany and Switzerland



Yash Jethani
APAC and UK

A Glimpse into ISG Provider Lens™ Award Ceremony



***ISG** Provider Lens™

Annual Plan 2024

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