

# \*ISG Provider Lens™

## Annual Plan

### 2025



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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 AI, 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 [www.isg-one.com](http://www.isg-one.com).

## ISG Research

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

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900 or visit [research.isg-one.com](http://research.isg-one.com).



# Message from the Global Head of ISG Provider Lens™

Dear Colleagues and Provider Partners,

I am excited to share the 2025 ISG Provider Lens™ Research Agenda as we embark on our research journey together. I want to take a moment to outline our vision and highlight the changes you will see as we approach 2025 as a unified ISG Research team. Our unified ISG Research team is committed to shaping the future of our industry amidst a rapidly evolving technology landscape.

As we have built our unified agenda, we have categorized our expertise into six key areas: Vertical Industry, Business Software & Services, AI & Technologies, IT & Technologies, Enterprise Sourcing and Technology Industry Intelligence. Our 50+ studies align with these categories, each focusing on a specific area of expertise outlined in our research agenda. Additionally, we have highlighted Associated Reports and Events from our various divisions. We want you to be aware of our complete expertise and help us jointly collect insights from each of you in one effort. Thank you for sharing your feedback on this opportunity for improvement; you will see it reflected in our Research Brochures.

We value your input and are introducing or re-engineering ten studies for 2025 across the ecosystem, BPO and industry research categories. Our Star of Excellence program continues to grow, and we will incorporate many of your suggested upgrades and changes.

As the line between technology and services blurs, our acquisition of Ventana Research — now ISG Software Research — allows us to create cohesive narratives that reflect the interconnection between these areas. This unified agenda will ensure that our analyses enhance the understanding of market dynamics, trends and solutions.

We look forward to collaborating with you in the coming weeks and throughout 2025 to gather insights and refine our research to better serve enterprise clients and our partners. Thank you for your continued partnership and commitment to excellence.

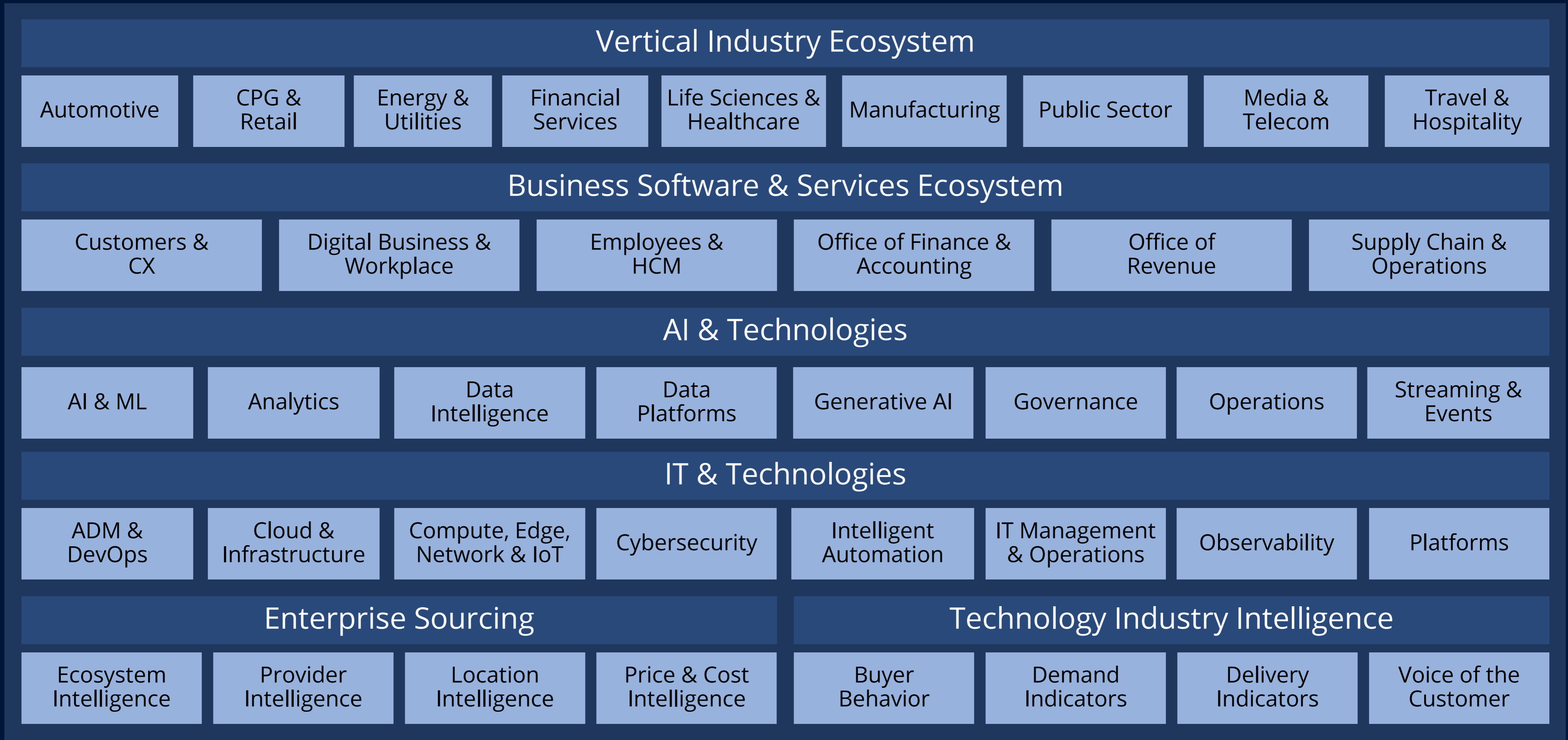
Happy IPLing.



**Jan Erik Aase**

Partner and Global Head – IPL

# ISG Research – Expertise and Insights



The details of each unified category with the corresponding studies are available in the relevant slides.



# Research Calendar 2025

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Others	Switzerland	U.S.	U.S. Public Sector	U.K.
Agribusiness and Chemicals Services and Solutions	Oct-24	Mar-25			✓							✓		
Global Capability Centers Services	Oct-24	Mar-25							✓					
Digital Business & innovation Services	Oct-24	Mar-25			✓									
Digital Engineering Services	Oct-24	Apr-25				✓						✓		
Guidewire Services Ecosystem	Sep-24	Mar-25							✓					
HR Outsourcing and Transformation Services	Nov-24	Apr-25										✓		
Mainframe Services and Solutions	Oct-24	Mar-25				✓						✓	✓	
Microsoft Cloud Ecosystem	Oct-24	Mar-25		✓	✓			✓	✓	Mexico	✓			
Procurement BPO Services	Oct-24	Apr-25							✓					
Salesforce Ecosystem Partners	Oct-24	Mar-25			✓			✓				✓		✓
SAP Ecosystem Partners	Oct-24	Mar-25	✓		✓			✓	✓			✓		✓
ServiceNow Ecosystem Partners	Oct-24	Mar-25	✓		✓	✓						✓		

# Research Calendar 2025 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Others	Switzerland	U.S.	U.S. Public Sector	U.K.
Aerospace & Defense Services	Dec-24	May-25		✓		✓						✓		✓
Automotive & eMobility	Dec-24	Apr-25	✓			✓						✓		
Cybersecurity – Services and Solutions	Dec-24	Jun-25		✓	✓		✓	✓	✓		✓	✓	✓	✓
Google Cloud Partner Ecosystem	Dec-24	Jun-25	✓		✓	✓						✓		
Life Sciences Digital Services	Dec-24	Apr-25							✓					
Network - Software Defined Services and Solutions	Dec-24	Jun-25	✓					✓				✓		✓
Private/Hybrid Cloud - Data Center Services and Solutions	Dec-24	Jun-25			✓		✓	✓	✓	Netherlands Nordics	✓	✓	✓	✓
Snowflake Ecosystem Partners	Dec-24	May-25				✓						✓		
Specialty Analytics - Retail	Feb-25	Jun-25							✓					
VMware Ecosystem	Dec-24	May-25				✓						✓		

# Research Calendar 2025 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Others	Switzerland	U.S.	U.S. Public Sector	U.K.
AWS Ecosystem Partners	Mar-25	Sep-25	✓		✓			✓		Mexico		✓		✓
Contact Center/ Customer Experience Services	Mar-25	Sep-25		✓	✓	✓			✓					
Enterprise Service Management (ESM) — Services and Platforms	Mar-25	Sep-25							✓			✓		
Finance and Accounting (FAO) BPO Services	Mar-25	Sep-25							✓					
Future of Work (Workplace) – Services	Mar-25	Jul-25		✓	✓			✓			✓	✓	✓	✓
Healthcare Digital Services	Apr-25	Aug-25			✓							✓		
Next-Gen ADM Services and Solutions	Mar-25	Sep-25	✓		✓	✓			✓			✓		
Payroll Services and Solutions	Mar-25	Sep-25										✓		
Public Sector	Mar-25	Sep-25		✓										✓
Specialty Analytics - Supply Chain	Feb-25	Aug-25							✓					
Specialty Analytics - Life Sciences and Healthcare	Feb-25	Sep-25							✓					
Supply Chain Services	Mar-25	Sep-25			✓	✓						✓		
Workday Ecosystem	Mar-25	Sep-25				✓						✓		



# Research Calendar 2025 (continued)

Study Name	Launch Month	Report Publish	APAC	Australia	Brazil	Europe	France	Germany	Global	Others	Switzerland	U.S.	U.S. Public Sector	U.K.
Advanced Analytics and AI Services	Feb-25	Dec-25			✓	✓						✓		
Sustainability and ESG Services	Jun-25	Oct-25		✓		✓						✓		
Generative AI Services	Feb-25	Oct-25			✓				✓					
Intelligent Automation Services	Feb-25	Dec-25				✓						✓		
Insurance Industry Services	Jun-25	Oct-25		✓		✓						✓		
Enterprise Managed Network Services	Jun-25	Dec-25	✓			✓						✓		
Manufacturing Industry Services	Aug-25	Dec-25				✓						✓		
MarTech Service Providers	Aug-25	Dec-25			✓									
Telecom, Media and Entertainment Services	Jun-25	Oct-25				✓						✓		
Medical Devices	Jul-25	Nov-25				✓						✓		
Multi Public Cloud – Services and Solutions	May-25	Dec-25			✓	✓	✓	✓	✓	Nordics	✓	✓	✓	✓
Oil and Gas Industry – Services and Solutions	Jul-25	Nov-25				✓						✓		
Oracle Cloud and Technology Ecosystem	Jul-25	Jan-26	✓		✓	✓						✓		
Power & Utilities Industry - Services and Solutions	Jun-25	Oct-25	✓			✓				North America				



# Cluster Studies: A Unified Approach

## Objective

ISG Provider Lens™ is excited to announce the launch of cluster studies! This initiative by ISG aims to combine all interrelated studies at the start of the year, providing providers with early notification and clarity on what to expect throughout the year. By streamlining processes and eliminating redundancy, we are enhancing efficiency for all stakeholders.

## Timelines

List of Studies	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
Specialty Analytics Services – Retail	RFI/Briefing	RFI/Briefing		Sneak Phase	Publish							
Specialty Analytics Services – Supply Chain	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing		Sneak Phase	Publish					
Specialty Analytics Services - Life Sciences and Healthcare	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing		Sneak Phase	Publish				
Advanced Analytics and AI Services	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing			Sneak Phase	Sneak Phase	Publish
Generative AI Services	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing			Sneak Phase	Publish			
Intelligent Automation Services	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing	RFI/Briefing			Sneak Phase	Sneak Phase	Publish

■ RFI/Briefing    
 ■ Sneak Phase    
 ■ Publish

## Why Clusters?

### Advance Notification

Providers will be notified at the beginning of the year about all common topics, allowing them ample time to prepare and respond throughout the year.



### Coordinated Briefings

Providers can now plan the briefings early in the game. They can even combine the common topics and provide consolidated briefings.



### Flexibility

This program is intended to provide a tremendous amount of flexibility to providers for planning and responding to all RFIs.



### Eliminate Redundancy

The program aims to remove redundant efforts, including overlapping questions.



# 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 and AI Services
- Data Modernization Services
- Advanced BI and Reporting Modernization Services



## Aerospace and Defense Services

### Overview

The ISG Provider Lens™ Aerospace and Defense Services study focuses on factors such as complex regulatory compliance, stringent quality requirements, and the need for innovative solutions and cutting-edge technologies, all of which define the industry's unique landscape. The study analyzes a comprehensive range of services, from engineering and design to manufacturing and maintenance, ensuring that every aspect of the value chain aligns with the industry's high standards.

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

- Design, Engineering and Innovation
- Manufacturing and Process Transformation
- Asset management and Maintenance, Repairs and Overhaul (MRO)
- Supply Chain Management
- Enterprise Transformation

Corresponding unified category

AI & Technologies

Analytics

Corresponding unified category

Vertical Industry Ecosystem

Manufacturing and Public Sector

### Associated reports and events:

- **AI Platforms** *ISG Buyers Guides*
- **Analytics and Data** *ISG Buyers Guides*
- **Data Intelligence** *ISG Buyers Guides*
- **DataOps** *ISG Buyers Guides*
- **Data Platforms** *ISG Buyers Guides*

# Study Descriptions (continued)



## Agribusiness and Chemicals Services and Solutions

### Overview

The global chemicals industry is currently experiencing a challenging year, as geopolitics, commodity price volatility, overall demand and supply chain issues plague the entire industry value chain. Moreover, the industry is confronted with the imperative of energy transition, carbon reduction and the adoption of new technologies. Automation, AI and other new technologies are influencing the overall production processes and fostering the development of innovative materials while helping chemical companies reduce emissions. A subset of the chemicals industry is agribusiness. Key components of agribusiness include seeds and agrichemicals, also known as agricultural chemicals. Agribusiness encompasses a wide range of products used in agriculture to enhance crop production, protect plants and improve soil fertility. These include seeds, pesticides (herbicides, insecticides and fungicides), fertilizers and other chemicals.

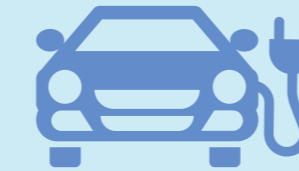
The ISG Provider Lens™ Agribusiness and Chemicals Services and Solutions study aims to understand some of these key industry challenges and assesses service providers' capabilities to address the unmet needs of enterprises. With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Agribusiness and Chemicals Services and Solutions study:

- Technology and Operations Services
- Supply Chain and Logistics
- Sustainability and Innovation

Corresponding unified category

Vertical Industry Ecosystem

Energy



## Automotive and eMobility

### Overview

The ISG Provider Lens™ Automotive and eMobility study analyzes service providers' contributions to the evolving automotive landscape and eMobility future. It evaluates their ability to deliver innovative, tech-driven solutions for electric, connected, and autonomous vehicles. Focusing on key automotive processes, including manufacturing and innovation, the study serves as a strategic resource for automakers, government entities, and industry stakeholders. By assessing providers on technology innovation, scalability, sustainability, and customer satisfaction, it identifies key players driving transformation in this rapidly evolving industry.

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

- Automotive Manufacturing and supply chain services
- Mobility as a Service (Interface, Multimodal and User Controlled)
- Autonomous & Connected Vehicles
- Sustainability and Automotive Green tech
- Electric Mobility Systems (Infrastructure, Technologies and Ecosystem Players)

Corresponding unified category

Vertical Industry Ecosystem

Automotive



# Study Descriptions (continued)



## AWS Ecosystem Partners

### Overview

The ISG Provider Lens™ AWS Ecosystem Partners study focuses on providers that leverage AWS technologies and services to develop and deliver an array of enterprise IT and business services. These certified partners specialize in areas such as architecture and strategy consulting, implementation, migration and professional services 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, AI and ML
- AWS Brazil Public Sector — Technology Services
- AWS Professional Services
- AWS Managed Services



## Contact Center — Customer Experience Services

### Overview

The ISG Provider Lens™ Contact Center — Customer Experience Services study 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
- Intelligent CX Services
- Intelligent AX Services
- Debt Collection Services

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

- Contact Center as a Service (CCaaS)

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

Corresponding unified category

Business Software & Services Ecosystem

Customers & CX

### Associated reports and events:

- **AI Platforms** *ISG Buyers Guides*
- **Analytics and Data** *ISG Buyers Guides*
- **Cloud Computing Platforms** *ISG Buyers Guides*
- **Data Intelligence** *ISG Buyers Guides*
- **DataOps** *ISG Buyers Guides*
- **Data Platforms** *ISG Buyers Guides*
- **Intelligent Automation** *ISG Buyers Guides*
- **Real-Time Data** *ISG Buyers Guides*

### Associated reports and events:

- **Xperience Summit**, *New York, U.S.*
- **Sourcing Industry Conference**, *Dallas, U.S., and London, U.K.*
- **Contact Center and Agent Management** *ISG Buyers Guides*
- **Customer Experience Management** *ISG Buyers Guides*



# Study Descriptions (continued)



## Cybersecurity — Services and Solutions

### Overview

The ISG Provider Lens™ Cybersecurity — Services and Solutions study focuses on providers offering professional services and related technologies and independent software vendors involved in securing IT/OT systems. The study covers services such as strategy development, specialized technical competencies, maintenance and management of security technologies, enterprise-grade threat intelligence, attack surface management, vulnerability management, detection and response, forensics, and recovery capabilities within the framework of IT 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 and Solutions study:

- Identity and Access Management (IAM)
- Data Leakage/Loss Prevention (DLP) and Data Security
- Extended Detection and Response (XDR)
- Security Service Edge (SSE)
- Strategic Security Services
- Technical Security Services
- Managed Security Services – SOC
  - Managed Detection and Response Services — Midmarket
- Digital Forensics and Incident Response (DFIR)
- Vulnerability Assessment and Penetration Testing (VAPT)

Corresponding unified category

IT & Technologies

Cybersecurity

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for Cybersecurity Solutions, covering Vulnerability Management, Identity And Access Management, Endpoint Security, Network Security (including IDS/IPS and Firewall) and SOC/SIEM.
- **Digital Security** Technology Buyers Guide
- **Cybersecurity** Market Lens user study



## Digital Business and Innovation Services

### Overview

The ISG Provider Lens™ Digital Business and Innovation Services study focuses on service providers offering solutions that help businesses enhance their customer and employee experiences and optimize digital business strategies and operations across their digital journey. These services help companies create new business models using existing resources and capitalize on market opportunities. These services must generate significant benefits for customers and drive growth. Service providers must possess the expertise to transform and optimize organizations' operating environments through research, benchmarking and consulting, focusing on IT, business process transformation, program management services and organizational change management.

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

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

Corresponding unified category

Business Software & Services Ecosystem

Digital Business & Workplace

### Associated reports and events:

- **Digital Business Summit**, Frankfurt, Germany, and Dallas, U.S.
- **Digital Innovation Tour**, India
- **Customer Journey Management** ISG Buyers Guide
- **Collaboration & Communications** ISG Buyers Guides

# Study Descriptions (continued)



## Digital Engineering Services

### Overview

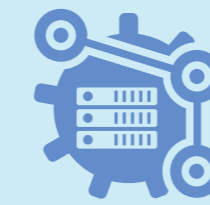
The ISG Provider Lens™ Digital Engineering Services study focuses on service providers engaged in all the relevant phases of product lifecycle management and engineering. Digital engineering services encapsulate conceptualization, design and consulting, prototyping, application engineering, value engineering, 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 the effective utilization of digital technology stacks, such as ML algorithms and digital twins, to facilitate rapid prototyping, accelerate go-to-market and enable iterative enhancements to 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

### Associated reports and events:

- **Product Information Management** *ISG Buyers Guides*
- **Product Lifecycle Management** *ISG Buyers Guides*



## Enterprise Managed Network Services

### Overview

The ISG Provider Lens™ Enterprise Managed Network Services study evaluates service providers offering 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 solutions such as WAN or LAN services, fully managed WLAN installations, managed firewalls, virtual private networks (VPNs) and VoIP services.

The services provided include onsite installations, remote monitoring, fault diagnosis, configuration management, update and patch management, and disaster recovery.

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

- Managed Network Services
- Managed DIA, VPN and VoIP Services
- Network as a Service (NaaS) Offerings

Corresponding  
unified category

IT & Technologies

Compute, Edge,  
Network & IoT

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for Network Services covering routers, switches, firewalls, WAP, load balancers, W-LAN controllers, IDS, WAN accelerators, SD-WAN devices and contact center (including handset, video conferencing and mailbox)
- **Network Modernization** Market Lens Study

# Study Descriptions (continued)



## Enterprise Service Management (ESM) — Services and Platforms

### Overview

The ISG Provider Lens™ Enterprise Service Management (ESM) study emphasizes key focus areas such as digital transformation, service integration, user experience enhancement, automation, and sustainability. It highlights capabilities including smart analytics, cloud-native architecture, predictive technologies, customizable user journeys, and comprehensive service management. ESM platforms are evolving to become technology-agnostic, enabling organizations to modernize workflows and improve collaboration across departments. The integration of emerging technologies and intelligent automation is crucial for driving efficiency and enhancing employee experiences, ultimately supporting enterprises in their digital transformation journeys.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrants for the Enterprise Service Management (ESM) — Services and Platforms study:

- ESM Consulting Services
- ESM Managed Services for Converged IT and Business Ops
- ESM Implementation and Integration Services

### Associated reports and events:

- **IT Service Management ISG Buyers Guide**



## Finance and Accounting Outsourcing Services

### Overview

The ISG Provider Lens™ Finance and Accounting Outsourcing Services study 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 collaborate with enterprises seeking to modernize their finance and accounting (F&A) operations through digital transformation. By leveraging digital technologies, the providers help these enterprises streamline processes, increase productivity, improve data accuracy, reduce costs and enhance CX. 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

Corresponding unified category

Business Software & Services Ecosystem

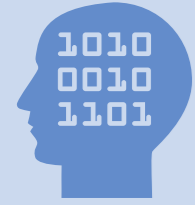
Office of Finance & Accounting

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for FAO covering the FTE rates for AR/AP/GL
- **Business Planning** ISG Buyers Guides
- **Financial Consolidation and Close** ISG Buyers Guides
- **ERP** ISG Buyers Guides



# Study Descriptions (continued)



## Future of Work (Workplace) — Services

### Overview

The ISG Provider Lens™ Future of Work (Workplace) — Services study focuses on service providers assisting enterprises in improving digital dexterity and employee productivity. This empowerment enables efficient connection and collaboration among co-workers across places, particularly within the context of an increasingly prevalent remote/virtual work model. In this environment, service providers support clients with their workplace transformation journeys by creating or reviewing work and 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 AI, AR and VR. Providers contribute to clients' sustainability initiatives by providing sustainable and inclusive workplace environments.

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:

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed Workplace Services — End-User Technology
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace Services

Corresponding unified category

Business Software & Services Ecosystem

Digital Business & Workplace

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for the Workplace covering desktops, laptops, VDI, tablets and smartphones
- **Future Workplace Summit**, *New York, U.S.*
- **Collaboration & Communications** ISG Buyers Guides
- **Work Management** Technology Buyers Guide



## Generative AI (GenAI) Services

### Overview

The ISG Provider Lens™ Generative AI Services and Solutions study focuses on technology and service providers that leverage generative AI (GenAI) 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 GenAI solutions, covering aspects such as use-case identification and prioritization, architecture and strategy consulting, foundation model and tool selection, data comprehension, implementation, testing and scaling across an enterprise. Additionally, these providers are expected to assist enterprises with GenAI-related concerns such as ethics, responsibility, sustainability and explainability within 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:

- Strategy and Consulting Services
- Development and Deployment Services

Corresponding unified category

AI & Technologies

Generative AI

### Associated reports and events:

- Artificial Intelligence Market Lens Study
- **AI Platforms** ISG Buyers Guide
- **GenAI Platforms** ISG Buyers Guide
- **MLOps** ISG Buyers Guide



# Study Descriptions (continued)



## Global Capability Centers Services

### Overview

The ISG Provider Lens™ Global Capability Centers (GCC) study examines providers' ability to deliver highly integrated services for operationalizing GCCs. These providers may offer niche services or a wide range of solutions, supporting the setup, management and optimization of GCCs. The study assesses how providers help organizations establish efficient operations, enhance service delivery, supply talent and drive innovation within GCCs, ultimately contributing to their long-term success and competitiveness.

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

- Operational Design and Set Up
- Operational Excellence

### Associated reports and events:

- **Global Capability Centers** Market Lens Study



## Google Cloud Partner Ecosystem

### Overview

The ISG Provider Lens™ Google Cloud Partner Ecosystem study 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 experience, which can help clients unlock the next level of business growth. The study considers partners that have achieved specialization in a solution area, established a Google Cloud services practice, demonstrated consistent customer success, showcased proven technical capabilities and employed certified personnel with 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
- Sustainability Services on Google Cloud

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

### Associated reports and events:

- |  |   |
|--|---|
| ■ <b>AI Platforms</b> ISG Buyers Guides              | ■ <b>DataOps</b> ISG Buyers Guides                |
| ■ <b>Analytics and Data</b> ISG Buyers Guides        | ■ <b>Data Platforms</b> ISG Buyers Guides         |
| ■ <b>Cloud Computing Platforms</b> ISG Buyers Guides | ■ <b>Intelligent Automation</b> ISG Buyers Guides |
| ■ <b>Data Intelligence</b> ISG Buyers Guides         | ■ <b>Real-Time Data</b> ISG Buyers Guides         |

# Study Descriptions (continued)



## Guidewire Services Ecosystem

### Overview

The ISG Provider Lens™ Guidewire Services Ecosystem study identifies and assesses IT service providers offering services related to the Guidewire core platform for insurers globally. While many providers are consistent across regions, they differ in their service portfolios and implementation experience. These service providers address the following:

- System integration challenges addressed through consulting services
- Cloud integration leveraging engineering expertise
- Complex data migration utilizing accelerators and frameworks
- Implementation with regional expertise
- QA and testing services
- Managed and support services with certified onsite and offshore teams
- Value-add services, including digital engineering and third-party integrations

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

- Global Services Providers

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence



## Healthcare Digital Services

### Overview

The ISG Provider Lens™ Healthcare Digital Services study focuses on service providers operating across various segments of the healthcare industry. These providers navigate new regulations, integrate changes resulting from competitive mergers and acquisitions, and adapt to the evolving needs of an aging population. They also offer guidance on and undertake necessary but costly integration efforts. As consumers increasingly anticipate advanced and convenient digital services, digital transformation services are crucial 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

Corresponding unified category

Vertical Industry Ecosystem

Life Sciences & Healthcare

### Associated reports and events:

- **Workforce Management for Healthcare** *ISG Buyers Guide*

# Study Descriptions (continued)



## HR Outsourcing and Transformation Services

### Overview

The ISG Provider Lens™ HR Outsourcing and Transformation Services study focuses on providers offering managed services that include advanced cloud HCM technologies to transform HR operations. Globally, employers are increasingly seeking transformative solutions to enhance 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:

- Multiprocess HR Services and Solutions
- Health and Welfare (H&W) Benefits Administration Services

Corresponding unified category

Business Software & Services Ecosystem

Employees & HCM

### Associated reports and events:

- **Compensation Management** ISG Buyers Guides
- **ERP/HR Buyer Behavior**
- **HCM Platform and Suites** ISG Buyers Guides
- **Learning Management** ISG Buyers Guide
- **Payroll Management** ISG Buyers Guide
- **Workforce Management** ISG Buyers Guide



## Insurance Industry Services

### Overview

The ISG Provider Lens™ Insurance Industry Services study focuses on service providers that offer a wide spectrum of insurance industry services. From traditional ADM and managed services to modern digital technology stacks, encompassing cloud, data and cybersecurity, and systems integration (SI) consulting, the providers cater to the 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
- ITO services — Midmarket
- Nex-Gen ITO Services — Midmarket
- Life and Retirement Insurance TPA Services
- Property and Casualty Insurance TPA Services

Corresponding unified category

Vertical Industry Ecosystem

Financial Services

### Associated reports and events:

- **Contact Center for Insurance** ISG Buyers Guide
- **Provider Ranking tool**
- **Insurance Industry Market Lens Study**



# Study Descriptions (continued)



## Intelligent Automation Services

### 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 study 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 aligning their resources accordingly to enhance their capabilities in areas such as ESG, innovation and futuristic solutions. This study 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

Corresponding unified category

AI & Technologies

AI and ML

### Associated reports and events:

- **Intelligent Automation** *ISG Buyers Guide*
- **Intelligent Document Processing** *ISG Buyers Guide*
- **Process Automation** *ISG Buyers Guide*
- **Process Discovery and Mining** *ISG Buyers Guide*



## Life Sciences Digital Services

### Overview

The ISG Provider Lens™ Life Sciences Digital Services study focuses on service providers specializing in 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 based on their effectiveness as an extension of clients' technology organizations, including their ability to develop blueprints, architecture frameworks and management processes. The evaluation also considers factors such as brand recognition, market reach, customer base, annual revenue, dedicated 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

Corresponding unified category

Vertical Industry Ecosystem

Life Sciences & Healthcare

### Associated reports and events:

- **Strategic Insights Report**



# Study Descriptions (continued)



## Mainframes — Services and Solutions

### Overview

The ISG Provider Lens™ Mainframes — Services and Solutions study assesses service providers and vendors offering mainframe optimization, outsourcing and mainframe as a service (MFaaS). The study also evaluates system integrators and automation tool vendors offering refactoring, rehosting, replatforming, rewriting and reengineering applications to facilitate cloud migration.

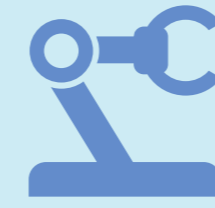
Market consolidation and cloud innovation, including GenAI, continue to change the competitive landscape. Mainframe software licensing, particularly third-party software and middleware, pushes mainframe budgets. Mainframe modernization aims to optimize resources and license costs while reducing or eliminating technical debt.

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

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for Mainframe Services covering MIPS/MSU/CPU hours



## Manufacturing Industry Services

### Overview

The ISG Provider Lens™ Manufacturing Industry Services study focuses on critical aspects of services and solutions offered to enterprises in the manufacturing industry. The study compares the strengths, areas of development, capabilities and 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 include, but are not limited to, design and development services, PLM, MES, smart factory solutions, supply chain services 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:

- Product Development and Design
- Smart/Digital Factory Solutions
- Manufacturing Supply Chain and Procurement
- Aftermarket Services
- Industry Transformation Services

Corresponding unified category

Vertical Industry Ecosystem

Manufacturing

### Associated reports and events:

- **Smart Manufacturing** Market Lens Study
- **ERP** ISG Buyers Guides
- **Product Information Management** ISG Buyers Guide
- **Product Lifecycle Management** ISG Buyers Guide
- **Workforce Management for Manufacturing** ISG Buyers Guide

# Study Descriptions (continued)



## MarTech Service Providers

### Overview

The ISG Provider Lens™ MarTech Service Providers study focuses on providers collaborating with digital marketing professionals to develop marketing technologies. Given the emergence of new technologies and evolving consumer behavior, which is already influenced by digital transformation, a new marketing approach is required that emphasizes a shift in mindset rather than solely focusing on tools.

By combining creativity, digital campaign development expertise, digital tools and methodologies such as design thinking and agile processes to meet the expectations of digital customers, martech companies offering a wide range of services are growing worldwide.

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

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

### Associated reports and events:

- CRM – Marketing *ISG Buyers Guide*
- Digital Commerce *ISG Buyers Guide*



## Medical Devices

### Overview

The ISG Provider Lens™ Medical Devices study examines the ongoing digital transformation in the medtech industry, focusing on product development, engineering, production and logistics. Advancements in connectivity, mobile enablement, IoT, advanced analytics and ML have streamlined the integration of medical devices into operational processes. These technologies enable efficient remote data collection and processing throughout the product lifecycle, improving overall product management and functionality.

The study examines key areas such as product lifecycle management, engineering services, logistics, distribution and maintenance. As medtech companies embrace digitalization, technology providers are increasingly expected to offer comprehensive solutions across the entire product development lifecycle, often taking responsibility for various aspects of business operations. This shift not only enhances operational efficiency but also helps meet the growing demands of the modern healthcare environment.

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

- Product Design and Engineering
- Quality Manufacturing Operations
- Customer Experience

Corresponding unified category

Vertical Industry Ecosystem

Life Sciences & Healthcare

# Study Descriptions (continued)



## Microsoft Cloud Ecosystem

### Overview

The ISG Provider Lens™ Microsoft Cloud Ecosystem study focuses on service providers with expertise in Microsoft solutions, enabling them to offer comprehensive consulting, implementation, integration and managed services for clients' IT environments. The increasing complexity of integration, coupled with expanding use cases, is driving a dynamic market for professional services. As one of the largest global ecosystems, the Microsoft Ecosystem encompasses thousands of partner companies supporting enterprises across diverse industries. This study specifically targets select regions, addressing the unique needs of different 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
- FinOps services for Azure
- Sustainability or green-ops on Azure
- Microsoft Data fabrics



## Multi Public Cloud Services and Solutions

### Overview

The ISG Provider Lens™ Multi Public Cloud Services and Solutions study evaluates service providers for their expertise in managing multi public cloud environments. The study evaluates the consulting and managed services capabilities of hyperscaler partners, while also assessing the hyperscalers themselves for their infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS) offerings.

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
- AI Infrastructure Services

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

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

Corresponding unified category

IT & Technologies

Cloud & Infrastructure

### Associated reports and events:

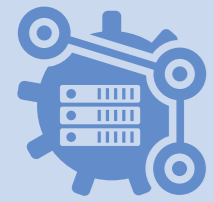
- **AI Platforms** ISG Buyers Guides
- **Analytics and Data** ISG Buyers Guides
- **Cloud Computing Platforms** ISG Buyers Guides
- **Data Intelligence** ISG Buyers Guides
- **DataOps** ISG Buyers Guides
- **Data Platforms** ISG Buyers Guides
- **Intelligent Automation** ISG Buyers Guides
- **Real-Time Data** ISG Buyers Guides

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for Public Cloud in its IaaS Module
- **Cloud Market Lens** User Study
- **Cloud Computing Platforms** ISG Buyers Guides
- **Cloud-Native AI and Data Platforms** ISG Buyers Guides
- **Cloud Observability Platform** ISG Buyer Guide



# Study Descriptions (continued)



## Network — Software Defined Services and Solutions

### Overview

The ISG Provider Lens™ Network — Software Defined Services and Solutions study evaluates provider offerings related to software-defined enterprise networks. These include managed SD-WAN services, consulting and advisory services, and implementation support, as well as enterprise network technologies and edge services. A key development in managed network services is network as a service (NaaS), where service providers offer network services on a subscription basis, including hardware, software, management and licensing. This evolution of NaaS is covered in detail in the separate MNS IPL study.

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
- SD-Networks Transformation Services (Consulting and Implementation)
- Edge Technologies and Services (Including Private 5G)
- Secure Access Service Edge (SASE) Services (Including SD-WAN Plus SSE)

Corresponding unified category

IT & Technologies

Compute, Edge, Network & IOT

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for network services, covering routers, switches, firewalls, WAP, load balancers, W-LAN controllers, IDS, WAN accelerators, SD-WAN devices and contact center (handset, video conferencing and mailbox)
- **Network Modernization** Market Lens Study



## Next-Gen ADM Services and Solutions

### Overview

The ISG Provider Lens™ Next-Gen ADM Services and Solutions study evaluates providers' capabilities in Agile modernization, transformation, service management and quality assurance. As cloud computing, automation and AI evolve, emerging technologies such as generative AI (GenAI) and low-code/no-code (LCNC) platforms are gaining traction. Providers focus on Agile methodologies and DevSecOps, aligning digital and operational goals with clients' objectives.

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
- AI-Enabled Application Development and Maintenance

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 Development Platforms and No-Code Development Platforms

Corresponding unified category

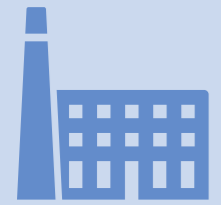
IT & Technologies

ADM & DevOps

### Associated reports and events:

- **Application Development and Operations** Technology Buyers Guide
- **Application Development and Maintenance** Market Lens User Study

# Study Descriptions (continued)



## Oil and Gas Industry — Services and Solutions

### Overview

The ISG Provider Lens™ Oil and Gas Industry — Services and Solutions study evaluates the offerings and capabilities of service providers with deep expertise in the oil and gas industry, including proficiency in digital technologies and innovation. As companies face challenges such as rising oil and gas prices, declining global oil inventories and increasing geopolitical tensions, they are making significant investments in digital innovation and operational efficiency. This includes the adoption of cloud, AI, ML, mobility, automation and operational technology (OT) security. Additionally, the industry is focusing on energy transition, with many companies transforming their portfolios by replacing aging assets with low-carbon resources. Energy transition has been identified as a key priority for 2023 and beyond.

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
- Data Management and Cloud Computing
- Energy Transition Services

Corresponding unified category

Vertical Industry Ecosystem

Energy & Utilities

### Associated reports and events:

- Strategic Insights Report



## Oracle Cloud and Technology Ecosystem

### Overview

The ISG Provider Lens™ Oracle Cloud and Technology Ecosystem study highlights the leading and most relevant Oracle partners. These partners possess valuable expertise across various domains, such as enterprise performance management (EPM), enterprise resource planning (ERP), human capital management (HCM), Oracle Cloud Infrastructure (OCI), Oracle E-Business Suite, Oracle Exadata Database Machine, and Oracle Supply Chain Management (SCM) & Manufacturing.

This year's ISG Provider Lens™ Oracle Cloud and Technology Ecosystem study has expanded its scope beyond implementation, integration and managed services to offer a more in-depth analysis of OCI solutions and capabilities, ensuring a more comprehensive analysis of the entire Oracle ecosystem.

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
- OCI Solutions and Capabilities

Corresponding unified category

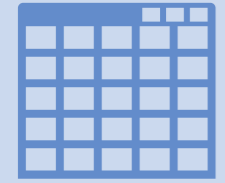
Enterprise Sourcing

Ecosystem Intelligence

### Associated reports and events:

- AI Platforms ISG Buyers Guides
- Analytics and Data ISG Buyers Guides
- Cloud Computing Platforms ISG Buyers Guides
- Data Intelligence ISG Buyers Guides
- DataOps ISG Buyers Guides
- Data Platforms ISG Buyers Guides
- Intelligent Automation ISG Buyers Guides
- Native-Cloud AI & Data Platform ISG Buyers Guide
- Real-Time Data ISG Buyers Guides

# Study Descriptions (continued)



## Payroll Services

### Overview

The ISG Provider Lens™ Payroll Services study evaluates technology and managed service providers offering advanced digital solutions to enable global payroll operational transformation. Companies of all sizes, across various industries and regions, recognize payroll as a critical component of employee experience (EX) and a key business asset. Consequently, they are actively seeking advanced digital capabilities and managed services to enhance their payroll processes, 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 study:

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



## Power and Utilities Industry — Services and Solutions

### Overview

The ISG Provider Lens™ Power and Utilities Industry — Services and Solutions study evaluates providers with deep industry expertise and strong capabilities in 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 stringent regulatory guidelines are compelling the industry to seek transformative sourcing options to enhance 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/OT Services
- Grid Modernization
- Enterprise Asset Management (EAM)
- Customer Information Systems (CIS) and Customer Experience (CX)

Corresponding unified category

Business Software & Services Ecosystem

Employees & HCM

Corresponding unified category

Vertical Industry Ecosystem

Energy & Utilities

### Associated reports and events:

- Domestic US ISG Buyers Guide
- Global Payroll ISG Buyers Guide
- International Payroll ISG Buyers Guide
- Multi-Country Payroll ISG Buyers Guide

### Associated reports and events:

- Enterprise Asset Management ISG Buyers Guide
- Grid Management ISG Buyers Guide
- Strategic Insights Report



# Study Descriptions (continued)



## Private/Hybrid Cloud — Data Center Services and Solutions

### Overview

The ISG Provider Lens™ Private/Hybrid Cloud — Data Center Services and Solutions study evaluates providers of outsourcing, hosting, colocation and managed services. Their offerings are aligned with security and governance requirements, large-scale data management and the need for seamless integration with other enterprise applications and workflows across various cloud environments. In this scenario, data centers may be owned by an enterprise, a service provider or a third-party colocation provider. A hybrid cloud combines the strengths of on-premises, private and public cloud infrastructures, aiming to create a unified, automated, well-managed and distributed computing environment by integrating services and data from multiple cloud models.

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:

- AI-ready Infrastructure Design Services
- Managed Hosting
- Managed Services
- Colocation Services

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:

- Hybrid Cloud Management Platforms
- Resiliency Platforms

Corresponding unified category

IT & Technologies

Cloud & Infrastructure

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for data centers (servers/public and private cloud/storage)
- **Cloud Computing Platforms** ISG Buyers Guides
- **Cloud** Market Lens User Study



## Procurement BPO Services

### Overview

The ISG Provider Lens™ Procurement BPO Services study highlights the rapidly evolving business transformation reshaping the scope and value of procurement services used by client enterprises. Pandemic-driven supply disruptions have shifted global attention toward diversifying and localizing suppliers to mitigate risks, while also simplifying overall procurement processes. Concerns about sustainability and social responsibility are influencing supplier selection and enhancing supply chain transparency. Automation and AI are streamlining certain procurement processes, though not all, and are creating efficiencies and cost savings. Rapid advances in AI capabilities, including GenAI, are driving the growth of analytics and the adoption of non-human, task-specific decision-making processes. This ISG study captures these disruptions and the resulting business changes.

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

- Procurement Operations Modernization Services
- Strategic Sourcing and Category Management Services
- Direct Procurement Enablement and Modernization Services

Corresponding unified category

Business Software & Services Ecosystem

Supply Chain & Operations

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for FAO covering the FTE rates for procurement services
- **ERP** ISG Buyers Guide
- Procure-to-Pay Business Buyers Guide

# Study Descriptions (continued)



## Public Sector

### Overview

The ISG Provider Lens™ Public Sector study examines core services providers offer governments, such as strategy development, project execution, and outsourced department management (e.g., visa processing). It focuses on transformation, innovation, and evolving citizen services to meet the needs of budget-conscious governments. Targeting the U.K., Australia, and Brazil, the study assesses providers' capabilities in delivering secure, scalable, and advanced technology solutions. As governments increasingly rely on external providers, they require partners who understand the complexities of operations, regulatory needs, and the importance of reliable solutions. The study will focus on key quadrants of public sector services.

- Strategy and Enablement Services (Consulting)
- Managed IT Services (Large Market)
- Managed IT Services (Midmarket)
- Business Process Outsourcing Services and Outsourced Operations
- Services to Local and Devolved Governments
- Digital Transformation and Innovation Services



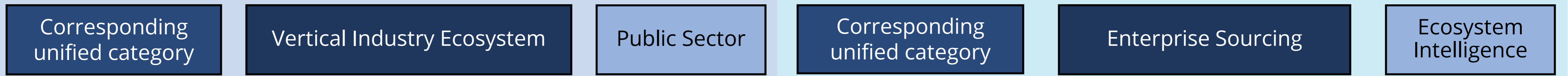
## Salesforce Ecosystem Partners

### Overview

The ISG Provider Lens™ Salesforce Ecosystem Partners study focuses on leading Salesforce partner companies. ISG evaluates various offerings on the Salesforce platform, distinguishing between implementation services (the Change Business) and managed application services, which provide operational support for live applications (the Run Business). Additionally, the study differentiates between large enterprises and midmarket enterprises, with large enterprises requiring more complex Salesforce integration into their application landscapes. These enterprises often operate globally, necessitating service providers with matching global delivery capabilities.

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



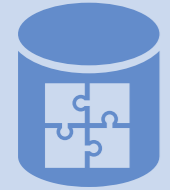
### Associated reports and events:

- ISG Strategic Industry Report
- ISG Provider Benchmarking
- **Workforce Management for Public Sector** ISG Buyers Guide

### Associated reports and events:

- **AI Platforms** ISG Buyers Guides
- **Analytics and Data** ISG Buyers Guides
- **Cloud Computing Platforms** ISG Buyers Guides
- **Contact Centers** ISG Buyers Guides
- **CRM** ISG Buyers Guides
- **Data Intelligence** ISG Buyers Guides
- **DataOps** ISG Buyers Guides
- **Data Platforms** ISG Buyers Guides
- **Intelligent Automation** ISG Buyers Guides
- **Native-Cloud AI & Data Platform** ISG Buyers Guide
- **Real-Time Data** ISG Buyers Guides

# Study Descriptions (continued)



## SAP Ecosystem Partners

### Overview

The ISG Provider Lens™ SAP Ecosystem Partners study identifies leading SAP partner companies that offer exceptional client services and maximize the benefits of S/4HANA investments. Engaging with these top partners enables clients to optimize operating expenditure (OpEx) and achieve a high ROI. For clients using S/4HANA, this study assesses managed service providers that enhance application performance, including stability, availability and security. It also examines cloud migrations, technology innovations and the integration of AI and ML into application maintenance and operations. The study aligns 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
- Testing Services

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

### Associated reports and events:

- ISG ProBenchmark® offers of Indicative Pricing Module for SAP services based on SIDs
- **AI Platforms** ISG Buyers Guides
- **Analytics and Data** ISG Buyers Guides
- **CRM** ISG Buyers Guides
- **Data Intelligence** ISG Buyers Guides
- **DataOps** ISG Buyers Guides
- **Data Platforms** ISG Buyers Guides
- **ERP** ISG Buyers Guides
- **HCM Suites and Platform** ISG Buyers Guides
- **Intelligent Automation** ISG Buyers Guides
- **Real-Time Data** ISG Buyers Guides



## ServiceNow Ecosystem Partners

### Overview

The ISG Provider Lens™ ServiceNow Ecosystem Partners study evaluates and ranks leading ServiceNow partners that offer workflow-enabled service management software solutions. Realizing the full potential of ServiceNow's extensive functionalities requires a range of professional services, encompassing process (re)design, software implementation and integration, application management and training. Partner companies' diverse offerings and certifications highlight their focus, which can range from comprehensive lifecycle support to specialized services for specific tasks. For managed service providers, the ServiceNow platform offers a strong foundation for building additional functionalities or integrating it with industry-specific frameworks to optimize enterprise operations. Additionally, security features and cloud management tools are key considerations in leveraging the platform effectively.

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
- Innovation on ServiceNow

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

### Associated reports and events:

- **Customer Experience Management** ISG Buyers Guides
- **HCM Suites and Platform** ISG Buyers Guides
- **Intelligent Automation** ISG Buyers Guides
- **IT Management** ISG Buyers Guides
- **Work Management** ISG Buyers Guides



# Study Descriptions (continued)



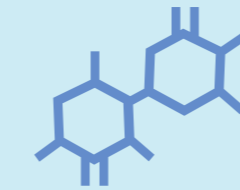
## Snowflake Ecosystem Partners

### Overview

This ISG Provider Lens™ Snowflake Ecosystem Partners study evaluates Snowflake’s partners across key focus areas, categorizing them by their strengths, competencies and market impact. The document will provide insights into which partners excel in specific domains and how they can be leveraged to meet diverse customer needs. The assessment will identify high-performing partners and areas for growth, providing customers with a clear understanding of which partners to engage with based on their specific requirements.

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

- Data Engineering and Integration Solutions
- Analytics and Business Intelligence Services
- Managed Services and Platform Optimization



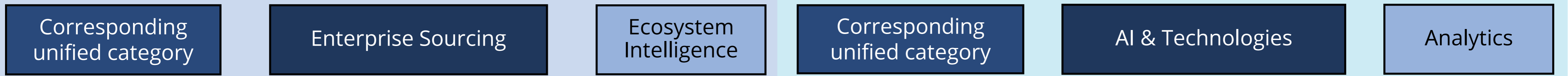
## Specialty Analytics Services — Life Sciences and Healthcare

### Overview

The ISG Provider Lens™ Specialty Analytics Services — Life Sciences and Healthcare study focuses on providers with expertise in advanced automation. They leverage cutting-edge analytics technologies to customize AI and ML models, algorithms and workflows and deploy their services efficiently. Providers should also exhibit end-to-end capabilities in scaling AI and analytics projects across the value chain to enable business leaders to extract actionable insights, value and data-driven decisions from their data. Large service providers, analytics platform vendors with life sciences and healthcare modules, and verticalized platform vendors offering analytics solutions as part of projects are not included in this study.

With respect to the mentioned market and its requirements, ISG will be focusing on the following quadrant for the global Specialty Analytics Services — Life Sciences and Healthcare study:

- Life Sciences and Healthcare Analytics Services — Specialist Providers



### Associated reports and events:

- **AI Platforms** *ISG Buyers Guides*
- **Data Platforms** *ISG Buyers Guides*

### Associated reports and events:

- **Analytics and Data for Healthcare and Life Sciences** *ISG Buyers Guides*
- **Contact Center for Healthcare** *ISG Buyers Guide*

# Study Descriptions (continued)



## Specialty Analytics Services — Retail

### Overview

The ISG Provider Lens™ Specialty Analytics Services — Retail study evaluates providers offering AI and analytics services that integrate scientific methods with business context for retail enterprises. These providers address critical business challenges by combining domain knowledge and retail industry expertise, helping clients drive substantial data-driven growth and enhance CX through actionable insights.

Providers should demonstrate their capabilities and expertise in developing hyperpersonalized self-services utilizing AI and analytics, encompassing areas such as customer intelligence, commerce insights, campaign management, product placement, personalization, pricing, merchandising, fulfillment, last-mile delivery and store operations. They should also highlight proficiency in modeling and customizing ML models, algorithms and workflows, using the latest analytics technologies to efficiently deliver their services.

The ISG Provider Lens™ Specialty Analytics Services — Retail study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers on their competitive strengths and portfolio attractiveness
- Focus on the global market (single quadrant)

Corresponding unified category

AI & Technologies

Analytics

### Associated reports and events:

- [Analytics and Data for Retail ISG Buyers Guides](#)



## Specialty Analytics Services — Supply Chain

### Overview

The ISG Provider Lens™ Specialty Analytics Services — Supply Chain study, featuring a global quadrant, evaluates the portfolios of providers offering AI and analytics services that integrate scientific methods with business context for enterprise clients in the supply chain domain. These providers address critical business challenges by combining domain knowledge with supply chain expertise, helping clients uncover patterns and generate actionable insights. Their services aim to enhance risk management, reduce costs, improve planning accuracy and predict future events. This approach utilizes an intelligent data ecosystem, incorporating IoT datasets and empowering control towers with AI- and cognitive-enabled self-learning systems.

Providers should demonstrate expertise in facilitating self-service analytics for decision-making across various supply chain functions, including control, operations, monitoring, shipping, logistics, transportation, inventory, warehousing and distribution. They should have proficiency in advanced automation, data lakes, modeling and the customization of AI and ML models, algorithms and workflows. By utilizing the latest analytics technologies, providers can efficiently deploy their services to optimize supply chain performance.

Providers must demonstrate end-to-end capabilities in designing, implementing, deploying and scaling AI and analytics projects across the entire supply value chain, empowering business leaders to make data-driven decisions and gain actionable insights. This category excludes large service providers, analytics platform vendors with supply chain modules, and supply chain platform vendors with analytics solutions.

Corresponding unified category

AI & Technologies

Analytics

### Associated reports and events:

- [Supply Chain Analytics ISG Buyers Guide](#)

# Study Descriptions (continued)



## Supply Chain Services

### Overview

The ISG Provider Lens™ Supply Chain Services study evaluates providers offering consulting, implementation, and digital transformation solutions, including supply chain software vendors. It examines their expertise in planning, execution, and insights generation, as well as their support for clients' ESG goals. Providers use digital technologies like IoT, AI, ML, and predictive analytics to optimize ecosystems of suppliers, customers, and partners. They help manage demand, supply, and business risks while driving operational transformation and innovation. The study focuses on real-time collaboration, data-driven decision-making, and achieving net carbon neutrality through supply chain optimization and data orchestration.

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
- Circular Supply Chain Services

Corresponding unified category

Business Software & Services Ecosystem

Supply Chain & Operations

### Associated reports and events:

- **Supply Chain Management and Supply Chain Planning** Business Buyers Guide



## Sustainability and Environmental, Social and Governance (ESG) Services

### Overview

The ISG Provider Lens™ Sustainability and Environmental, Social and Governance (ESG) Services study evaluates providers' capabilities to deliver quantifiable improvements in their clients' ESG targets — an increasingly critical focus for a wide range of stakeholders. Providers must add value and offer support in IT, innovation, management, strategy, and organizational and process consulting, all aimed at fostering sustainable business models in these connected areas. Sustainable enterprises must align with the UN's 17 Sustainable Development Goals (SDG), which are set for achievement by 2030. Providers' services must be deeply integrated to collect ESG-related data, encompassing various metrics to calculate impact, generate reports, share data for analysis and deliver actionable insights.

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

Corresponding unified category

Business Software & Service Ecosystem

Supply Chain & Operations

### Associated reports and events:

- Sustainability & ESG Business Buyers Guides
- **Sustainability** Market Lens Study



# Study Descriptions (continued)



## Telecom, Media and Entertainment Services

### Overview

The ISG Provider Lens™ Telecom, Media and Entertainment Services study focuses on key providers of advisory, information technology outsourcing (ITO) and business process management services for the telecommunications, media and entertainment industries. These industries face challenges such as increasing customer expectations, thin profit margins, low average revenue per user (ARPU) and high customer churn. Consequently, end-users seek ITO and BPO services that enhance network agility, improve service delivery and enable cost-effective, seamless migration to new technologies, such as 5G.

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

- Strategy and Enablement Services for Media and Telecom
- Telecom Next-Gen IT Services
- Media Next-Gen IT Services
- Intelligent Business Process Services for Media and Telecom



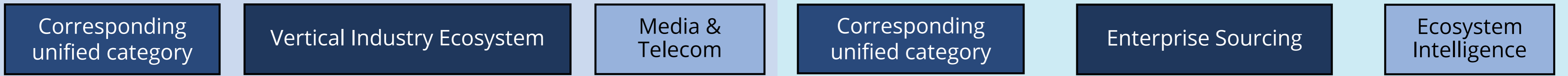
## VMware Ecosystem

### Overview

Amid VMware’s acquisition by Broadcom and the resulting shifts in the landscape, this ISG Provider Lens™ study aims to identify and analyze key players within the evolving VMware ecosystem. As the industry adapts to these new dynamics, enterprises need clear insights to make informed decisions when selecting partners for their VMware-related needs. Partners specializing in end-to-end managed services, such as infrastructure monitoring, optimization and automation, are now better positioned to showcase their strengths and differentiate their unique offerings in this increasingly competitive space.

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

- Cloud Management and Infrastructure
- Network and Security
- Digital Workspace and End-user Computing
- Managed Services and Support
- Data Center Modernization and Automation
- Industry-specific VMware Solutions



### Associated reports and events:

- Strategic Insights Report
- **Subscription Management for B2C ISG Buyers Guide**

# Study Descriptions (continued)



## Workday Ecosystem Partners

### Overview

The ISG Provider Lens™ Workday Ecosystem Partners study identifies leading partner companies within the Workday Ecosystem. Service partners enable efficient Workday deployments and the adoption of new capabilities, while implementation partners ensure seamless integration, allowing information to flow smoothly between Workday, internal systems, cloud applications and third-party services.

Beyond technology implementation, this ecosystem plays a crucial role in helping enterprise clients reduce the complexity of implementation and migration to next-gen solutions. This includes developing comprehensive implementation road maps, streamlining internal business processes, managing internal and external stakeholder expectations, crafting new strategies to minimize disruption to critical business operations, and ensuring the solution is delivered on time and within budget.

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 and Integration
- Workday Optimization Services
- Workday Enterprise Solutions

Corresponding unified category

Enterprise Sourcing

Ecosystem Intelligence

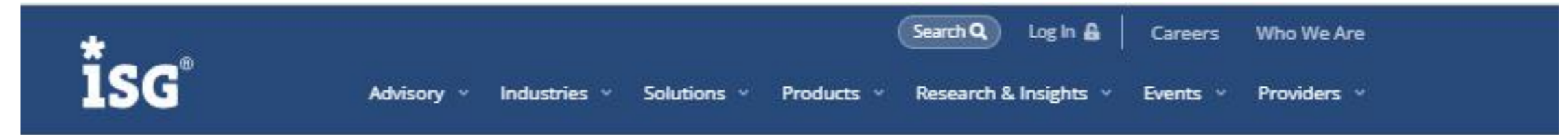
### Associated reports and events:

- **Business Planning** ISG Buyers Guides
- **Compensation Management** ISG Buyers Guides
- **ERP** ISG Buyers Guides
- **Financial Consolidation and Close** ISG Buyers Guides
- **HCM Platform and Suites** ISG Buyers Guides
- **Learning Management** ISG Buyers Guides
- **Payroll Systems** ISG Buyers Guides
- **Workforce Management** ISG Buyers Guide



## 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. This brochure will not only contain the final quadrant names, topic descriptions, and analyst names for each region, but it will also serve as a unified agenda. It will provide information on all ISG offerings related to that particular topic, such as ISG Provider Lens™, ProBenchmark®, Market Lens, Buyer's Guide, and events.
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

<b>3350+</b>	<b>67+</b>	<b>795+</b>	<b>23</b>	<b>745+</b>	<b>3100+</b>	<b>6</b>	<b>12</b>
Service providers and technology companies analyzed	Service lines and technology topics covered	Research reports published by geography	Geographies covered	Quadrant 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.

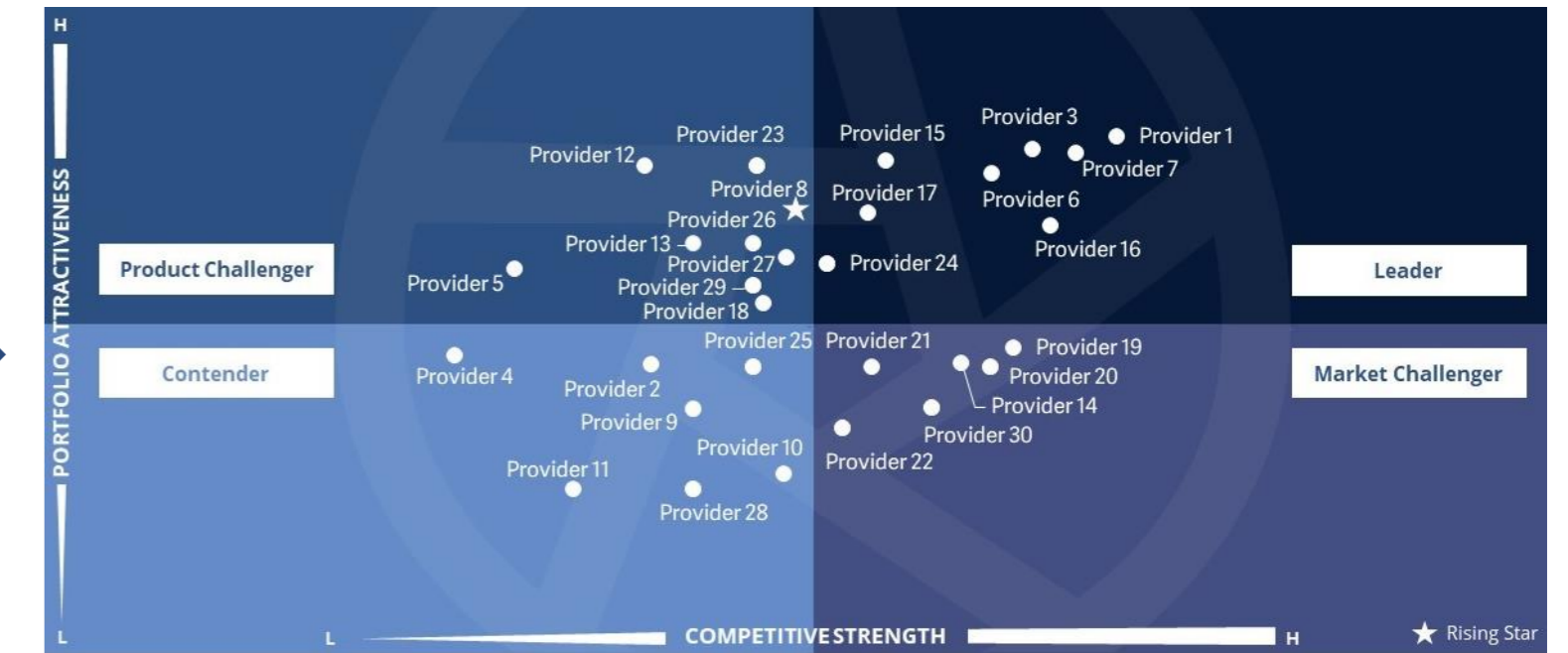
ISG compares and positions service providers in a graphical presentation based on the strength of their service portfolio and market competitiveness. These studies are conducted across multiple regions and encompass multiple service lines in the fields of ITO and BPO, spanning industry-specific domains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

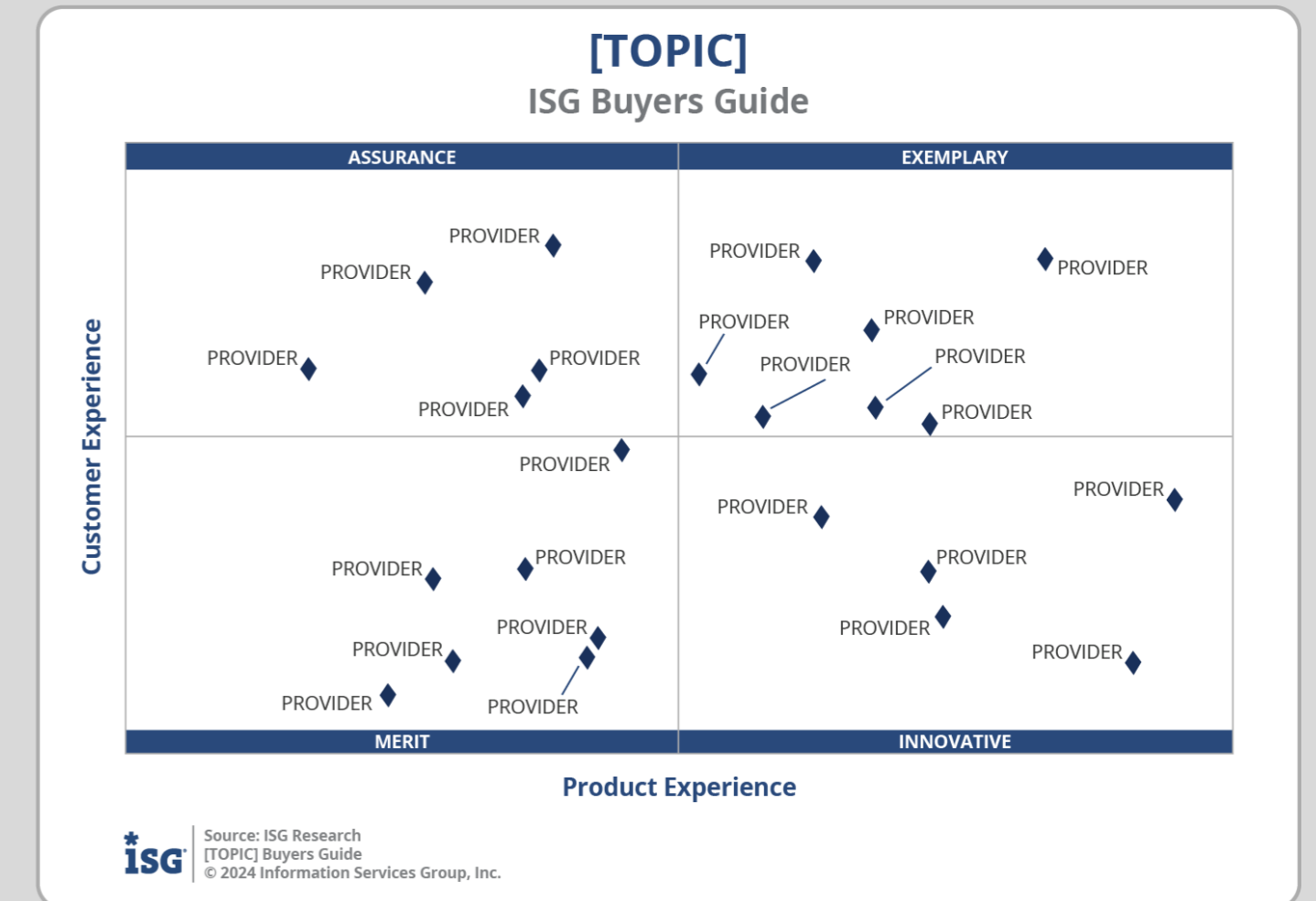


# ISG Buyers Guide

The ISG Buyers Guide provides a balanced perspective of software providers and products that are rooted in understanding enterprise requirements. Our research methodology and decades of experience enable our Buyers Guide to effectively understand, assess and select software providers and products. Research ratings contribute to our comprehensive approach to assessing software providers based on how an enterprise would complete assessments.

The ISG Buyers Guide evaluates software providers and products in seven key evaluation categories that are weighed to reflect buyers' needs based on our expertise and research. Of these, five are product-experience related. They include adaptability, capability, manageability, reliability and usability. We consider two customer-experience categories: validation and total cost of ownership/return on investment (TCO/ROI). Every software provider is ranked overall and in terms of product and customer experience, which include seven categories. Based on the rankings, the ISG Buyers Guide quadrants categorize them into exemplary, innovative, assurance and merit.

ISG Research believes that an objective review of software providers and products is a critical business strategy for considering service providers and helping enterprises adopt and implement enterprise software. Any review of a software provider should include a thorough analysis of both what is possible and what is relevant. The Buyers Guides align with ISG Research's market research agenda in vertical industries, business, AI and IT sectors. In 2025, more than 125 reports will be published in these areas.



Buyers Guide Quadrant

[TOPIC] [Provider]

Category	Performance	Grade
Overall	00.0%	X
Product	00.0%	X
Adaptability	00.0%	X
Capability	Leader 00.0%	X
Manageability	00.0%	X
Reliability	00.0%	X
Usability	00.0%	X
Customer	00.0%	X
TCO/ROI	00.0%	X
Validation	00.0%	X

Source: ISG Research [TOPIC] Buyers Guide © 2024 Information Services Group, Inc.

Provider Ranking

[TOPIC] Overall

Providers	Grade	Performance
[PROVIDER]	X	Leader 00.0%
[PROVIDER]	X	Leader 00.0%
[PROVIDER]	X	Leader 00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%
[PROVIDER]	X	00.0%

Source: ISG Research [TOPIC] Buyers Guide © 2024 Information Services Group, Inc.

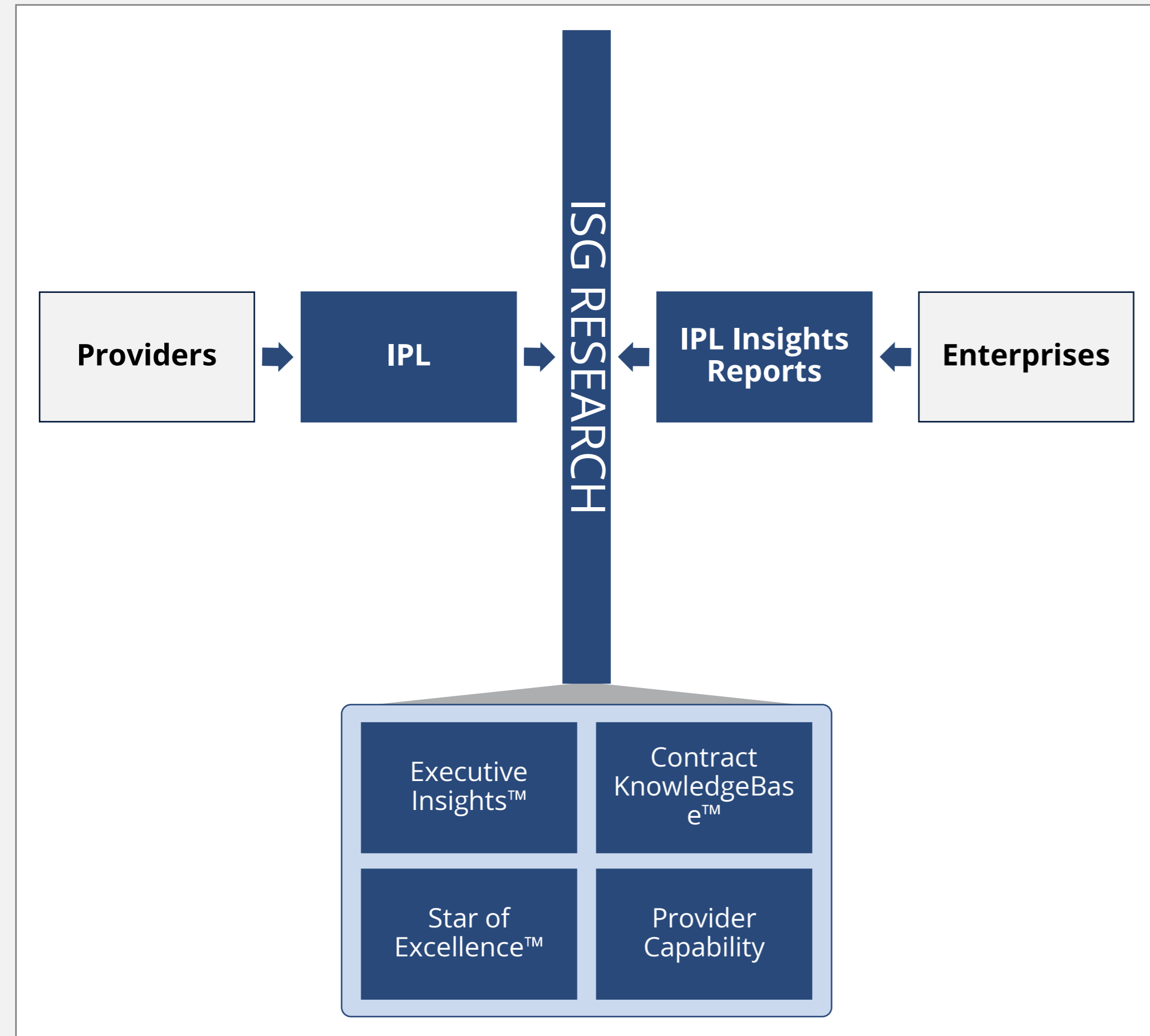
Category Ranking



# 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	2.8%
Other	2.3%
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

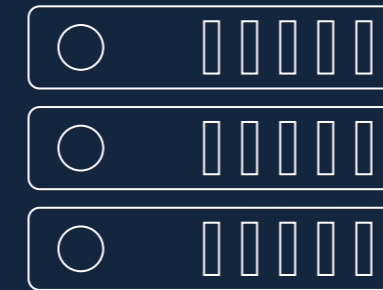
By addressing the needs of enterprises, the report brings vitality to the topic and broadens its scope, enabling readers to gain a comprehensive understanding of the market. It encompasses market trends, contractual aspects and buyer behavior and integrates various buyer types into a maturity curve of 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

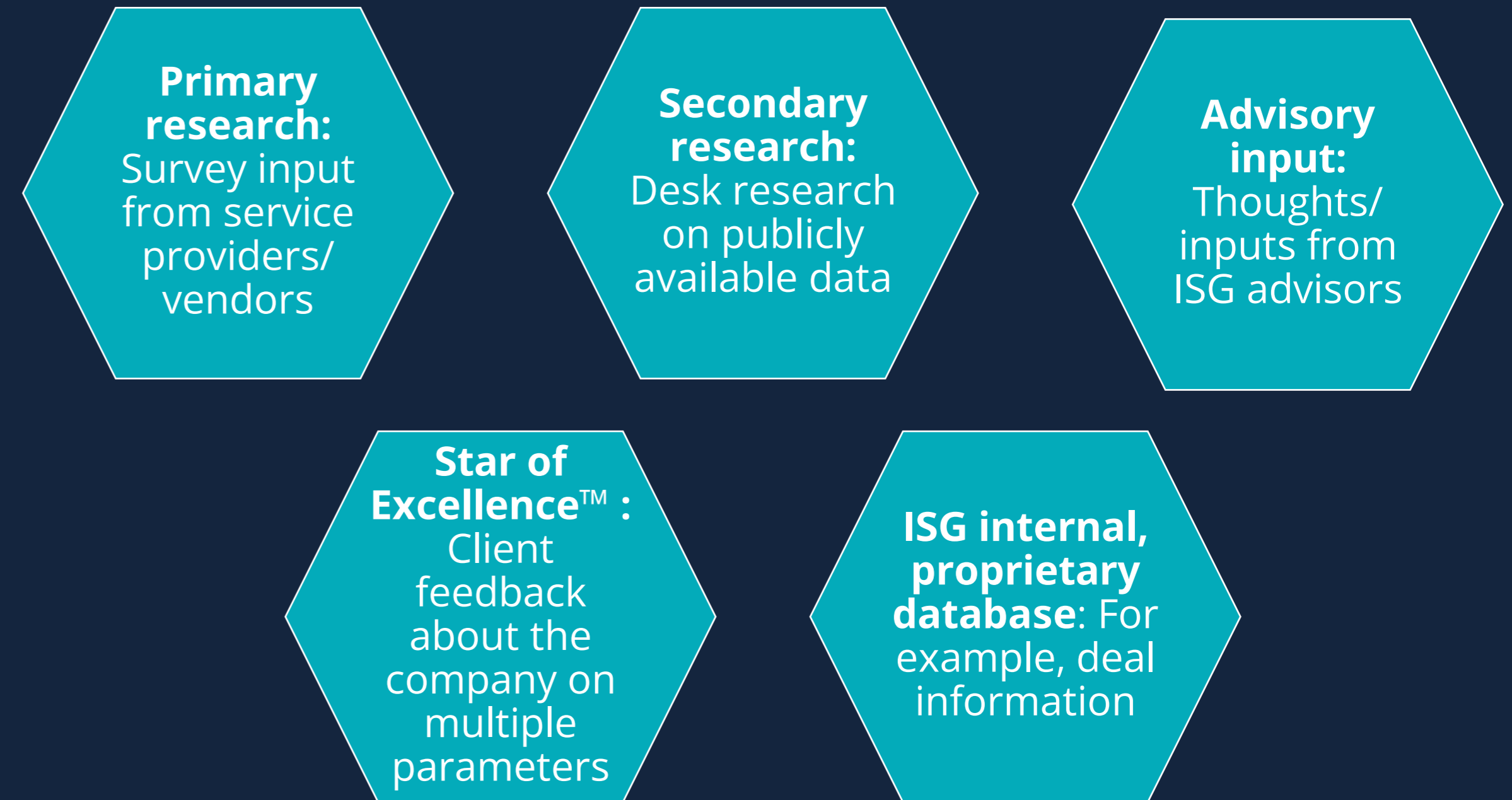
ISG Provider Lens™ research studies analyze relevant software vendors/service providers in a particular market, based on a multi-phased research and analysis process, and position these providers based on the ISG research methodology. For both quadrant and archetype reports, the evaluation framework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

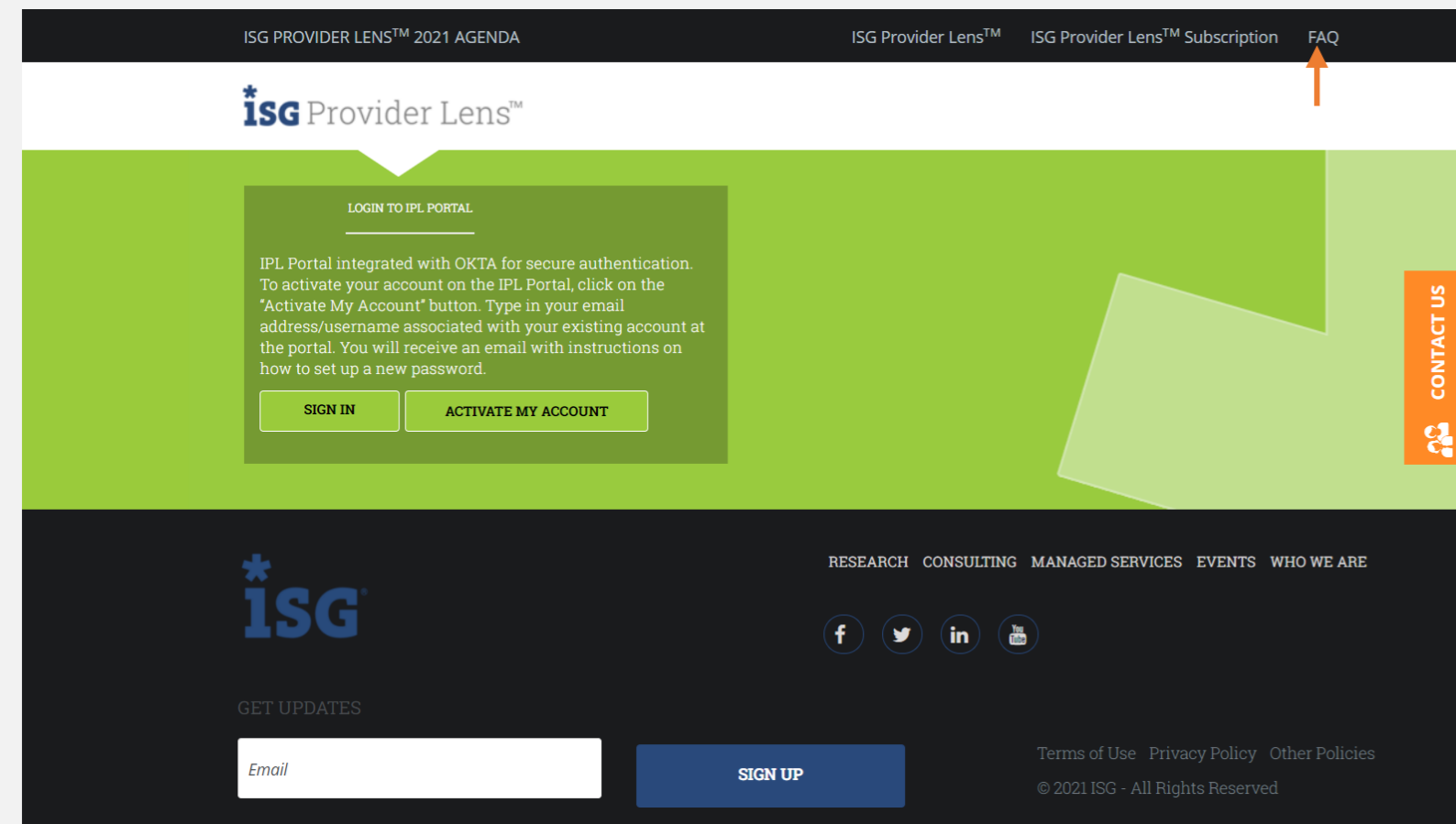




# ISG Provider Lens™ Portal

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

	<b>Who has the capabilities to deliver for my client?</b>	<b>1</b>	<ul style="list-style-type: none"> <li>■ ISG Provider Lens™ research studies; 60+ Studies planned for 2025</li> <li>■ Analyst and advisor briefings</li> <li>■ ISG advisor experience and peer insights</li> </ul>
	<b>How often and where have they delivered similar services?</b>	<b>2</b>	<ul style="list-style-type: none"> <li>■ ISG Contract KnowledgeBase™</li> <li>■ ISG Research tracks more than 210,000 contracts signed between enterprises and service providers</li> </ul>
	<b>How well have they performed when delivering similar services?</b>	<b>3</b>	<ul style="list-style-type: none"> <li>■ Case Study Research and Awards</li> <li>■ ISG Paragon Awards</li> </ul>

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

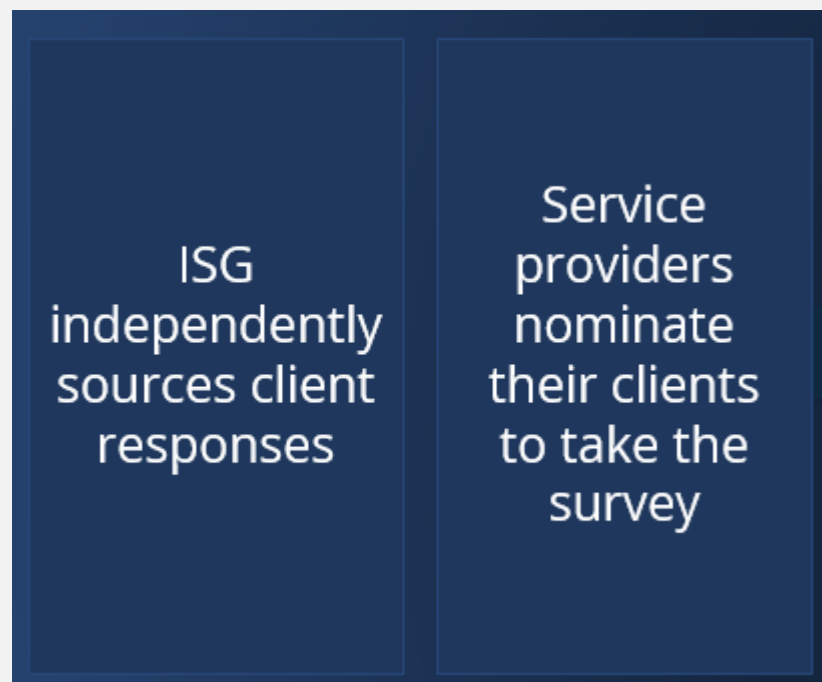
ISG Provider Lens™ studies leverage provider customer experience (CX) intelligence from the ISG Star of Excellence™ program as part of provider evaluation criteria. This independent survey of enterprise clients provides an in-depth look at their satisfaction and experience with IT/BPO and technology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

As part of the survey, enterprise clients rate their providers on a scale of 0 – 100 for two aspects:

- Providers' ability to maintain partnership with their clients that is defined by the six CX pillars
- Satisfaction with specific technology/ service line

## Survey Channels



## CX Scores



## Final Positioning



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



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

## Nominate your clients for the ISG Star of Excellence™ survey

Providers can nominate their clients to take the ISG Star of Excellence™ survey and provide feedback about their services and solutions. In addition to independently sourcing client feedback, ISG invites service providers to nominate their clients to take the survey.

### Why nominate?

ISG Star of Excellence™ offers an independent view of your client's experience and actionable insights on satisfaction with specific services that can be used to improve your CX initiatives. Providers who have nominated their clients in the program can show diversity in their client responses and will have a slight advantage in their CX score calculation. CX scores are also leveraged by the 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 the client details or also ask their clients to take the survey directly by selecting the Participate button. The responses submitted after the evaluation phase of the IPL report will be considered for next year's evaluation program for up to two more 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 must have independently sourced 30% of responses. The only exception to this rule is when a provider receives at least 60 client responses via nominations.

### Data usage and privacy

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

## ISG Star of Excellence Recognition

### ISG CX Star Performer Awards

At the end of each ISG Provider Lens™ report cycle, ISG recognizes the provider with the highest CX score in that category as the CX Star Performer. This recognition is independent of the provider's positioning in the quadrant(s).



### 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 of exceptional customer experience. The winners will receive a trophy at a gala award ceremony at one of the ISG's annual industry events.



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

Or reach out to [star@cx.isg-one.com](mailto:star@cx.isg-one.com).

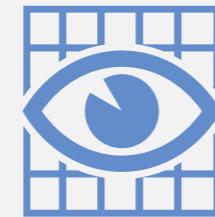


# All you need to know about the ISG Provider Lens™ Report Process



## 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.

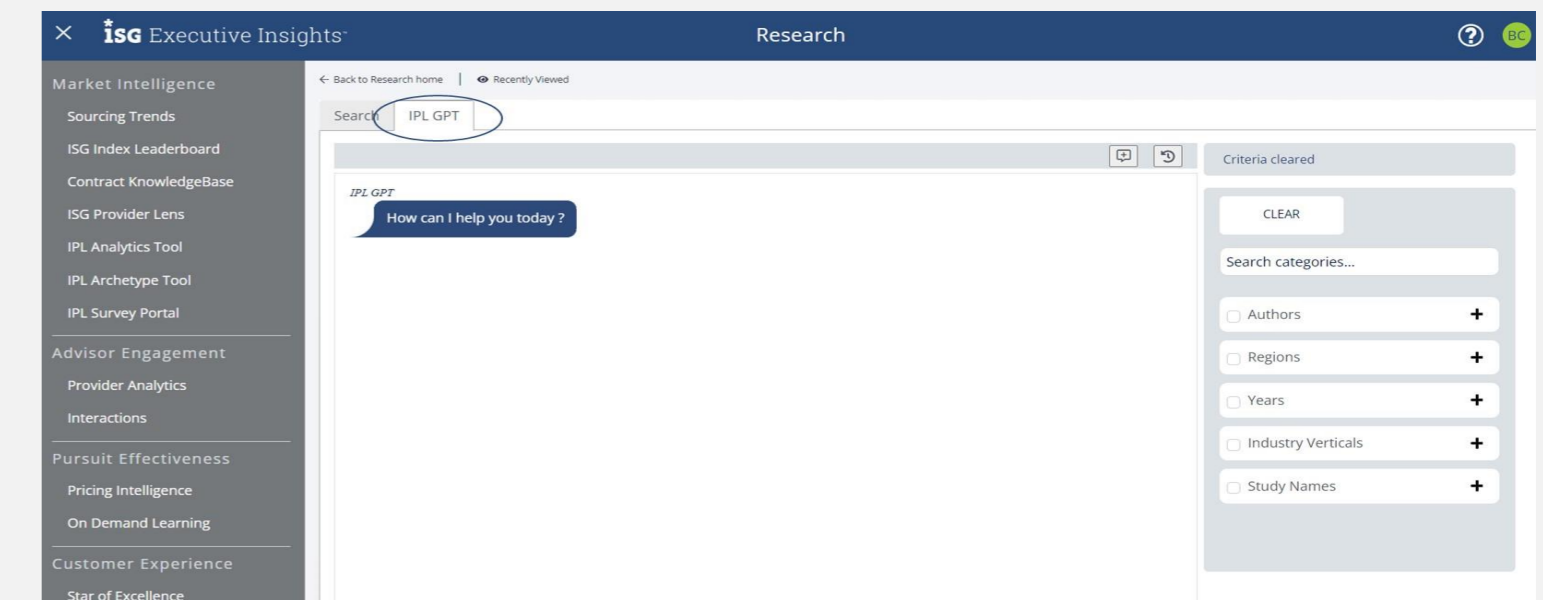
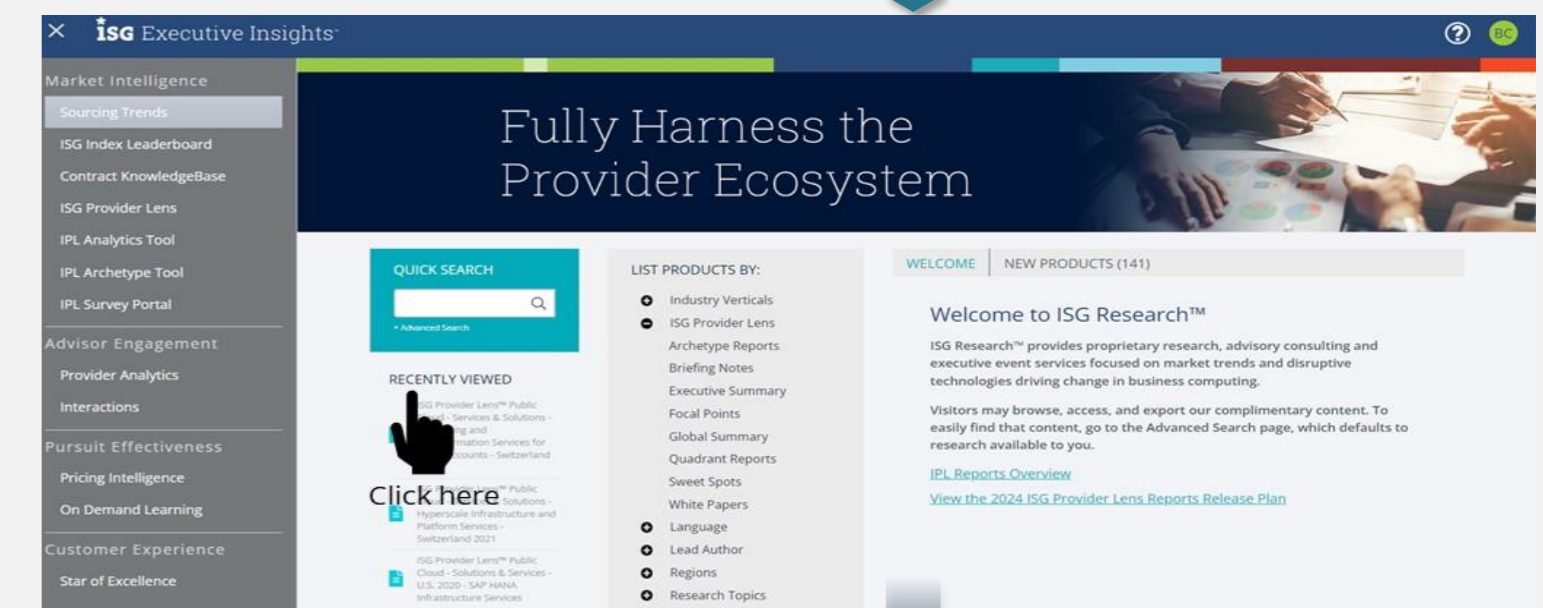
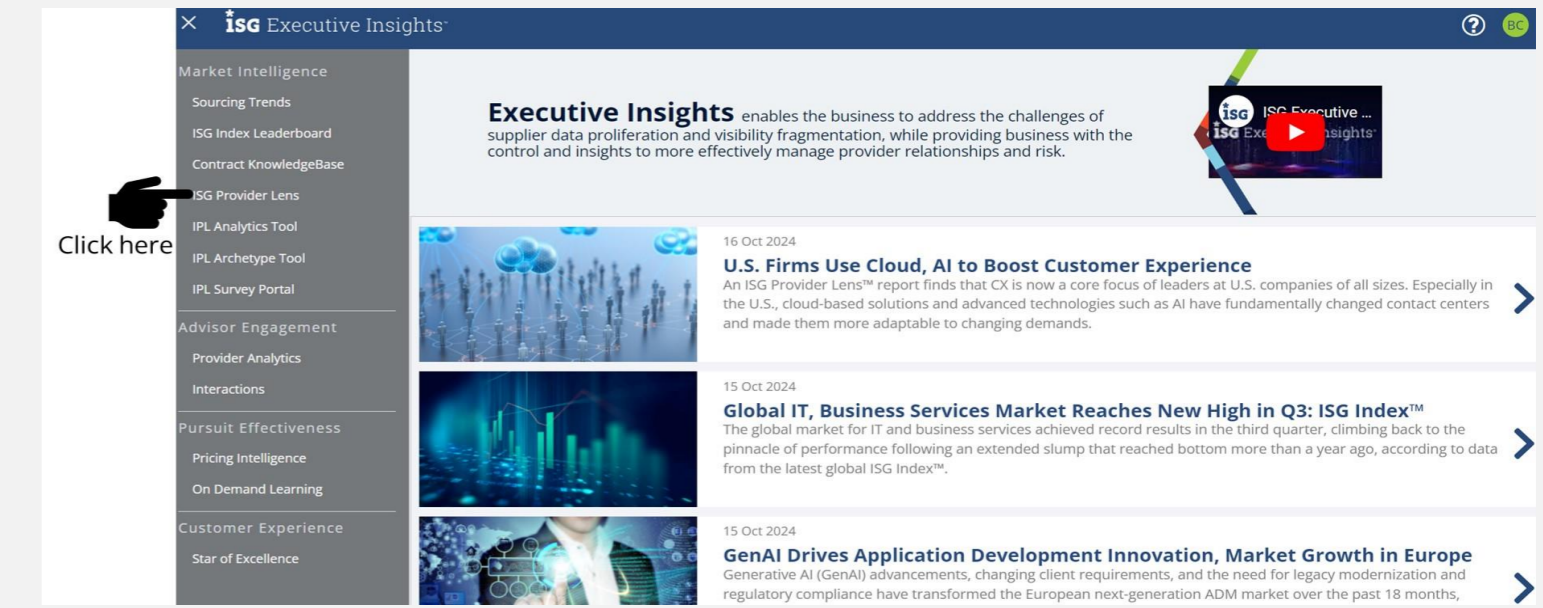
# IPL GPT

We are thrilled to announce the launch of IPL GPT, a highly anticipated tool designed to enhance your engagement with IPL quadrant reports. IPL GPT allows users to easily search and analyze various elements of IPL reports, including comprehensive summaries, frequency of featured providers and detailed insights. You can access overviews, strengths, cautions, author quotes and current market trends, all in one convenient location.

This tool covers vital topics such as cybersecurity, digitization, artificial intelligence and more, providing a holistic view of the latest developments in these areas. Whether seeking specific information or exploring broader trends, IPL GPT offers an extensive ISG perspective, making it easier to stay informed and make data-driven decisions. **Importantly, every source for your queries is referenced with report names and page numbers, facilitating easy access to the original content.**

To take advantage of this powerful tool, please speak with your account executive about upgrading your existing **IPL subscription**. There is also a limited-time offer for **standalone access**, allowing you to benefit from IPL GPT without needing a full subscription. Do not miss the chance to enhance your analytical capabilities and gain valuable insights into the rapidly evolving technology and services landscape.

These screenshots illustrate how to access IPL GPT and make the most of this innovative resource!





# Meet the Experts –2025

## ISG's Industry Subject Matter Experts



Industry Lead  
**Iain Fisher**

For more information on these studies, contact [Iain.Fisher@isg-one.com](mailto:Iain.Fisher@isg-one.com)

Aerospace & Defense Services



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Mohd. Aves Malik

Automotive and eMobility



Harish B



Swadhin Pradhan

Future of Work (Workplace) - Services



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Healthcare Digital Services



Rohan Sinha



Sneha Jayanth

Insurance Industry Services



Ashish Jhajharia



Sandhya Navage

Life Sciences Digital Services



Rohan Sinha



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Oil and Gas Industry Services and Solutions



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Mohd. Aves Malik



Swadhin Pradhan

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Harish B

Sustainability and ESG Services



Matt Warburton



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Ashwin Gaidhani

Mainframes Services and Solutions



Oliver Nickels



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Private/Hybrid Cloud – Data Center and Multi Public Cloud



Meenakshi Srivastava



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Pedro Maschio



Shashank Rajmane



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# Meet the Experts –2025

## ISG's BPO Subject Matter Experts



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Srinivasan PN



Tapati Bandopadhyay

Finance and Accounting (FAO) BPO Services



Gaurang Pagdi

Generative AI Services



Gowtham Kumar



Hemangi Patel



Arjun Das



Marcio Tabach

Global Capability Centers Services



Gaurang Pagdi

HR Outsourcing and Transformation Services



Gaurang Pagdi



# Meet the Experts –2025

## ISG's BPO Subject Matter Experts



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Rachel Anderson

Procurement BPO Services



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Retail, Supply chain and Life Sciences and Healthcare Vertical Analytics



Manav Deep Sachdeva

Supply Chain Services



Sidney Nobre



Tarun Vaid

# Meet the Experts –2025

## ISG's Ecosystem Subject Matter Experts



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### Google Cloud Partner Ecosystem



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### Guidewire Services Ecosystem



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### Microsoft Cloud Ecosystem



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Cristiane  
Tarricone

### Oracle Cloud and Technology Ecosystem



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Roman  
Pelzel



Sonam  
Chawla



Maharshi  
Pandya



Cristiane  
Tarricone

### Salesforce Ecosystem Partners



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# Meet the Experts –2025

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### SAP Ecosystem Partners



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Tarun Vaid

### Snowflake Ecosystem Partners



Hemangi Patel

### VMware Ecosystem



Siddharth Idnani



Roman Pelzel

### Workday Ecosystem



Gaurang Pagdi



Ashwin Gaidhani



# A Glimpse into ISG Provider Lens™ Award Ceremony





# \***ISG** Provider Lens™

**Annual Plan 2025**

[www.isg-one.com](http://www.isg-one.com)