*ISG Provider Lens™

ServiceNow Ecosystem Partners

ServiceNow Managed Services Providers

ServiceNow is rapidly transforming the workflows across the enterprise portfolio.

Customized report courtesy of:

HCLTech

QUADRANT REPORT | MARCH 2023 | U.S.

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ServiceNow is driving business transformation for its enterprise clients by focusing on Functions - specialized platform capabilities

Enterprise service management (ESM) is the underlying capability that converges the nature of processes without distinguishing them. It has become the driving factor of every workflow management platform. As enterprises transition to a new work model, improved service support and efficient information flow of data are required to conduct systemic interactions. The latest advancement in the workflow system is the development of low-code/no-code platforms that help users create processes or applications, regardless of their technical knowledge. Orchestration, automation, distributed tracking and analytics are the most sought-after features embedded in these platforms. Enterprise workflow management vendors align their offerings to meet transforming business demands

and productivity requirements to amplify the platform engagement quotient. With an emphasis on AI and ML technologies, ServiceNow has been increasing its capabilities and product range. It continues to improve its AI-powered capabilities, such as predictive analytics, virtual agents and NLP, to help enterprises automate workflows and decision-making processes. Moreover, ServiceNow constantly enhances its platform's user experience, making it more intuitive and user-friendly. Overall, ServiceNow will play an essential part in enterprises' digital transformation, assisting them in streamlining operations, increasing productivity and improving CX.

With a range of enterprise portfolios and related processes, ServiceNow positions itself as an experience platform. Purpose-led applications, productivity-driven processes and modern workflows are critical to improving the overall business potential. The ServiceNow platform helps enterprise clients modernize workflows and drive their business. At the same time, service providers align with enterprise clients' business objectives, enabling them to capture

Enterprises seek platforms that deliver enhanced CX and business success.

business data across various enterprise systems and make critical decisions. This data fabric is building the information mesh through seamless processes and workflows. An analyst with business process knowledge can design, develop and deploy a process blueprint on the ServiceNow platform.

Technology adoption is elevating the competency and capability of platforms to achieve higher ability and improved accuracy. Similarly, ServiceNow aligns the features on its platform with emerging technologies and preeminent capabilities to deliver user experience and convenience at every point of interaction. ServiceNow formulates solutions considering employee productivity and hybrid workplace challenges by studying employee journeys and simplifying the interactions with the platform. The hybrid workplace model transforms application usage and criteria. Most users demand platform-independent and personalized experiences during every interaction. Enterprise clients strive to deliver these experiences to their internal stakeholders for better response rates and accurate service provisioning.

ServiceNow is one of the fastest-adopted platforms for ESM and infrastructure services in the U.S. market. The primary reason for ServiceNow being preferred over other platforms is its increasing relevance of solutions focused on business functions. The Now Platform is an excellent example of personalization and customization to design business- and industry-specific workflows. ServiceNow has strategic partnerships with service providers and enterprise clients to build customized, vertical-specific modules to meet unique business requirements. For instance, the telecommunications module, covering telecom service management and telecom order management. Healthcare and life sciences service management, financial services operations and public sector digital services are a few latest developments that orient with the respective business verticals.

Similarly, ServiceNow has already released human resource service delivery (HRSD) services and customer service management (CSM), tapping into the service functions of enterprises. The platform expands in every dimension by covering all portfolios and

business functions. Every new ServiceNow release includes features and advancements to address IT/OT gaps or enhance functionality. Security operations, GRC and enterprise asset management continuously lead to product maturity and bring rapid changes in business structures.

The future requirements are being discussed, and the effort to build future-ready offerings by studying the market trends and developments is driving ServiceNow to explore possibilities and gain capabilities through acquisitions. Hitch Works, Dotwalk, Mapwise, Era Software and Lightstep (microservices observability tool) are a few recent acquisitions adding exclusive capabilities to increase the intelligence quotient of the platform and expand its reach to large accounts.

ServiceNow continues to develop and innovate novel features that further streamline processes, with new features being developed regularly, which is accelerated due to technological advancements.

The latest feature being implemented by ServiceNow includes the new Tokyo release,

which was launched in September 2022, with the general release planned for the third quarter of this year.

The prominent features include the admin dashboard, which enables the user to keep track of various applications provided on the platform and provide alerts for available updates. Other dashboard features include a favorite folder and a widgets section. The widgets offer the flexibility of setting out the apps according to a client's requirements, making it more accessible to the client as a functional consultant. The other features include Formula Builder, which is mainly used in the development of fields and tables without any coding, reducing errors and accelerating the build time. The formula can be created for a particular field based on the App Engine Studio application builder. ServiceNow has further added basic mathematical formulas into the latest Tokyo release. The other features of this new Tokyo update include condition builder, user presence, multilingual notification support, S/MIME (Secure/Multipurpose internet Mail Extensions) support for inbound/outbound emails, guided setup, ATF test generation,

Executive Summary

field service management, financial services operations, telecommunications service management, and order management.

The workflow platforms will evolve faster to become inclusive across processes. The game-changing milestones will be ambitions such as building business rules on the platform and developing an intuitive dashboard driven by analytics. ServiceNow has always complemented industry and customer base developments and acted promptly to stay ahead of the competition. Hence, ServiceNow is the market leader in the enterprise workflow management space and continues to retain this position consecutively for the second year. Enterprise services and the ServiceNow platform will keep evolving with time. It is still unclear how the competition will drive the shift in strategies and redefine the potential and ability of the platform.

Enterprises are witnessing an increase in the pace of business transformation with portfolio consolidation

Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
Advance Solutions	Product Challenger	Contender	Product Challenger
Aspire Systems	Product Challenger	Contender	Product Challenger
Atos	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Coforge	Rising Star ★	Product Challenger	Rising Star ★
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader

Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
DXC Technology	Leader	Market Challenger	Leader
Evoke Technologies	Contender	Contender	Not In
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Market Challenger	Not In	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger
Glidefast	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
HGC	Contender	Contender	Contender

Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader
INRY	Rising Star ★	Rising Star ★	Product Challenger
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Leader	Leader
NewRocket	Not In	Not In	Contender
NTT DATA	Market Challenger	Not In	Market Challenger
RapDev	Not In	Rising Star ★	Not In

Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Market Challenger	Market Challenger
Thirdera	Product Challenger	Product Challenger	Product Challenger
Trianz	Product Challenger	Product Challenger	Product Challenger
UST	Contender	Not In	Contender
Wipro	Leader	Leader	Leader
YASH	Not In	Product Challenger	Product Challenger

Key focus areas for **ServiceNow** Ecosystem 2023.

Simplified Illustration Source: ISG 2023

ServiceNow Consulting Services

ServiceNow Implementation and Integration Services

ServiceNow Managed Services Providers

Definition

ServiceNow just announced for its third quarter, 2022, subscription revenues of $1,742 million, which translates to 22 percent year-over-year growth and is a clear demonstration that the ServiceNow platform fits well to the market demand for a transformation based on improved and engaging CX.

ServiceNow Partners are benefiting from the growth once every dollar spent on subscription licenses levers into substantial revenue for the ServiceNow Ecosystem.

The ServiceNow Ecosystem 2023 study examines the extensive, complex global partner network of one of the leading software solutions that allow companies to digitalize, connect and automate siloed processes to make workflows smoother. The broad acceptance of ServiceNow's offerings among the user community has led to the exponential growth of the company across the globe. Enterprises seek accredited and reliable professional services to fully utilize ServiceNow's broad functionalities – from process redesign and software implementation and integration to application management and training. Various offerings and certification levels indicate the focus of partner companies, covering full-scale lifecycle support and laser-focused services for specific tasks.

Digital transformation is powering the future of organizations that are exploring new ideas, innovating at scale and realizing value faster by empowering people to do their best in a rapidly changing world, and the ServiceNow platform accelerates that journey.

The ISG Provider Lens™ ServiceNow Ecosystem 2023 study analyzes the services and offerings of ServiceNow partners in the U.S., Brazil, Germany and Australia, in selected segments. The findings from the analysis help assess the service providers operating in the defined segments for the strength of their respective portfolios and their competitiveness in the market.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: ServiceNow Consulting Services, ServiceNow Implementation and Integration Services and ServiceNow Managed Services Providers. This ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- 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 service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 matrixcontaining four segments (Leader, Product & 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.

★ **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.

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.

ServiceNow Managed Services Providers

ServiceNow Managed Services Providers

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. for evaluating ServiceNow managed services providers.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow managed services to enterprises in the U.S. and how each provider addresses the critical challenges faced in the region.

The critical success factors for enterprises in the U.S. are quality, availability and agility of the managed services workforce. Enterprises look for managed service providers with proven capabilities and a highly engaging workforce with adequate knowledge of technology and processes to deliver efficient results, including reduced expenses and minimized downtime.

Relevance and recency of ServiceNow skills in supporting and upgrading ServiceNow solutions and certifications on the latest versions of ServiceNow releases are some of the major technical capabilities that enterprises look for in a service provider. As ServiceNow releases are frequent, managed service providers must be updated with the changes and the impact the new version brings to enterprises.

Strategy professionals should read this report to understand the capability of service providers to manage and support the maintenance of ServiceNow solutions across all portfolios.
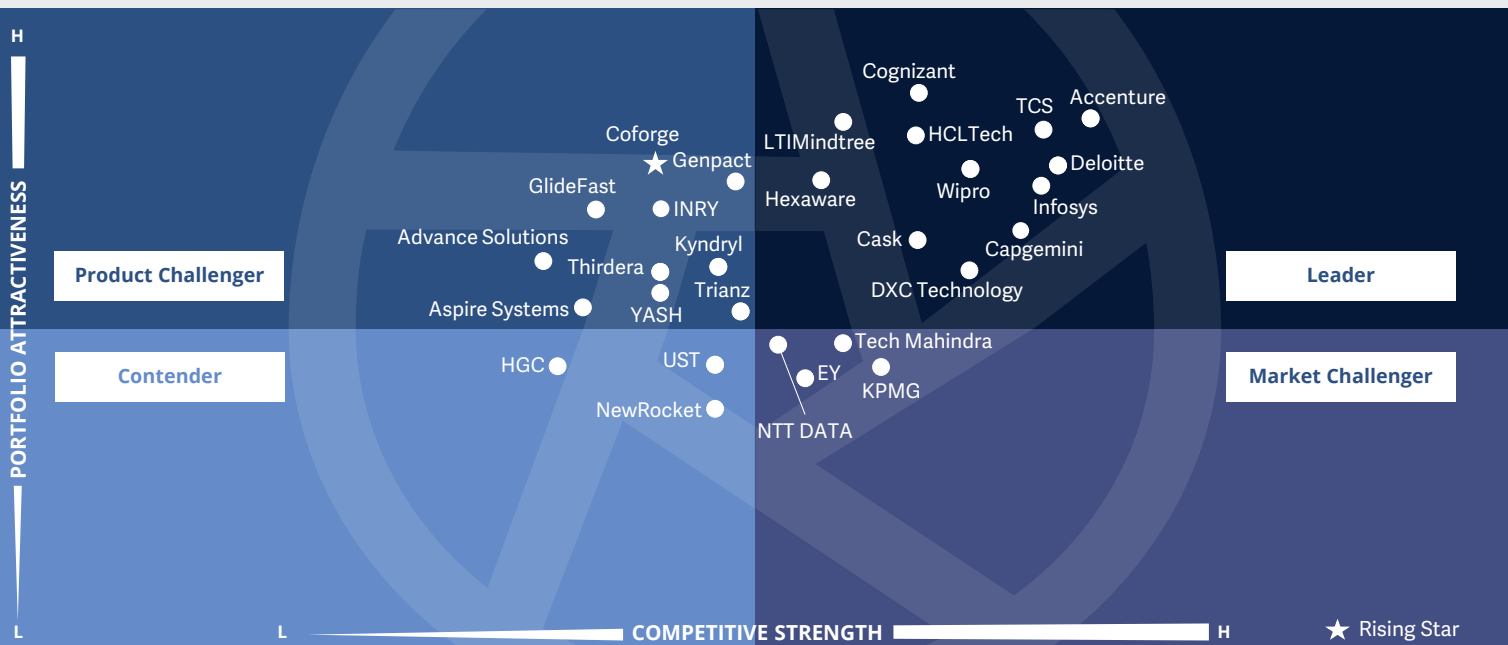
Service line and functional professionals should read this report to rationalize the fitment of ServiceNow resources and workflows across all services.

Service delivery professionals should read this report to understand how ServiceNow managed service providers retain their credibility and service quality.

ISG Provider Lens™

ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

L

Cognizant

Coforge
★ Genpact

LTIMindtree

GlideFast

INRY

Advance Solutions

Hexaware

Kyndryl

Thirdera

Aspire Systems

Trianz

YASH

HGC

UST

NewRocket

TCS   Accenture

HCLTech

Deloitte

Wipro

Infosys

Cask

Capgemini

DXC Technology

Tech Mahindra

EY
KPMG

NTT DATA

Leader

Market Challenger

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates the competency of service providers to **manage ServiceNow post-implementation activities, including customization**. The resource count, **certifications and technology components** will also be considered.

Dr. Tapati Bandopadhyay

ServiceNow Managed Services Providers

Definition

This quadrant assesses providers for their capability to offer managed services for maintenance and support functions, including monitoring; remote support; and the centralized management of the Now Platform, workflows and the applications that run on the platform.

With the growing popularity of the DevOps method, managed service providers are expected to comply with a new set of requirements. These providers need to be prepared for the continuous evolution of the platform, which can challenge the status quo of the existing solution, and the management of two new releases in a short period.

Considering the complexity of workflows that need to be supported, providers must deliver services with global reach and cross-organizational use. They also need to support a highly sophisticated and integrated application landscape and prove how they operate in or integrate with a multi-vendor environment.

When analyzing the providers in this quadrant, maintenance, data quality management, data security and compliance-related aspects are considered. Managing multi-cultural aspects when nearshore/offshore delivery is involved is as important as offering different deployment options, considering potential data privacy and residency concerns. Also important are different pricing options due to the new economic situation in many countries.

Eligibility Criteria

1. **Experience with support:** Includes ServiceNow's Now Platform, workflows, third-party applications, integrators and accelerators, newly released features/modules and upgrades

2. **Delivery capabilities:** Efficient delivery with proximity to clients

3. **Technology partners:** Partnerships with key software providers and breadth of application management service (AMS)-related portfolio

4. **Service integration and management (SIAM) and delivery models:** Experience in managing ServiceNow in broader applications, such as AIOps, MLOps and ITOps

5. **Maturity of delivery and contract models:** Ability to manage multiple vendors and dependencies between toolchains and support SLAs

6. **Broad customer base:** Includes local use cases and references

7. **Intelligent, adoptive and evolutive maintenance:** In sync with upgrades and functionality enhancements from ServiceNow and technology ecosystems, as well as with service integrators, in-house engineering teams, external partners and specialist tool providers

8. **Ability to manage decentralized deployment inside the organization:** Adoption of low-code/no-code and citizen developer techniques; training for identification and delivery; and user knowledge updates on new releases, versions, features and modules

In addition to the criteria mentioned above, the following parameters apply to all the quadrants:

* Unique differentiators

* Economic stability

* Market position

Observations

The technology landscape is evolving with innovative solutions that re-define business processes and workflows. The managed services delivery model is a key focus area and is rapidly growing, with the availability of ServiceNow resources. Service providers are increasingly adopting ServiceNow's in-house programs and are using its features to improve processes that adhere to the business needs of enterprises. Clients leverage resources for short- to moderate-term service engagements based on their work requirements. This initiative is backed by ServiceNow to increase and build resource pool to meet the continuous demands in the market. ServiceNow also provides service business capability and key performance indicators (KPI) to optimize the CapEx around technology, allowing providers to align their resources in other areas.

- ServiceNow's core platform capabilities and low-code/no-code engine enable enterprises to execute legacy architecture transformation with a level of insight, scale and speed that was not available earlier.

- Enterprises are utilizing the ServiceNow ITSM capabilities to map business services to the technology they depend on. They are able to comprehend the risks of legacy infrastructure and technology-enabled availability and performance of their business services, while having an insight into the supply chain they depend on for the delivery of these services.

- Providers are focusing on the development, testing and integration of custom ServiceNow applications, while implementing new ServiceNow products.

From the 70 companies assessed for this study, 29 have qualified for this quadrant with 12 being Leaders and two Rising Stars.

accenture

Accenture's managed service offering covers the end-to-end lifecycle of all the solutions offered, building strong client confidence. It has developed a self-service, automated billing solution that generates and validates documents with a single click.

Capgemini

Capgemini and ServiceNow bring together a combination of processes, technologies and services to deliver experiences with sustainable business outcomes for clients looking for managed services. The ServiceNow HRSD application is one such example.

Cask

Cask's ServiceNow managed services include proactive maintenance, technical support, strategy consulting, ongoing enhancements, integration support, analytics, reports and dashboards, ServiceNow optimization and platform automation.

cognizant

The combined experience of **Cognizant** and ServiceNow brings together a well-balanced managed services portfolio. Cognizant leverages its long-standing tools and technology know-how to offer a wide range of managed services.

Deloitte

Deloitte's ServiceNow managed service offering covers a range of services that are imperative for bolstering clients' confidence. These include security operations, ESM, automation, and AI and ML.

DXC TECHNOLOGY

DXC Technology, together with ServiceNow, provides unique managed services that are integrated with differentiators and accelerators to strengthen its positioning in the market. It considers ServiceNow as a preferred partner for DXC platform X™.

ServiceNow Managed Services Providers

HCLTech

HCLTech is a leading ServiceNow partner, focusing on leveraging its established managed services competencies across all enterprise client segments. Its market strategy is based on ServiceNow's ITSM product offering. HCLTech also empowers managed service clients with ServiceNow solutions.

HEXAWARE

Hexaware leverages its long-standing partnership with ServiceNow to offer managed services. It offers various service bundles and provides end-to-end visibility by making ServiceNow the single system of records and engagement using CSDM.

Infosys®

Infosys' ServiceNow managed services ensure seamless integration of workflows on the ServiceNow platform, considering clients' interests and outcomes. This enables the company to achieve continuous process and service improvements.

LTIMindtree

LTIMindtree has skilled ServiceNow developers for its managed services. The expanded talent pool, combined with its collaborative learning approach and culture, positions LTIMindtree as a unique partner for clients that focus on achieving success with ServiceNow applications.

TATA CONSULTANCY SERVICES

TCS takes a unique and holistic approach to ServiceNow managed services, focusing on applications, the development of new modules, releases and updates, client productivity and outcome management.

wipro

Wipro leverages ServiceNow managed services to share a common data model with clients by deploying world-class, enterprise-wide workflow engines to enhance productivity. With IRM-GRC solutions, ServiceNow helps clients transform security and risk management.

Coforge

Coforge (Rising Star), along with ServiceNow, offers unique, domain-aware, technologically savvy managed services, ranging from instance setup (dedicated/shared), license provisioning, maintenance and support to enhancements, upgrade support, architecture and platform optimization.

HCLTech

Leader

"HCLTech delivers ServiceNow managed services with outcome-focused business solutions, addressing challenges associated with customer value realization."

Dr. Tapati Bandopadhyay

Overview

HCLTech is headquartered in Noida, India, and operates in 52 countries. It has more than 219,300 employees across 215 global offices. In FY22, the company generated $11.5 billion in revenue, with IT and Business Services as its largest segment. HCLTech demonstrates experience in application management and support, along with maintenance and development. It also provides solutions for HR service management, IT operations management and security operations. It has 39 delivery centers and 10 innovation labs in the U.S.

Strengths

Outcome-focused business solutions: HCLTech works with ServiceNow to develop and deliver maintenance and managed services competencies not only in the ITSM space but also in the broader fields of ITOM and non-IT services, such as field service management and legal services delivery. Its go-to-market strategy is based on GBP, leveraging ServiceNow's ITSM product offering.

Maintaining ITOM and the App Engine deliverables: The end-to-end automation of the service mapping lifecycle can act as a one-stop shop for all types of service maps by providing a self-service portal that supports building and delivering service maps faster.

Solving unique customer value realization issues: HCLTech's ServiceNow practices, including managed services, focus on solving customer problems rather than just managing the technology assets in a one-size-fits-all manner. For instance, the customer solutions created for legal service delivery include additional legal matter templates and automated workflows led by domain experts. These knowledge assets, especially for advanced and complex ServiceNow competencies, make a consistent and optimizing impact on clients' operational scenarios.

Caution

HCLTech can prove its capabilities by generating value from the success stories posted by its U.S. clients on platforms related to ServiceNow managed services. These success stories can establish efficient and cost-effective benchmarks for different complex and traditional digital industries and other diverse segments.

Appendix

The ISG Provider Lens™ 2023 – ServiceNow Ecosystem Partners report analyzes the relevant software vendors/service providers in the U.S., 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 February 2023 , 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 ServiceNow Ecosystem Partners market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & 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

Author & Editor Biographies

Author

Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst

Arjun Das
Research Specialist

Arjun Das is a research specialist at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platform and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than 8 years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain.

Author & Editor Biographies

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

ĭSG 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.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™