



**\*ISG** Provider Lens™

2020

Digital Business –  
Solutions and Service  
Partners 2020

imagine your future®

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



## Table of Contents

|  |    |
|--|----|
| Definition .....   | 4  |
| Quadrants Research .....                                     | 5  |
| Quadrants by Region .....                                    | 10 |
| Archetype Report.....  | 11 |
| Schedule.....  | 13 |
| Partial list of companies being invited for the survey ..... | 14 |

© 2020 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.

# Definition

Digital technologies are permeating all aspects of the traditional business. The use of information technology to change the customer journey, improve business agility or deliver digital products causes a digital disruption across all business processes, including sales, trading, production, supply chain, product design and human resource management among others.

Enterprise agility goes beyond software development and refers to how organizations can adjust business, development and operations workstreams to survive and thrive when competition and customer requirements are constantly changing. This adjustment and the speed at which it happens is relevant and critical for increasing business value.

ISG's Digital Cube™ is an interactive model of enterprise capabilities that are required for digital transformation. It illustrates the six capabilities that any business must have to fully realize its digital ambitions: digital backbone, emerging technologies at scale, enterprise agility, digital ecosystems, digital insights and business model innovation.

ISG Digital Cube™ is the main reference model that ISG will be using to guide clients in their digital transformation. This ISG Provider Lens™ study is focused on identifying the service providers that can support clients in these digital capabilities.

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

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

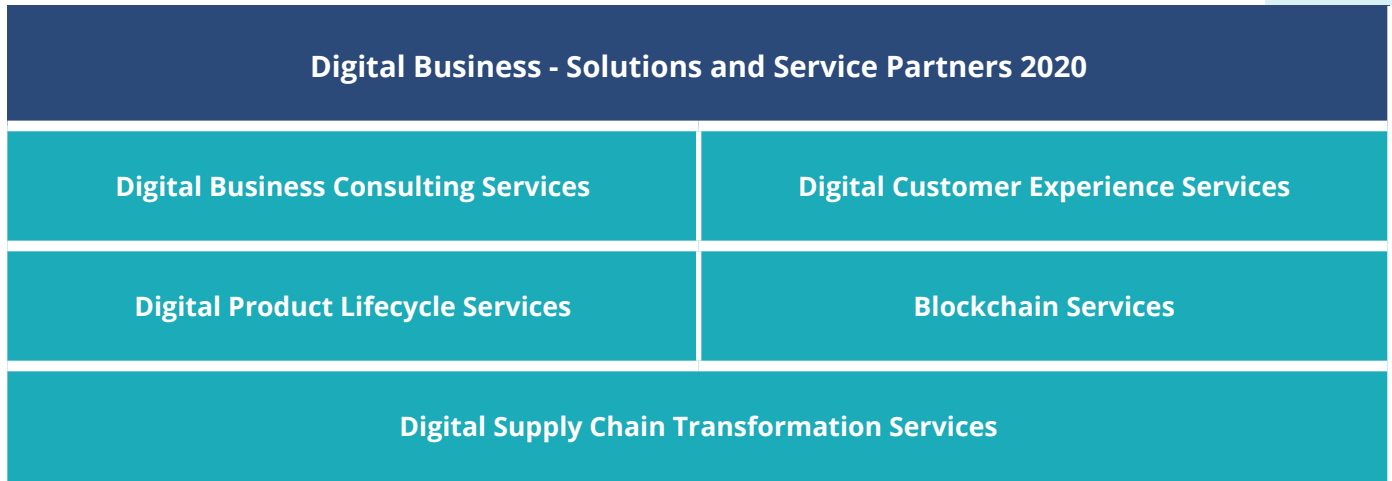
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segment
- Focus on different markets, including the U.S., U.K., Germany, Nordics, Brazil and Australia

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

# Quadrants Research

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

Simplified illustration



Source: ISG 2020

## Digital Business Consulting Services

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

Digital business consulting includes services for transforming the design, strategy and operations of a business by leveraging emerging technologies such as the internet of things (IoT), analytics, artificial intelligence (AI), mobile and cloud. These deliver significant improvements to a client's customer services, business processes or operating models to realize benefits and drive growth. Providers in this space should be able to help organizations transform and optimize their operational environments through research, benchmarking, advisory and consulting with a focus on information technology, business process transformation, program management services and organizational change management.

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

### Eligibility criteria:

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

## Digital Customer Experience Services

The Digital Customer Experience Services quadrant assesses a service provider's portfolio and capacity to deliver business model innovation, enabling enterprises to build competitive differentiation in today's digital economy.

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

Customer experience shows how digital companies design differentiation. This area involves conceiving customer journeys to create new business models and demanding new technology and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product and a brand. The design process includes technology experts, sales, marketing, designers and clients in a collaborative process. Design thinking and lean are common methodologies in use. Leading firms use analytics to extract insights from user data. Cognitive computing extracts data from conversations, texts and social media. The experience is measured with simple A/B tests as well as complex sentiment analysis captured from customer interactions.

The customer experience includes daily monitoring and measuring the customer experience that drives changes to the journey, the supporting technology and business processes. The customer experience team produces a continuum change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy. Providers in this quadrant should be able to provide consulting and implementation services to improve the customer experience for their clients.

### Eligibility Criteria:

- Consulting firms, service providers and digital agencies that focus on user experience to design apps, web and product/services with an omnichannel approach
- Employ design thinking or alternative methodologies to involve the customer in designing products and services
- Offer consulting and integration services for client's end-to-end customer journey cycle
- Provides services with local expertise in the assessed region or country

## Digital Product Lifecycle Services

The Digital Product Lifecycle Services quadrant assesses the service provider's capability to conceptualize, design, prototype, develop, deploy and manage the digital experience for clients.

Digital product lifecycle services include developing digital products or platforms that are typically tailored to the organization's requirements and are designed to align with business priorities. The provider designs the product to realize the benefits of digital transformation and the product complements the organization's processes and digital roadmap. Providers in this segment have the capacity to adapt its delivery model to each digital product with required speed, enabling a client enterprise to adopt agile and adaptive operating models. The portfolio includes agile, testing and DevSecOps to rapidly deploy or transform products and services according to market changes.

Service providers' professionals are organized in squads with multi-functional teams that use design thinking, real-time analytics, product and service performance data, benchmarking, social network feedback, agile development and many specialized tools to change products and offerings in a short timeframe for nearly immediate deployment. Two to four weeks of release cycles are common goals. This also requires continuous integration, continuous testing and DevSecOps, for continuous delivery. All these processes need discipline, governance and automation; otherwise, the delivery process becomes costly, ineffective and slow. Providers in this quadrant have the experience and expertise in implementing emerging technologies such as AI, augmented reality (AR), virtual reality (VR) and digital twins to improve the product lifecycle.

The participating companies may be using development platforms that allow applications to be seamlessly deployed in multiple clouds. The consistency of one application running in multiple clouds elevates the availability, security and business continuity at lower costs when compared to deprecated clustering and disaster recovery methods.

### Eligibility criteria:

- Ability to offer development and deployment services across one or more aspects of client's digital journey
- Delivery model includes agile and DevOps in organizations with many developers and clients' product owners in product squads
- Provide an organizational change program to transform a client's product and service development process
- Technology employed includes automation and continuous development platforms, comprising trunks synchronization, code repository, version control, release management, automated testing, and automated build and deploy tools
- Backed by Cloud Foundry or OpenShift-qualified professionals
- Provide quality assurance methodologies for clients

## Digital Supply Chain Transformation Services

The Digital Supply Chain Transformation Services quadrant assess service providers across consulting, integration, support, and managed services for the supply chain across planning, execution and insights. The provider would leverage a comprehensive framework or methodology to use digital technologies such as IoT, machine learning (ML), AI, predictive analytics across the supply chain to enable the client optimize its entire ecosystem of suppliers, customers, employees, and third-party partners to balance each client's business risk profile.

The digital supply chain transforms a company's ability to anticipate and serve customer needs by managing the supply chain efficiently using digital technologies. It enables a company to move from cost savings to monitoring inventory based on customer needs, optimize the supply chain network and create a predictive, self-adapting supply chain. To deliver these advanced features, the company uses sensors, predictive analytics, digital twins, blockchain, ML and AI solutions, giving it end-to-end real-time visibility across its integrated and networked supply chain. Due to the pandemic, many organizations are moving towards the digital supply chain and providers are helping clients to plan, transform and execute the digitalization of supply chains.

Service providers in this quadrant typically provide supply chain analytics, data management, demand planning and order management to deliver substantial benefits to their clients. They conceptualize the digital supply chain, leverage digital technologies to deliver the digitized version and manage the digital supply chain for their clients in an outcome-based model.

### Eligibility criteria:

- Ability to offer planning & designing digital supply chain strategies, and architecting blueprint closely tied with company's supply chain vision and strategy
- Ability to offer consulting, managed and integration services for digitized supply chains
- Ability to offer delivery model that includes agile and DevOps
- Focus on more than one specific industry across regions
- Focus on end-to-end delivery of services across the supply chain by leveraging digital technologies.
- Provide clients with supply chain operation capabilities such as demand planning & forecasting, order management, network management, inventory, logistics & warehouse optimization services and data management
- Technology capabilities includes supply chain analytics, IoT & location analytics, intelligent automation, cloud, and ability to model digital supply chain control tower (creating holistic view)
- Provides services with local expertise in the assessed region or country



## Blockchain Services

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

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

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

### Eligibility Criteria:

- Member of at least one blockchain consortium
- Offer consulting expertise to design viable solutions
- Demonstrate several blockchain use cases and provide a library that accelerates new deployments
- Backed by qualified and trained practitioners to deploy and operate the platform for customers
- Investment in R&D to develop and execute complex blockchain applications
- Ability to bring together partners in the ecosystem to enable successful use of blockchain application

## Quadrants by Region

| Quadrants                                    | Global   | U.S. | U.K. | Germany | Nordics | Brazil | Australia |
|--|----------|------|------|---------|---------|--------|-----------|
| Digital Business Consulting                  | Overview | √    | √    | √       | √       | √      | √         |
| Digital Customer Experience Services         | Overview | √    | √    | √       | √       | √      | √         |
| Digital Product Lifecycle Services           | Overview | √    | √    | √       | √       | √      | √         |
| Digital Supply Chain Transformation Services | Overview | √    | √    | √       | √       | √      | √         |
| Blockchain Services                          | Overview | √    | √    | √       | √       | √      | √         |

# Archetype Report

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

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

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

Figure 1: Sample ISG Provider Lens™ Study Provider Listing

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

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

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

- **Traditional & Conservative:** This segment covers enterprise buyers that focus primarily on cost reduction and seek outsourcing/staff augmentation assistance for basic monitoring and operations activities. These clients want to embark on their digital journey but have not approached any digital contracts yet. They are often completely risk averse. They typically have a legacy-heavy enterprise IT and networking function that may have multiple silos and is often disjointed from the business without automatically coupling the business needs to network delivery KPIs. For these organizations, enterprise IT and network functions are often perceived and budgeted as a cost center and not a value generator. They have recently introduced a roadmap on the vision and mission for digitalizing their company and seek the support of service providers. These companies are looking for new revenue streams to achieve a competitive advantage, improve customer relations, increase operational efficiency and reduce overall long-term costs. For these clients, forming a digital transformation office with a broad scope is helpful to ensure governance, effective execution, value and progress measurement and management. These companies seek to implement a digital contract across one business function or one aspect of the entire business slowly and cautiously and will insist on proofs of concept (PoCs) and pilot deployments before any commercial roll-out decisions are made. They may be in an exploratory stage on the tools and methodologies that could be adopted for the transformation. These clients need a strategy, consulting, implementation, and managed services from the provider for their digital journey.

- **Managed service focused:** This segment covers enterprise buyers that are looking for a broader suite of managed services with some elements of transformation. They may be mid to large-sized enterprises, often with their own data centers and some experience in sourcing or hosting their services. They may still be on the journey from legacy siloed solutions towards business focused and integrated solutions with an aim to have digital business as an inherent business function. This, together with the rest of IT and networks and technology, would enable business differentiation and performance/cost improvements. However, they may not be at this stage yet. These companies are looking for new revenue streams to achieve a competitive advantage, improve customer relations and increase operational efficiency. For these clients, forming a digital transformation office with a broad scope is helpful to ensure governance, effective execution, value and progress measurement and management. These companies seek to implement a digital contract across one business function or one aspect of the entire business as a pilot or proofs of concepts (PoCs) and are exploring tools and methodologies that could be adopted for the transformation. They are fully open to managed service offerings to achieve this. These clients need a strategy, consulting, implementation, and managed services offering from the provider for their digital journey.
- **Transformational:** These enterprise buyers have already achieved a high level of virtualization/standardization and are looking to transform their infrastructure further. They are companies that are born digital, are highly customer centric, or can create a competitive advantage by utilizing current and emerging digital transformation methods, processes and technologies. These companies will often have multi-channel customer touchpoints. Their focus is on generating more revenues by using IT, rather than simply reducing costs. Increasing revenue is the major driver behind their strategy, along with improving flexibility, agility, competitive positioning, and speed of reaction to competitive pressure. Their technical resources and hardware infrastructure are already lean and agile in nature. Hence, a shift to managed services (where not already hosted) will not make a big cultural impact. They would have created a strategy roadmap for the overall digital transformation, which will allow for fast revisions and multiple smaller projects as required by market demand. They are comfortable with crowdsourcing and crowdfunding, user micro service creation, continuous development, improvement, etc. They are agreeable to forming partnerships and engaging in profit sharing or pay-as-used relationships with providers, rather than simply buying sourcing contracts. They are prepared, in some specific circumstances, to adopt disruptive or new solutions relatively rapidly through PoCs or pilot projects, but will often limit these to specific targeted solutions, especially if deploying enterprise wide.
- **Pioneering:** This segment covers enterprise buyers that aspire to achieve high levels of automation, orchestration and implementation of a software-defined infrastructure for boosting developer productivity; These enterprises are often mid-sized with fewer internal resources and are typically born digital without significant legacy infrastructure to transform. Their CIOs often come from software companies or digitally transformed enterprise backgrounds. These clients are already involved with agile and lean developments and integrate a software-defined overlay with cloud networks. They intend to adopt advanced or niche technologies such as blockchain, AR, VR and 3D printing and are highly innovative in nature. Digital technologies and innovation are in their DNA, and cost implications are not a major showstopper for these clients. Such companies have a high R&D investment and want to collaborate to develop a truly next-generation innovative solution. As disruption embracers, they want to partner not only with service providers but also with the hardware vendors and are seeking a holistic partnership that can support their aim of being the most innovative enterprise. These companies are happy to form partnerships and collaborations with providers (from small to large) on a seed payment, no success/no fee, profit sharing or pay-as-used basis. They create or defend a competitive advantage by using emerging, potentially disruptive methods, processes and technologies (such as blockchain) as early as possible.

# Schedule

The research phase falls in the period between **July and August 2020**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **October 2020**.

| <b>Milestones</b> | <b>Beginning</b> | <b>End</b>         |
|-------------------|------------------|--------------------|
| Launch            | June 23, 2020    |                    |
| Survey Phase      | June 23, 2020    | July 10, 2020      |
| Sneak Preview     | August 31, 2020  | September 11, 2020 |
| Press Release     | October 08, 2019 |                    |

## Access to Online Portal

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

Please refer to [this link](#) to view/download the ISG Provider Lens™ 2020 research agenda.

## Research Production Disclaimer:

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

# Partial list of companies being invited for the survey

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

|                    |                     |
|--------------------|---------------------|
| 4all               | Centric Consulting  |
| Accenture          | CenturyLink         |
| Altoros            | CGI                 |
| Applied Blockchain | CI&T                |
| Arvato Systems     | Claranet            |
| Atos               | Cloud2b             |
| Avanade            | Cocus               |
| Avenue Code        | codecentric         |
| AVEVA              | Cognizant           |
| Axians             | Coinify             |
| Bain & Company     | Compasso            |
| BCG                | Computacenter       |
| BearingPoint       | ConsenSys           |
| Bechtle            | Crayon              |
| Beeders            | CSS Corp            |
| Birlasoft          | DataArt             |
| Blockchain Expert  | Datacoper           |
| Blockshipping      | DB1 Global Software |
| Bridgei2i          | DBC Company         |
| BRLink             | Dedalus             |
| BRQ                | Deloitte            |
| BT                 | Devoteam            |
| CANCOM             | doubeslash          |
| Capgemini          | DP6                 |

DXC  
ec4u  
eccelerate  
e-Core  
Extreme Digital Solutions (EDS)  
elInfochips  
EloGroup  
Endava  
EPAM  
Everis  
Everymind  
EY  
fme  
Fujitsu  
GAVB  
GEP  
GFT  
GlobalLogic  
Group 50  
Grupo BExpert  
Grupo New Way  
HCL  
Hexaware  
HGS Digital  
HighRadius  
IBM

Icaro Tech  
ilegra  
Infinite  
Infosys  
Infogain  
Innominds  
Intellectsoft  
Kaleido  
Kearney  
KMD  
KPMG  
Logicalis  
LTI  
MaibornWolff  
McKinsey  
McorpCX  
Mercos  
Mindtree  
Monitora Soluções  
Mooven  
Mphasis  
Mutant/CINQ/Dextra/Interaxa  
MUUUH!  
NNIT  
NTT Data  
OpenLedger

PA Consulting  
Persistent Systems  
PIA (UDG)  
PlusServer  
Pollux  
Programmer's - Beyond IT  
Protiviti  
Publicis Sapient  
PWC  
QSC  
R3  
Radix  
Reply  
Resource IT Solutions  
Revelo/Daitan Group  
SAP  
ScienceSoft  
SLK Group  
Smart-it  
Snowman Labs  
Softtek  
Sonda  
Sopra Steria  
Sottelli  
Stefanini

Sutherland  
Take  
TCS  
Tech Mahindra  
The App Business  
ThoughtWorks  
TIVIT  
Trianz  
T-Systems  
T-Systems Multimedia Solutions  
TTEC  
Unisys  
UOL DIVEO  
UST Global  
Valtech  
Venture Aviator  
Verizon  
Visagio  
Visionet  
Vodafone  
Vortigo  
Wipro  
zauberware  
Zensar



# Contacts for this study



Akhila Harinarayan  
Lead Analyst - UK, NORDICS



Tarun Nathooram Vaid  
Lead Analyst, U.S.



Kenn Walters  
Lead Analyst – Germany & Archetype



Monica K  
Global Overview Analyst



Craig Baty  
Lead Analyst - Australia



Dhananjay Koli  
Global Project Manager



Mauricio Ohtani  
Lead Analyst - Brazil

## Do you need any further information?

If you have any questions, please contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).