ISG Provider Lens™

SAP HANA Ecosystem Services

SAP S/4HANA System Transformation - Large Accounts

U.S. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCL

July 2021

About this Report

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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 May 2021, 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 lead author for this report is Kartik Subramaniam. The editors are Ipshita Sengupta and John Burnell. The research analyst is Arjun Das and the data analyst is Kankaiah Yasareni. The Quality and Consistency Advisor is Yadu Singh.

ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on 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.

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EXECUTIVE SUMMARY

S/4HANA, SAP's intelligent and integrated enterprise resource planning (ERP) system running on SAP HANA, has been undergoing an evolution to meet the business requirements of enterprises that are looking for a clear digital core while embarking on their digital transformation journeys. It aims to help enterprises transform their business processes through the use of artificial intelligence (AI), either on the cloud or on-premises. With a focus on digital transformation, SAP S/4HANA aims to alleviate enterprise business processes through its interactive interface and by applying analytics to speed insights delivery.

The transformation delivered varies by macroeconomic factors, coupled with developments such as COVID-19 that have an impact across geographies. The pandemic impacted the adoption of SAP S/4HANA as enterprises slowed down their transformation momentum and focused more on cost efficiency and "keeping the lights on services" to operate in the uncertain circumstances. However, toward the latter part of 2020, a gradual recovery was observed, led by positive economic sentiments. As service providers settled down with remote modes of working for their employees, their projects continued to be delivered virtually without much disruption. One of the implications of COVID-19 has been remote working. This has led to consultants working from home or remote locations away from their offices. A key enabler of this new work model has been the increased adoption of collaboration tools.

With the need to rein in costs, enterprises could consider cloud as an enabler of cost reductions, upgrades and agility. At the same time, organizations could continue with a staggered approach for SAP S/4HANA, to ensure minimum disruption to their existing business processes and derive maximum value for their investment and efforts.

Another key development in 2021 has been SAP's new campaign, "RISE with SAP." The initiative bundles existing SAP assets by offering business-transformation-as-a-service to enterprises and accelerating their cloud adoption. Clients benefit from reduced licensing costs. They can put their perpetual enterprise resource planning license into the deal and replace the annual ERP maintenance fee with a monthly pay that, bundled with cloud usage fees, makes a positive business case.

SAP offers both on-premises and cloud options for SAP S/4HANA to meet the business requirements of both large and midsize enterprises. While the on-premises option offers more customization and requires a greater management effort, the cloud option is suitable for enterprises seeking limited customizations, automatic upgrades and faster implementation.

The presence of S/4HANA certified professionals serves as one of the differentiators for providers, indicating their expertise in managing complexity and delivering services. Investments in reskilling initiatives have yielded results for providers; they have expanded the base of SAP- and S/4HANA-certified professionals in their respective organizations.

Service providers continue with their focus to integrate agile and DevOps processes into SAP services, across development, implementation and managed services. Providers are not only leveraging their proprietary tools and accelerators to deliver

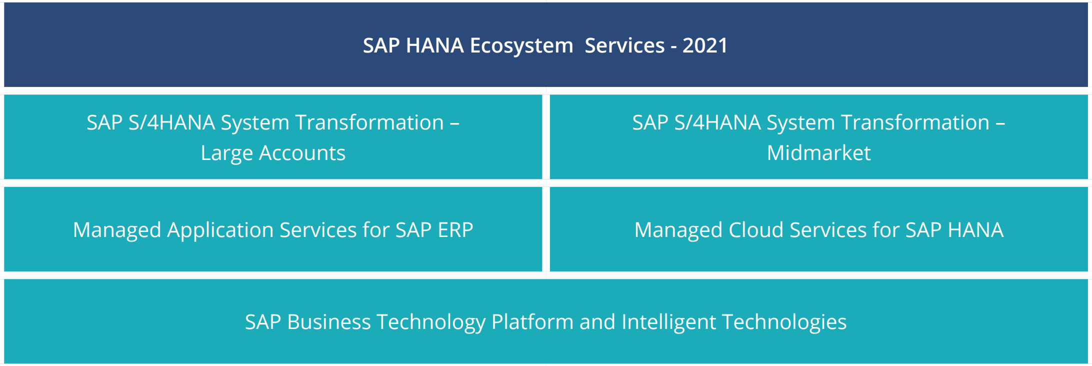
S/4HANA services, but also are integrating agile and DevOps methodologies with their frameworks to increase efficiencies and reduce delivery time cycles. From a marketing strategy perspective, providers have innovation hubs to establish a connection with their customers and undertake innovation-led ideation initiatives in the U.S.

Some of the key trends in the U.S. are summarized below.

- **Frameworks, tools and accelerators for SAP S/4HANA services delivery:** Service providers continue to focus on developing tools and accelerators to accelerate the SAP S/4HANA journeys of their customers. They are investing to shore up their assessment areas, code reconciliation, data management, testing and other components of S/4HANA conversions, transformations and migration tools. These assets and tools are powered by AI, enable safer and faster transformations, and reduce the SAP S/4HANA implementation time for enterprises.
- **Use of hybrid agile and DevOps methodologies:** Service providers are investing in and integrating hybrid agile and DevOps approaches such as Scaled Agile Framework (SAFe) for rapid development, creation of prototypes, deployment and faster release cycles. They are also using agile sprints and have dedicated centers of excellence (CoEs) for them.
- **Industry-specific solutions for transformation:** Service providers have increased their focus on creating ready-to-run templates, industry-specific solutions and preconfigured offerings for S/4HANA and SAP Business Technology Platform (SAP BTP) to help customers with integration and business agility. Enterprises are looking for such solutions as a differentiator for faster time-to-market, and to become intelligent enterprises. Several providers have also established innovation centers, labs and other facilities to showcase their solutions and provide a platform for enterprises to experience them before deployment.
- **Increased use of bots and automation in managed services:** With a focus on lowering costs and increasing delivery speed, service providers are increasing their use of conversational AI, in the form of bots, and their use of robotic process automation (RPA) for improving operational efficiency, streamlining incident management, configuring triage and providing other benefits.
- **Intelligent focus and SAP BTP:** Service providers are leveraging emerging technologies such as Internet of Things (IoT) and blockchain to create ready-to-use solutions for various processes such as supply chain and for industries such as retail, utilities and manufacturing. Providers continue to leverage their partnerships with SAP to co-innovate and co-develop solutions to serve specific use cases for different industries. ISG defined the SAP Cloud Platform (SCP) and SAP Leonardo Services quadrant before SAP renamed its application programming interface (API) and innovation library platform Leonardo to Intelligent Enterprise platform. In 2021, SAP changed the name again, now calling it SAP Business Technology Platform (SAP BTP). This platform helps enterprises through integration, extension and data-to-value from all SAP and third-party applications and assets.
- **Partnerships with hyperscalers:** Most of the service providers have developed alliances or partnerships with all leading hyperscaler cloud services providers to offer platform application services in areas such as archiving, backup, disaster recovery, security, compliance and monitoring.

Introduction

Simplified illustration



Source: ISG 2021

Definition

With more than 21,000 partner companies, SAP has a significant impact on the IT market, in terms of both innovation and global IT spend. This research study identifies the top SAP partner companies that offer differentiated services to enterprise clients, and deliver the best results for their clients' SAP S/4HANA investments.

SAP S/4HANA offers superior performance by using in-memory technology. As transformation projects require detailed planning and business participation, clients should refine their selection process and criteria to find the right partner for providing higher business value at low cost.

For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study includes references to case studies and success stories. ISG has identified viable tools and frameworks for large SAP

Definition (cont.)

transformations and greenfield SAP S/4HANA implementations that are delivered in record time for midmarket clients. The right partner can support clients and allay fears arising from the end of support for legacy SAP ERP, which is scheduled for 2027.

With the introduction of SAP BTP, it has become evident that the major benefits of adopting SAP S/4HANA are its innovation backbone, as offered through SAP BTP as well as the novel ways of leveraging APIs and microservices. In this context, SAP partners have demonstrated innovation by using AI, analytics, IoT, mobile apps, RPA and blockchain to disrupt markets and transform businesses.

For clients that have adopted SAP S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security. In addition, recently, AI and machine learning (ML) have been incorporated into application maintenance and operations to predict incidents and automate troubleshooting, ticket processing and provisioning. This allows for increased scale that can lower support costs. This study identifies service providers that effectively apply new technologies to support SAP S/4HANA and HANA databases.

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

- Transparency on providers' relevant strengths and weaknesses
- A differentiated positioning of providers by segments
- Focus on different markets. This study focuses on the U.S.

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

Definition (cont.)

Scope of the Report

This study considers the top service providers certified by SAP to support clients in ERP and HANA products. These service providers were qualified in five quadrants of the SAP HANA Ecosystem Services:

The **SAP S/4HANA System Transformation – Large Accounts quadrant** assesses consulting and system integration service providers on their abilities for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite, with SAP Fiori as the user interface. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

The **SAP S/4HANA System Transformation – Midmarket quadrant** assesses consulting and system integration service providers on their ability to offer a rapid turnaround for SAP S/4HANA implementations for clients in the midmarket (which ISG defines as companies with less than 5,000 SAP users or revenue of less than $1 billion).

The **Managed Application Services for SAP ERP quadrant** assesses service providers for their capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized management of applications for SAP S/4HANA and legacy SAP business suites such as ECC 6.0.

The **Managed Cloud Services for SAP HANA quadrant** assesses service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure and cloud operations. The technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, enabling these providers to support clients in migrating from a private cloud to a public cloud in exceptional cases.

The **SAP Business Technology Platform (BTP) and Intelligent Technologies quadrant** examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on SCP. These providers offer lab facilities for clients to experiment with emerging technologies. They offer innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA.

Provider Classifications

The provider position reflects the suitability of IT 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 US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts**: Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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).

Rising Star

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

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.

SAP HANA Ecosystem Services - Quadrant Provider Listing 1 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
Accenture	Leader	Not in	Leader	Leader	Leader
Applexus	Not in	Product Challenger	Not in	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Rising Star
Birlasoft	Not in	Leader	Product Challenger	Contender	Contender
Capgemini	Leader	Product Challenger	Leader	Leader	Leader
Clarkston Consulting	Not in	Contender	Not in	Not in	Not in
Cognizant	Product Challenger	Product Challenger	Leader	Product Challenger	Leader
Delaware	Not in	Contender	Not in	Not in	Not in
Deloitte	Leader	Not in	Not in	Not In	Not In
DXC	Product Challenger	Not in	Leader	Product Challenger	Contender
EPI-USE	Not in	Rising Star	Not in	Contender	Not In
GyanSys	Not in	Contender	Not in	Not In	Not in

SAP HANA Ecosystem Services - Quadrant Provider Listing 2 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
HCL	Leader	Product Challenger	Leader	Leader	Product Challenger
Hexaware	Not in	Leader	Product Challenger	Not In	Not In
IBM	Leader	Not in	Leader	Leader	Leader
Infosys	Leader	Leader	Rising Star	Leader	Leader
LTI	Product Challenger	Not in	Not in	Not in	Not in
Lumen	Contender	Not in	Contender	Contender	Contender
Mindset Consulting	Not in	Product Challenger	Contender	Product Challenger	Not in
Mindtree	Not in	Leader	Product Challenger	Product Challenger	Not In
Mphasis	Not in	Product Challenger	Contender	Not In	Contender
Navisite	Not in	Rising Star	Contender	Contender	Not in
NTT DATA	Product Challenger	Leader	Product Challenger	Rising Star	Product Challenger
oXya	Contender	Not in	Contender	Not In	Contender

SAP HANA Ecosystem Services - Quadrant Provider Listing 3 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
Softtek	Product Challenger	Not In	Product Challenger	Not In	Contender
Stefanini	Contender	Product Challenger	Product Challenger	Not In	Not In
Suneratech	Not In	Product Challenger	Product Challenger	Not In	Not In
TCS	Leader	Not In	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Leader	Leader	Product Challenger
T-Systems	Product Challenger	Not in	Product Challenger	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Virtustream	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Rising Star	Leader	Leader	Leader	Leader
Yash Technologies	Not In	Contender	Contender	Contender	Not In
Zensar	Not In	Product Challenger	Not In	Not In	Not In

SAP HANA Ecosystem Services Quadrants

ENTERPRISE CONTEXT

SAP S/4HANA System Transformation - Large Accounts

This report is relevant to enterprises across industries in the U.S. for evaluating providers of SAP S/4HANA consulting and implementation services for large system transformations.

In this quadrant report, ISG highlights the current market positioning of SAP S/4HANA consulting and implementation services providers in the U.S., based on the depth of their service offering and market presence.

S/4HANA transformation across industries has been influenced by the pandemic, with most enterprise clients focusing on developing automated-led processes rather than relying on people-intensive ones. To cater to enterprise needs, service providers have incorporated automation-led approaches to achieve better synchronization of the projects and helps enterprises in several complex transformations. DevOps and continuous integration/continuous delivery (CI/CD) processes have reduced the risk for S/4HANA transformation and accelerated the deployment for many enterprise clients.

The complexities of an SAP S/4HANA implementation are directly proportional to the size of an enterprise. Because most large enterprise implementations occur at a global level involving multiple regions, the projects become very complex. Therefore, large enterprise clients prefer service providers with a skilled workforce, high integration capabilities and a global presence. Enterprises should not only look at the depth of offering of a service provider's offering, but also the provider's regional presence and local expertise.

Compared with companies in other regions and countries, large enterprises in the U.S. are leading adopters of SAP S/4HANA in their business processes. U.S. enterprises have specific IT infrastructure needs, of which easy scalability and adaptability are top priorities.

Who should read the report:

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4HANA services for day-to-day analysis and dashboarding.

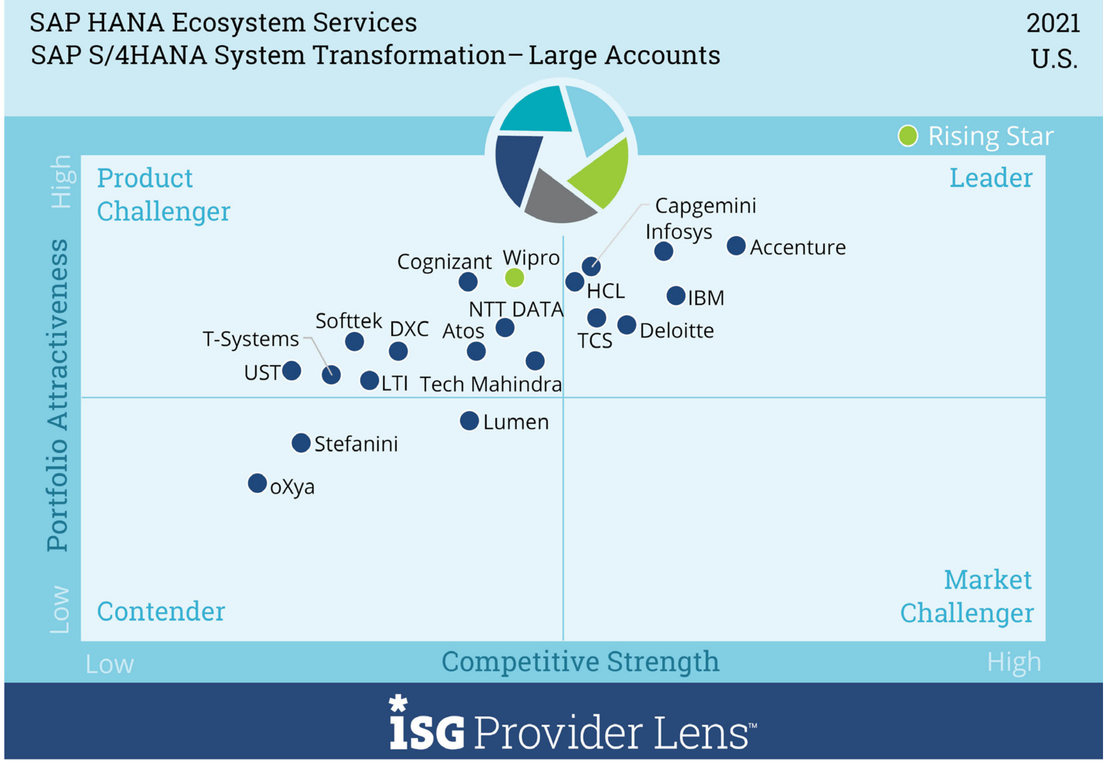
IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers in the SAP S/4HANA ecosystem, and understand how they integrate the latest technologies/capabilities into their S/4HANA offerings to gain a competitive edge in the market.

Line-of-business, industry and finance leaders should read this report to understand the relative positioning of the partners that can help them effectively procure SAP S/4HANA services with respect to their business/industry and to ensure return on investment.

SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Definition

ISG assesses consulting and system integration service providers for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The evaluation includes planning, designing and modeling of applications, taking into consideration the service provider's ability to manage the complexity and scale that are common characteristics of large enterprise clients. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.



Source: ISG Research 2021

SAP S/4HANA SYSTEM TRANSFORMATION FOR LARGE ACCOUNTS

Eligibility Criteria

- Participant's service portfolio to include development, integration and testing of SAP S/4HANA, with at least one implementation of S/4HANA or SAP Business Suite on HANA
- Demonstrate S/4HANA advisory capabilities and implementation experience on greenfield or brownfield deployments
- Provision to offer on-premises and cloud-based implementations
- Availability of SAP-certified consultants and practitioners across regions to support multi-country and multi-language implementations
- Ability to handle complexity and scale through optimal onshore-offshore delivery models

Observations

- **Accenture's** proprietary myConcerto platform, strong partnership with SAP, industry expertise, specific solutions and innovation-led focus for SAP S/4HANA services make it a market Leader in this quadrant.
- **Capgemini's** broad portfolio of SAP S/4HANA services, investments in development of proprietary assets and preconfigured industry PATH solutions are its strengths.
- **Deloitte** delivers a robust package of SAP S/4HANA services that include its strong consulting background, decades of SAP partnership and extensive industry experience and accelerators. This makes the company a Leader.
- **HCL** has a balanced SAP practice that is built around its DRYiCE framework, industry solution templates (Base90), U.S.-focused market strategies and partnership with SAP.
- **IBM** delivers a broad spectrum of SAP S/4HANA greenfield, bluefield, conversion and migration services led by frameworks and tools. It has an established SAP S/4HANA practice comprising more than 19,000 certified practitioners and other staff.

SAP S/4HANA SYSTEM TRANSFORMATION FOR LARGE ACCOUNTS

Observations (cont.)

- **Infosys** has a large SAP S/4HANA practice and offers services for a wide range of needs, ranging from migrations and conversions to transformations. The company has increased its focus on SAP S/4HANA services through its Cobalt service offering. It has a large pool of skilled resources and a broad network of innovation hubs in the U.S.
- **TCS'** SAP S/4HANA services cover conversions, migrations and digital transformation, and are delivered through a structured methodology and a combination of tools and accelerators. The company has a strong partnership with SAP and focuses on customer experience, making it a Leader in this quadrant in the U.S.
- **Wipro's** broad set of SAP S/4HANA services, tools repository, accelerators, frameworks and preconfigured solutions for industries make it a Rising Star.

HCL

Overview

HCL accelerates the digital transformation of enterprises through its SAP S/4HANA services that include assessment services for brownfield and greenfield migrations. The company delivers these services through its offerings such as BridgeS4HANA, S/4HANA Base90 industry templates, the Factory+ conversion offering and Activate+ rapid agile implementation methodology. The company has a strong presence in the U.S. with skilled FTEs offering services to clients.

Strengths

DRYiCE suite and intelligent-process-engineering-led approach: HCL's DRYiCE suite of services, and products and platforms for autonomics and orchestration are available on the SAP BTP. The platform uses AI, IT automation and RPA to help enterprises have leaner, faster and more cost-effective operations. HCL also differentiates itself by focusing on customer experience, and through automation with its Intelligent Process Engineering approach.

iMRO next-gen maintenance offering: HCL has been engaged with SAP for reselling iMRO, their joint maintenance, repair and overhaul add-on solution, to the latter's customers. The offering falls under SAP's Enterprise Asset Management and helps to extend SAP ERP services to companies that maintain complex, expensive and regulated assets.

Industry focused go-to-market (GTM) strategy: HCL's GTM strategy, to accelerate and enable business transformation for its customers, is led by industry-specific Base90 templates, along with best practices solutions for industries such as aerospace, manufacturing, life science and utilities. One example is its supply chain innovations for life sciences.

Caution

HCL should leverage its broad base of assets and focus on growing its base of large enterprises (for transformation engagements) in the U.S.

2021 ISG Provider Lens™ Leader

HCL has a balanced SAP practice, built around its DRYiCE framework, industry-specific solution templates (Base90), U.S focused market strategies and partnership with SAP.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 SAP HANA Ecosystem Services, U.S." analyzes the relevant software vendors/service providers in the Brazilian market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of SAP HANA Ecosystem Services 2021 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 and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & Vision
   - Innovation
   - Brand Awareness and presence in the market
   - Sales and partner landscape
   - Breadth and Depth of portfolio of services offered
   - Technology Advancements

Authors and Editors

Kartik Subramaniam, Author

Senior Lead Analyst

Kartik Subramaniam is the Lead Analyst for SAP HANA and Application Development and Maintenance (ADM). He brings in close to 10 years of experience in primary as well as Secondary Research, Advisory and Consulting experience from leading IT companies such as Accenture, IBM, IDC and TNS. Kartik has worked on many Research and Advisory assignments in the areas of offering in application development and maintenance, multi layered/pace layered IT/applications, cybersecurity and infrastructure services. Apart from research, Kartik also worked closely with the strategy and sales teams providing insights on strategic planning for offerings and creating seller enablement deliverable through analytics at Accenture and IBM respectively.

Arjun Das - Enterprise Context and Global Summary Analyst

Research Analyst

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

Authors and Editors

Jan-Erik Aase, Editor

Partner and Global Head – ISG Provider Lens/ISG Research

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.

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