

Digital Business Enablement and ESG Services

A research report comparing provider strengths, challenges and competitive differentiators

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In the U.S., the focus is now on being digital

The renaming of this study to Digital Business Enablement and ESG (Environmental, Social and Governance) Services reflects that digital transformation is now a necessity for enterprise clients across industries. The market trend has completely shifted from doing digital to being digital. At the same time, ESG services are now being seen as one of the most important requirements for enterprise clients and have become a critical component and a differentiator in the digital transformation services offered by providers.

The term enablement represents the maturity and complexity that digital

transformation requirements have reached in the last 24 months. To further penetrate the market, providers must not only depend on their robust portfolio of services but also demonstrate their expertise in implementing digital technologies such as AI, analytics, security, IoT and AR/VR. Providers also need to offer strong digital and customer experience (CX) governance frameworks. In addition, they must provide digital tools that support both industry and function transformation, work closely with regional partners and have a strong innovation roadmap that involves clients and partners in developing new and niche capabilities.

Digital reality services present a major opportunity for digital transformation in which enterprise clients explore new ways of collaboration, learning, training, product design and creating hyper-personalized experience.

In the U.S.,
focus has now
shifted to **being**
digital



Executive Summary

In the U.S., the complexity of digital transformation requirements has increased drastically in the last two years. For successful digital transformation, it is very important for providers to show a strong understanding of modern technologies; be focused on innovation; demonstrate thought leadership in advising clients on the latest IT, market and industry trends and offer references on successful implementation.

Continuous IT advancements have resulted in a significant uptake in the use of digital services, tools and frameworks by enterprises in the U.S. Enterprise digital leaders are deploying AR/VR/MR with the goal of creating more immersive experiences for employees and customers, enhancing data visualization, and improving manufacturing and maintenance processes. Enterprises in the U.S. will be more dependent on digital service providers for building and refining

digital business models, fostering a culture that prioritizes experimentation and using technology and data to establish competitive advantages.

Analysis of the data shared by providers as well as in-depth briefings reveal some notable digital transformation and enablement trends in the U.S.

- Providers are now highly focused on offering a more human-centered approach to creating experiences based on the principles of experience-first design for offering a seamless, cohesive omnichannel experience. This includes robust expertise in qualitative research and analysis, ideation, concepting, product strategy, prototyping and validation, agile design and innovative products and services that assist clients in building better digital solutions to address their customers' needs.
- CX is a key focal point for most businesses across all industries in the U.S. It is a determining factor in driving customers' decisions toward the business outcome that defines their journey. By understanding customers' behavior and assessing their requirements, organizations can design an interaction path that influences customer decisions to choose a brand or to buy a product or service.
- Providers continue to invest in building in-house digital tools. The combined use of tools and accelerators for digital services as well as ready-to-deploy platforms helps providers position themselves distinctively in the market. They are investing in building industry-specific tools with proven use cases and function-specific solutions. These tools help providers create the required differentiation in the competitive digital business transformation services market.
- A data-driven transformation approach remains a major requirement from enterprise clients and for a majority of the work that providers have delivered. Clients in the U.S. seek support for decision-making that is highly informed, prescriptive, driven by data and augmented by AI, machine learning (ML) and digital twins for driving tangible business value. Providers are making significant effort into offering analytics services that generate prescriptive, explainable recommendations to optimize business outcomes in less time and with lower cost and risk.
- Digital technologies continue to have a major impact on digital transformation, and they act as the



Executive Summary

biggest enabler to support clients in their digital journey. AI, IoT, AR/VR, cybersecurity and the cloud are being adopted rapidly to modernize and optimize processes and become digital native. Next-gen customer relationship management (CRM) systems enabled with IoT capabilities are helping businesses in the U.S. offer more personalized and connected experience, and providers have started building their capabilities across CRM systems.

- Clients' requirements for digital business model transformation and optimization of digital operations capabilities and services have grown as pandemic-driven structural changes have become permanent. Clients are looking for providers that can assist them by consulting and offering digital technologies and approaches to enable fundamental

changes in their business model, optimize their operations and make them more cost-efficient.

- Self-monitoring, reporting and forecasting models such as predictive analysis are used to detect, contain and solve problems, often with built-in machine learning. To trace and improve forecasts or automate methods and improve the quality of a service, results and reports are stored and shared with involved parties by applying AI inputs to selected relevant employees. This is now of major importance in the supply chain and manufacturing areas.
- In the U.S., enterprise digital leaders are deploying AR/VR/MR with the goal of creating more immersive experiences for employees and customers, enhancing data visualization and improving manufacturing and maintenance

processes. Clients in manufacturing, automotive, energy and utilities and aerospace have already implemented digital reality services at large scale. Healthcare and banking are the next major areas of focus.


- As per the Star of Excellence™ 2021 findings, clients in the U.S. are specifically choosing providers that can blend technology expertise, digital services, tools and talent to help them with digital transformation. They need strong, local and experienced resources that understand the nuances, trends and compliance needs of the local market, as well as provide reference use cases, core platforms, industry expertise and strong product and innovation roadmaps to guide them.

Services from the roadmap strategy through to the realization of digital transformation goals are now mainstream

both in the U.S. and globally. It is essential to obtain the correct stakeholder involvement within the enterprise and to find the best consultancies, service providers and ICT companies to provide the support required, execute the implementation and enable large-scale digital transformation.


Providers and enterprises focus on sustainable offerings and operations



 Provider Positioning


	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Accenture	Leader	Leader	Leader	Leader	Leader
Arvato	Not In	Contender	Contender	Not In	Contender
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Bain & Company	Product Challenger	Not In	Not In	Not In	Not In
BCG	Leader	Not In	Not In	Product Challenger	Not In
Birlasoft	Product Challenger	Product Challenger	Rising Star ★	Not In	Market Challenger
Capgemini	Leader	Product Challenger	Product Challenger	Leader	Product Challenger
Cognizant	Leader	Leader	Leader	Product Challenger	Product Challenger
Cybage	Not In	Product Challenger	Product Challenger	Not In	Not In
Deloitte Digital	Leader	Market Challenger	Market Challenger	Product Challenger	Not In



 Provider Positioning


	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
eInfochips	Product Challenger	Not In	Contender	Not In	Not In
ENGIE Impact	Not In	Not In	Not In	Contender	Not In
Espire Infolabs	Contender	Contender	Not In	Not In	Not In
EY	Product Challenger	Not In	Product Challenger	Contender	Not In
GEP	Not In	Not In	Leader	Rising Star ★	Not In
Group50 Consulting	Not In	Not In	Contender	Not In	Not In
Guidehouse	Not In	Not In	Not In	Contender	Not In
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Leader	Not In	Not In	Not In



 Provider Positioning

	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
HGS	Contender	Product Challenger	Not In	Not In	Not In
IBM	Leader	Leader	Leader	Leader	Product Challenger
Infosys	Product Challenger	Leader	Leader	Product Challenger	Leader
KPMG	Market Challenger	Not In	Not In	Contender	Not In
LTI	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
Marlabs	Contender	Contender	Not In	Not In	Not In
McKinsey	Product Challenger	Not In	Not In	Product Challenger	Not In
Mindtree	Product Challenger	Leader	Product Challenger	Product Challenger	Product Challenger
Mphasis	Contender	Product Challenger	Contender	Contender	Not In
NTT DATA	Not In	Contender	Not In	Not In	Not In



 Provider Positioning

	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Publicis Sapient	Not In	Product Challenger	Not In	Not In	Not In
PwC	Leader	Not In	Market Challenger	Product Challenger	Not In
Siemens	Not In	Product Challenger	Not In	Product Challenger	Not In
Stefanini	Contender	Contender	Contender	Not In	Contender
TCS	Product Challenger	Leader	Leader	Leader	Product Challenger
Tech Mahindra	Rising Star ★	Leader	Product Challenger	Not In	Leader
T-Systems	Not In	Not In	Not In	Product Challenger	Not In
UST	Leader	Rising Star ★	Product Challenger	Not In	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Product Challenger
Zensar	Product Challenger	Rising Star ★	Leader	Not In	Contender



This study focuses on major **digital transformation** trends in the **U.S.**

Simplified Illustration Source: 2022

Business Consulting Services

Customer Experience Services

Supply Chain Transformation Services

Sustainability and ESG Services

Digital Reality Services

Definition

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

One of the most disrupted segments during the pandemic has been the supply chain, an increasingly complex system in a world that has become more

connected and highly interdependent. The digitalization of the supply chain also brings in the aspect of resilience. With enterprises expanding their technology and infrastructure footprints as a result of increased digitalization, they are also embracing sustainability goals for a greener and liveable planet.

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

The digital reality services domain has witnessed accelerated growth, especially in the last couple of years. Virtual reality, augmented reality and mixed reality will



be an integral part of digitalization. AI-powered AR and VR technologies drive the market shift toward the metaverse virtual world.

According to the ISG Index™ for Q1 2022, the annual contract value (ACV of \$5 million or more) for the combined global market, including both XaaS and managed services, grew by 31 percent in the first quarter to reach a record \$24.2 billion. A total of 602 managed services contracts were awarded in the first quarter, which is an increase of 14 percent from the previous year. A majority of those agreements — nearly 60 percent — fell into the smallest range of \$5 million to \$10 million of ACV. The industry also saw a jump in contract restructuring, which increased 19 percent in the quarter, surpassing \$3 billion in ACV for the first time since the pandemic.

The ISG Index for Q1 2022 analysis also observed that budgets have been rising as companies continue to increase investments in driving their digital transformation agendas. Despite the apparent slowdown in market demand in the fourth quarter of 2021, ISG still forecast solid growth for 2022, including 5.1 percent for managed services and 20 percent for the XaaS market, as enterprises invest in digital technologies and capabilities in response to the pandemic and despite current economic challenges.

This ISG Provider Lens™ study focuses on identifying service providers that can support clients with their digital business capabilities. Digital-ready service providers understand the full scope of digital services to provide constant innovation for improving user experiences, accelerating business delivery and incorporating intelligent solutions. They partner with leading technology vendors and facilitate

the use of cognitive computing and learning systems to digitalize client organizations.

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

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

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

Scope of the Report

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

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

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

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market (GTM) considerations. ISG advisors and enterprise clients also use



information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company size 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 revenue between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

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

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) which ISG believes has

strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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





Provider Classifications: Quadrant Key

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

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

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.

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

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

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





Business Consulting Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital business consulting services in the U.S. The region sees an increased usage of a combination of digital technologies to drive innovation and transformation across cloud, application modernization and content monetization.

Enterprises remain highly focused on identifying key innovation opportunities across their businesses to quantify the benefits and costs and accordingly prioritize investments. They seek providers with in-depth industry specific consulting expertise to build rapid and transformational innovation capability

and improve end-user experiences with the help of cutting-edge digital solutions powered by technologies such as augmented reality (AR), virtual reality (VR), hyperautomation, digital twin, and blockchain. They are comparing AI at the edge with cloud to enable every conceivable industry use case. As business enterprises look for incorporating security in connected devices and systems at all layers, digital consulting on cybersecurity is gaining momentum.



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



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



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





The business consulting service industry is highly people-centric. Providers are **investing heavily** in developing in-house tools, accelerators and other intellectual property to **differentiate themselves**. Digital experience strategy and digitalization of operations **continue to dominate**.

Tarun Vaid



Business Consulting Services

Definition

Business consulting services include services provided to enterprises across customer and employee journeys, strategy and digital business operations throughout the digital journey. These services help enterprises build new business models by making use of the existing capabilities across market opportunities. The services provided should create significant benefits for clients and drive their growth. Providers in this space should be able to help organizations transform and optimize their operational environments through research, benchmarking, advisory and consulting, with a focus on information technology, business process transformation, program management services and organizational change management.

The participating companies should be able to help their clients throughout the digital journey, from conceptualizing the vision to delivering the actions needed for the transformation across different industries.

Eligibility Criteria

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



Business Consulting Services

Observations

Based on in-depth discussion with providers in the U.S., it is clear that they see modernizing the core across the industries as the biggest trend that requires robust consulting expertise and tools. Enterprise clients in the U.S. are moving toward mixed architecture through cloud applications to augment their core systems. A majority of service providers have either formed or are in the process of forming strategic alliances with hyperscalers, which are enabling and supporting digital transformation by creating and offering industry clouds.

The demand for consulting capabilities and services for business model transformation, operational efficiency and product and service innovation has seen strong growth since last year's assessment. This is largely because enterprises in the U.S. have realized that improvements in productivity, customer engagement

and overall offerings have become major needs. This also highlights the complete shift in priorities from ensuring survival to enhancing operational efficiency, business model transformation for driving greater agility, improving resilience to deal with rapidly changing business environments and making their capabilities and culture more digital native.

ISG observed that providers are offering digital strategy design, organizational change management, collaboration tools, business model transformation, digital product and service innovation, digitalization of operations and digital experience strategy, as well as incorporating both customer and employee experience, in order to remain competitive.

From the 40 companies assessed for this study, 29 have qualified for this quadrant, with 11 being identified as Leaders and one as a Rising Star.



Accenture's digital business consulting services offer deep functional and industry insights along with competencies to help clients address complex and mission-critical issues.

BCG

BCG strongly focuses on and invests in digital, data and technology to help clients maximize the value of digital projects and improve their overall digital operational efficiencies.



Capgemini is highly innovative in developing new digital solutions and offers a full spectrum of digital business consulting capabilities supported by industry-specific services.



Cognizant reaches its markets via an operating structure that is based on industry verticals and broad industry knowledge, thereby providing clients with best-in-class solutions.

Deloitte Digital

Deloitte Digital offers practical insights from experienced industry practitioners with deep knowledge of the sectors and specific methodologies developed over years of solving real business problems for clients.

HCLTech

HCLTech has a 30-year presence in the U.S. and a demonstrated commitment to investing heavily in building intellectual properties including tools, accelerators and innovation labs.



Business Consulting Services



IBM is well known for its thought leadership and provides clients with superior support in areas such as business strategy development, digital process redesign, business and talent transformation, and development of responsive operating models that are AI-supported.



LTI brings its expertise in delivering connected enterprise transformation, data strategy and architecture, as well as fulfilling the complex requirements of data governance and change management.

PwC

PwC strategically uses its innovation centers such as Emerging Tech Labs, Innovation Labs and Experience Centers to continue innovating and developing its next-generation technology consulting capabilities.

UST

UST provides comprehensive digital business consulting, digital experience and cloud services that support enterprise clients in digital transformation.



Wipro's strong portfolio of digital consulting services, coupled with proven expertise in automation, analytics and industry-specific solutions makes the company a strong digital consulting leader in the U.S.



Tech Mahindra (TechM), a Rising Star, has the capability to offer strong and impactful digital insights by harnessing the potential of data, analytics and cognitive technologies.





“Cognizant continues to be highly focused on enhancing its digital consulting service capabilities.”

Tarun Vaid

Cognizant

Overview

Cognizant has 42 offices and six delivery centers in the U.S. It generated \$13.6 billion in revenue from North America in 2021, accounting for nearly 75 percent of the company's overall revenue. Cognizant Consulting is a growing team of over 4,000 employees delivering end-to-end consulting services. Cognizant continues to enhance its consulting portfolio organically as well as inorganically through industry- and capability-specific acquisitions to gain more strategic accounts.

Strengths

Structured consulting approach:

Cognizant offers enterprise process modernization, technology modernization and transformation management services. Additional consulting services include platform-enabled transformation, business process workflow modernization, cloud and data advisory, digital technology services, change management and M&A advisory.

Acquisition-focused growth strategy:

Since January 2020, Cognizant has announced a dozen acquisitions, all focused on its core and strategic capabilities such as cloud advisory,

digital consulting, data and AI, digital engineering and the cloud. These acquisitions expand its integrated, end-to-end digital transformation capabilities.

Consulting projects delivered:

Cognizant has met complex digital consulting requirements from clients across industries in the U.S. Its projects have included digital transformation of data collection, sharing and governance, omnichannel CX transformation and business model realignment.

Caution

Cognizant must focus on taking up large-scale engagements and increase its ACV from digital consulting services. To stay competitive with other leaders in this quadrant, Cognizant should also increase the number of its local, certified and experienced consultants in the U.S.





Customer Experience Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital customer experience services in the U.S. Customer experience has become integral for digital transformation in returning high ROI across industries.

In the face of new digital brands, new market entrants, and traditional competitors trying to steal market share, customer experience (CX) becomes more important for differentiation, customer retention, new customer acquisition, upsell and cross sell opportunities, customer lifetime value (CLV), and partner ecosystems. Enterprises are accelerating

the adoption of next-generation delivery models to meet the CX demands of their customers. To accelerate digital innovation in this space, they are heavily relying on AR/VR/MR, smart devices, chatbots and conversational A, and are experimenting with potential use cases of metaverse for building immersive and compelling end-user experiences. Enterprises are investing in omnichannel communication orchestration across voice, email, SMS, and the web. The increased use of AI is empowering contact center agents through tools such as Agent Assist and sentiment analysis.



Customer experience professionals should read this report to understand the capabilities and relative positioning of providers that deliver user-centric experience design and rebuild customer journeys. These providers are leveraging innovative technologies such as advanced analytics, automation, AI, machine learning, AR, and VR.



Digital professionals should read this report to understand the providers' capabilities in designing and implementing digital platforms and solutions across the value chain. This enables businesses to monitor and

manage the interaction points across all channels.



Strategy professionals, through this report, will gain insights on providers' experience-led advisory and implementation capabilities as well as their relative positioning. The report also highlights their expertise in formulating and implementing CX strategies to help enterprises reimagine the customer experience.





Providers in this quadrant **offer innovative services covering design thinking, experience design strategy, data modernization and monetization, data science and personalization**. They are expected to develop and deploy high-quality CX services in short time frames.

Tarun Vaid



Customer Experience Services

Definition

This quadrant assesses service providers' and digital agencies' 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 offer consulting and implementation services to improve customer experience (CX) for their clients, with a focus on specialized services for specific industries. Customer experience design is transforming how companies organize marketing, sales, delivery and post-sales processes. It is a customer-centric approach and changes an enterprise's business processes around a customer.

Digital customer experience indicates how digital companies design differentiation for the end-customer journey. This quadrant focuses on conceptualizing customer journeys to create new business models and realize benefits using new

technologies and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product or a brand. The design process includes technology experts, representatives from sales and marketing, and clients working in a collaborative manner. 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 and complex sentiment analysis captured from customer interactions.

Customer experience involves real-time monitoring and measuring of various touchpoints that drive the customer journey and the supporting technology and business processes. A customer experience team produces a continuous change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy.

Eligibility criteria:

1. Should focus on delivering an end-to-end customer journey to provide a differentiated value proposition **supported with advance technologies** such as AI, machine learning, IoT and analytics
2. Should offer advisory, **integration and managed services to enable customer experience services**
3. Must showcase deep industry and customer knowledge for business transformations, changing channels, business structures and cultural shifts
4. Must have an established **CX governance framework**
5. Should have the capability to deliver services using innovative technologies such as augmented reality and virtual reality



Customer Experience Services

Observations

The complexity of requirements for CX projects delivered by providers has increased exponentially in the U.S. in the last 12 months. Now, when clients need to move from doing digital to being digital and new market entrants and traditional competitors are trying to seize market share, CX has become even more important for differentiation and customer retention.

The pandemic, in particular, has unveiled gaps and weak spots in an enterprise's value chain (the way services are built, delivered and managed). As a result, enterprises will invest heavily in redefining their process and technology architectures to offer a truly superior and personalized experience. Providers have developed a host of automation tools and accelerators to enhance the CX journey for their clients, and they are taking full advantage of AI/ML to deliver next-gen CX solutions.

ISG observes that, as in 2021, providers are investing in AI, data analytics, hybrid cloud, digital engineering, edge, 5G and cybersecurity technologies. Significant portions of this investment are now devoted to training employees on these new technologies, enhancing digital centers of excellence (CoEs) for deeper capability incubation, and targeting design agencies for acquiring required expertise, resources and client base. All the leaders in this quadrant have robust offerings and delivery capabilities, a mature client base and proven partnerships. They also demonstrate innovation in developing a portfolio of in-house intellectual property for delivering exponential business outcomes from these services.

From the 40 companies assessed for this study, 28 have qualified for this quadrant, with 11 being identified as Leaders and two as Rising Stars.

accenture

Accenture continues to acquire companies to further strengthen its workforce and capabilities, transforming into an experience agency that can design, build and run customer experiences for growing brands and businesses.

cognizant

Cognizant applies an advisory-led, AI platform-based approach that covers data modernization and AI intellectual property, demonstrating its niche expertise.

HCLTech

HCLTech offers a wide range of frameworks, tools and processes across the consulting, technology solution and implementation areas of the digital business.

Hexaware

Hexaware provides end-to-end CX capabilities through its Mobyquity offering, plus a strong set of tools, platforms and accelerators. It has one of the most loyal client bases for experience services in the U.S.

IBM

IBM iX's CX offering has the most advanced technology capabilities and largest base of full-time employees in the U.S. to support clients across all industries.

Infosys

Infosys offers end-to-end digital transformation services along with a strong partner ecosystem and innovation capabilities.



Customer Experience Services



LTI has many innovative success stories of implementations and deployments for U.S.-based clients. The company is constantly scaling its capabilities across digital technologies.

Mindtree

Mindtree is one of the most trusted digital service providers in the U.S. with good references, use cases and breadth and depth of CX services and tools.



TCS has a large-scale digital CX transformation services practice, along with a robust portfolio of tools and accelerators. The company offers strong expertise in delivering large and complex transformation projects.



Tech Mahindra strategically uses its frameworks, AI, analytics tools and innovation labs to offer more comprehensive digital CX services to clients in the U.S.



Wipro's human-centric, design-led, customer journey conceptualization and delivery are unique in their complexity of projects delivered.

UST

UST, a Rising Star, strategically blends capabilities such as experience design, technology and engineering to create experiences across users' digital channels. It has a strong presence in the healthcare, pharmaceuticals and financial services industries in the U.S.

Zensar

Zensar, a Rising Star, provides end-to-end offerings such as strategy formulation, experience design services, digital channel delivery services (including AR/VR services), customer journey optimization, advanced digital analytics, platforms and frameworks to deliver digital CX services.





“Cognizant offers a comprehensive CX service portfolio with powerful built-in tools and solutions.”

Tarun Vaid

Cognizant

Overview

Cognizant is a U.S.-based company with 42 offices and 25 delivery centers in the region. It provides digital strategy consulting, CX advisory, marketing and analytics to develop CX solutions. It helps clients reinvent business models and innovate products to create better value by connecting people with assets, insights and experiences. The company’s consultants and domain experts assist clients in creating modern frameworks and platforms that leverage a range of digital technologies.

Strengths

Focus on innovation and development:

In the last 12 months, Cognizant introduced new concepts such as Design as a Service and Design Ops to strengthen its design methodology. The company continues to remain focused on developing capabilities such as MLOps and AI on the edge, MLOps accelerator on AWS, and Cloud AI data modernization.

CX approach and solutions: Cognizant offers three interrelated solutions for CX: customer/employee experience for building engagement with customers and employees; content and marketing services for managing channel and

content proliferation and omnichannel commerce for streamlining the buyer journey across channels.

Tools and accelerators: Cognizant uses an in-house tool to analyze customer transactional and behavioral data across channels, clickstream data and social and transactions data. The tool leverages AI and machine learning capabilities to generate personalized offers and campaigns to enhance customer engagement. It also has proven tools such as UX Maturity Assessment, Toybox, CoreArt and FuseKit™.

Caution

The company must focus on marketing initiatives to promote the large-scale transformation that it has delivered to large clients in the U.S. Cognizant also needs to watch out for the other leaders in this quadrant that continue to expand their client base by offering competitive, outcome-focused pricing model.





Supply Chain Transformation Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital supply chain transformation services in the U.S. Enterprises in the region seek more visibility and flexibility across their supply chain systems in order to quickly adapt to changing demands or supply situations.

There is a greater focus on automation and adoption of AI to achieve supply chain process improvements. Enterprises are seeking ways to use and integrate digital tools and technologies to monitor the supply chain in real time by increasing the planning capabilities through scenario modelling and impact analysis. They are seeking help from providers to redefine

and build supply chain strategies to achieve resilience across all supply chain functions. Enterprises are increasingly using data analytics, machine learning, and predictive forecasting techniques to manage costs and increase efficiency. Using blockchain technology in the supply chain to ensure transparency and risk management is becoming a common practice. Some of the ESG goals of enterprises are directly linked to the supply chain, leading enterprises to seek sustainable environmental processes and achieve a green supply chain.



Strategy professionals should read this report to understand providers' capabilities and relative positioning in supply chain advisory and implementation services to help enterprises align their supply chain processes with their overall business strategy for building resilient supply chains.



Technology professionals should read this report to understand a provider's capability in leveraging AI, IoT, advanced analytics, and blockchain in automating and improving supply chain processes and prioritizing sustainability across the value chain.



Supply chain and logistics professionals should read this report to understand providers' capabilities and expertise in supply chain-related systems, services, and technologies. This report also gives insights on how providers can be compared with each other.



ISG Provider Lens
 Digital Business Enablement and ESG Services
 Supply Chain Transformation Services

Source: ISG RESEARCH

U.S. 2022



This quadrant assesses providers that can enable **supply chain optimization**, consulting, integration and managed services **integrated with digital technologies**, including AI, machine learning and analytics to **deliver substantial benefits**, including **achieving ESG goals** for clients.

Tarun Vaid



Supply Chain Transformation Services

Definition

This quadrant assesses service providers offering consulting, integration and managed services for the supply chain across planning, execution and insights, in addition to achieving ESG goals for clients. Providers should leverage a comprehensive framework to use digital technologies such as IoT, machine learning, AI and predictive analytics to enable clients to optimize their entire ecosystem of suppliers, customers, employees and third-party partners to balance their business risk profiles and deliver on carbon neutrality.

A digital supply chain enables companies move from mainly focusing on cost savings to also monitoring inventory based on customer needs. It also helps them optimize their supply chain network and create a predictive, self-adapting supply chain. To deliver these advanced features, digital technology providers offer end-to-end, real-time visibility across an integrated

and networked supply chain. In addition, they are helping clients to not only plan, transform and execute the technology aspect of the entire supply chain, but also optimize their operations across the supply chain.

In the future, trade wars, political unrest, pandemic and the importance of having multiple production units and preference for domestic manufacturing might become norms. Providers will therefore need to re-architect their offerings to increase resilience and support the leveraging of digital technologies and frameworks, in-house tools, and accelerators to enable minimal disruption.

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

Eligibility Criteria

1. Must have delivered specific sustainability services and data **orchestration services for offering a connected supply chain experience**
2. Must have executed advisory, consulting or integration for the digital supply chain for one or more clients across regions or for a specific geography
3. Must demonstrate focus on one aspect of the digital supply chain or the end-to-end delivery of services across the supply chain by **leveraging digital technologies**
4. Must showcase expertise in integrating modern technologies such as **IoT, blockchain and automation** and deliver better user experience
5. Must have a focused and strong regional partner ecosystem of ISVs and other certified partners
6. **Must offer resilient digital supply chain services that support local governance, regulation and compliance standards**
7. Must offer **industry-specific solutions** and best practice knowledge of delivering supply chain services



Supply Chain Transformation Services

Observations

Providers are helping customers build futuristic, resilient and agile supply chains that not only can cater to changes across supply chain functions but also navigate through extreme situations like the pandemic and geopolitical unrest. Providers continue to innovate their existing offerings, making them more robust and strategically combining them with tools to support every facet of the supply chain (planning, execution and procurement). Digital supply chain services now cover in-depth strategy and advisory, solutions and roadmaps, network optimization, and integrating modern technologies.

ISG observed that business outcomes are the most important factors in defining supply chain strategies and suggesting solutions accordingly. Some of the most common outcomes reported are optimization of the supply chain

operations to improve profitability and cycle time, enhancing CX through better predictability and on-time performance, and having a connected supply chain based on strong data orchestration and governance. Providers are applying digital technologies and practices to create transformational outcomes across all supply chain capabilities — including demand planning and forecasting, inventory management, logistics, warehousing, distribution and network optimization — to make the overall supply chain functions more predictable and highly resilient.

Providers now have dedicated centers of excellence for digital supply chain services, where they focus on building use cases based on industry problem statements, client interactions and market research. Through these levers and their strong industry expertise, providers have created niche use cases. Areas where there have

been promising advances include network capacity optimization, digital twins, orchestration of data across systems, sustainable supply chains and ethical sourcing.

From the 40 companies assessed for this study, 26 have qualified for this quadrant, with nine being identified as Leaders and one as a Rising Star.



Accenture offers a portfolio of advanced end-to-end solutions and a suite of vendor-agnostic services for digital supply chain transformation and optimization to serve U.S.-based enterprises.



Cognizant has a strong and robust set of capabilities in digital supply chain transformation services, and it assists

clients in creating high-performance supply chain solutions enabled by next-gen digital technologies.

GEP

GEP is a strong supply chain and procurement solution provider with a comprehensive portfolio of consulting, software and managed services. It offers deep expertise in delivering complex supply chain transformation projects.

HCLTech

HCLTech's supply chain excellence practice leverages in-house tools, frameworks and key services, including consulting and product evaluation, implementation, application support, maintenance and testing, hosting services and application integration and enhancement.



Supply Chain Transformation Services



IBM uses its deep industry expertise and large workforce to offer end-to-end supply chain consulting and services, including supply chain planning transformation, supply chain control towers and supply chain risk and resilience.



Infosys has in-depth execution capabilities, an extensive partner ecosystem and continuous innovation in its digital Live Supply Chain solutions.



TCS collaborates with an extensive network of partners to transform its clients' supply chains by building resilient, responsive and responsible supply chain solutions.



Wipro has a strong focus on supply chains, is aligned with local requirements and has a strong ecosystem of end-to-end partners and services to deliver innovative services to customers.

Zensar

Zensar has strong business relationships and integrator partnerships with multiple leading product vendors, which enable it to offer comprehensive services for the digital supply chain.

Birlasoft

Birlasoft, a Rising Star, has deep expertise in the supply chain domain and has many deployment-ready supply chain solutions for clients that are seeking end-to-end supply chain services or have niche requirements.





“Cognizant has a large footprint in the U.S. and delivers innovative solutions for supply chain.”

Tarun Vaid

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S., and operates in 41 countries. It has over 340,400 employees across 162 global offices. In FY21, the company generated \$18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. It has over 2,000 trained consultants and a strong partnership with 12 digital supply chain management (SCM) tool providers.

Strengths

Strategic partnership with product vendors: Cognizant has strong partnerships with leading digital SCM tool providers such as Blue Yonder, Coupa, Kinaxis, e2open, HighJump, IValua, Manhattan, One Network, Oracle and SAP to provide clients with the experience of a connected supply chain while also easing system integration and data transfer.

Supply chain visibility and analytics: Cognizant develops and runs Business Intelligence Competency Centres (BICCs) using BI and analytics specialists with an in-depth supply chain knowledge to provide a robust

framework of service excellence and deliver KPI metrics from source to dashboard.

Breadth of offerings: Cognizant SCM offerings include transformation, planning and execution that assist clients in reducing complexity by leveraging technology solutions from leading vendors and custom development. Its breadth of supply chain capabilities include strategy, process transformation, maturity assessment, solution selection, roadmap and supply chain transformation management.

Caution

Cognizant must develop a more effective go-to-market strategy for its digital supply chain services to provide value for customers.





Sustainability and ESG Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer sustainability and ESG services in the U.S. Enterprises seek integrated capabilities of advisory and integration services from providers to incorporate net zero and circularity principles across their value chain and drive sustainable business operations.

Achieving sustainable supply chain and logistics systems is becoming a key priority for enterprises in the U.S. For this, enterprises are required to engage with suppliers beyond tier-1 types to actively deliver their ESG objectives. Therefore, there is immense stress on improving traceability metrics and reporting.

Enterprises are collaborating with their strategic suppliers to drive actionable and accountable initiatives to improve impact in addition to their organisation specific ESG efforts. These enterprises seek providers that can help them understand how to measure their scope-3 emissions from third-party suppliers, as third-party risk management is becoming imperative for enterprises in ESG compliance. ISG also observes a huge demand from enterprises for solutions to track and trace supplier compliance.



Technology professionals should read this report to understand the relative positioning and capabilities of providers that can help them with their sustainability targets, measure and track their ESG performance, and build sustainable business with the adoption of digital technologies.



Digital professionals should read this report to understand a provider's ability to deliver seamless sustainability and decarbonization solutions that leverage digital capabilities. The report also gives insights on how providers can be compared with each other.



For strategy professionals, through this report, will gain insights on providers build and implement sustainability-related strategies, enabling them to integrate ESG into their businesses as a key differentiator.





The Sustainability and Decarbonization quadrant has been replaced by the **Sustainability and ESG Services quadrant** this year to reflect changing market maturity. This quadrant assesses **providers that can help clients achieve ESG goals.**

Tarun Vaid



Definition

The Sustainability and ESG Services quadrant assesses service providers' ability to deliver sustainability services to their clients, either as a standalone service or as a packaged offering for digital contracts.

Technologies powering digital transformation generate a significant carbon footprint. However, digitalization is also a means to achieve sustainability and decarbonization. With world leaders taking a pledge to address climate change issues, it is imperative for businesses to achieve net neutrality in carbon emission and remain sustainable, besides reaping the other benefits of digital transformation.

Sustainable business innovation across enterprises is aligned with the United Nation's 17 Sustainable Development Goals (SDG) that are targeted to be achieved by 2030. The Climate Pledge

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

The providers in this quadrant should be able to help clients achieve carbon neutrality and improve their environmental, social and governance (ESG) performance.

Eligibility Criteria

1. Should have helped their clients in achieving at least one of the SDG and ESG goals
2. Should have **solutions for businesses** to achieve their sustainability goals
3. Should offer sustainability services as a **separate offering or as a part of their digital services**
4. Should have helped clients achieve, or have a target to achieve, sustainability in the region of assessment
5. Should be able to **measure and report revenue from sustainability services delivered to clients**



Observations

There has been a significant uptake in sustainability and ESG services by enterprises in the U.S. since the ISG Provider Lens™ 2021 assessment. This can be attributed to the fact that providers have now built very robust ESG practices that assist clients in achieving their sustainability and ESG goals. They offer capabilities for net-zero transitions; a sustainable value chain; integration of modern technologies; ESG measurement, analytics and performance; sustainable leadership and organization and sustainable CX and brand.

The importance of digital technologies such as AI, IoT, predictive analytics, and blockchain for sustainability and responsible business models is fast evolving and driving the sustainability and ESG service market. In the U.S., providers reported more work, reference use cases and client requirements on designing

carbon net-zero strategies, providing climate risk assessment tools and framework, ESG governance framework, and enabling sustainable product lifecycles by supporting the creation of a sustainable and circular business model to help promote a better future.

Leading companies in the U.S. have now turned their focus to digital technologies that can turn environmental challenges into major business opportunities. Cloud, data analytics, IoT and digital sustainable governance frameworks will continue to be the major areas of demand in the U.S., and sustainability service providers must enhance their capabilities in these areas to increase their share in this growing market.

From the 40 companies assessed for this study, 23 have qualified for this quadrant, with six being identified as Leaders and one as a Rising Star.

accenture

Accenture takes a holistic approach to delivering sustainability services to its clients. The approach encompasses strategy, design and execution to increase revenue, reduce cost, manage risk and enhance the clients' brand, reputation and intangible assets.

Capgemini

Capgemini can combine climate and data capabilities to repurpose an enterprise's business and operations for a sustainable future. Its range of assets includes tools, an ecosystem of alliances and partnerships, internal expertise and thought leadership.

HCLTech

HCLTech continues to grow its sustainability service capabilities and has demonstrated successful use cases that it has delivered for U.S. clients in the industrial manufacturing, automotive manufacturing, shipping and oil & gas industries.

IBM

IBM's proven portfolio of offerings feature cognitive technologies that are embedded in sustainability capabilities across many enterprise industries, many technology options and top-tier consulting assets — all of which help create compelling solutions.



Sustainability and ESG Services



TCS has over 40 years of experience in sustainability in a range of fields including environment, fisheries, agriculture, biodiversity, accessibility and water stewardship. It offers more than 200 offerings across industries and multiple dimensions of sustainable development.



Wipro offers comprehensive sustainability service capabilities to its huge client base in the U.S. It also offers deep expertise in delivering complex sustainability and decarbonization projects, which are witnessing tremendous growth in the U.S.

GEP

GEP, a Rising Star, offers a service that combines its ESG, procurement, supply chain and technology expertise to assist clients in operationalizing their ESG strategies.





Digital Reality Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital reality services in the U.S. The use of immersive technologies such as AR, MR, VR, and extended reality (XR) to transform the entire shopping journey of customers and create new memorable experiences is gaining traction in the market.

Most reality service initiatives are currently in the proof-of-concept phase. The common use case requests from U.S.-based enterprises include immersive training that includes virtual avatars, storytelling via metaverse, 3D-based immersive collaboration, and virtual events and exhibitions.

Information consumption, which advanced from text to images and videos, is currently shifting to 3D content. XR is increasingly supporting automation through the right visualization. Standard processes are mapped by automated data, and XR offers the tool to visually support these processes and display this data in real time. In this context, digital twins particularly present strong potential in the industrial environment.



Strategy professionals should read this report to understand the capabilities and relative positioning of providers across strategy consulting and implementation of digital reality services that enable enterprises to integrate AR, VR, and mixed reality into their strategy and operations.



Digital professionals should read this report to understand providers' capabilities in building and implementing digital reality solutions for specific use cases, and their strategic alliances and partner ecosystem.



Technology professionals, through this report, will gain insights on providers' technology expertise in helping enterprises to adopt and integrate technologies such as AI, advanced analytics, digital twins, computer vision, AI, machine learning, and 3D with their IT systems.



ISG Provider Lens™
Digital Business Enablement and ESG Services
Digital Reality Services

Source: ISG RESEARCH

U.S. 2022



This newly added quadrant assesses providers offering **digital reality services** and **advisory, integration and delivery** services to support clients in **adopting and deploying** digital reality services from **pilots to commercial deployments**.

Tarun Vaid



Digital Reality Services

Definition

The Digital Reality Services quadrant assesses providers offering strategy consulting, integration and delivery services to support clients in integrating reality services. In addition to these, providers can also showcase their capabilities on advising clients on digital reality services roadmap development, industry-specific solutions, thought leadership and experience in delivering one or more use cases. The providers need to work along with enterprise clients through ideation, consulting, assessment, storyboarding, prototyping and user testing. They also must leverage a comprehensive framework or methodology to use digital technologies such as IoT, machine learning, AI and advanced analytics to ensure a 360-degree immersive experience, while meeting business requirements and challenges.

Digital reality represents the next transformation in terms of how technology is addressed through an immersive experience that puts human users at the center of the design. It comprises a range of technologies and products that simulate reality in a variety of ways, including augmented reality (AR), virtual reality (VR) and mixed reality (MR). Enterprises and organizations in all industries are embracing AR, VR and MR.

The adoption of technologies such as blockchain, IoT, AI, machine learning, digital twins and computer vision is further reshaping digital reality services offerings.

Eligibility Criteria

1. Must have expertise and interdisciplinary capabilities for AR, VR and MR
2. **Must have developed industry-specific solutions, tools, accelerators and other intellectual property**
3. Experience in integrating one or more technologies, such as IoT, advance analytics, digital twins, computer vision, AI, machine learning and 3D
4. Service providers need to create MR solutions; AR and VR application development for multiple industries; and AR, VR and MR environments, content management, data security and governance frameworks
5. Experience in integrating digital reality services with other IT systems, such as ERP, CRM and learning management systems
6. **Must showcase use cases delivered or proofs of concept ready for pilot implementation**
7. Strong product and innovation roadmap for this service line comprising the strategy for talent, upskilling, R&D projects and partner ecosystem, covering both hardware and software providers
8. **Strong thought leadership capabilities**



Observations

Digital reality is an overarching term to encompass reality-creating technologies such as AR, MR, VR and extended reality (XR). They often include 360-degree video, wireless (if a mobile solution) broadband connectivity, hi-fi audio and other emerging immersive technologies that can create an artificial computer-generated environment. The term also covers technologies that offer users an immersive, engaging experience with their actual physical environment. These often allow the sharing of this experience and offering information or interactive data concerning the physical environment being experienced through the lens of a virtual interface device.

The pure virtual world allows much development, modeling and piloting to be performed and is in use increasingly across industries such as manufacturing. The largest deployments of digital

reality services, however, tend to be found currently in highly complex engineering and associated maintenance applications. For example, AR is used in aircraft engine or large turbine (ship or power) maintenance and in fault finding or upgrade work for complex electrical systems. Such AR solutions are often supplied by the industry manufacturers themselves (e.g., Airbus, Boeing, GE and Rolls-Royce). Some of these highly advanced systems are available to customers from third-party providers or supplied as part of a partner ecosystem by an advisory or system integrator provider.

Training, collaboration, customer assistance and product design continues to be major use cases. Smart city planning and applications across the healthcare industry are expected to be major focus trends in the future.

From the 25 companies assessed for this study, 17 have qualified for this quadrant, with four being identified as Leaders.

accenture

Accenture continues to bolster its digital reality capabilities by making strategic investments, through Accenture Ventures, in Cintoo, Strivr and Talespin.

HCLTech

HCLTech focuses on expanding its reality services business to include GTM, investments in startups and partnerships, building out its XR platforms, hiring qualified talent and growing through acquisitions.

Infosys

Infosys is extending its digital reality practice by developing reusable frameworks, partnering with technology providers, adopting startup-based accelerators and focusing on IP development and vertical solutions.

Tech Mahindra

Tech Mahindra has formed strategic alliances with 15 startups, including EarthID, GenXP and Setvi, as well as technology providers like Adobe, AWS, IBM, Microsoft and NVIDIA, with a focus on joint product development and GTM.





Appendix

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

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

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

The study was divided into the following steps:

1. Definition of Digital Business Enablement and ESG Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. 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



Author & Editor Biographies

Author



Tarun Vaid
Lead Analyst

Tarun has nearly a decade of extensive research experience across the ICT domain, including report writing, drafting thought leadership, analyzing IT spending, consulting clients on latest trends and business use cases. Additionally, he has been responsible for delivering end-to-end research projects, working with internal stakeholders in delivering various consulting projects.

Research Analyst



Monica K
Research Specialist

Monica K is a research specialist and a digital expert at ISG. She supports and co-authoring Provider Lens™ studies on the Internet of Things (IoT), Digital Business Transformation, Blockchain, Enterprise Application as a Service, and Cybersecurity. She has created content for the aforementioned Provider Lens™ studies, as well as content from an enterprise perspective, and she is the author of the global summary report. Monica K brings over 8 years of experience and expertise in technology,

business, and market research for ISG clients. Prior to ISG, Monica worked for a research firm specializing in technologies such as IoT and product engineering, as well as vendor profiling and talent intelligence. She has also been in charge of delivering end-to-end research projects and collaborating with internal stakeholders on various consulting projects.





IPL Product Owner

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

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

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



*ISG Provider Lens™

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

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*ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.





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