ISG Provider Lens™

ANNUAL PLAN

June 2020

imagine your future®

ABOUT ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 70 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; 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.

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, call +1.203.454.3900 or visit research.isg-one.com.

Table of Contents

Thank you

As we come close to wrapping up another successful year, the ISG Provider Lens™ team would like to extend our humble and heartfelt gratitude to all those who supported us in making this product a huge success. The amount of press coverage, conference stage shout-outs, Advisor Day mentions, and joint press releases has created a great buzz in the industry. In 2019, we also noted that our relationship with many of you extended beyond the ISG Provider Lens basic engagements and have translated into multiple other opportunities. We enjoyed writing briefing notes, hosting webinars, presenting to your clients and internal teams, writing whitepapers and working on multiple other successful projects.

This year certainly had a fair amount of challenges and learnings. We were excited to launch our new IPL Portal and appreciate the number of suggestions we've received for Phase 2. We continue to work on delivering according to our published timelines and appreciate your continued support and also for responding back within those timelines (at least most of you!). We do value your feedback about the overall IPL research process and we are committed to make participation in IPL a worthwhile, time saving and productive exercise for both parties.

In 2020, we intend to take these initiatives and many more to the next level. The ISG Provider Lens program in 2020 will include two new quadrant reports, evaluating technology and service providers specializing in the banking and manufacturing sectors, as well as two new geographies – Australia/New Zealand and France. This annual plan outlines all the details for the coming year, and we hope you will take the time to review it and then reach out to us so we can walk through the plan together.

Jan Erik Aase

(Director, Principal Analyst and Global Head – IPL)

Research Schedule and Agenda for 2020-2021

Preparation
Research & Reporting Phase
Sales Phase/Publish

	2019			2020												2021	
TOPICS	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Salesforce - Ecosystem Partners 2020																	
Microsoft - Ecosystem Partners 2020																	
Financial & Accounting Outsourcing (FAO)																	
Service Integration and Management - Solutions and Service Partners 2020																	
Private/Hybrid Cloud - Data Center Solutions and Services Partners 2020																	
Cyber Security - Solutions and Service Partners 2020																	
Network - Software Defined Solutions and Service Partners 2020																	
IoT - Services and Platforms 2020																	
SAP - HANA & Leonardo Ecosystem Partners 2020																	
Cloud Native - Container Services 2020																	
Digital Business - SaaS Solutions 2020																	
Contact Center/ Customer Experience 2020																	
Banking Industry Services 2020																	
Public Cloud - Solutions and Service Partners 2020																	
Digital Workplace - Solutions and Service Partners 2020																	
AWS - Ecosystem Partners 2020																	
Next Gen ADM - Service Partners 2020																	
Digital Business - Solutions and Service Partners 2020																	
Analytics - Solutions and Service Partners 2020																	
Manufacturing Industry Services 2020																	
Healthcare & Lifesciences - Industry Services 2020																	
Intelligent Automation – Solutions and Services 2020																	
Insurance Industry Services 2020																	

Geography Coverage

2020-21 Studies	Global Archetype	Global Overview	Australia	Brazil	Europe	France	Germany	Nordics	Switzerland	UK	USA
Salesforce - Ecosystem Partners 2020		✓		✓			✓				✓
Microsoft - Ecosystem Partners 2020		✓		✓			✓				✓
Financial & Accounting Outsourcing (FAO)	✓	✓								✓	✓
Service Integration and Management - Solutions and Service Partners 2020		✓					✓				✓
Private/Hybrid Cloud - Data Center Solutions and Services Partners 2020	✓	✓		✓			✓	✓	✓	✓	✓
Cyber Security - Solutions and Service Partners 2020		✓	✓	✓		✓	✓		✓	✓	✓
Network - Software Defined Solutions and Service Partners 2020	✓	✓					✓	✓		✓	✓
Cloud Native - Container Services 2020		✓									✓
IoT Services and Platforms 2020		✓					✓				✓
SAP - HANA & Leonardo Ecosystem Partners 2020	✓	✓		✓			✓	✓		✓	✓
Digital Business - SaaS Solutions 2020											✓
Banking - Industry Services 2020		✓					✓	✓	✓	✓	✓
Contact Center/ Customer Experience 2020	✓	✓	✓	✓	✓						✓
Public Cloud - Solutions and Service Partners 2020	✓	✓		✓		✓	✓	✓	✓	✓	✓
Digital Workplace - Solutions and Service Partners 2020	✓	✓		✓			✓	✓		✓	✓
AWS - Ecosystem Partners 2020		✓					✓				✓
Next Gen ADM - Service Partners 2020	✓	✓		✓			✓	✓		✓	✓
Digital Business - Solutions and Service Partners 2020	✓	✓	✓	✓			✓	✓		✓	✓
Analytics - Solutions and Service Partners 2020		✓		✓			✓	✓		✓	✓
Manufacturing Industry Services 2020		✓					✓			✓	✓
Insurance - BPO Industry Services 2020		✓					✓			✓	✓
Healthcare & Lifesciences - Industry Services 2020		✓					✓			✓	✓
Intelligent Automation – Solutions and Services 2020		✓					✓	✓		✓	✓

Topic Descriptions

Analytics – Solutions and Service Partners 2020

Overview:

The goal of Data Analytics is to extract information from a vast amount of data to help companies become more efficient, more flexible, and more relevant to employees, shareholders, and customers. The trend to generate valuable information from data in order to remain competitive is not new. As digitalization continues, data volumes are growing. Both the volume and the variety of data increase rapidly. At the same time, an increasingly intelligent use of the same data is expected. The analysis of internal data can be as much a part of the business model as the development of specific (external) products for the market.

The market segment "Data Analytics" has long since passed the Early Adoption Curve and is in the midst of a profound change. Increasing data center performance and scaling through public cloud infrastructures, as well as technological leaps in machine learning are currently the biggest drivers. They lead to ever more intelligent and complex ways of generating relevant knowledge from data, processing it and presenting it in decision templates. New data analytics structures and business models are being established via high-performance data centers - not on a greenfield site. Enterprise clients are watching the competitive landscape with active interest in order to set up their own Data Analytics eco system.

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

- Self Service-Analytics and BI Platforms as-a-Service
- Industrial Analytics & Automation Platforms
- Analytics Reporting Solutions
- Data Science Services
- Data Engineering Services
- Cloud Analytics Consulting & Integration Services

AWS – Ecosystem Partners 2020

Overview:

Amazon Web Services (AWS) is one of the world's leading service providers of public cloud infrastructures and platforms - making it an attractive partner for service providers and technology providers.

As part of AWS Partner Network (APN), AWS cooperates with service providers and technology providers. The AWS Partner Network (APN) is the global program for AWS partners. It helps APN partners to develop AWS-based businesses and solutions by providing business and technical support as well as sales and marketing support.

With the rapidly growing importance of AWS as an IT provider, the AWS partner ecosystem is also becoming increasingly relevant. This creates new offerings for user companies in the IT market. On the other hand, the advantages of an increasing offering are also accompanied by a growing complexity of the market. In general, however, more than two thirds of the public cloud revenues are initiated, advised and operated by partners. This fact and the trend to move complete data centers into the public cloud increase the need for partners that can hold the hand of the customer.

The ISG AWS Ecosystem Study therefore analyzes consulting, integration and managed services partners that belong to the APN or are certified for the various solutions and partner program tracks that AWS has to offer.

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

- SAP Partner
- Data Analytics and ML Partner
- IoT Partner
- Migration and Container Partner
- Consulting Partners
- Managed Service Partners

Banking Industry Services 2020

Overview:

Operational agility has become pivotal for both commercial and retail banks. However, established banks have a patchwork of legacy systems that adversely affect agility and can create hurdles in customer and clients' journeys. To address this, retail and commercial banks are evaluating next-generation Core Banking Systems, both in terms of the digital capabilities of these systems as well as the service providers that can implement and scale them.

Banks also face stiff competition; they are no longer the only entities offering financial services. For example, in the payment space, 25 percent of all transactions are undertaken by non-bank financial institutions. Therefore, there is increasing interest in Payment Services that are faster more cost effective, and leverage digital platforms preferred by today's financial services customer.

Finally, regulatory pressures remain significant. However, the industry has moved from coordinated programs to recapitalize banks and ensure sufficient liquidity to more regulatory divergence driven by local market conditions. Such jurisdictional divergence is a particular challenge for global banks. Adding to this challenge is the outbreak of Covid-19, which is compelling global banks to increasingly opt for technology to automate risk-related services such as Anti-Money Laundering (AML) and Know-Your-Customer (KYC).

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

- Banking Platforms & Implementation Services – Retail
- Banking Platforms & Implementation Services – Corporate
- Payments Ecosystem Services
- AML/KYC Services

Cloud Native - Container Services 2020

Overview:

In the past decade, new patterns and technologies have emerged for the development, deployment and operation of modern applications that take advantage of the capabilities available in cloud infrastructure environments. This cloud native approach focuses on building applications that are highly modular, adaptable, fault-tolerant and better capable of delivering value to end users.

In particular, Kubernetes, the open source container orchestration software originally released by Google, has become the foundation of the stack underpinning these applications. It provides software features that enable easier management of multi-container applications, including automatic scaling, management of container failures and routing network traffic.

While Kubernetes solves many problems in application development and operation, it also creates a host of new, complex issues that enterprises need to contend with. Shifting away from monolithic architectures means that monitoring, security and networking become significant challenges. New software and services have emerged to mitigate these issues, but that means enterprises must not only figure out how to adopt Kubernetes, but also how to secure their cloud native applications, how to best use service mesh to manage multi-container environments and how to monitor those applications and the increasingly complex fabric of connections and logic.

Service mesh helps technology teams manage the communications and connections between different containerized applications within an overall technical estate. Given the hype around this technology, ISG notes that enterprise interest around it far outweighs its current utility for most businesses. Service providers must be able to provide a clear business case and value for implementing service mesh, beyond its current trendiness.

Cloud native security offerings are necessary to protect an attack surface that is considerably different from what enterprises are traditionally used to managing. This added layer of security complexity often requires dedicated software and services. Past incidents have shown that even the most technically capable enterprises can be caught out by their Kubernetes clusters' security needs.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A view of the global services market with a focus on the U.S.

Our study serves as the basis for important decision-making 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.

- Managed Kubernetes
- Managed Service Mesh
- Managed Cloud Native Security
- Cloud Native Observability Solutions

Contact Center / Customer Experience Services 2020

Overview:

Contact center / customer experience services focuses on outsourcing services and the associated aspects of enhancing the customer experience. When assessing providers, it considers their service offerings, delivery centers, language capabilities, full-time equivalents (FTEs) and digital transformation elements such as consulting, AI and analytics capabilities and more.

Contact center service providers are using technologies and practices such as design thinking, omnichannel support, cloud offerings, analytics and automation to offer an end-to-end customer experience (CX).

Whether the service line is ADM, workplace services, contact center services, data center, IoT or something else, each focus area typically consists of consulting and advisory services, system integration, development and support.

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

- Consulting Services
- Digital Operations
- Contact Center as a Service (aaS)

Cyber Security – Solutions and Service Partners 2020

Overview:

Within the scope of digitalization and the (industrial) internet of things, business processes more and more shift into the IT. In order to protect the company itself, it becomes increasingly important to protect its IT- and communication systems. Finally, IT security turns into company security for the purpose of digitalization.

Data and IT infrastructures are permanently exposed to criminal threats. Additionally, there are threats causing from carelessness in the companies. Beside the demand for self-protection, laws (e.g. in Europe: General Data Protection Regulation) more and more force companies to protect themselves from cyberattacks.

So, ICT security is a topic which must not be ignored. However, IT executives often struggle to justify security investments to the business management, particularly the CFO, to whom many of them report directly. Unlike other IT projects, it is not always possible to prove the ROI of such security investments. It is not easy to quantify threat-related risks, and therefore, security measures are often rather low-level and not sufficient to address novel kinds of threats. On the other hand, it is not (always) the lack of suitable technology that leads to security vulnerabilities; many attacks such as Trojan and phishing attacks, are caused by users' thoughtless behavior.

Therefore, consulting and user trainings continue to play a key role, together with up-to-date ICT equipment.

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

- Strategic Cyber Security Transformation
- Technical Cyber Security Consulting
- Managed Security Service
- Identity Access Management Services
- Data Leakage Prevention (DLP)

Digital Business - SaaS Solutions 2020

Overview:

In 2019, ISG introduced the ISG Digital Cube™, an interactive model, to define the enterprise capabilities required for digital transformation. It includes six parameters, namely, digital backbone, emerging technologies at scale, enterprise agility, digital ecosystems, insights, and business model innovation. The ISG Digital Cube™ is the primary reference model for ISG as it guides clients toward realizing their digital ambitions. This ISG Provider Lens™ study focuses on identifying the service providers that can support clients in achieving digital capabilities.

Enterprise clients looking for alternative ways of building a robust digital backbone may consider the software-as-a-service (SaaS) option. SaaS is a ready-to-use option and can support end-to-end business processes such as market-to-order, recruitment-to-hire and procurement-to-pay.

- HCM SaaS
- ERP SaaS
- CRM SaaS

Digital Business – Solutions and Service Partners 2020

Overview:

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

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

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

- Digital Supply Chain Transformation
- Digital Business Consulting Services
- Digital Customer Experience Services
- Digital Product Lifecycle Services
- Blockchain Services

Digital Workplace – Solutions and Service Partners 2020

Overview:

Digital workplace of the future refers to the technology ecosystem that enables employees in an enterprise to securely access their work profiles, data and applications anytime, anywhere and on any device or platform. It aims to improve digital dexterity and productivity for workers while enabling them to efficiently connect and collaborate with fellow employees.

Key trends in digital workplace are driven by users' preference to use technology of their own choice and by the increased relevance of emerging technologies and diverse possibilities they bring. Enterprises are focusing on end user experience enablement and its measurement. Consequently, service providers are moving from SLAs to XLAs in workplace services contracts.

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

- Digital Workplace Consulting Services
- Managed Workplace Services
- Managed Mobility Services
- Unified Endpoint Management
- Enterprise Collaboration Solutions
- Meeting and Conferencing Solutions

Financial and Accounting Outsourcing (FAO)

Overview:

For enterprises with legacy systems, large infrastructures or decentralized operations, the transformation journey will take time and may be rolled out in phases without disrupting existing operations. However, next-generation companies that do not have any burden of legacy are ready to adopt new technology quickly and are ready to adopt BPaaS solutions. After outsourcing mere transactional processes such as order-to-cash and procure-to-pay, CFOs now are beginning to engage with service providers more holistically. They view providers as strategic partners that can provide meaningful insights and guide decision-making. More complex functions are being outsourced so the enterprise can get more complete, meaningful data and insights back from service providers. Tax, treasury, management reporting and other complex record-to-report functions that were typically retained by enterprises are now being outsourced. Businesses also are open to outsourcing processes like exception handling, budgeting and forecasting, and external reporting to financial authorities

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

- Consulting Services
- Transactional Services
- Strategic Services

Healthcare & Life Sciences Industry Services 2020

Overview:

For the first time, in 2020 ISG will evaluate providers of services to the healthcare payers and providers as well as biotech and pharmaceutical firms. ISG will look at both the traditional services and emerging services tailored to healthcare and life sciences companies.

Because of the COVID-19 pandemic, there is a rapid acceleration of need to reduce physical contact and improve digital services for telemedicine, remote monitoring, and other contactless interactions. In Life sciences, there is are accelerated efforts for new tests, vaccines and treatments for the disease. Also, digitization is rapidly expanding, including the expansion of electronic filing in clinical trials.

As the market needs evolve, platforms are emerging to help better collect, store, share, and integrate electronic health records to better serve the people using the payer and provider services – plan members and provider patients. Technology and service platforms are emerging to better serve digital health and life sciences services to support data-driven initiatives, hosted on the cloud, supporting mobility and at-home / remote services. ISG will assess the providers of these emerging platforms and next-generation services leveraging them, including not only the traditional services providers but also the technology companies entering the market as disruptors. The study will also assess the relative strengths of current offerings of traditional managed services with focus on ADM, infrastructure, and BPO.

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

- Managed Services
- Emerging Platforms
- Next-Generation Services

Insurance Industry Services 2020

Overview:

Insurance coverage is a critical service that companies offer to consumers to safeguard against financial loss in the event of unforeseen circumstances such as illness, natural calamity and vehicular accidents. It is a contingency or a risk management plan for individuals or companies. It is a basic essential and with the growing number of customers in this market, enterprises are looking to streamline their services, service offerings and provide a seamless experience for customers — starting from purchasing to after-sales services. Insurance enterprises are leaning towards outsourcing partners to bring this journey to fruition.

Insurance BPO involves the outsourcing of insurance functions like life, annuity, health, and property and casualty (P&C). With the outsourcing landscape changing, it is no longer limited to just the backend services; enterprises are seeking to partner with providers and strategically align themselves to support businesses. With enterprises maturing and more open to forming partnerships, we at ISG adopt a holistic approach in assessing insurance outsourcing that includes:

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

- **Strategy and management** such as strategic management, pricing, product sales and marketing
- **Front and middle office services** such as research and analytics, investment management and sales support
- **Back office/transaction processing** such as underwriting and claims processing

With 'digital' becoming a priority for enterprises to keep pace with their millennial customers and remain competitive, enterprises are embracing digital technologies such as automation, artificial intelligence and cloud solutions. To enable deeper insights, analytics, efficiencies and productivity, insurance BPO will also be measured in terms of technology adoption to gain the digital advantage.

Intelligent Automation – Solutions and Services 2020*

Overview:

While most organizations are improving their automation capability, many of them are still in the early stages of their automation journey according to the ISG Insights™ 2019 RPA Deployment & Capability study. Only 12 percent of companies have automated more than 50 processes and just 7 percent have progressed into enriching their robotic process automation (RPA) with Intelligent Automation. One of the compelling reasons that prevents companies from improving their automation capability is the "RPA wall". While RPA can take the pain out of repetitive and mundane processes, reduce errors and improve compliance, it cannot read text, communicate with a person, interpret a contract, scrape information from an invoice, make a complex decision or improve over time. Enterprises that have bumped into these limitations struggle to get beyond automating 10 to 20 processes because they lack the required foundation of people, processes, and technology. This lack of internal capabilities and knowledge is driving enterprise clients to look for transformational sourcing options, which include a significant intelligent automation capability.

Intelligent automation gives enterprise software bots a method for learning how to interact with unstructured data. Intelligent automation generally includes the following capabilities: image recognition, natural language processing, cognitive reasoning, and conversational AI. Enterprise clients of service providers around the globe are starting to think about building intelligent automation capabilities into their RPA initiatives, as companies realize they will be left behind if they fail to utilize such next-generation technologies quickly. When orchestrated correctly, intelligent automation technologies are enabling enterprises to automate processes that until now have been un-automatable and deliver higher productivity, reduced cost, improved data accuracy and an enhanced customer experience. This study on Intelligent Automation Solutions and Services is aimed at understanding enterprise requirements and provider capabilities to meet their demands.

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

- Intelligent Business Automation*
- Artificial Intelligence for IT Operations
- Conversational Artificial Intelligence

IoT - Services and Platforms 2020

Overview:

Internet of Things (IoT) refers to connectivity across devices, machines, data, systems and objects. The entire physical world is being pulled in together in a connected ecosystem through sensors and responses. Capturing vital data and generating meaningful results and insights from it has been the core of the connected ecosystem. Trillions of devices are connected, and each day, new connectivity is adding to the pool of information being captured in real time.

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

The Industrial Internet of Things (IIoT), sometimes called Industrie 4.0 (I4.0), focuses on the production process within what ISG calls a smart factory, based on connected and automated machines. The need for data processing and storing next to the user, driven by augmented or mixed reality use cases, brings in edge computing as increasingly important discipline for IoT scenarios.

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

- Consulting and Integration
- Managed Services
- IoT Platforms
- Connected Vehicles
- Manufacturing
- Smart Buildings

Manufacturing Industry Services 2020*

Overview:

The manufacturing vertical present different set of attributes for different industries such as consumer electronics, aerospace and defense, automotive and transportation, energy, FMCG, healthcare etc. The overarching shroud of engineering, however, is a confluence of multi-faceted disruptions witnessed in these industries. This expedites the creation and evolution of various solutions and services which can make the manufacturing processes more airtight for errors and cost-effective.

The "Manufacturing Industry Services 2020" study tracks and analyses the offerings around several elements of manufacturing, from the intricacies of 3D simulation to shop floor robotics. Automation plays a significant role in this, spreading across components such as manufacturing operations management (MOM), manufacturing execution systems (MES) as well as capturing process data and storing it in the cloud. The study examines the role of service providers across the entire value chain of manufacturing engineering, from virtual layout or simulation of the shop floor, human ergonomics for machinery, IT/OT convergence to aftermarket services such as leveraging digital twin to check the condition of the machinery while it reaches the wear-out period of the wear curve.

Considering the dynamics of this market, ISG would focus on the following quadrants:

- Manufacturing Engineering Systems solutions and services
- Manufacturing Automation solutions and services
- Manufacturing Supply Chain solutions and services
- OT Security solutions and services

MS

Microsoft – Ecosystem Partners 2020

Overview:

Microsoft is one of the most system-relevant IT providers worldwide. The Microsoft ecosystem, one of the largest in the world, comprises thousands of partner companies that address enterprise user companies of all sizes and industries across the globe.

Microsoft has a focus on technology trends and growth markets such as AI or IoT, robotics, cloud computing with edge computing and HPC, etc., without neglecting product and service areas that have been established over the last decades. For this purpose, Microsoft has restructured their development as well as sales and marketing teams and has driven innovations, with the goal to deliver a differentiated value across the cloud portfolio, which enables Microsoft to differentiate themselves from the competition, remain a relevant player in the market and achieve high cross-margins.

The partner ecosystem for Microsoft products/XaaS is being increasingly broadened. The increasing complexity of integration with expanding use areas is leading to a dynamic market development for professional services in the areas of consulting, design, integration, implementation and managed services for Microsoft and its offerings.

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

- Azure Managed Services
- SAP on Azure
- Office 365 and Modern Workplace
- SharePoint Integration

Network – Software Defined Solutions and Service Partners 2020

Overview:

The network acts as enabler of many ICT topics that impact our increasingly digital economy. Software-defined networks (SDN) and innovative WAN offerings serve as basis for digital ecosystems and ensure that known bottlenecks occurring during data transport from A to B are reduced or eliminated and that increasingly dynamic network loads are balanced accordingly. Connections characterized by high bandwidth and low latency are increasingly becoming important to realize the best affordable digital user experience.

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

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

- SDN Transformation Services (Consulting & Implementation)
- Managed (SD) WAN Services
- SD WAN Equipment and Service Suppliers (DIY)
- Mobile Network (4G/5G) Additional (non-core) Services
- SD Network Technologies (Core & Mobile to Edge)

Next Gen ADM – Service Partners 2020

Overview:

Application outsourcing in the recent years has evolved from being led by a waterfall-based traditional development approach into one that has incorporated disruptive agile-based operating models, making the core development model a direct competitive advantage for many enterprises. Enterprise client requirements are currently led by mobile and other emerging technologies which, in turn, are fueling the transformation of the application services landscape that rises the need for next gen ADM.

ADM consists of consulting, design, custom development, packaged software integration, operations, and testing. Next-gen ADM makes use of emerging technologies/methodologies like agile, DevOps, automation, and modernization techniques to deliver application outsourcing projects. Service providers are incorporating new approaches in how they develop and deliver applications via modular, component-based and container technology in a continuous manner. Because an application more and more gets broken down into workloads and microservices, its release and production cycles are short, which makes applications easier to modify and deploy.

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

- Next-gen ADM
- Agile Development
- Continuous Testing
- Application Management Services
- DevSecOps

Private/Hybrid Cloud - Data Center Solutions and Services Partners 2020

Overview:

The customer's own data centers are becoming too small or are no longer meeting today's security or connectivity standards. When considering upgrading the existing data center or building a new one, many companies decide to outsource all or part of their IT infrastructure to a colocation service provider or to move to the cloud. Enterprises or businesses with strict security and governance requirements, exorbitant data volumes and a need for tight integration with other enterprise applications and workflows are best suited for private and hybrid cloud scenarios, managed by professional service providers.

In many IT departments, there is a lack of suitable employees or appropriate specialists who can manage the complicated IT operations, and they cannot be recruited on the personnel market because of an imminent shortage of skilled IT personnel that can deal with modern cloud and container architectures. One way out is to transfer the IT infrastructure to a service provider who takes over the management of part or the entire IT infrastructure.

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

- Managed Services
- Managed Hosting
- Colocation Hub Services
- Cloud Datacenter Security Solutions
- (Hyper) Converged Systems

Public Cloud - Solutions and Service Partners 2020

Overview:

With the rise in digital innovations, enterprises are undertaking several digital initiatives that are leading to an increase in cloud spending. ISG has observed that public cloud spending is increasingly rapidly due to an increase in number of cloud workloads being migrated and operated on the public cloud – some clients decided to completely rely on public cloud resources already. This is due to a growing use of PaaS services by the developer community and an increase in data generation sources, such as IoT, edge technology and cheaper internet consumption, leading to a significant generation of customer data. This data is being analyzed with the help of analytics tools available on the cloud.

The growth of public cloud adoption by enterprises and the maturity of the cloud industry are creating a major impact on organizations, both enterprises and IT service providers, and on business models. This requires increased market adaptation and could lead to obsolescence of old IT environments. Considering the widespread adoption in the as-a-service area, enterprises must continuously evaluate cloud service and IT providers on a global level. The study examines the public cloud infrastructure and platform market as well as transformation and managed service providers that have respective accreditations for the most important public cloud solution provider.

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

- Consulting and Transformation Services (CATS)
- Governance, Risk and Compliance Services
- Managed Public Cloud Services
- Secure Enterprise Cloud Filesharing
- IaaS-PaaS Hyperscaler Services
- (Hyperscale) Infrastructure as a Service for SAP HANA

Salesforce - Ecosystem Partners 2020

Overview:

Salesforce sees itself as a provider of Software as a Service and Platform as a Service and specializes in Customer Relationship Management (CRM) for companies of all sizes. Salesforce products are also designed to help companies connect employees, customers, and products. With its cloud platform, Salesforce offers applications for customers in nearly all phases of the customer journey.

The “Salesforce Ecosystem“ study examines various offerings around the Salesforce platform. It analyzes providers who act as implementation partners for Salesforce and design, configure and implement solutions for clients of this platform. Within this group a distinction is made between those providers that beside their Salesforce related knowledge are also capable of integrating Salesforce based solutions into major system landscapes (system integrators) and those providers that are specialized on the implementation of Salesforce itself. Furthermore, the study analyzes providers who offer services that support their customers in the operation of the implemented Salesforce solutions (Managed Support Services).

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

- Implementation & Integration Services
- Implementation Services for Core Clouds
- Implementation Services for Marketing Cloud
- Managed Application Services

SAP - HANA & Leonardo Ecosystem Partners 2020

Overview:

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

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

- SAP S/4HANA & Business Suite on HANA Transformation
- Managed Application Services for SAP ERP
- SAP C/4HANA System Transformation
- Managed Platform Services for SAP HANA
- SAP Cloud Platform Services and SAP Leonardo Services
- SAP BW/4 on HANA and BW on HANA Services

Service Integration and Management - Solutions and Service Partners 2020

Overview:

Service Integration & Management (SIAM) is a collection of frameworks and best practices encompassing the people, processes & tools required to manage end-to-end services through their lifecycle (service strategy; business demand & interfaces; change delivery; operational management; supplier management), to deliver value to the business in a multi-supplier environment. In the past, many companies outsourced multiple towers to large system integrators and it required some coordination to ensure those service providers were well integrated into the technology landscape of the company, most often on the infrastructure side of the house. In today's environments, it's common to see multiple service providers, both large and small, and they are no longer just in the infrastructure space, but also in application development & maintenance (ADM), business process outsourcing (BPO) and in non-traditional spaces such as finance, marketing and legal. The SIAM market is currently undergoing some fundamental changes due to the use of new technologies by solution providers especially in the areas of using big data volumes and new analysis features. As such forward looking maintenance and faster restore of services will lead to higher service qualities.

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

- Business Value Service Management
- Service Design & Transition
- Service Operation & Delivery
- Sourcing Information Management
- System Integrators for ServiceNow Products
- System Integrators for BMC Products

Additional Information

1. Please note that the quadrant names mentioned in this plan are not final. Once again these are subject to change based on market dynamics, advisors' inputs and analysts' views. With the start of the research phase for each study, the launch email will include a project brochure that will contain finalized quadrant names, descriptions of the topics and analyst names for each region.

2. The timeline is indicative and may change but not significantly.

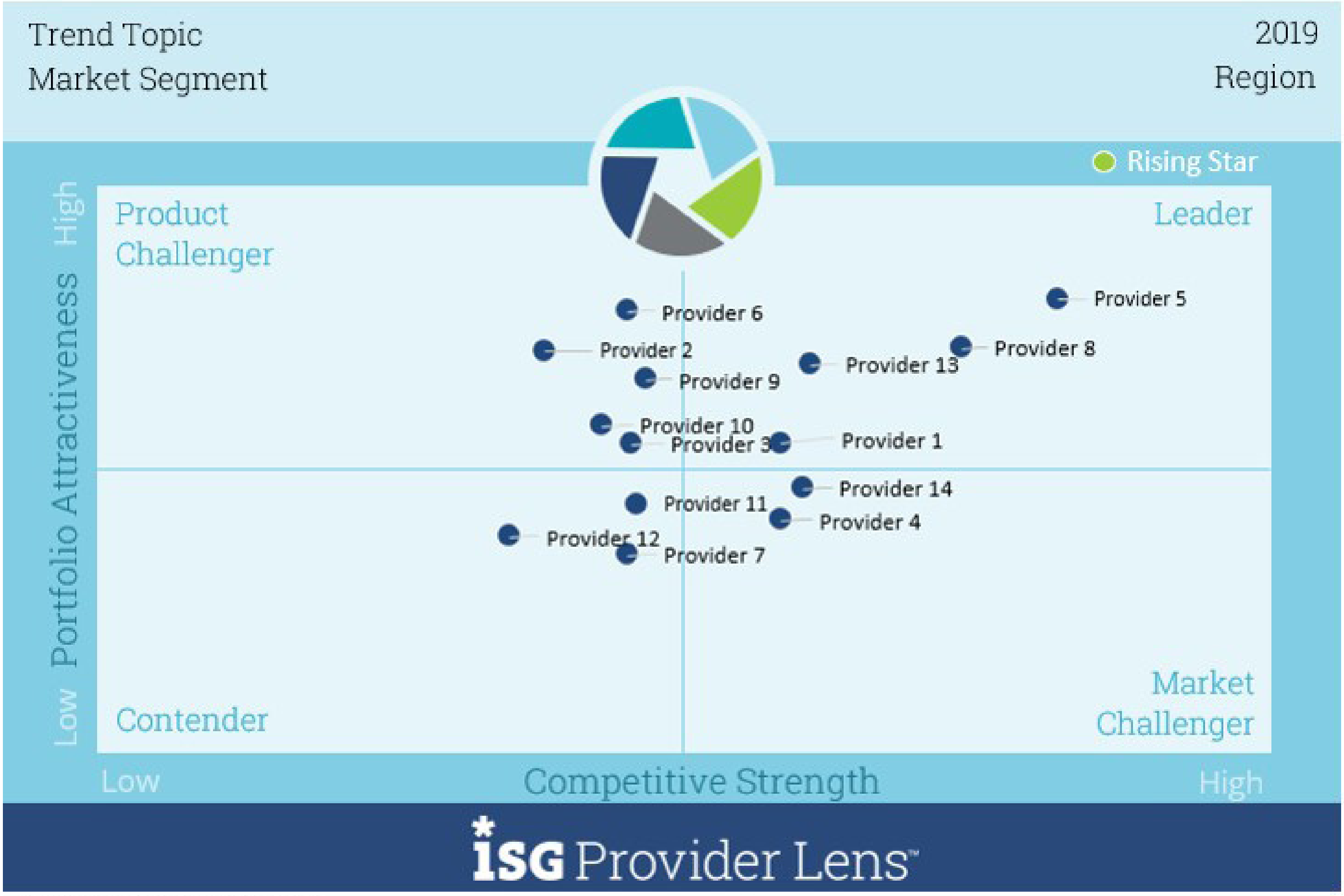
3. The dates of research phase will be included in the project brochure.

4. Project 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.

About ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on business process, technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

ISG Provider Lens™ research reports provide independent vendor evaluations and enterprise buying behavior segmentation. Service provider data, from either primary or secondary research, will translate into three different outputs. They are categorized as:



Source: ISG Research 2019

ISG Provider Lens™ Quadrant Reports

ISG compares and positions service providers in a graphical presentation based on their service portfolio strength and market competitiveness. Based on their relative positioning, service providers are identified as leaders, challengers, contenders or rising stars. These studies are conducted over multiple regions and for multiple service line topics, in the IT, BPO and industry-specific domains.

Evaluation logic and explanation of grid axes:

Y axis = Portfolio attractiveness

- Scope of portfolio (breadth & depth offering)
- Portfolio quality (technology/skills, customer satisfaction, USP, security)
- Strategy & vision (product roadmap, thought leadership, investments)
- Local characteristics (product support, infrastructure)

X axis = Competitive strength

- Market position (revenues & growth)
- Degree of awareness, image and customer satisfaction
- Core competencies (innovative power, stability, ecosystem, business model)
- Go to market (sales, sales channel, marketing)

ISG Provider Lens™ Archetype Reports:

This ISG distinctive report examines outsourcing maturity in totality by identifying the changing buying behavior on the demand side and matching it with the evolving capability on the supply side. The archetype report segments the prevalent enterprise buying behaviors for various domains or service lines. These buying behaviors or archetypes generally represent different enterprise preferences based on their maturity journey. These studies also highlight unique service providers best suited to serve each of these archetypes.

	Domain Expertise	Languages Supported	Scale of Operations	Traditional Pricing Models
Provider A	●	◕	●	◕
Provider B	◑	◑	◕	●
Provider C	●	◕	●	●
Provider D	◑	◕	●	●
Provider E	●	●	●	●
Provider F	●	◕	●	◕
Provider G	●	●	●	◔
Provider H	◕	◕	◕	◑

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

Evaluation logic and explanation:

- Considers only global capabilities
- Doesn't measure a provider's capability based on scale but measures them based on true potential that providers can bring to the table
- Measures the readiness of the providers catering to enterprises across different maturity levels

ISG Provider Lens™ Profiles:

ISG advisors are the primary consumers of these provider profiles, these profiles are key outputs from the data collected from the providers during the research phase of our ISG Provider Lens™ studies. These profiles are then translated into provider capability presentations. ISG advisors actively leverage these profiles when helping clients evaluate their current vendor relationship and potential new engagements.

Why ISG Provider Lens™?

1. **Participation is FREE OF CHARGE:** The ISG Provider Lens™ Annual Plan is released in the 4th quarter of each year and, published online. If providers or product vendors regard any of the studies as relevant to their organization's capability, they can reach out to ISG to be invited. Service providers can purchase reprint rights of the study for marketing, press and sales purposes and participate in ISG's press release for each study.

2. **Practitioners Approach:** ISG's distinctive positioning in the sourcing industry is our product's key differentiation factor. ISG Provider Lens™ takes a practitioner's approach in addition to academic research. Our reports leverage the strong and practical 'on-the-ground' experience from ISG advisors, based on their expertise in solving enterprise problems and understanding of service provider experience. These studies go beyond high-level academic market views and provide real actionable insights by comparing service providers at each nuanced segmentation for a given domain and service line.

3. **Country-level positioning:** ISG Provider Lens™ reports provide service provider comparisons at specific country levels. Local service providers can position strongly in country-specific parameters against their global large-scale competitors. This will help ISG sourcing advisors and local enterprise buyers make better informed decisions based on specific local requirements.

4. **One-stop shop for ISG advisory:** ISG Provider Lens™ reports and profiles are a "one stop shop" for ISG advisors and is one of the primary channels that they use to communicate service provider capabilities with their clients. These reports are key to ISG's FutureSource™ and CPQ process and are leveraged in the long listing and short-listing of service providers for client engagements.

5. **Highlighting Niche strengths:** ISG Provider Lens™ reports provide service provider comparisons for every facet of a technology domain or service line. In addition, ISG Provider Lens™ archetype reports provide information about relevant enterprise buying patterns and highlight the service providers best suited for each. These reports provide strong opportunities for service providers who specialize in niche capabilities and can strongly serve a unique archetype.

6. **ISG endorsement and greater visibility:** As one of the biggest and independent sourcing advisory firm in the industry, enterprises value ISG's research and advisory viewpoints. Additionally, ISG has a close connection to many enterprise clients and service providers can benefit greatly by getting visibility amongst both advisors and enterprises.

Candidate Provider Qualification CONNECTION

The Candidate Provider Qualification (CPQ) process is a key component of the ISG FutureSource™ methodology and ISG Provider Lens™ is a critical source of data for the CPQ program. As part of this program ISG advisors are provided with a list of all applicable service providers to produce the initial recommendation long list for their enterprise engagements. Based on the enterprise client's requirements and maturity, the CPQ team also provides relevant strengths and weakness points for the selected service providers along with their profiles, briefing materials and data point comparisons to support their recommendations.

HOW DOES IT WORK

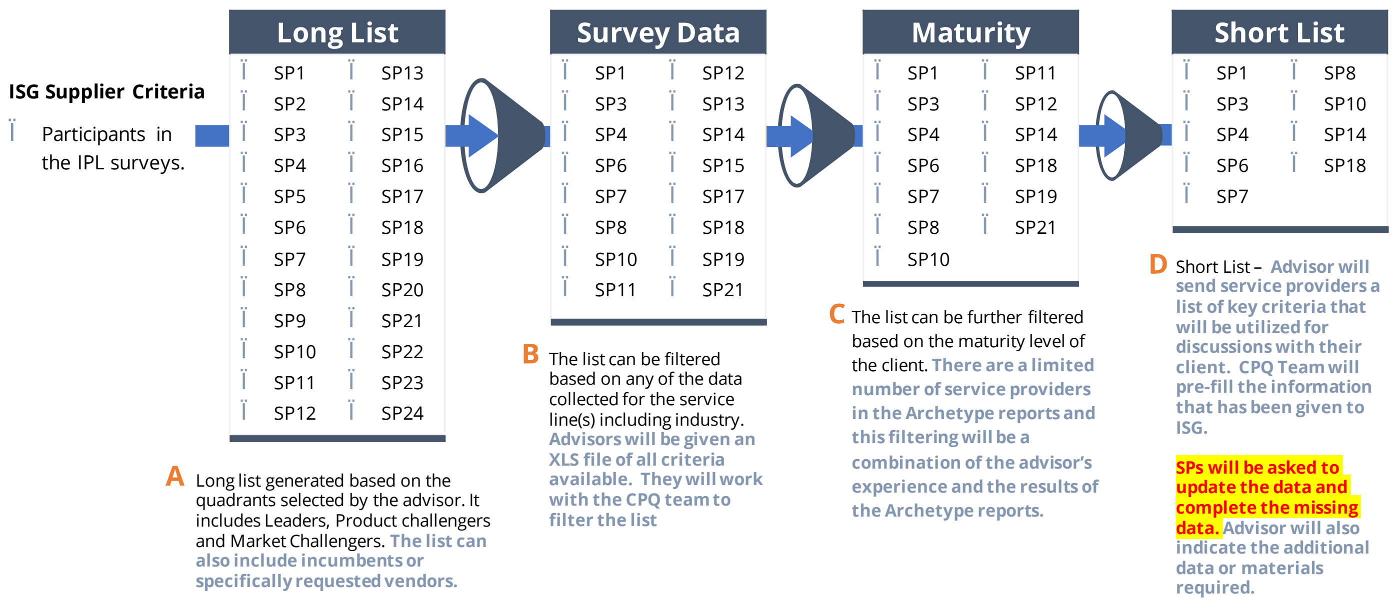
The data used to produce the initial recommendation long list, is a combination of data that is collected to create the ISG Provider Lens™ quadrant and archetype reports and proprietary ISG data assets (such as the Contract KnowledgeBase, Voice of the Customer (VOC) survey data, Advisory Awareness Survey data, ISG Quarterly Index, etc.). The CPQ process is intended to follow three phases:

Phase 1: Initiating a request for the recommendation long list;

Phase 2: Filtering the long list down (leveraging the more granular level data collected thru the ISG Provider Lens™ studies to narrow the list to more closely match the client's requirements);

Phase 3: When applicable, requesting additional information and material from the short-listed providers (in preparation to present the list to the client and when critical data is missing for certain providers).

CPQ and CAS - Selection Process Example



Clarifications on the influence of ISG Provider Lens™

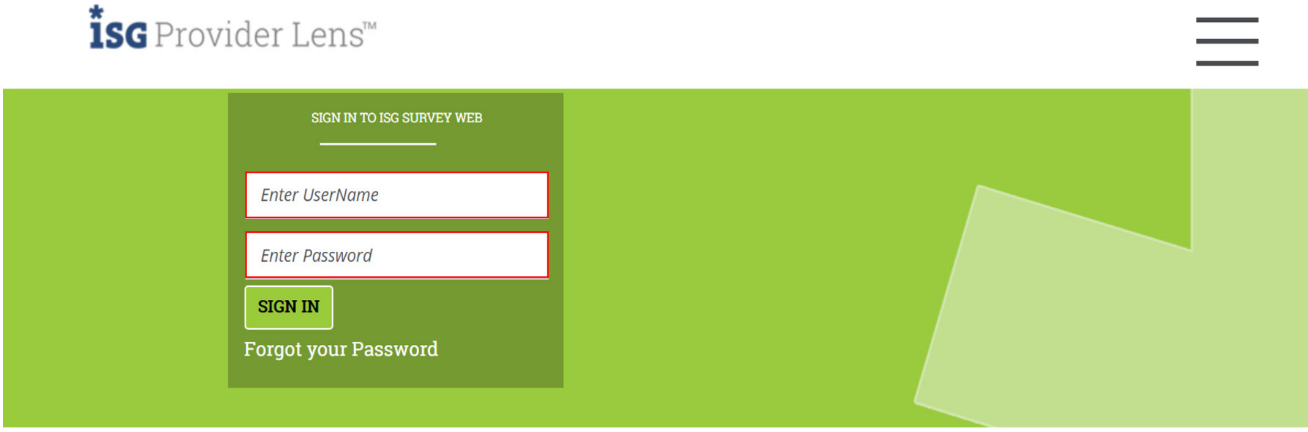
1. **Participation:** ISG produces country specific reports that aligns with most of the countries where ISG advisory has strong presence. ISG invites providers to participate based on their presence, our market knowledge and the opinions of ISG Advisors. If ISG believes that a provider company is a key player in the market with good presence, then ISG will position such providers irrespective of participation.

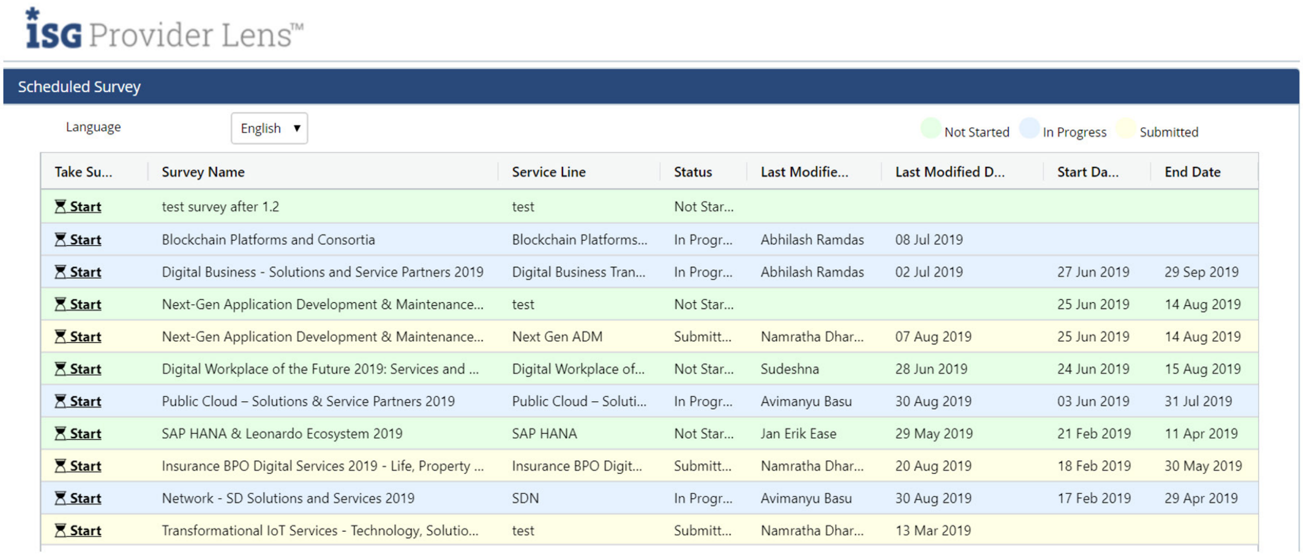
2. **Chances of getting invited to deals is increased though not guaranteed:** Participation in ISG Provider Lens™ research studies significantly increase your company's visibility amongst ISG advisors and enterprise clients. Participation also impacts inclusion on advisor long lists but does not guarantee inclusion in the final recommendations to the enterprise clients.

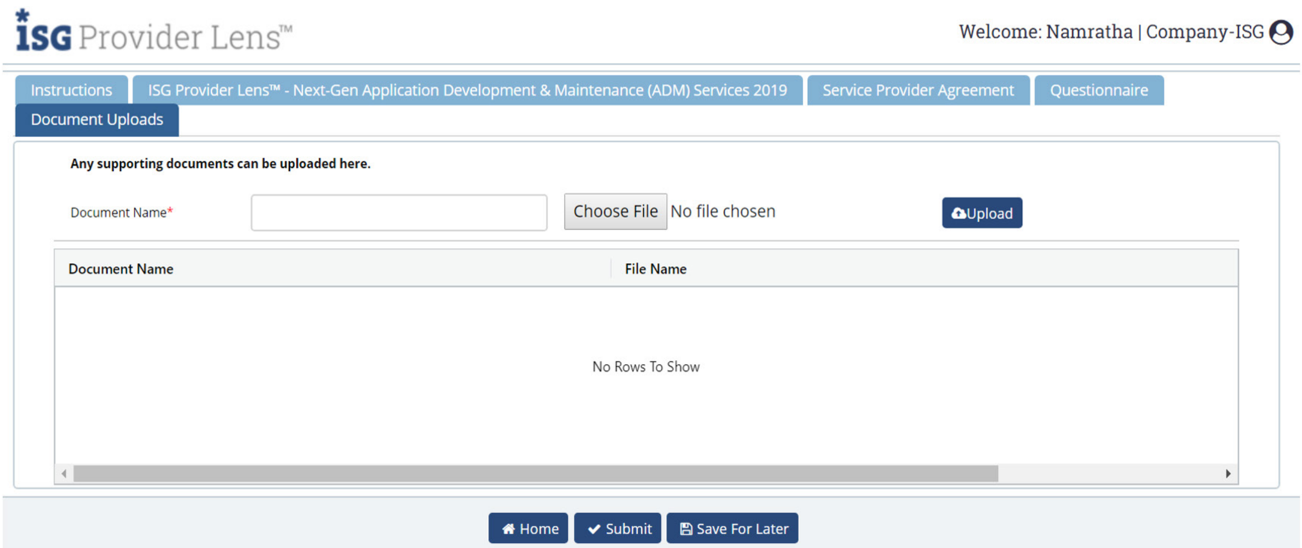
3. **CPQ Connection:** ISG Provider Lens™ reports and data collected, actively feed into the CPQ long list process. Shortlisting of companies is an evolving journey and left to the discretion of advisors and enterprise clients. However, the data provided continues to influence the further steps post long listing.

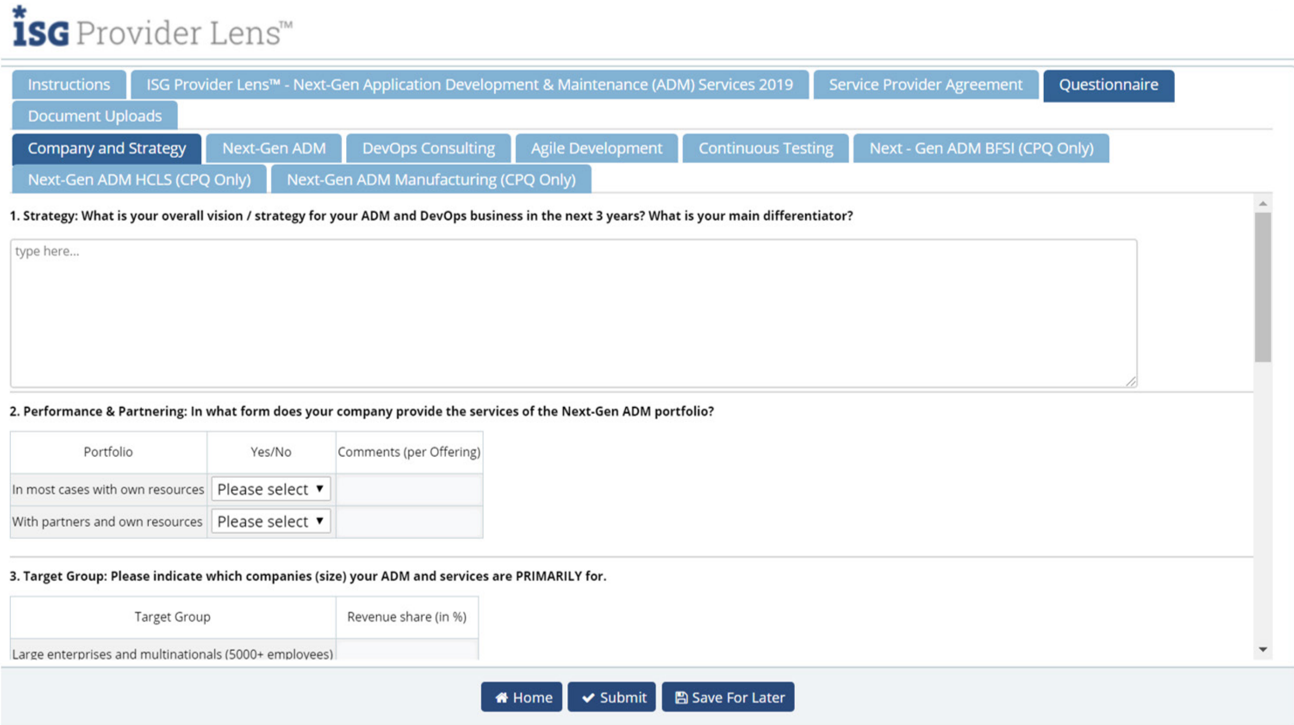
Introduction to the ISG Provider Lens™ Portal

ISG Provider Lens designed and launched a data collection portal to increase collaboration, reduce efforts and save time during the data collection process. This portal is designed to provider 24/7 access to providers to feed in their most current data or to maintain and update existing data. At the same time ISG utilizes this latest data to support ISG advisory.









Benefits of using the portal

- **Access to excel questionnaires –** We understand that excel is still a critical survey instrument for internal data collection purposes. Post login excel questionnaires are made available for downloading and distribution. However, we request that the final round of submissions is completed through the portal in order to be leveraged by the CPQ process.
- **24/7 access –** Service providers are given 24/7 access. The named SPOCs have access to the portal to input data at any time of the year.
- **Visibility –** The IPL Portal dashboard is available at any time to portray the participation status for any research study.
- **Preloaded data from last cycle –** For studies that are getting annually refreshed, providers can view previously entered data and choose to modify the fields that need modification. They have an advantage of saving time by not entering the data all over again and update only the fields that have changed. This will significantly save time and effort.
- **Latest and greatest data –** If service providers ensure that their latest data is made available to us, then we will ensure that the same data is made available to our internal advisors during client engagements.
- **Central data repository and going the digital way –** Moving away from traditional excel questionnaires, this central data repository houses all the data provided to us.

NOTE:

- **Advisors do not access the portal:** Our internal advisors do not have access to the portal. All data requests are channeled through CPQ and our internal team connects with the CPQ team on a regular basis to ensure the latest data is made available to our advisors.
- **Access:** Currently SPOCs registered with us get access to the portal. Although, our portal is designed to give access to multiple users from the same company to work in parallel, our default is to only give access to SPOCs from provider companies.
- **Research phase:** The data entry window for a study is typically open for a period of 6 weeks. Once the submission of data is completed on the portal, the **SUBMIT** button then changes to **UPDATE**. This signifies that you are welcome to update any data points, however, the updated data will **NOT** be considered for evaluation post the closure of the research phase.

Course Followed for Each Research Project

Research Phase

ISG Provider Lens™ projects start with the research phase and the following are the steps in chronological order that are followed during the research phase.

- We send out mailers introducing the launch of a study. In this email, watch out for login details for the portal. Participants will be sent a project brochure containing all details pertaining to the project such as the research phase schedule, topics discussed, descriptions of quadrants and analyst bios.
- Clients are given about 5-6 weeks to submit the data. Excel questionnaires are made available on the portal.
- During this phase, the providers are also encouraged to proactively suggest dates for briefing to provide analysts with more in-depth information.
- Once the data has been submitted on the portal, this represents the data that will be considered for evaluation.

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

Sneak Previews

- Once the research phase has been completed, sneak previews will be conducted. Sneak previews are 30-minute telephone conferences with our analysts and account managers to explain the ISG Provider Lens™ study results to only the respective quadrant or archetype leaders/Rising Stars.
- We also conduct sneak previews with any study participant on request to present second-window rights and related opportunities, based on the study. A fact check will be requested from each provider identified as a leader /Rising Star.
- A period of 72 hours will be given to return any factual or data changes. If the changes are not reported back to us within the time frame, then ISG will publish the content presented in the sneak preview data.
- All results, calculations and assumptions presented within the sneak previews are business secrets of ISG; they are protected accordingly, based on the Act Against Unfair Practices, and by copyright law. No content of such sneak previews may be disclosed to any third party, unless required rights and entitlements have been acquired accordingly; this also applies for quotations or copies of parts of the sneak preview and includes the respective company's advertising, promotional activities and press releases.

NOTE:

- The main purpose of the Sneak Preview is to present the results of the study and to ensure that the textual facts about the supplier/service provider are presented correctly.

SNEAK PREVIEWS ARE NOT INTENDED TO:

- Dispute the ratings / positioning on the quadrant or archetype.
- Provide additional data to complete the survey responses. This data will not be considered for evaluation; however, this will be updated in the provider profiles.

Non-leaders

- Non-leaders/Rising Stars will be notified with a draft report before the ISG press release.

Press

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

Press releases, ISG Insights™, ISG website, and social media

Providers can purchase reprint rights to the report and then have the option to be included in our Press Release via a landing page link. Copies of the full report can also be purchased for internal use. *(Please see appendix to get a glimpse of our press releases)*

List of Analysts for 2020

Akhila Harinarayan

Lead Analyst – SAP, Digital Business

Geography Coverage –
UK, Nordics

Amar Changulani

Principal Analyst – FAO, Automation

Geography Coverage – US

Avimanyu Basu

Lead Analyst – Software Defined Network, Manufacturing

Geography Coverage –
US, UK, Nordics

Blair Hanley Frank

Principal Analyst – Microsoft, Private Cloud, Cloud Native Containers

Geography Coverage – US

Bruce Guptill

Principal Analyst – Microsoft, AWS

Geography Coverage – US

Craig Baty

Principal Analyst – Digital Business, Cyber Security

Geography Coverage – Australia

David Wilkinson

Principal Analyst – Cyber Security

Geography Coverage – US

Dennis Winkler

Principal Analyst – Insurance

Geography Coverage –

Dr. Henning Dransfeld

Principal Analyst – Microsoft, Analytics, Digital Workplace, Manufacturing

Geography Coverage –
Germany, Nordics, UK, Switzerland

List of Analysts for 2020

Florian Scheibmayr

Lead Analyst – Contact center

Geography Coverage – Brazil

Frank Heuer

Lead Analyst – Cyber Security, AWS

Geography Coverage - Germany, Switzerland

Gowtham Sampath

Lead Analyst – Banking, Analytics

Geography Coverage – US and UK

Heiko Henkes

Principal Analyst – Private Cloud, Public Cloud

Geography Coverage – Germany, Switzerland

Jan Erik Aase

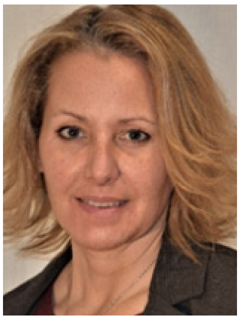
Principal Analyst - SIAM (Service Integration and Management)

Geography Coverage – US

Jonathan Siefke

Lead Analyst – Public Cloud

Geography Coverage – Germany



Karen Antons

Principal Analyst – Cyber Security

Geography Coverage – US, UK

Kartik Subramaniam

Lead Analyst – Next Gen ADM, SAP

Geography Coverage – US, Nordics

Kenn Walters

Principal Analyst – Software Defined Network, Digital Business

Geography Coverage – US, Germany

List of Analysts for 2020

Lutz Peichert

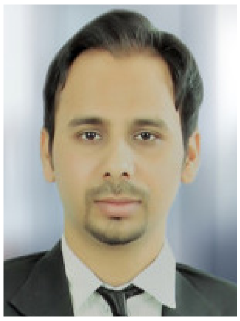
Principal Analyst – SIAM

Geography Coverage – US and Germany

Manali De Bhaumik

Lead Analyst – Internet of Things

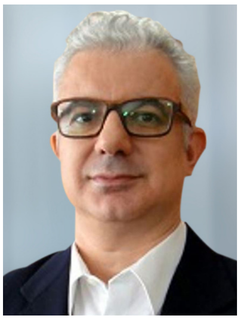
Geography Coverage –US



Manoj Chandra Jha

Lead Analyst – Private Cloud, Public Cloud, Automation

Geography Coverage – UK, Nordics



Marcio Tabach

Lead Analyst – Data Analytics Services & Solutions

Geography Coverage – Brazil

Mauricio Ohtani

Principal Analyst – Salesforce, Microsoft, Digital Business

Geography Coverage – Brazil, LATAM

Mrinal Rai

Principal Analyst – Digital Workplace, Automation

Geography Coverage – US

Namratha Darshan

Principal Analyst – Contact center, FAO, Insurance

Geography Coverage – US, Europe

Oliver Nickels

Principal Analyst – IoT, Next Gen ADM, Banking

Geography Coverage – Germany,UK,Nordics

Pedro Luís Bicudo Maschio

Principal Analyst – SAP, Next Gen ADM, Private Cloud, Public Cloud, Cybersecurity, Digital Workplace

Geography Coverage – Brazil, France, LATAM

List of Analysts for 2020

Praveen Nair

Lead Analyst – Contact center

Geography Coverage - UK

Rainer Suletzki

Principal Analyst – Salesforce, SAP

Geography Coverage – Germany

Ron Exler

Principal Analyst – Salesforce, IoT, Digital Workplace, Healthcare, Cyber Security,Software Defined Networks

Geography Coverage – US

Shashank Rajmane

Lead Analyst – Private Cloud, Public Cloud

Geography Coverage –US

Stanton Jones

Principal Analyst – Banking

Geography Coverage – US

Tarun Vaid

Lead Analyst – Digital Business

Geography Coverage – US

Wolfgang Heinhaus

Principal Analyst – Private Cloud, Public Cloud

Geography Coverage – Germany, Switzerland

A Glimpse at IPL in Media

Facebook, Igloo Named Leaders in Enterprise Social Collaboration by ISG

ISG Provider Lens™ report finds enterprises across the globe embracing social business collaboration tools

NEWS PROVIDED BY
Information Services Group, Inc. →
Oct 02, 2019, 10:45 ET

STAMFORD, Conn., Oct. 2, 2019 /PRNewswire/ -- Facebook was named a global leader in enterprise social business collaboration solutions in a recent report published by Information Services Group (ISG) (Nasdaq: III), a leading global technology research and advisory firm.

The 2019 ISG Provider Lens™ Social Business Collaboration - Services & Solutions Global Report noted that "Workplace by Facebook has gained significant traction since its initial launch almost three years ago. The familiarity and popularity of the Facebook user interface makes Workplace deployments faster and require little or no training."

CISION PR Newswire News Products Contact Search

News in Focus Business & Money Science & Tech Lifestyle & Health Policy & Public Interest People & Culture

Enterprises Across the Globe Move Toward SDN and Related Networking Services

ISG Provider Lens™ report sees rapid adoption of software-defined networking as a way for enterprises to save money, offer more flexible services

NEWS PROVIDED BY
Information Services Group, Inc. →
Aug 21, 2019, 10:02 ET

SHARE THIS ARTICLE

STAMFORD, Conn., Aug. 21, 2019 /PRNewswire/ -- Enterprises across the globe and in the U.S. are rapidly adopting software-defined networking and related technologies as an alternative to traditional LAN and WAN services, according to new reports published today by Information Services Group (ISG) (Nasdaq: III), a leading global technology research and advisory firm.

The 2019 ISG Provider Lens™ Network - Software Defined Solutions and Services Global and U.S. reports find enterprises in many regions embracing SDN, network function virtualization (NFV) and software-defined WAN (SD-WAN) technologies and services as well as related network services such as performance assurance and managed networks and devices.

NEWS SITES ET PRIME

ETtech.com From the Economic Times | Startups | Technology | Corporate | Mobile | Internet | Peo

E-commerce • Digital Payments • Interviews • Funding • Smartphones • NEA 2018 • Govt policy • Lo

“(This) will help TCS as analysis shows that their employee cost as well as employee cost-as-percentage-of-revenue has been increasing last few quarters,” said Mrinal Rai, principal analyst at technology consulting firm ISG.

"Infosys has strong capabilities in back-end business process services, while contact centre services are more of front-office operations," said Mrinal Rai, principal analyst at technology researcher ISG. "There is pressure to bring back-office and integrate with front-office and providers are strengthening their capabilities."

sdxcentral SD-WAN SDN NFV CONTAINERS 5G SECURITY EDGE MULTI-CLOUD

The leaders in these quadrants represent providers that offer the most appropriate services to meet the needs of clients from the technological perspective as well as the business and market perspective, said Avimanyu Basu, team leader at ISG, in an email to SDxCentral.

Global firms such as UBS, NetApp and Symantec have stepped up moving back work from vendors as they look to retain core work in-house. “Switching to insourcing from a outsourcing-dominant business model is not new in the capital-intensive aerospace and defence industry — Airbus’ American competitor, Boeing, is a classic example,” said Avimanyu Basu, lead analyst for engineering services at ISG.

"Digital is no longer a differentiator in customer service; it's an imperative. Omnichannel solutions and cloud capabilities are now table stakes for contact center services. Among new, cutting-edge approaches, the use of automation technologies like chat bots and intelligent self-service are on the rise, as is the use of advanced analytics to better understand customer needs and make the entire service experience more personalized and pro-active,"
said Namratha Dharshan, a principal analyst with ISG Research and co-author of the report.

COMPUTERWORLD FROM IDG NEWS TECHNOLOGY TOOLS WHITEPAPERS

"Backed by its strong technological background, good geographic presence in the U.S. and focused investments, HCL is named a leader in Finance and Accounting Outsourcing Services in our ISG Provider Lens report. With automation being significant game changer in this industry, HCL is set to transform its FAO services with its AI-enabled EXACTO tool, while continuing to offer solid domain expertise to its clients" Namratha Dharshan - Senior Manager and Principal Analyst.

Tue Jun 18/ 2:40 PM - 3:25 PM (45 Min)

Beyond the Transaction: Where Technology and Empathy Collide

8 Northumberland Avenue, Salon

Good technical support goes beyond transactions - it's an opportunity to make more meaningful connections with customers. Through a blend a soft skills, technical expertise and efficient processes, agents can build trust with customers by delivering resolutions during moments of truth.

Breakout Session | Empowering Insight

Speakers

Christian Bosse
VP, Sitel Technical Support as a Serv...
Sitel Group
Speaker

Mrs. Namratha Dharshan
Assistant Director Of Research
ISG (Information Services Group)
Speaker

Jan Erik Aase
Director and Global Head - ISG Provi...
ISG
Speaker