ISG Provider Lens™

Digital Business Enablement and ESG Services

Business Consulting Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:
Computacenter

QUADRANT REPORT | DECEMBER 2022 | GERMANY

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Digital business enablement endemic across modern enterprises

Digital enablement is a term used to recognize that digital transformation is now a reality and fast becoming a norm across almost all enterprises, regardless of industry coverage or focus. The enablement of the transformation itself, encompassing many technological topics, business coverage areas, organizational functions and business processes, has now become the emphasis to move these initiatives into commercial rollout and deployment. In Germany, over the last 2-3 years, emphasis was given to evolving working environments, remote working, manufacturing process optimization and upgrades (many incorporating Manufacturing 4.0 principles), supply chain process optimization and resilience, and customer experience (CX) and retention, among others. Such rapid evolution has delivered significant business benefits, together with user and CX benefits in many quantifiable areas.

Enterprises across Germany are currently focusing on effectively enabling investments that they have been making during the last 18-24 months and seeking demonstrable ROI, as well as a proven efficiency increase, higher security and continuity assurance, and heightened competitive effectiveness.

A significant challenge faced by many of the German enterprises, especially within manufacturing and production areas with large infrastructure and headcounts, has been transforming established processes, supply chains, organizations

Digital enablement is **mainstream** among enterprises and management practices. To enable technologies and leverage them to bring in the change that business leaders require, how can companies implement the needed non-technological changes across departments and enterprise boundaries so they can deliver benefits to themselves and their customers (wherever they may be in a mobile world)?

Enterprise agility and flexibility define how effectively organizations can enable digital transformation to modify business and operation work streams to thrive in a constantly changing, highly competitive environment. This enablement, and the rapidity with which it is implemented, is critical for the entire enterprise value stream.

Digital enablement is realized through the virtualization of technologies and operations, while integrating the virtual and physical worlds. From the technology viewpoint, virtual refers to running workloads remotely on cloud and includes software-defined architecture and infrastructure, even if enterprise-owned data centers and branch end points remain (to some extent) in place. Digital enablement is the effective implementation of functions, including automation, AI and cognitive technologies, coupled with feedback and analytical capabilities, that can be applied in both the real world (such as production facilities, customer contact centers, retail environments and other customer interaction points, physical or mobile/remote) and in the virtual world by automating the response and interaction with users, clients, partners and governments.

Within the market in Germany, the following list contains the key characteristics of digital services, including their differentiation from less digitalized services, as they are being enabled currently.

- Digital enablement combines and provides services with maximum automation with autonomy, providing omnichannel and multiplatform compatibility. Service performance is assured, regardless of overall utilization rates and is based on automated and predictive integrated rapid provisioning tools. Service delivery is based on ubiquitous software-defined communications and information networks, which include stationary and mobile networks (increasingly including campus/private 5G) and wideband IoT and narrowband IoT (NB-IoT). This is demonstrated by the high growth rates within German engineering and manufacturing enterprises, together with widespread acceptance.
- Automated digital services often provide individual variants (such as dynamic response and provisioning, automated policy mapping and security level variations based on location) and are based on an integrated service management approach. Performance can be adjusted based on the information gathered by location-based services, cookies, physical devices (such as radio frequency identification tags) and/or movement profiles. Service variations and improvements are location and time independent and are performed based on user preferences, classification or other factors, such as enterprise policy settings. This has become an area of importance within the German retail and services personalization marketplaces.

- Multiple supply chain options with the lowest cost of delivery, or the fastest delivery time, have become the norm in many enterprises. In some advanced manufacturing companies, scheduled and regular delivery of smaller-volume loads of parts is also interspersed with non-scheduled pop-up deliveries, if, for example, certain custom options become more popular during a given time period, outside of what was originally planned for. These pop-up deliveries usually do not incur any, or any significant, extra cost compared with the scheduled delivery part prices. These pop-up delivery orders are also placed automatically as required, based on the information derived from order processing systems, and a trend/predictive analysis is applied so that scheduled orders of these parts can be increased, if required.
- Self-monitoring, reporting and forecasting models, such as predictive analysis, are used to detect and contain problems and resolve them, often with in-built machine learning. To trace and improve forecasts or automate methods and improve the quality of a service, results and reports are stored and shared with involved parties by applying AI inputs to selected relevant humans; this has become of major importance within the German supply chain and manufacturing areas.
- Customer service is based around highly automated and distributed CX services. These CX systems are highly advanced in most cases with significant automation and bot inclusion, together with a high percentage of remote working agents working in a secured environment. Such security is supplied by advanced environmental monitoring, as well as data and user security on application and network layers. Agent retention in a difficult hiring market has become essential; hence, many of these CX systems also employ retention and gamification mechanisms to help reduce attrition. Virtual assistants and chatbots are highly implemented in Germany, especially within retail and financial or service consumption areas. Human agent interaction based on the number of transactions per day is fast becoming the minority of all interactions and is occurring only when expert attention by subject-matter experts is truly required.
- Sustainability and environmental, social and governance (ESG) solutions and services are in the early stages of adoption in a variety of different ways in many German enterprises. Currently, in Germany, due to energy price shocks and power supply uncertainty, most attention has been turned toward green energy, alternate energy supply, and smart building control and energy usage, as well as carbon offsetting and reduction methods. This is, however, growing to become a wider subject area, more in keeping with the German, EU and UN environmental and emission programs. Social inclusion programs, governance, monitoring systems and diversity are still in their infancy in a majority of enterprises in Germany, still relying heavily on traditional HR teams and policies. Such services may take the form of consulting and advisory, monitoring and dashboards through to partnered clean energy supply systems, automation in the workplace to reduce emissions, or even office or data center changes to reduce carbon footprints.

Services from the roadmap strategy through to the realization enablement of digital transformation goals are now mainstream in Germany. It is essential to obtain the correct stakeholder involvement within an enterprise and to find the right consulting houses, service providers and ICT companies that can provide the support required and enable digital transformation programs in Germany.

Digital enablement makes effective transformation plans a reality

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Accenture	Leader	Leader	Leader	Leader	Leader
Arvato Systems	Leader	Leader	Leader	Leader	Product Challenger
Atos	Leader	Leader	Leader	Leader	Product Challenger
Axians	Not In	Not In	Leader	Not In	Product Challenger
BCG	Product Challenger	Market Challenger	Not In	Product Challenger	Product Challenger
Birlasoft	Contender	Contender	Contender	Not In	Contender
CANCOM	Not In	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Leader	Leader	Product Challenger	Product Challenger
CGI	Not In	Leader	Not In	Not In	Not In

Provider Positioning

	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Cognizant	Product Challenger	Leader	Leader	Product Challenger	Not In
Computacenter	Leader	Not In	Product Challenger	Not In	Not In
Cybage	Not In	Contender	Product Challenger	Not In	Not In
Deloitte Digital	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Not In
Devoteam	Not In	Not In	Market Challenger	Contender	Not In
DXC Technology	Product Challenger	Not In	Leader	Not In	Not In
EcoVadis	Not In	Not In	Not In	Product Challenger	Not In
eInfochips	Contender	Contender	Not In	Not In	Not In
EY	Not In	Not In	Not In	Product Challenger	Not In

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
GEP	Not In	Not In	Contender	Not In	Not In
HCLTech	Leader	Rising Star ★	Product Challenger	Product Challenger	Leader
Hexaware	Not In	Not In	Not In	Not In	Market Challenger
HGS	Not In	Product Challenger	Not In	Not In	Not In
IBM	Leader	Leader	Leader	Leader	Product Challenger
Infosys	Leader	Leader	Leader	Leader	Leader
KPMG	Market Challenger	Not In	Not In	Market Challenger	Market Challenger
LTI	Not In	Not In	Product Challenger	Not In	Not In
McKinsey	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Mindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Publicis Sapient	Not In	Leader	Not In	Not In	Not In
PwC	Product Challenger	Not In	Not In	Product Challenger	Not In
Siemens	Product Challenger	Product Challenger	Not In	Leader	Leader
Stefanini	Not In	Product Challenger	Not In	Contender	Not In
TCS	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Tech Mahindra	Leader	Product Challenger	Product Challenger	Product Challenger	Leader
Tietoevry	Not In	Not In	Product Challenger	Rising Star ★	Product Challenger

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
T-Systems (Detecon)	Leader	Not In	Not In	Not In	Not In
T-Systems	Not In	Leader	Leader	Leader	Leader
Visionet	Product Challenger	Product Challenger	Not In	Not In	Not In
UST	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Zensar	Not In	Product Challenger	Product Challenger	Not In	Contender

This study focuses on the **critical** aspects of **digital enablement**.

Simplified Illustration Source: ISG 2022

Definition

As information technology has advanced in recent years, there has been a significant uptake in the use of digital tools and transformation services around the world. Many of these initiatives have helped businesses survive and thrive, making digital transformation a pathway to success for enterprises across all industries. The use of information technology to change the customer journey, improve business agility and deliver digital products has helped across most businesses processes, including sales, trading, production, supply chain, product design and human resource management, deliver real benefits to the bottom line and maintain the quality of CX during the pandemic.

One of the most disrupted segments during the pandemic has been the supply chain. The complexity involved in this system emphasizes the increased shift to a globally connected and highly interdependent world. The digitalization of the supply chain also brings in the aspect of resiliency. With enterprises expanding their technology and infrastructure footprints as a result of increased digitalization, it is imperative for organizations to embrace the sustainability goals for a greener and livable planet.

In recent years, several companies have been working on achieving net-zero carbon emission or carbon reduction. More companies are taking action to reduce the emission gap. Those that focus on addressing climate change-related challenges find it important to deploy analytics using connected, centralized and reliable data. The integration of AI and machine learning into this digital foundation allows for more accurate prediction, increased efficiency and real-time innovation opportunities.

The digital reality services domain has witnessed accelerated growth, especially in the last couple of years. Virtual reality, augmented reality and mixed reality will be an integral part of digitalization. AI-powered AR and VR technologies drive the market shift toward the metaverse virtual world.

According to the ISG Index™ for Q1 2022, the annual contract value (ACV) of $5 million or more shows that the first-quarter ACV for the combined global market (both XaaS and managed services) grew by 31 percent to reach a record of $24.2 billion. A total of 602 managed services contracts were awarded in the first quarter, which is an increase of 14 percent from the previous year, with a majority—nearly 60 percent—falling within the smallest range of $5 million to $10 million of ACV. The industry also saw a jump in contract restructuring, which increased 19 percent in the quarter, surpassing $3 billion of ACV for the first time since the pandemic. The ISG Index for Q1 2022 analysis observed budgets have been rising as companies continue to increase investments in driving their digital transformation agendas. Despite the apparent slowdown in market demand in the 2021 fourth quarter, ISG still forecast solid growth for 2022, including 5.1 percent for managed services and 20 percent for the XaaS market, as enterprises continue to invest in digital technologies and capabilities in response to the pandemic and despite current economic challenges.

This ISG Provider Lens™ study focuses on identifying the service providers that can support clients with their digital business 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 facilitate the use of cognitive computing and learning systems to digitalize client organizations.

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

- Transparency on the strengths and areas for improvement of relevant providers
- A differentiated positioning of providers by segment
- A perspective on different markets, including the U.S., the U.K., Germany, the 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.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Business Consulting Services, Customer Experience Services, Supply Chain Transformation Services, Sustainability and ESG Services and Digital Reality Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product and Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Business Consulting Services

Who Should Read This

In this quadrant report, ISG evaluates providers that offer digital business consulting services with the ability to advise clients on the different facets of the digital journey. The services cover strategy, design, data, technology, organizational change management, operations, digital culture and innovation.

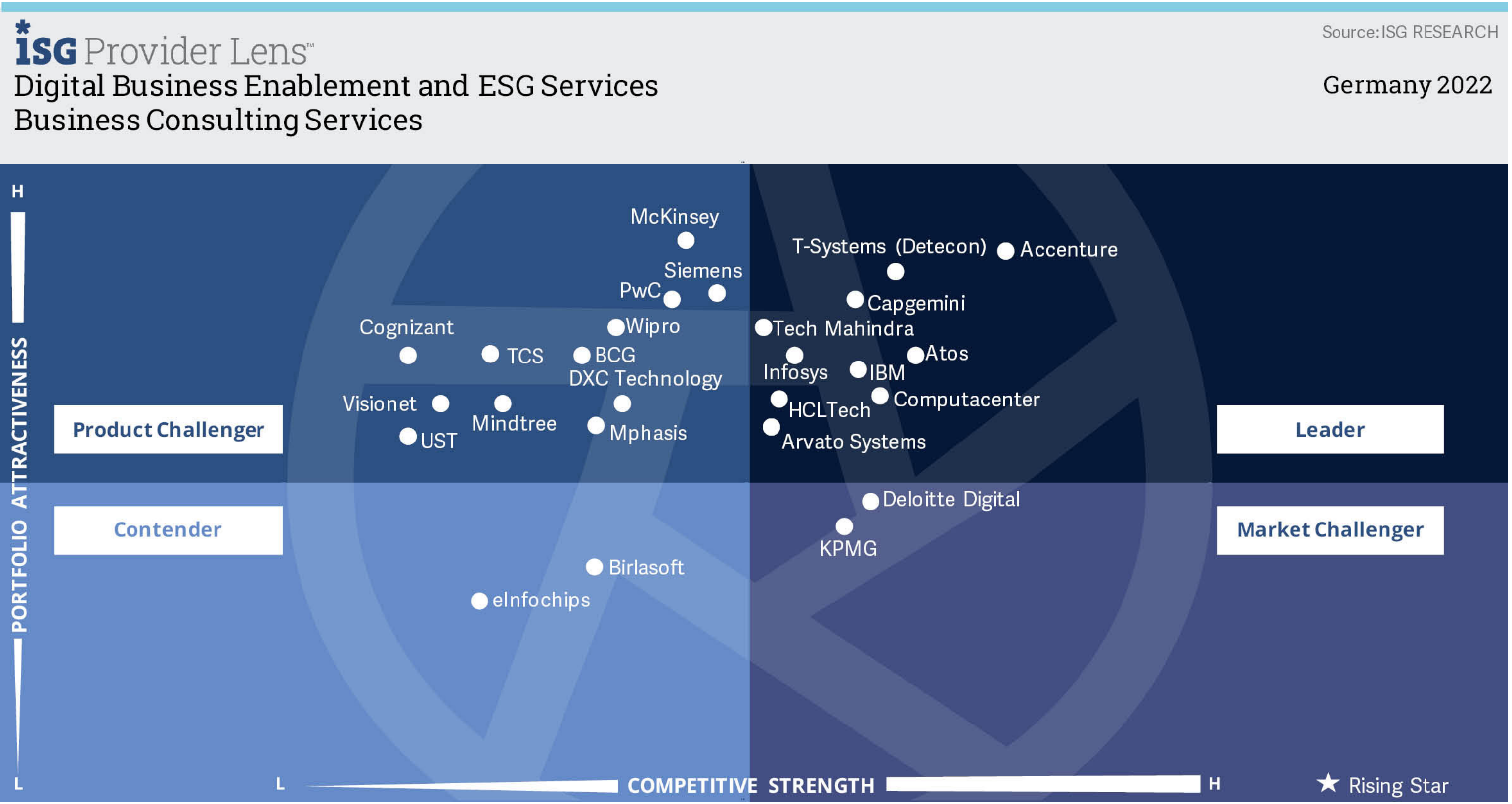
ISG defines the current positioning of digital business consulting service players in Germany with a comprehensive overview of the market's competitive landscape. Digitization and transformation efforts are gaining traction in the market, with sustainability and supply chain issues becoming key themes.

Digital innovation and the adoption of emerging technologies are on the rise with a strong focus on data security in the market. Enterprises are seeking support from providers that have strong business acumen, advisory and technology expertise to help them with industry specific end-to-end digital strategies. They are more inclined towards measuring tangible results and business improvements in their digital transformation efforts. Despite the shortage of skilled workers, the market is witnessing a high demand for ICT transformations and technological developments, which in turn leads to a growing demand for advisory services. Enterprises are actively investing in data, AI, cloud and digital platforms to transform their business models and facilitate industry and product specific differentiations.

Digital transformation professionals should read this report to understand the technology capabilities and product portfolio of providers that can help businesses to transform their services and scale up digital technologies to increase operational efficiency and potentially transform their company culture.

Technology professionals should read this report to understand how providers are leveraging technology advancements to help enterprises reimagine their businesses. The report also highlights the technical and integration capabilities of providers and their partner ecosystem.

Strategy professionals, through this report, will gain insights on providers' advisory and implementation services capabilities and their relative positioning. The report also highlights the providers' expertise in formulating digital strategies that will help enterprises to implement high-value digital technology initiatives.



This quadrant analyzes **providers of advisory or consulting and realization services** associated with enabling and delivering digital transformation plans for German enterprises, starting **from initial advisor consulting to service delivery and rollout.**

Dr. Kenn Walters

Definition

Business consulting services include services that are provided to enterprises across customer and employee journeys, strategy and digital business operations throughout the digital journey. These services help enterprises build new business models by making use of the existing capabilities across market opportunities. The services provided should create significant benefits for clients and drive their 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 should be capable of helping their clients throughout the digital journey, from conceptualizing the vision to delivering the actions needed for the transformation across different industries.

Eligibility Criteria

1. Offer **one or more consulting services** across the digital journey
2. Ability to advise clients on the **different facets of the digital journey**, including strategy, data, technology, organizational change management, operations and consulting on industry processes.
3. Help clients formulate their **digital roadmaps and build the digital strategies** for the short and long terms
4. Offer advice and guidance on **process optimization** to deliver tangible benefits
5. Manage a geographically **dispersed workforce** for its service across geographies

Observations

Driving digital transformational plans through to commercial deployment across an enterprise goes beyond traditional management consulting capabilities. These plans involve deployment frameworks, multi delivery company selection, and management and implementation, as well as active and certified functional testing and delivery to clients' satisfaction, within time and budget goals. Selecting the right partner for an individual enterprise is complex and goes far beyond the ability to plan or describe technology, as it does potential changes to a client's organization and business model to obtain desired results.

CEOs and CTOs should understand that full digital enablement involves many business and organizational structural issues, as well as technological changes, including data center network function virtualization, cloudification, software-defined networking, intelligent edge, edge compute and mobility strategies, along with digital business transformation areas, such as AI, IoT, automation, collaboration and CX. Collectively, these have high influence on agility, flexibility, productivity and profitability across an entire enterprise, and the selected consulting partner should be able to address all of them to be truly comprehensive in their offering. In Germany, there are many such all-encompassing providers of digital business consulting, who we have included within our analysis.

From the 95 companies assessed for this study, 26 have qualified for this quadrant, with 10 being Leaders.

Accenture's consulting approach is supported by a powerful set of diverse assets and capabilities, brought together for specific client engagements. This includes the use of its global network of people, supported by powerful assets, platforms and partnerships.

Arvato Systems' digital business works around three pillars, namely creative partner cloud and AI technologies, industry experts and innovative platforms, and reliable managed services for secure applications and multicloud infrastructures.

Atos creates its digital agenda around core initiatives that range from strategy and experimentation to transformation leadership and performance delivery. The approach combines business and technology expertise.

Capgemini's Invent, the business unit responsible for digital consulting, combines strategy, technology, data science and creative design to help enterprises build strategy and roadmap for the future.

Computacenter

Computacenter delivers technology and network transformation services for large corporate and public sector organizations and helps by advising, designing, procuring, transforming and managing their technology infrastructure to enable digital transformation.

HCLTech

HCLTech's solutions bridge the gap between digital strategy and execution and helps organizations in both defining transformation initiatives and executing them by aligning operating models with engineering best practices.

IBM

IBM brings digital strategy, data and analytics, experience design and platform implementation expertise to clients' CX strategy. IBM iX® combines end-to-end business strategy with customer insights and experience design. IBM has retained its consulting unit, Global Business Services, after the Kyndryl spin-off.

Infosys

Infosys has a powerful consulting offering to develop strategies that realize and scale the value derived from successful and sustained delivery and the orchestration of customer and employee experience. It operationalizes experience capability for clients.

Tech Mahindra

Tech Mahindra's Business Excellence group is the consulting and management services division responsible for digital business consulting. Tech Mahindra has gained capabilities, either through acquisitions or organically in the areas of cloud, CX, physical design and niche design agencies, with many recently focused on digital transformation.

T-Systems (Detecon)

T-Systems (Detecon) advises on digital ecosystems and innovation-driven digital growth to enable clients to achieve superior CX. With the integration of Detecon's consulting competencies into the overall portfolio of T-Systems, clients receive all benefits from a single source.

Computacenter

Leader

"Computacenter offers client-centric, industry experienced digital business consulting."

Dr. Kenn Walters

Overview

Computacenter Germany is a part of the global Computacenter Group, with integration and service centers in its German headquarters in Kerpen, a service center in Erfurt and many regional offices across the country. The company delivers technology and network transformation for large corporate and public sector organizations in Germany and offers advisory/consulting support (including audits, sourcing and implementation) within many industry verticals.

Strengths

Valued delivery partner with long-term references in Germany: Computacenter is a valued and reliable provider of high-quality consulting and advisory services, technology, engineering and transformational services in Germany. It has a large portfolio of major references, many with multiyear and repeat engagement characteristics.

Digital realization and enablement practices: Computacenter delivers its digital enablement solutions portfolio as a part of consulting-led process engagement. The portfolio includes Digital Connect (SD networking solutions), Digital Me (workplace services), Digital Power (cloud and data center services) and Digital Trust (security).

Digital Me leveraging UX: Digital Me helps create a flexible, consistent UX for consulting deliverables, regardless of platform and location. This assists in gaining user acceptance for a new experience-led digital workplace and thereby boosts competitiveness, collaboration and solution agility. It also helps reduce the cost of technology and operations.

Caution

Computacenter focuses on both midmarket and large accounts in Germany, with many solutions being adopted after successful and highly competitive PR and sales campaigns by targeted large regional and global providers. A continued focus on highly active PR campaigns, together with social media marketing in the German language, and the addition of more references and use cases to its marketing materials are still required for the company's continuous success in Germany.

Appendix

The ISG Provider Lens 2022 – Digital Business Enablement and ESG Services analyzes the relevant software vendors/ service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of October 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

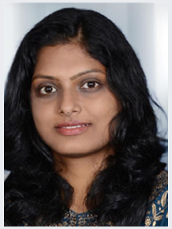
The study was divided into the following steps:

1. Definition of Digital Business Enablement and ESG Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Author

Dr. Kenn Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience in directing and managing major transformational technology projects, research and development programs, and has extensive experience within providers and in global industry research and management consultancy. For ISG, Kenn has written over 100 articles as a distinguished lead analyst for ISG Insights in areas such as digital transformation, cloud managed networks, SD networking, SDN, and digital disruptors. He is a Distinguished lead analyst and author for multiple regions in the Provider Lens™ reports, (https://isg-one.com/research/isg-provider-lens) in such areas as Networks – Software Defined Networking, Digital Business Solutions and Services, Contact Center as a Service and CC CX. He holds BSc, MSc and PhD degrees in computer science and communications systems.



Research Analyst

Bhuvaneshwari Mohan
Research analyst

Bhuvaneshwari is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital Banking Services and Digital Business Enablement and ESG Services. She supports the Lead Analysts in the research process along with developing content from an enterprise perspective and authors Global Summary report. She comes with 7 years of hands-on experience and has delivered insightful custom reports across verticals. She is a versatile research professional having experience in Competitive Benchmarking, Social Media Analytics, and Talent Intelligence. Prior to ISG, she has held research positions with IT & Digital Services Providers and was predominantly part of Sales Enablement teams. Her core areas of expertise lie in AI/ML, Blockchain, IoT, Digital and Experience Engineering.

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

About Our Company & Research

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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.

ISG Provider Lens™

DECEMBER 2022

REPORT: DIGITAL BUSINESS ENABLEMENT AND ESG SERVICES