ISG Provider Lens™

Digital Business — Solutions and Services

Digital Customer - Experience Services

Australia 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

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.

The lead author for this report is Craig Baty. The editors are Ipshita Sengupta and John Burnell. The research analyst is Monica K and the data analyst is Komal Kumari The Quality and Consistency Advisor is Troy Williams & Michael Gale

ISG Provider Lens

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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 Player8s as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

Australian enterprises are continuously evaluating ways to increase their competitiveness, improve their delivery structures and enable remote working and business continuity. These trends were significantly accelerated due to the COVID-19 pandemic. But any change involves surmounting not just technological challenges, but also cultural dogmas, and involves changing mindsets, alongside transforming established processes and questioning traditional management practices.

Digital transformation (DX) is a broad term that encompasses many technologies and business processes. It refers to both the digitalisation of existing processes and the development of new and digitally enabled ways of doing business. Evolving technologies, such as AI and IoT, are accelerating these trends and leading to exponential changes in the business arena.

Building a digitally transformed enterprise involves much more than the traditional areas of Agile development, now commonly called DevOps. True enterprise agility comes from the ability of a business to respond to changes in the competitive environment, in real time. Speed and effectiveness of response are critical for an enterprise's end-to-end value stream.

Effective DX also requires the achievement and maintenance of flexibility, agility, speed and collaboration across departmental and enterprise boundaries, while enabling the workforce and delivering benefits to customers. Enterprises undertaking digital transformation understand that technologies such as AI, IoT, blockchain, open source and workplace automation and collaboration have a significant influence on these factors. In Australia, there has been strong movement, in the recent years, to cloud-based processing.

Australian organisations are essentially becoming their own software providers, as they hire developers and train employees to become developers, while removing the boundaries between the development and use of applications.

Digital transformation of functions includes technologies and techniques such as automation, AI and cognitive technologies, and feedback and analytical capabilities that can be applied in both the real world and the virtual world by automating responses and interaction with clients, partners and governments. Software and applications are increasingly being developed in digital or virtual test labs, often through automation, and tracked using internal or external sensors or compatible touchpoints during and after delivery, to identify customer preferences in real time.

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Digital transformation is challenging many established business models and changing an enterprise's relationships with customers, employees and business partners at every stage of the value chain. It is essential that Australian enterprises find the appropriate software and services providers, consultants and IT vendors that can provide the support they need in a fast-changing world.

To better understand how suppliers are delivering DX products and services to their clients, ISG has developed a framework with five broad service delivery areas, four of which are covered in the Australian report:

- Digital Business Consulting Services
- Digital Customer Experience Services
- Digital Supply Chain Transformation Services
- Sustainability and Decarbonisation Services
- Blockchain Consulting Services (not covered in Australia)

The key observations for the Australian market are covered in more detail within each chapter. A brief overview of each area is provided below:

Digital Business Consulting Services

There is increased demand for products and services that can help organisations plan, implement and manage processes as digital transformation becomes the norm. The Australian market is mature, with many local and multinational players. This chapter focusses on Australian suppliers that specialise or excel in these services and cover a broad range of activities.

Customer Experience Services

Customer experience (CX) is an integral part of the digital delivery of an organisation's products and services. Australian organisations are well advanced in applying CX techniques and technologies. Australia has a well-developed information and communications technology (ICT) market. It is the 14th largest economy in the world, with a GDP of more than US$1.3 trillion. In addition, Australian consumers have high expectations and demand high levels of customer experience, which poses additional challenges for service providers.

Digital Supply Chain Transformation Services

Supply chain management (SCM) has long been an important and recognised discipline among Australian businesses. Most Australian enterprises have mature SCM processes, and the discipline is well served by local suppliers and consultants. In the digital world, the supply chain, like a business itself, has been transformed from a physical object process to a digital process.

Sustainability and Decarbonisation Services

Australia has been viewed by many nations as lagging in its net zero emission targets, however, in recent times climate change has become high priority in the Australian political agenda. Growing pressure from several high-profile Australian businesses has contributed to this change in mindset. Australia's largest businesses are now being increasingly required to demonstrate how they are managing the range of physical and transitional risks associated with a changing climate.

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Introduction

Simplified illustration

Digital Business - Solutions and Services 2021	
Digital Business Consulting Services	Digital Customer - Experience Services
Digital Supply Chain Transformation Services	Sustainability and Decarbonization Services

Source: ISG 2021

Definition

The COVID-19 pandemic has accelerated the adoption of digital tools and transformation services around the world and created a surge of new digital transformation initiatives. Many of these initiatives have helped businesses survive and thrive; hence, digital transformation has become the pathway to success for businesses across all industries. The use of information technology to change the customer journey, improve business agility or 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 real benefits to the bottom line and have enabled businesses to maintain the client experience during the ongoing pandemic.

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Definition (cont.)

In the past one and half years, many businesses have digitized their customer experience to continue servicing their clients, specifically in the industries where brick-and-mortar stores remained inaccessible due to the COVID-19 pandemic. While some of the businesses moved their customer journeys to online channels, some other businesses have leveraged innovative services such as the use of multiple emerging technologies to deliver better customer experiences, thereby moving from generation 1 customer experience (online channels) to generation 2 customer experience (innovative services).

One of the most disrupted segments during the COVID-19 pandemic has been the supply chain. The complexity involved in the supply chain emphasizes the fact that we 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 increasing technology and infrastructure footprint due to an increase in digitalisation, it is imperative for organisations to embrace the sustainability goals for a greener and liveable planet.

Scope of Report

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 digitize 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 Australia, Brazil, Germany, Nordics, the U.K. and the U.S.

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.

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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 $20 million and $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 $1 billion, with activities worldwide and globally distributed decision-making structures.

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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.

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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.

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

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Sustainability and Decarbonization Services
Accenture	Leader	Leader	Leader	Leader
Atos	Product Challenger	Not in	Leader	Contender
Avanade	Market Challenger	Product Challenger	Not in	Not in
Bain & Co.	Contender	Not in	Not in	Not in
BCG	Contender	Not in	Not in	Market Challenger
Birlasoft	Contender	Not in	Not in	Not in
Bridgei2i	Not in	Not in	Contender	Not in
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CGI	Contender	Not in	Not in	Not in
Clavax	Not in	Not in	Contender	Not in
Climate Works	Not in	Not in	Not in	Contender
Coforge	Contender	Product Challenger	Not in	Not in
Cognizant	Product Challenger	Product Challenger	Not in	Not in

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

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Sustainability and Decarbonization Services
Customer Driven	Not in	Product Challenger	Not in	Not in
Cybage	Not in	Rising Star	Not in	Not in
Datacom	Product Challenger	Leader	Not in	Not in
Deloitte	Leader	Leader	Market Challenger	Market Challenger
DXC	Leader	Product Challenger	Leader	Product Challenger
Edge Environment	Not in	Not in	Not in	Rising Star
Empired	Leader	Leader	Not in	Not in
Energetics	Not in	Not in	Not in	Leader
EY	Leader	Not in	Not in	Leader
GEP	Not in	Not in	Product Challenger	Not in
HCL	Leader	Leader	Leader	Leader
Hexaware	Not in	Leader	Not in	Not in

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

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Sustainability and Decarbonization Services
IBM	Leader	Leader	Leader	Product Challenger
Infosys	Leader	Leader	Leader	Leader
Kinetic Consulting	Product Challenger	Contender	Not in	Not in
KPMG	Market Challenger	Not in	Not in	Contender
Logicalis	Contender	Not in	Not in	Not in
LTI	Not in	Product Challenger	Product Challenger	Not in
McKinsey	Leader	Not in	Not in	Contender
Mindtree	Contender	Product Challenger	Contender	Not in
Mphasis	Contender	Not in	Contender	Not in
nDevr Environment	Not in	Not in	Not in	Contender
NTT DATA	Product Challenger	Contender	Product Challenger	Not in
Persistent	Contender	Contender	Not in	Not in

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

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Sustainability and Decarbonization Services
Point Advisory	Not in	Not in	Not in	Leader
Publicis Sapient	Product Challenger	Leader	Not in	Not in
PWC	Product Challenger	Not in	Not in	Product Challenger
Sonata	Product Challenger	Product Challenger	Rising Star	Not in
TCS	Product Challenger	Leader	Product Challenger	Not in
Tech Mahindra	Leader	Leader	Product Challenger	Not in
Telstra Purple	Leader	Leader	Not in	Not in
The Customer Experience Company	Not in	Product Challenger	Not in	Not in
UST	Contender	Contender	Not in	Not in
Visionet	Not in	Contender	Contender	Not in
Vuram	Rising Star	Contender	Not in	Not in
Wipro	Leader	Leader	Leader	Leader

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Digital Business – Solutions and Services Quadrants

ENTERPRISE CONTEXT

Digital Customer - Experience Services

In this quadrant report, ISG evaluates providers that offer 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 Australia with a comprehensive overview of the competitive landscape of the market. We observe a lack of investment among enterprises in harnessing the advantages of the CX to increase brand awareness, customer satisfaction rates and customer retention rates. By adopting CX services, enterprises are expecting to increase productivity, innovation and change management capabilities to keep pace with competitors' offerings, increase revenue and maintain margins, quality and level of operations.

With customers preferring digital experiences, technologies such as mobile and cloud are accelerating progress exponentially. Enterprises are also using new technologies such as sensors, IoT and RPA to drive digital operations. COVID-19 has become a driving force in ramping up digital adoption at the industry and individual organization levels.

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 their digital experience technologies and services.

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 also gives insights into how 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.

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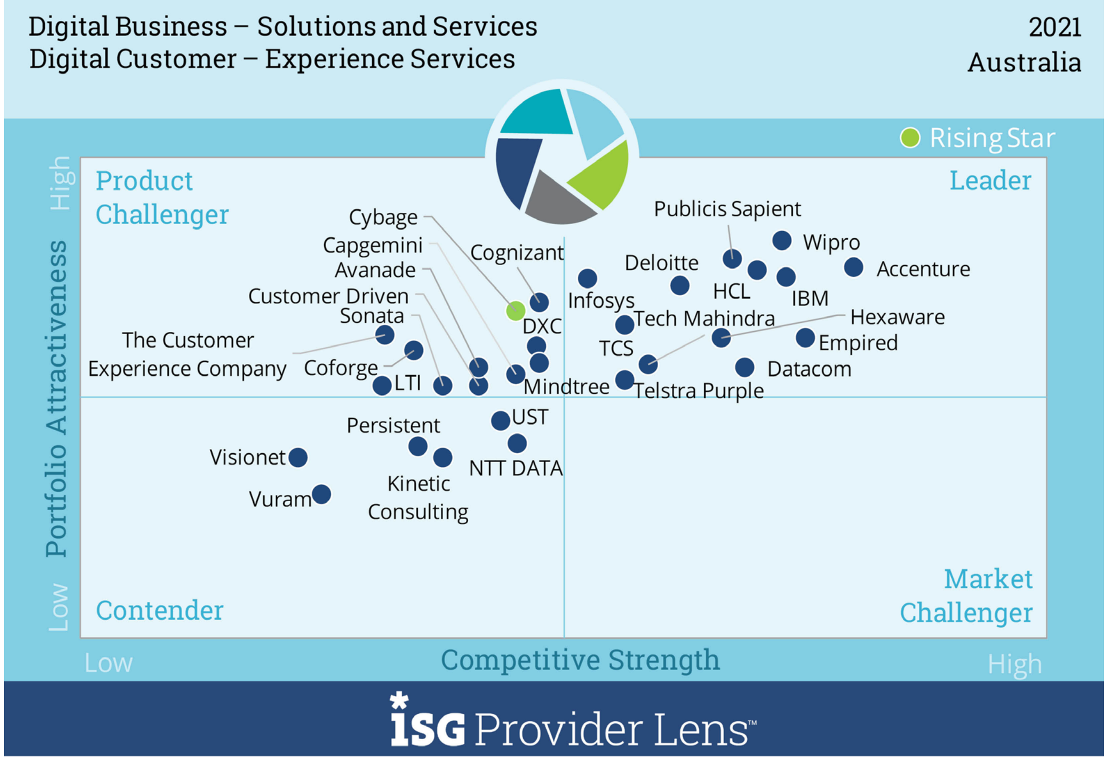
DIGITAL CUSTOMER - EXPERIENCE SERVICES

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



Source: ISG Research 2021

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DIGITAL CUSTOMER - EXPERIENCE SERVICES

Definition (cont.)

technology experts, sales, marketing 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

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DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations

Customer experience (CX) is an integral part of the digital delivery of an organisation’s products and services. Australian organisations are generally well advanced in applying CX techniques and technologies. Australia has a well-developed information and communications technology (ICT) market. It is the 14th largest economy in the world, with a GDP of more than US$1.3 trillion. In addition, Australian consumers demand high levels of CX, which poses additional challenges for service providers.

CX is the focal point for most businesses across verticals in Australia. It is the key to driving customer decisions toward the business outcomes that define their journey. By understanding the behaviour of their customers, organisations can design an interaction path that influences a customer’s buying decision (product or service) or commitment to a brand.

In the modern world, an appealing design and a superior CX are fundamental to capturing an individual's attention. This factor has encouraged many suppliers to acquire digital design agencies, including smaller Australian design consultancies. Optimal design, which is central to customer experience, is applied to stores, branches, apps, websites, social media appearance and marketing campaigns. It shows how a customer can interact with the organisation’s touchpoints. Australia has been especially strong in digital design, with many local production houses acquired by large players for their expertise.

In recent years, digital marketing, of which the CX is an essential component, has emerged as a critical differentiator. It adds the skills needed to understand and improve the touchpoints' effectiveness. Ideally, digital marketing involves a significant use of research and statistics. Vast volumes of data are typically captured at each touchpoint, which requires sophisticated data analytic tools, powered by AI and machine learning, to provide actionable insights. Data-driven AI and machine learning insights do not replace people but allow for scaling operations. CX is central to the process.

Of the 30 providers assessed for this quadrant in Australia, 13 are Leaders and one is a Rising Star:

- **Accenture** is a global professional services company with industry-leading capabilities in digital, cloud and security. It has highly developed technology innovation capabilities and a unique technology consulting approach.

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DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations (cont.)

- **Datacom** is one of Australasia's largest professional IT services companies. It offers a range of specialised services that includes CX consultant specialists.
- **Deloitte** is a part of the multinational Deloitte Consultancy Group, and is active in 29 countries. It has a comprehensive end-to-end CX strategy and a broad and extensive digital enablement toolset.
- **Empired** is an Australia-based managed service provider, established in 1999 in Western Australia. It has a comprehensive CX-led digital strategy and broad industry coverage across Australia and Southeast Asia.
- **HCL Technologies** is an India-based multinational IT services and consulting technology company with offices in Australia. HCL has an experience-first approach to CX consulting and employs a design-led strategy, leveraging its expertise in human-centric design thinking and deep domain understanding.
- **Hexaware** is a next-generation global provider of IT, BPO and consulting services. It has a highly comprehensive customer experience consulting offering, with high levels of functionality and a strong CX partner ecosystem.
- **IBM** is a major global IT hardware, software and service provider. It offers business strategy development and design services with its iX Consulting Services for digital strategy and CX and digital platforms.
- **Infosys** provides business consulting, IT and outsourcing services across 46 countries, including Australia. Its DX offering delivers integrated and personalised experiences, while its Digital Marketing offering delivers personalised marketing campaigns.
- **Publicis Sapient** has more than three decades of experience in IT consulting. It has a highly competitive CX offering with a strong heritage in experience design.
- **Tata Consultancy Services (TCS)** is a global IT services, consulting and business solutions company. It has an innovative CX offering, supported by a network of Digital Reimagination Studios.

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DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations (cont.)

- **Tech Mahindra** is an India-based technology provider of digital transformation, consulting and business re-engineering services. It has a comprehensive end-to-end customer experience offering and a strong presence in Australia.
- **Telstra Purple** is part of Australia's largest telecommunications provider Telstra and has a presence in several overseas markets. It Telstra Purple business unit has strong customer experience expertise and a growing CX consulting presence across Australia, the U.K. and Asia.
- **Wipro** is a leading global IT, consulting and business process services provider, based in India. It provides a comprehensive end-to-end CX offering that includes strategic design, experience mapping and advanced research techniques.
- **Cybage Software** (Rising Star) is an IT services company, founded in India, employing more than 7,000 people, globally. It has an innovative CX consulting offering, comprehensive and expanding AI capabilities and strong expansion plans for the next five years.

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HEXAWARE

Overview

Hexaware is a next-generation global provider of IT, business process outsourcing (BPO) and consulting services. It has an active team of direct sales consultants across the U.S., Europe, the U.K. and Australia, with industry-specific expertise to target midsize and large companies. Hexaware considers all the dimensions of a customer's digital business, including strategy, experience design, marketing service, data and analytics, marketing and content platforms, cloud and mobility. It looks closely at the points of friction within clients' digital products and experiences to design a custom project roadmap. The key verticals it focusses on in Australia include healthcare, retail, banking and payments.

Strengths

Highly comprehensive CX consulting offering: Mobiquity is Hexaware's go-to-market brand for digital products and digital CX. Hexaware's market differentiation in the CX segment is derived from the combination of its CX-first approach, digital product engineering capability and continuous experience delivery. It has four main service categories, namely, digital strategy, digital product engineering, digital branding and marketing and support services. Hexaware blends teams of consultants, analysts, designers, developers and data scientists.

Strong CX partner ecosystem: Hexaware has joint go-to-market plans with partners such as Adobe, Microsoft and AWS. Other key technology partners include Salesforce, Sitecore, Google Cloud, Pega, Liferay and Mambu. The Liferay-Hexaware partnership is unique to the Australia and New Zealand region and successful go-to-market models are currently being carved out for similar regional alliances.

Broad range of CX offerings with high levels of functionality: Hexaware offers services to enable insight and innovation, including workshopping, contextual inquiry, ethnographic research, interviews, research trips, secret shopping, observational research, data analysis and insight. It also offers empathy mapping, journey work, service design and field research. Hexaware enables a client to experience new technologies in which it can practically work through any design or technology question. It uses its Digital Traction Framework to engage with clients to productise innovation.

Caution

Hexaware has strong proprietary offerings and approaches but would be able to extend its business in Australia and enhance its engagement with the overall CX ecosystem by driving co-innovation through partnerships with small, local vendors and start-ups.

2021 ISG Provider Lens™ Leader

Hexaware's Mobiquity offering builds digital products and services that deliver on brand promise and realise business results. This includes a full range of marketing services to launch, amplify and continuously improve products. Hexaware provides Australian organisations of all sizes with a unique end-to-end CX service.

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Methodology

METHODOLOGY

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

Craig Baty, Author

Distinguished Lead Analyst

Distinguished lead analyst and author Craig Baty has extensive research and thought leadership experience in tAP/J ICT markets. Craig is Principal and Founder of DataDriven, ISG's APAC Research partner. Craig has more than 30 years of executive and board-level experience in the ICT industry, including as a Group VP and Head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, EGM Marketing and CTO Fujitsu ANZ, GM Marketing Strategy and Alliances at BT Syntegra Australia, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces and presented at more than 1,500 events globally. He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a executive board member of the Australian Information Industry Association (AIIA) and other appointments. He is currently pursuing a Doctor of Business Administration by Research (DBA) on national culture impact on IT Strategic use and investment (Japan compared to Australia).

Monica K, Enterprise Context and Global Overview Analyst

Research Analyst

Monica K is the research analyst for the Internet of Things and Digital business transformation studies as part of the ISG Provider Lens™ program. She also has experience in researching technologies such as robotic process automation, blockchain, and artificial intelligence. Monica has been working with ISG for the past year and actively takes part in mobilizing service provider information through primary and secondary research. Additionally, she engages in delivering ad-hoc requests from providers and advisor.

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Authors and Editors

Jan Erik Aase, Editor

Partner and Global Head - ISG Provider Lens™

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