

Digital Business Solutions and Services

UK 2021

Quadrant Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 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 December 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.

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EXECUTIVE SUMMARY

Tremendous growth in digital sector and high focus on sustainability, UK is focusing heavily on post-pandemic growth

It is a well-known fact that COVID has triggered a many-fold increase in digital transformation adoption. However, the depth of adoption and areas of adoption have differed from region to region. In the UK, many enterprises were forced to adjust to the regulations changes imposed for the public safety. When survivability took precedence, enterprises had to be really innovative to stay afloat in the market. Many enterprises moved to online channels and delivered on-channel services to their clients, and reworked their services delivery strategies to reach to the end consumers. Some of them implemented self-service capabilities to prioritize customer experience and constantly deliver services specific to the different client segments addressed by each of the businesses. Automation and analytics were the most-used digital technologies during these tough times. Automation helped in saving time and effort that otherwise would have consumed most of the employee bandwidth. In some cases, automation helped tackle the situation of lack of personnel due to various reasons including illness and layoffs. Analytics was used across businesses to assess the right customer experience approach and to manage the supply chain across various segments. While tackling most of these situations, sustainability and decarbonization has been one of the major focus areas to address, and organizations set targets.

The service providers have supported their clients in these aspects by helping them navigate through the COVID era. Providers have been helping clients strategize the right aspects across the roadmap and to prioritize the spend depending on these strategies. Some service providers have helped build innovative and omnichannel customer experience services for their clients, and have turned the projects around in a short time, which has helped clients in launching and delivering services to capture the market share. While the providers are aware of the challenges faced by their clients during pandemic, they are also helping clients to build the post-COVID strategies and to grow in the post-pandemic era. With a majority of businesses moving to online channels, cloud-based implementations have increased and there has been a high focus on managing these applications. The supply chains for these businesses have been hit drastically last year due to the disruptions. Many service providers have helped their clients to assess the demand-supply planning using digital technologies and to build a model to manage the supply chain by assessing the status of demand. As the enterprises turn towards local production as a replacement for some of the products across supply chain, the providers have been nimble to implement these changes across the client's IT landscape to keep the lights on. Some of the service providers have also helped their clients in managing their carbon footprint and achieve sustainability for their IT estates.

Digital Business Consulting Services

With most enterprises grappling with the pandemic situation, the consulting providers have helped their clients to manage their businesses during the pandemic by moving to digital and by prioritizing services that would benefit the client's business. There has been a high focus on building these services using data-driven models and to use analytics to assess the right path forward based on the historical data. The pandemic period also saw the growth of new business models. Consulting providers have helped enterprises to start new businesses that would be beneficial in terms of providing alternative forms of revenue with the uncertainty in the environment due to the changing phases of pandemic.

Digital Customer - Experience Services

With many businesses moving to online channels, the service providers have been nimble and agile in building these applications for their clients in a shorter time than usual. The customer experience services delivered by the service providers have helped businesses to reach out to their clients and sustain the day-to-day operations in a digital manner. With increased digital adoption, there has been a tremendous increase in cloud-based implementations. Many providers have deployed customer experience services that they have built on the hyperscalers' platforms. With continued focus on CX services, there has been huge emphasis on building direct-to-consumer strategies and applications around them. With many distributors having a difficult time to keep working with boundaries set upon for public safety, businesses have built direct-to-consumer applications wherein the services are directly delivered to the consumers through digital channels.

Digital Supply chain Services

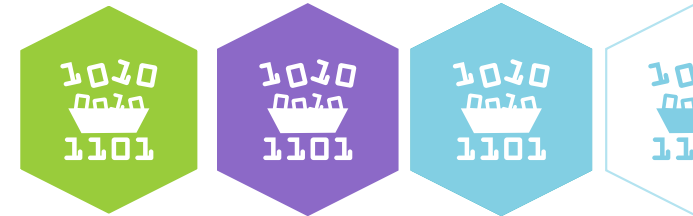
With supply chains hit drastically due to the fluctuations in demand and supply due to COVID, service providers have built digital applications to assess the demand-supply requirements, which will help the clients to plan the actions accordingly. Implementing automation to handle some of the supply chain tasks has also been on the rise mainly to handle the cost implications and to manage the lack of personnel. Process realignments due to Brexit have also been an area where the enterprises have sought their IT partner's help to realign some of the core systems in their supply chains. While handling these challenges, businesses have been aware of the decarbonization and sustainability implications of their supply chains and are working towards carbon neutrality targets set by themselves or to meet regulations of the region.

Sustainability and Decarbonization Services

With a very high focus on sustainability and decarbonization across Europe, many UK enterprises are focusing on achieving carbon neutrality and zero emissions by 2030. Service providers have specific offerings to help their clients in this segment. These offerings include assessing and measuring the carbon emissions, assessing the areas where there could be possible carbon footprint reduction/exclusion, and using digital technologies to strategize and plan decarbonization across the business units. Some enterprises are also targeting to achieve a circular economy leading to zero waste and to create sustainable supply chains for specific industries.

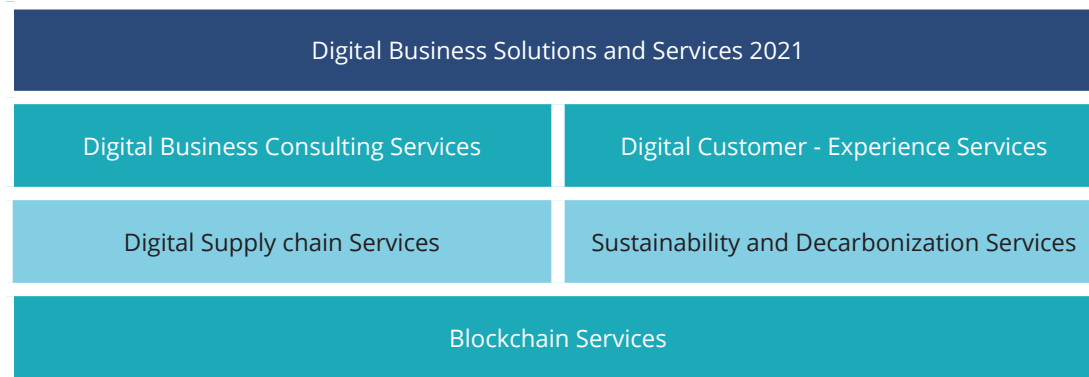
Blockchain Services

While there is a high dependency on the underlying infrastructure requirements and the complexity involved in the various actors working together for a successful blockchain implementation, there have been certain specific areas where there is traction for blockchain in the UK region. Some of these areas include healthcare record sharing to maintain the records, maintaining electric vehicle charging records, and meeting supply chain requirements such as for smart contracts or track and trace. Another noteworthy area where blockchain application has increased is the cryptocurrency segment, where payment providers have launched crypto services in UK. Service providers have built, deployed and managed blockchain applications across these areas and have helped their clients grow their services in the region.



Introduction

Simplified illustration



Source: ISG 2021

Definition

The COVID-19 pandemic has accelerated the adoption of digital tools and transformation services across enterprises and led to a surge in new digital transformation initiatives. Such actions have helped businesses survive and thrive, making digital transformation a pathway to success for businesses across all industries. The use of information technology (IT) to change the customer journey, improve business agility and deliver digital products has helped businesses across all processes, including sales, trading, production, supply chain, product design and human resource management among others, to deliver bottom line benefits and help businesses manage the client experience during the crisis.

Definition (cont.)

Over the past year and a half, many businesses have digitised their customer experience to continue supporting their clients, specifically in industries where brick-and-mortar stores remained inaccessible due to the pandemic. While some businesses moved their customer journeys to online channels, others have leveraged innovative services such as the use of multiple emerging technologies to deliver better customer experiences, moving from generation 1 (online channels) to generation 2 (innovative services).

One of the most disrupted segments during the pandemic has been the supply chain. Its complexity pointed out how people live in a globally connected and highly interdependent world. The digitalisation of the supply chain also brings in the aspect of the resilient supply chain. With the expanding technology and infrastructure footprint as a result of the surge in digitalisation, organisations should embrace the sustainability goals for a greener and more livable planet.

Scope of the Study

This ISG Provider Lens™ study is focused on identifying the service providers that can support clients in these capabilities. Digital-ready service providers understand the full scope of digital services to provide constant innovation for improving user experiences, accelerating business delivery and incorporating intelligent solutions. They partner with leading technology vendors and can articulate the use of cognitive computing and learning systems to digitise any client organisation.

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 UK, Germany, Nordics, Brazil, 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.

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 products/ services and follow 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.

Digital Business Solutions and Services - Quadrant Provider Listing 1 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Accenture	● Leader	● Leader	● Leader	● Leader	● Leader
Applied Blockchain	● Not in	● Not in	● Not in	● Market Challenger	● Not in
Atos	● Leader	● Leader	● Product Challenger	● Leader	● Leader
Avanade	● Not in	● Contender	● Not in	● Not in	● Not in
Bain & Co.	● Product Challenger	● Not in	● Not in	● Not in	● Not in
BCG	● Leader	● Not in	● Not in	● Not in	● Product Challenger
BearingPoint	● Not in	● Not in	● Contender	● Not in	● Not in
Birlasoft	● Product Challenger	● Product Challenger	● Leader	● Product Challenger	● Not in
Blockchain Expert	● Not in	● Not in	● Not in	● Contender	● Not in
Bridgei2i	● Not in	● Contender	● Product Challenger	● Not in	● Not in
Capgemini	● Leader	● Leader	● Product Challenger	● Product Challenger	● Leader
CGI	● Not in	● Contender	● Not in	● Not in	● Not in

Digital Business Solutions and Services - Quadrant Provider Listing 2 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Coforge	● Product Challenger	● Product Challenger	● Not in	● Leader	● Not in
Cognizant	● Product Challenger	● Leader	● Product Challenger	● Leader	● Not in
CSS Corp	● Not in	● Contender	● Not in	● Not in	● Not in
Cybage	● Not in	● Product Challenger	● Product Challenger	● Not in	● Not in
Deloitte	● Leader	● Market Challenger	● Not in	● Not in	● Contender
DXC	● Contender	● Product Challenger	● Product Challenger	● Contender	● Not in
Ecovadis	● Not in	● Not in	● Not in	● Not in	● Contender
EY	● Leader	● Not in	● Not in	● Not in	● Product Challenger
GEP	● Not in	● Not in	● Rising Star	● Not in	● Not in
HCL	● Leader	● Leader	● Leader	● Product Challenger	● Leader
Hexaware	● Not in	● Leader	● Not in	● Not in	● Not in
IBM	● Leader	● Leader	● Leader	● Leader	● Product Challenger

Digital Business Solutions and Services - Quadrant Provider Listing 3 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Infosys	● Product Challenger	● Product Challenger	● Leader	● Leader	● Product Challenger
Kearney	● Product Challenger	● Not in	● Not in	● Not in	● Not in
Kin+Carta	● Not in	● Rising Star	● Not in	● Not in	● Not in
KPMG	● Market Challenger	● Not in	● Not in	● Not in	● Contender
Logicalis	● Market Challenger	● Not in	● Not in	● Not in	● Not in
LTI	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Not in
McKinsey	● Leader	● Not in	● Not in	● Not in	● Not in
Mindtree	● Product Challenger	● Leader	● Product Challenger	● Product Challenger	● Product Challenger
Mphasis	● Contender	● Contender	● Contender	● Contender	● Not in
NTT DATA	● Contender	● Product Challenger	● Product Challenger	● Product Challenger	● Not in
Persistent	● Contender	● Contender	● Not in	● Contender	● Not in
PWC	● Leader	● Not in	● Not in	● Not in	● Product Challenger

Digital Business Solutions and Services - Quadrant Provider Listing 4 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Siemens	● Not in	● Product Challenger	● Not in	● Not in	● Leader
Sopra Steria	● Not in	● Contender	● Contender	● Contender	● Not in
TCS	● Product Challenger	● Leader	● Leader	● Product Challenger	● Not in
Tech Mahindra	● Product Challenger	● Leader	● Product Challenger	● Leader	● Not in
T-Systems	● Not in	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
UST	● Product Challenger	● Product Challenger	● Contender	● Product Challenger	● Not in
Valtech	● Not in	● Contender	● Not in	● Not in	● Not in
Wipro	● Leader	● Leader	● Leader	● Leader	● Leader
Zensar	● Contender	● Leader	● Leader	● Leader	● Not in



Digital Business Solutions and Services Quadrants

ENTERPRISE CONTEXT

Digital Business Consulting Services

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

ISG highlights the current positioning of digital business consulting service providers in the U.K. with a comprehensive overview of the market's competitive landscape. We observe that the U.K. is a mature market for the consulting industry. The main industries adopting digital business consulting in the U.K. are retail, financial services, technology, media and telecommunication and the public sector.

With the COVID-19 pandemic, there has been a drastic change in the way most companies prioritize their digital transformation. Tech savvy enterprises are building and/or re-designing applications that leverage modern constructs such as SOA, API, microservices and containers to be world class, nimble and agile and not be constrained by a single technology stack. Ensuring data security, regulatory compliance and data quality checks is another key priority, as the majority of the workforce is currently working remotely due to the pandemic.

The following roles can use this report to identify and evaluate different service providers:

Chief information officers (CIOs) should read this report to understand the relative positioning and capabilities of providers, which can help them effectively plan and improve the reliability and availability of their digital transformation initiatives. The report also highlights service providers' technical and integration capabilities and their strategic partnerships.

Chief strategy officers (CSOs), through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality.

Chief technology officers (CTO) should read this report to understand how digital services providers undertake transformation initiatives and how they perform when compared with each other.

DIGITAL BUSINESS CONSULTING SERVICES

Definition

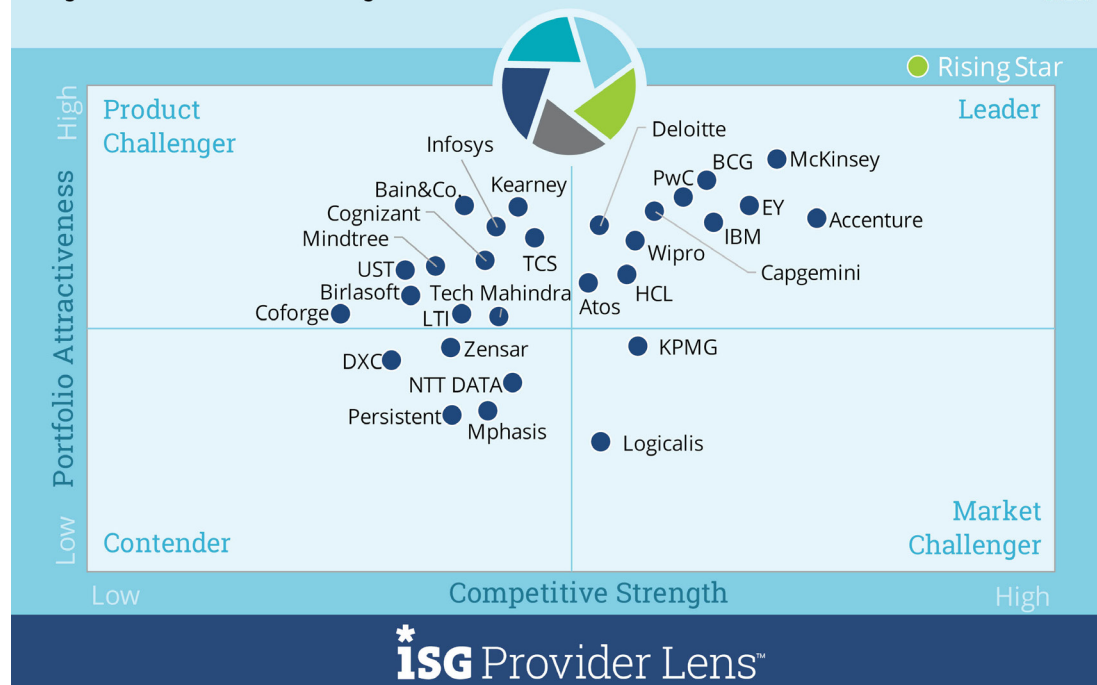
The digital business consulting services quadrant assesses the provider's capability to advise clients on the different facets of the digital journey, including strategy, design, data, technology, organizational change management, operations, digital culture and innovation.

Digital business consulting includes services provided to enterprises across client and employee journeys, strategy and operations of digital business. These services help enterprises build new business models by capitalizing the existing capabilities across market opportunities. The services provided should create significant benefits for the client and drive growth. Providers in this space should be able to help enterprises 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 through the digital journey, from conceptualizing the vision to delivering the actions needed for the transformation across different industries.

Digital Business - Solutions and Services Digital Business Consulting Services

2021
U.K.



Source: ISG Research 2021

DIGITAL BUSINESS CONSULTING SERVICES

Eligibility Criteria

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

Observations

In the UK, digital business consulting services saw a huge uptake among enterprises, specifically for the strategy and consulting work related to COVID-19 and the areas that it has impacted. With the increased digital technologies adoption (with pandemic being the main driver), many enterprises and governments across the globe have sought the help of consulting providers to handle the complexities that arose due to the socioeconomic situation. Some providers have also focused on delivering sustainability solutions and helped clients achieve net-zero emissions. Those that availed the ample number of opportunities in the digital segment were able to grow in the market. With the explosion of digital technologies, providers also got the opportunity to lead with a design-led strategy and strong consulting services for customer experience, and to enhance process efficiencies within the organization for improving internal processes and external-facing functions.

Among the 29 providers assessed in this quadrant, 11 have been positioned as leaders.

DIGITAL BUSINESS CONSULTING SERVICES

Observations (cont.)

- **Accenture** has acquired REPL Group, a UK-based technology consultancy specializing in solutions for supply chain, workforce management, store operations and retail customer experiences.
- **Atos** has a strong set of proven accelerators such as digital transformation frameworks, “out-of-the-box” templates, and innovation-ready environments and platforms to drive creative design, ideation and experimentation.
- **BCG** has invested in three ventures: SOL-X, Chord X and Spares CNX. These three separate startups together demonstrate the transformational power of strategically applying digital and deep technology, such as AI, machine learning (ML) and industrial IoT (IIoT), to create massive operational efficiencies across the shipping value chain.
- **Capgemini** has a wealth of deep industry vertical and cross-industry expertise, which is further enhanced through constant acquisitions.
- **Deloitte's** Greenhouse™ Labs are specifically designed to bring Deloitte and client teams together to accelerate decision making and deliver faster, better outcomes to client challenges.
- **EY** is well known among industries for its consulting capabilities and thought leadership in digital business transformation.
- **HCL** focuses on enterprise cultural transformation and has the expertise to prepare agile workforces that can respond to constant change.
- **IBM** translated its inventive process into IBM Garage™, which merges design thinking with labs and rapid prototyping capabilities.
- **McKinsey's** digital labs have world-class digital talent, human-centered designers, data scientists, agile engineers, software specialists and change leaders. It has a network of more than 300 relationships with technology and software companies.
- **PwC** has robust capabilities for supply chain and process optimization. The company has designed plug-and-play solutions for these challenges by incorporating disruptive technologies to give clients a competitive edge and help deploy these solutions.
- **Wipro's** consulting and service model is based on the ability to release new features into the market with the highest velocity, throughput and quality.

ENTERPRISE CONTEXT

Digital Customer - Experience Services

In this quadrant report, ISG evaluates providers offering customer experience (CX) solutions and services with the ability to deliver business model innovation and enable enterprises to build competitive differentiation in today's digital economy.

ISG highlights the current positioning of CX providers in the U.K. with a comprehensive overview of the market's competitive landscape. We observe rising demand among enterprises for personalized products and services. As a result, providers increasingly focus on offering highly personalized CX.

The enterprises are seeking personalized customer experiences that enable them to engage with customers anytime, anywhere, with smarter real-time experiences. Companies are looking at AI as the technology to empower every industry imaginable. As a result, industries are moving toward digital systems powered by AI. Artificial intelligence is already playing a pivotal role in healthcare, automotive, smart devices and apps, and will further penetrate into many other industries in the near future.

The following roles can use this report to identify and evaluate different service providers:

IT leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their businesses.

Digital transformation professionals should read this report to understand a provider's capability to deliver seamless omnichannel solutions, leveraging AI and analytics for superior CX. The report would also give insights into how the providers can be compared with one another.

Business strategy leaders, through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.

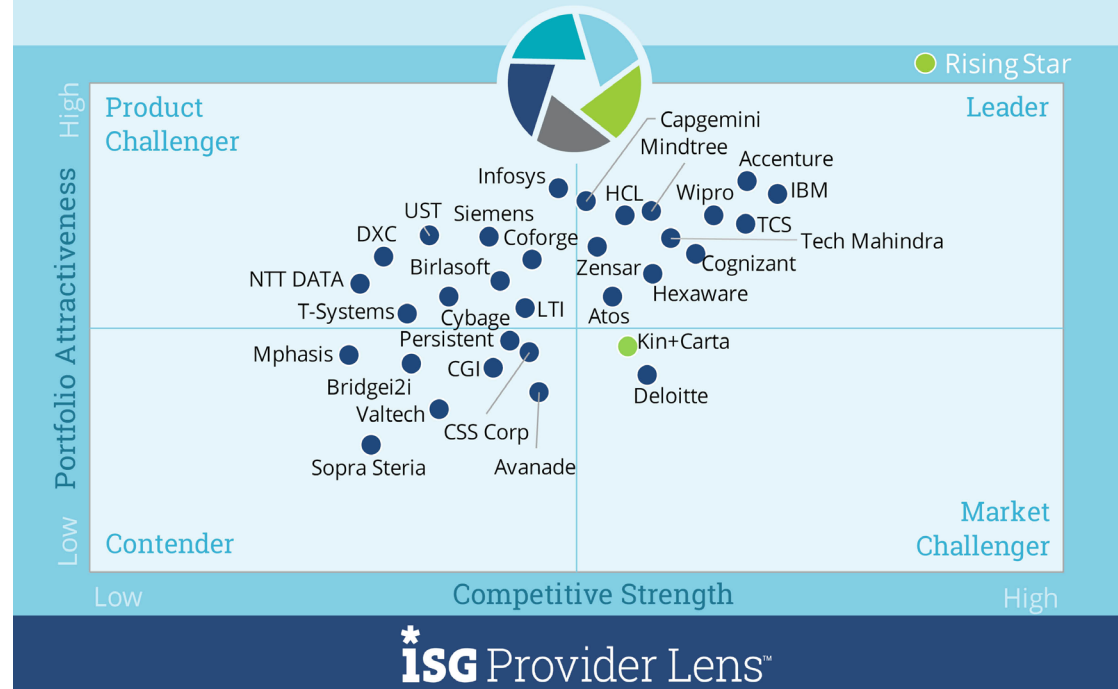
DIGITAL CUSTOMER - EXPERIENCE SERVICES

Definition

This quadrant assesses a service provider's and digital agency's ability to deliver business model innovation, enabling enterprises to build competitive differentiation in today's digital economy. Providers in this quadrant should be able to provide consulting and implementation services to improve the customer experience for their clients. Customer experience design is transforming how companies organize marketing, sales, delivery and post-sales processes. It is a customer-centric approach and changes all of the enterprise's business processes around the customer. Digital customer experience indicates how digital companies design differentiation for the end customer journey. This quadrant involves conceiving customer journeys to create new business models and realizing the benefits using new technology and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product and a brand. The design process includes technology experts, sales, marketing

Digital Business - Solutions and Services
Digital Customer - Experience Services

2021
U.K.



Source: ISG Research 2021

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Definition (cont.)

and clients in a collaborative process. Leading firms use analytics to extract insights from user data. Cognitive computing extracts data from conversations, texts and social media. The experience is measured with simple A/B tests as well as complex sentiment analysis captured from customer interactions. The customer experience involves real-time monitoring and measuring of various touch points that drive the customer journey and the supporting technology and business processes. The customer experience team produces a continuum change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy.

Eligibility Criteria

- Should focus on user experience to design apps, web and product/services using advanced technologies such as AI, machine learning and IoT.
- Should focus on delivering an end-to-end customer journey to provide a differentiated value proposition.
- Should offer advisory, integration and managed services for innovative customer experience services.
- Must showcase deep industry and customer knowledge for business transformations, changing channels.
- Business structures and cultural shift.
- Must have established CX governance framework.
- Should have the capability to deliver services using innovative technologies such as augmented reality and virtual reality.

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations

With a sharp increase in online/e-commerce services, primarily driven due to the pandemic, digital customer experience services have seen a drastic change complexity of services provided to enterprises. With enterprises seeking alternate services to sustain themselves, providers have helped them not only in building online-centric business models, but also in delivering innovative human-centric designs and customer experiences. The market has seen new additions, such as Siemens, that have focused on delivering customer experiences along with helping enterprises with sustainability and decarbonization services. This market is expected to grow in the next few years considering the continuum of the hybrid services launched during the pandemic.

Among the 31 providers assessed in this segment, 12 have been named Leaders and one as a Rising Star.

- **Accenture** showcases cutting-edge, thoughtful innovative proofs-of-concept and success stories in its local centers of excellence in the UK to support clients.
- **Atos'** customer experience labs are designated spaces for innovation and design to improve an enterprise's customer experience. The labs are fully equipped with collaborative design software including ideation tools and capabilities for journey mapping creation, prototyping, user testing and editing.
- **Capgemini** offers strategy and transformation as well as creative design through experienced experts in emerging technology and data. Perform AI is the catalyst for AI-infused customer experience transformation.
- **Cognizant's** Bolt Accelerator, powered by Salesforce Health, Community Cloud and Service Cloud, is a patient engagement hub solution for pharmaceutical companies offering specialty treatments and therapies that require extensive collaboration among physicians, caregivers, insurers and pharmaceutical companies.

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations (cont.)

- **HCL** provides a holistic framework for clients pursuing digital journeys to deliver connected experiences by improving value propositions for businesses, users and operating models by using various tools and platforms.
- **Hexaware** has a strong discipline in human-centered design and research that focuses on user feedback and reviews. The customer experience team envisions client requirements and builds the digital roadmap using customer experience-specific methodologies.
- **IBM** uses the Garage™ methodology for ideation and customer experience design. The company translated its inventive process into IBM Garage™, which merges design thinking with labs and rapid prototyping capabilities.
- **Mindtree** delivers large-scale digital transformation initiatives such as digital presence transformation, MarTech operations and direct channel commerce for clients. These have been templated and are delivered to clients through a platform-based approach.
- **TCS** Customer Intelligence & Insights (CI&I) can capture the customer journey across multiple channels, platforms and devices. It helps in collecting and analyzing large volumes of data in real time using big data analytics.
- **Tech Mahindra** offers campaign management, digital analytics, search marketing, social listening, personalization and targeting along with digital marketing consulting.
- **Wipro's** service model is based on the ability to release new features into the market with the highest velocity, throughput and quality. The company is increasingly moving towards zero-latency client engagements.
- **Zensar** provides end-to-end offerings such as strategy formulation, experience design services, digital channel delivery services (including augmented reality and virtual reality services), customer journey optimisation, advanced digital analytics, platforms and frameworks to deliver digital customer experience services.
- **Kin+Carta** (Rising Star) has delivered multiple customer experience design services for clients in the UK. It has a strong focus and local expertise to deliver client-centric digital customer experience services.

HEXAWARE



Overview

Hexaware's digital business practice generated revenues of \$419 million in 2020. It has more than 250 clients and approximately 5,000 consultants with a strong focus on driving a strategy for digital business solutions. Hexaware brings together capabilities in design, engineering and continuous experience delivery to build capabilities organically and inorganically. It acquired Mobiquity in 2019, which enhances its customer experience portfolio and now serves as its go-to-market brand for digital products and digital CX. Its consulting-led digital business practice has two additional strategic pillars, namely Automate Everything™ and Cloudify Everything™. Hexaware has deep domain expertise in specific verticals, an innovation-led culture and a strong partner ecosystem.



Strengths

Human-centric focus in customer experience journey: Hexaware has a strong discipline in human-centered design and research that focus on user feedback and reviews. The Mobiquity customer experience team envisions client requirements and builds the digital roadmap using methodologies specific to customer experience including the North Star framework and Digital Traction model.

End-to-end services for customer experience: Hexaware provides strategy, consulting and implementation of innovative customer experience services for clients. The deep expertise in delivering customer experience before and during the pandemic stands as testament to its effectiveness.

Data-driven approach: Hexaware offers a data-driven approach to deliver customer experience by measuring engagement and performance across channels, endpoints and the overall solution to help derive meaningful insights that enable better experiences. This approach helps clients to manage large data volumes and leverage the data for building next-generation customer experiences.



Caution

Hexaware could focus on delivering complex applications through multiple digital technologies and by gaining clients in this specific segment in the UK.

The company should also consider delivering customer experience services that are niche and well sought after in the UK region.



2021 ISG Provider Lens™ Leader

Hexaware offers end-to-end customer experience capabilities through its Mobiquity offering plus a strong set of tools, platforms and accelerators. It demonstrates a strong focus on design thinking and has the flexibility to adapt to client requirements.

ENTERPRISE CONTEXT

Digital Supply Chain Transformation Services

In this quadrant report, ISG evaluates providers offering digital supply chain management (SCM) services with the ability to deliver business model innovation and enable enterprises to build competitive differentiation in today's digital economy.

ISG highlights the current positioning of digital SCM providers in the U.K. with a comprehensive overview of the market's competitive landscape. We observe that the U.K. has started to realize the impact of engaging in digital supply chains. This is due to the rising enterprise demand to harness the advantages of automated digital supply chains to improve productivity, efficiency and visibility with accurate demand planning, real-time inventory management and reliable fulfillment.

With the adoption of the Internet of Things (IoT), the use of advanced robotics and the application of advanced analytics and big data to SCM services, enterprises are expecting to increase their productivity, innovation and change management capabilities to remain competitive in the market. They also expect to increase revenue and maintain their margins, quality and level of operations.

The following roles can use this report to identify and evaluate different service providers:

IT leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their businesses.

Digital transformation professionals should read this report to understand a provider's capability to deliver seamless omnichannel solutions, leveraging AI and analytics for supply chain. The report also gives insights into how the providers can be compared with one another.

Supply chain strategy leaders, through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.

DIGITAL SUPPLY CHAIN TRANSFORMATION SERVICES

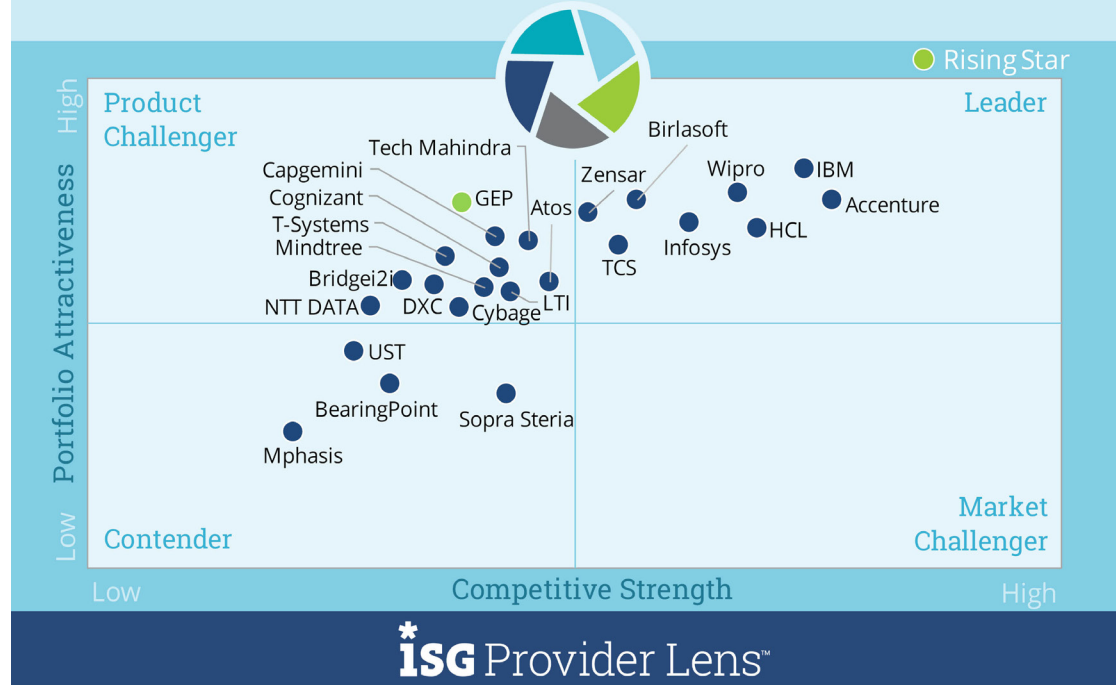
Definition

The digital supply chain transformation services quadrant assesses service providers that offer consulting, integration, support and managed services for the supply chain across planning, execution and insights. Providers in this space typically leverage a comprehensive framework or methodology for digital technologies such as IoT, machine learning, AI and predictive analytics across the supply chain to help clients optimise their entire ecosystem of suppliers, customers, employees and third-party partners and thus balance their business risk profiles.

The digital supply chain transforms a company's ability to anticipate and serve client needs by managing the supply chain efficiently using digital technologies. It enables an enterprise to move from cost savings to monitoring inventory based on customer needs, optimise the supply chain network, and create a predictive, self-adapting supply chain. To deliver these advanced features, providers use sensors, predictive analytics, digital twins, blockchain, machine learning and AI solutions, allowing for end-to-end real-time visibility across the integrated and networked supply chain. Due to the COVID-19 pandemic,

Digital Business - Solutions and Services Digital Supply Chain Transformation Services

2021
U.K.



Source: ISG Research 2021

DIGITAL SUPPLY CHAIN TRANSFORMATION SERVICES

Definition (cont.)

many enterprises have moved towards the digital supply chain. In addition, providers are helping clients to not only plan, transform and execute the technology aspect of the entire supply chain but also optimise operations. In a future where trade wars, political unrest and pandemics can be expected, the importance of having multiple production units and preferences for domestic manufacturing may become a norm. Providers should this re-architect their digital supply chain offerings to increase resilience, leverage more digital technologies and frameworks to enable minimal disruption, and reduce loss of economic value for clients.

Service providers in this quadrant offer supply chain analytics, data management, demand and supply planning and forecasting, and order management. These are integrated with digital technologies to deliver substantial benefits to clients.

Eligibility Criteria

- Ability to offer consulting and integration services for supply chains.
- Focus on more than one specific industry across the country or region.
- Should have executed advisory, consulting, or integration for the digital supply chain for one or more clients across the regions or for a specific geography.
- Focus on one aspect of the digital supply chain or through end-to-end delivery of services across the supply chain by leveraging digital technologies.
- Ability to integrate modern technologies such as IoT, blockchain and automation and deliver better UX.
- Strong regional partner ecosystem of independent software vendors (ISVs) and other certified partners.
- Offer resilient digital supply chain services supported by local governance, regulation and compliance requirements.

DIGITAL SUPPLY CHAIN TRANSFORMATION SERVICES

Observations

Supply chain disruptions have been inevitable due to restrictions imposed across regions in and around the UK. In addition, the Brexit situation and lack of personnel (for e.g. truck drivers) have also directly impacted the supply chain. Service providers have been focused on tackling these challenges by helping clients to plan the demand and supply functions with the use of analytics and automation. There has also been a high focus on using data-driven approaches to design newer supply chains — an alternate to tackle the lacuna of the older supply chains. Providers are also building circular economies and sustainable supply chains, which has been an integral part of their portfolio. GEP has grown well in the region with its focus on providing supply chain services, complemented by the software portfolio that it provides to clients.

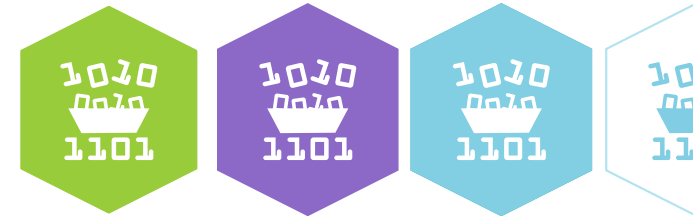
Among the 23 providers positioned in the quadrant, eight have been named Leaders and one as a Rising Star.

- **Accenture** acquired REPL, a UK-based technology consultancy specialising in solutions for supply chain, workforce management, store operations and retail customer experiences.
- **Birlasoft** has a large partner ecosystem, comprising SAP, Oracle, Adobe, UiPath, Microsoft and PTC, which helps in delivering complex supply chain transformation services for clients.
- **HCL** Supply Chain Center of Excellence focuses on a range of digitally enabled capabilities. It provides real-time visibility and tracking, automation and digitalization, digital planning, predictive analytics and deep learning through AI and other digital technologies.
- **IBM** has numerous solutions and implementations for blockchain-based supply chain transformations including food supply chain, digital identity for supplier onboarding and frictionless global trade.
- **Infosys** aims to help clients build futuristic, agile and resilient supply chains by reimagining the supply chain network to become live at the core, make platforms become live at scale, and enhance supply chain experience and efficiency by design.
- **TCS** has a high focus on building safe, responsible and resilient supply chains. It is building a reliable farmer onboarding and crop harvest data-tracking system for a global food and confectionaries company.

DIGITAL SUPPLY CHAIN TRANSFORMATION SERVICES

Observations (cont.)

- **Wipro** has a strong ecosystem of partners, alliances and strategic investments for the supply chain. The provider also has a strong relationship with Manhattan Associates.
- **Zensar** has strong warehouse management capabilities, implementing them for one of the largest retailers customized for client requirements.
- **GEP** (Rising Star) has a strong product portfolio with services across multiple domains. These include digital supply chain strategy, digital demand, supply planning, S&OP and S&OE, inventory strategy, operations and manufacturing excellence, network strategy and footprint optimisation, warehousing and transportation management, supply chain risk and resilience, and supply chain sustainability.



ENTERPRISE CONTEXT

Sustainability and Decarbonization Services

In this quadrant report, ISG evaluates providers offering sustainability and decarbonization services with the ability and capability to help clients in achieving carbon neutrality and improve their environmental, social and governance (ESG) performance.

ISG highlights the current positioning of sustainability and decarbonization service providers in the U.K. with a comprehensive overview of the market's competitive landscape. Sustainable business innovation across the enterprises is aligned with the United Nation's 17 Sustainable Development Goals (SDGs) targeted to be achieved by 2030.

Governments are incentivizing decarbonization through new regulations such as the EU's Green Deal and the related carbon levies and investment contributions. Furthermore, businesses are understanding that innovative business models may help them safeguard and grow their shareholder wealth.

Companies are increasingly focusing on long-term objectives rather than short-term shareholder interest's optimization. This involves meeting customer requirements, treating workers as human beings and allowing them to grow, and generating societal value, which, includes the influence of corporate operations on the environment.

The following roles can use this report to identify and evaluate different service providers:

IT leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their businesses.

Digital transformation professionals should read this report to understand a provider's capability to deliver seamless sustainability and decarbonization solutions, leveraging digital capabilities. The report also gives insights into how the providers can be compared with one another.

Sustainability and strategy leaders, through this report, will gain knowledge on providers' product portfolio capabilities and ability to support enterprise ESG goals.

SUSTAINABILITY AND DECARBONIZATION SERVICES

Definition

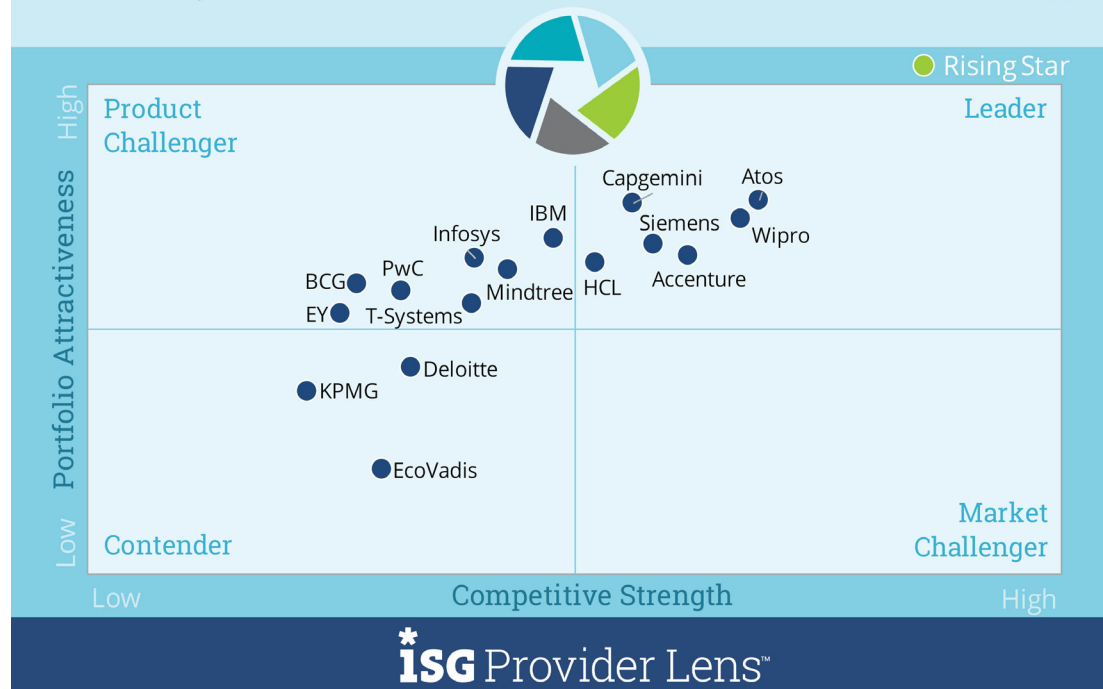
The sustainability and decarbonisation services quadrant assesses a service providers' ability and capability to deliver sustainability services for clients either as a standalone service or a packaged offering for digital contracts.

Technology that powers digital transformation generates a significant carbon footprint; however, digitalisation is also a means to achieve sustainability and decarbonisation. With world leaders taking a pledge for climate change, it is imperative for businesses to achieve net neutrality in carbon emission and remain sustainable to achieve the dual impact of sustainability goals and the benefits of digital transformation.

Sustainable business innovation across the enterprises is aligned with the United Nation's 17 Sustainable Development Goals (SDG),

Digital Business - Solutions and Services
Sustainability and Decarbonization Services

2021
U.K.



Source: ISG Research 2021

SUSTAINABILITY AND DECARBONIZATION SERVICES

Definition (cont.)

targeted to be achieved by 2030. The climate pledge for mitigating climate change in 2016 in Paris signed by approximately 196 countries has steered organisations to focus on net zero carbon emission and 100 percent renewable energy. With these imperatives, services providers are helping clients in their sustainability efforts while addressing digital transformation initiatives.

Service providers in this quadrant have the capability to help clients achieve carbon neutrality and improve their environmental, social and governance (ESG) performance.

Eligibility Criteria

- Should have helped clients in at least one of the SDG and ESG goals
- Provide solutions for businesses to achieve their sustainability goals
- Offer sustainability services as a separate offering or as a part of their digital services
- Help clients achieve or target to achieve sustainability in the region of assessment
- Should be able to measure and report revenue from sustainability services delivered to clients

SUSTAINABILITY AND DECARBONIZATION SERVICES

Observations

Sustainability and decarbonisation has been a major focus area in the UK, with organisations and government bodies preceding the targets to meet the 1.5 degree climate change target and to remain sustainable. Many have joined hands with international bodies such as the United Nations to focus on improving their sustainability targets, mainly to remain compliant, build brand awareness and attract customers. Service providers have been instrumental in helping clients in their net zero carbon emission targets and in building sustainable supply chains. Many implementations across different industries are progressing towards the circular supply chains with a focus on various strategies to help clients reach their goals, including net-zero targets.

Among the 16 providers positioned in this quadrant, six have been named as Leaders.

- **Accenture** provides services to shift from linear processes to closed-loop, circular processes that minimise waste. It has offerings such as value chain strategies, responsible sourcing, end-to-

end transparency and visibility, network strategy and planning, logistics strategies including fleet electrification, and route optimisation.

- **Atos** has formed a dedicated unit for net-zero transformation for clients. Its services portfolio comprises Atos Zero with five modules.
- **Capgemini** can combine climate and data capabilities to repurpose an enterprise's business and operations for a sustainable future. It has a wide range of assets ranging from tools, an ecosystem of alliances and partnerships to expertise and thought leadership.
- **HCL** Cloud Smart helps clients build a sustainable future with business value and transformation initiatives. It offers environmental and societal commitments as the core of business.
- **Siemens** has identified multiple opportunities to help clients meet goals and drive growth across sectors. These include data-based solutions to make products more resource-efficient, use less energy and enable supply chain transparency. The company also offers infrastructure solutions targeting e-mobility and energy-efficient indoor climates.
- **Wipro** works closely with clients to help design circular business models. It focuses on sustainability by design, covering five dimensions of sustainability. These include environmental capital, social capital, human capital, business model and innovation, and leadership and governance

ENTERPRISE CONTEXT

Blockchain Services

In this quadrant report, ISG evaluates the changing dynamics of the blockchain services landscape and assesses service providers with competencies in consulting, designing, deploying and operating blockchain solutions and managed services. ISG highlights the current positioning of blockchain services players in the U.K., with their relative strengths and gaps.

Blockchain has witnessed widespread industry adoption, with projects moving from proof-of-concept (PoC) to deployment phases. Ethereum and Hyperledger Fabric are emerging as blockchain frameworks of choice for enterprise blockchain initiatives. These initiatives are getting intertwined with other emerging technologies, especially IoT and AI. Blockchain adoption is led by the financial services industry; however, credible use cases are emerging across almost all industries. In the U.K., the government initiatives for blockchain are predominant. Enterprises in the U.K. have made significant investments in piloting or scaling blockchain capabilities.

The following roles can use this report to identify and evaluate different service providers:

IT leaders should read this report to understand the relative positioning and capabilities of providers, which can help them effectively plan and improve the reliability and availability of their businesses.

Innovation leaders should read this report to understand a provider's capability to deliver seamless solutions with blockchain, AI and analytics. The report also gives insights into how the providers can be compared with one another.

Business strategy leaders, through this report, will gain knowledge of providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality.

BLOCKCHAIN SERVICES

Definition

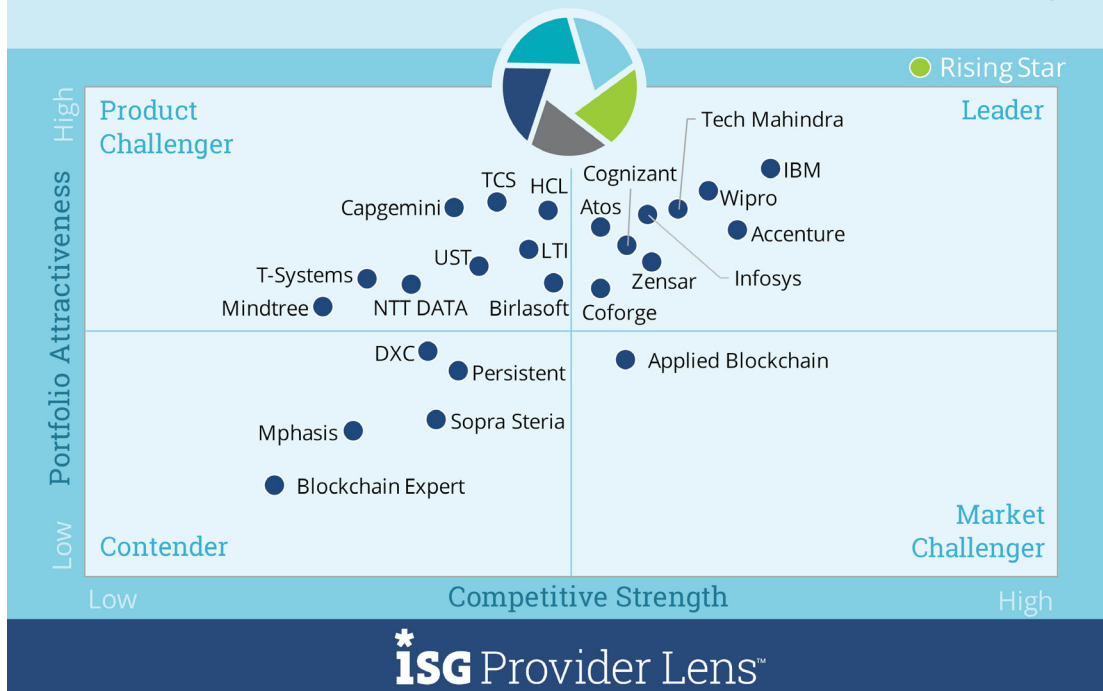
The blockchain services quadrant assesses a service provider's competencies in consulting, designing, deploying and operating blockchain solutions as well as providing services to manage these solutions.

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

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

Digital Business - Solutions and Services Blockchain Services

2021
U.K.



Source: ISG Research 2021

BLOCKCHAIN SERVICES

Eligibility Criteria

- Should be a member of at least one blockchain consortium
- Offer consulting expertise to design viable solutions
- Demonstrate several blockchain use cases and provide a library that accelerates new deployments
- Backed by qualified and trained practitioners to deploy and operate the platform for clients
- Provide services with local expertise in the assessed region or country

Observations

The adoption of blockchain has increased this year as compared to last year. Most cyclic value chains, such as in the energy sector, have implemented blockchain to enable easier functioning and trace the transactions, thereby helping them build new revenue channels. The service providers are not only designing and developing blockchain applications for their clients, but also managing the applications post-deployment. The providers have added numerous decentralized applications (DApps) to their portfolio and have hosted them on their marketplaces so that they can be demonstrated to the clients. The service providers either take a use-case approach to the market (based on industry-specific use cases) or build accelerator platforms specifically for blockchain. The blockchain market in the UK has been stagnant over the past few years. Despite the limited number of blockchain implementations, service providers have deployed some innovative solutions in the region. The solutions were mainly focused on digital identity for medical devices, managing the charging record for electric vehicles and supply chain tracking and tracing. The infrastructure requirements to manage these solutions on blockchain are still a challenge. Another area where blockchain has seen an uptake in the UK is cryptocurrency, with banks expanding services in this segment.

Among the 24 providers evaluated in this quadrant, nine have been named as Leaders.

BLOCKCHAIN SERVICES

Observations (cont.)

- **Accenture** has a strong blockchain business and delivers workshops and training to explore applicability of blockchain for specific client needs. Its solution design for clients encompasses people, processes, operating model and technology
- **Atos** offers end-to-end blockchain services encompassing use case development, application development, privacy and data access models, hardware security management (HSM), service application programming interfaces (APIs), blockchain as a service and managed services, among others.
- **Coforge** has built a common numbering database on blockchain hyper-ledger technology for various telecom providers to provide an updated status of phone numbers.
- **Cognizant** has deployed and tested use cases that are specific to track and trace, including supply chain resilience, food traceability and drug supply chain. These areas gained significant importance during the pandemic period.
- **IBM** has launching enerT, a new token-based renewable energy certificate solution that eliminates third-party involvement in transactions. This allows suppliers and consumers to trade energy certificates with greater efficiency and at a lower cost.
- **Infosys** has a set of toolkits and frameworks to help businesses identify the right use cases and discover network imperatives. These toolkits are utilised extensively in design thinking workshops with network stakeholders.
- **Tech Mahindra** adopts a holistic framework called Block Ecosystem that comprises various levers including Block Studio, Block Engage, Block Talks, Block Geeks, Block Accelerate, Block Access and Block Value. These help create leading applications that are architected on innovation and human excellence to unlock significant value for all stakeholders.
- **Wipro** has several platforms, including blockchain for supply chain, digital assets, digital identity, decentralised trading marketplaces and Wipro Slingshot.
- **Zensar** engages with approximately 25 percent of its global blockchain clients in an outcome-based model, one of its strong differentiators in the industry.



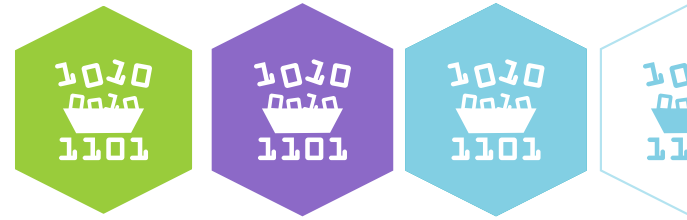
Methodology



METHODOLOGY

The ISG Provider Lens™ "2021 — Digital Business Solutions and Services" Study research study analyzes the relevant software vendors/service providers in the UK. 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 "Digital Business Solutions and Services" UK 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



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Akhila Harinarayan is Senior Lead Analyst and the lead author for ISG Provider Lens studies with a focus on Digital Business Transformation and SAP Services. She has more than 12 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions. She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies. She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers



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ISG Provider Lens™ | Quadrant Report

December 2021

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