

Next-Gen ADM Services

Agile Application Development Outsourcing

A research report comparing provider strengths, challenges and competitive differentiators

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DXC TECHNOLOGY



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Cost reduction and business efficiency have become prevalent over new technology exploitation

The next-gen application development and management (ADM) market in Europe is evolving at a rapid pace. AI is a prevalent trend, with generative AI being the next level, driving innovation and efficiency across various verticals. In the aftermath of COVID-19, the focus of enterprises has largely shifted to cost reduction and efficiency from new technology exploitation. Automation has gained prominence as clients seek business-centric solutions with a strong emphasis on meeting their industry-specific KPIs.

Consolidation and cost centricity

Technology consolidation and rationalization, including low-code/no-code development, play a significant role in digital transformation. Customers increasingly favor managed services,

a trend augmented by the rising involvement of hyperscalers, which necessitates comprehensive system maintenance. Managed services are further integrated with cloud solutions, driving the demand for combined proposals.

Simultaneously, there is an increase in the need for global capability centers, as managed services move toward consolidation. Amid this shift, the pressure for total cost of ownership (TCO) reduction intensifies, particularly in large, multi-million Gen 2 and Gen 3 contracts. Standard levers such as the global delivery model (GDM), pyramid mix and junior intake are reaching their limits, compelling providers to innovate and demonstrate proactiveness.

One such innovation is AI-driven zero touch operations, providing predictive and proactive monitoring via AIOps-led use cases. This approach enhances IT operations, aligns business and ITOps and standardizes service request workflows. There is a significant focus on transforming the existing landscape, with Agile becoming mainstream and site reliability engineering (SRE) gaining traction.

Localization
is a critical
success factor
for providers
in the European
Next-Gen
ADM market.



In this evolving market, delivering value has never been more crucial. The focus is on industry value realization, end-to-end automation, AI Operations (AIOps) and full-stack development. Security also demands increased effort and commitment. The market is seeing a shift toward business/end-user orientation, with unique commercial models and SLAs, such as business experience level agreements (BXLA), gaining traction.

Security

Security is at the core of Next-Gen ADM in the European market. With increasing cyber threats — having peaked in the past 18 months during the Russo-Ukrainian War— and stringent regulations such as the General Data Protection Regulation (GDPR), the role of DevOps has evolved to incorporate security from the ground up, resulting in the emergence of DevSecOps.

In DevSecOps, security is not an afterthought but an integral part of the entire development lifecycle. This integration minimizes application vulnerability risks, ensuring secure software delivery at the speed required for modern business operations.

However, incorporating security in DevOps (DevSecOps) is not an easy task. It necessitates a deep understanding of the potential security risks associated with application development and a proactive approach to addressing them from the outset. This includes applying robust security measures, such as strong data encryption, strict access controls, secure coding practices and continuous monitoring for potential vulnerabilities. Furthermore, providers must regularly conduct audits and vulnerability assessments to identify and rectify potential threats. These requirements make continuous improvement, which is essential for successful DevSecOps implementation.

Leading providers demonstrate their commitment to data protection and adherence to regional regulations. This includes understanding the nuances of local laws and building solutions that are not only technologically advanced but also compliant with regulations.

Cloud-based ADM

Cloud-based ADM solutions are expanding rapidly due to their scalability, cost-effectiveness and flexibility. They are crucial in promoting

Agile and DevOps practices, enabling faster application deployment and improving business agility. Furthermore, cloud solutions facilitate integration with emerging technologies such as AI and automation, thus amplifying innovation and efficiency. Amid the digital transformation wave, cloud-based ADM services have become a linchpin for companies striving to adapt, evolve and compete in the fast-paced, tech-driven market.

Green ADM

An upcoming component of Next-Gen ADM in Europe is its environmental impact. The pursuit of green ADM strategies is pivotal, including designing energy-efficient software and responsible disposal of e-waste. Providers are expected to align with regulations such as the Waste Electrical and Electronic Equipment (WEEE) Directive in Europe. As digital transformation accelerates, the importance of minimizing the carbon footprint associated with software development and deployment cannot be understated. This societal and environmental awareness is part of the broader industry shift, emphasizing businesses' need to operate

sustainably in an increasingly digital world. Some providers have created various offerings for green ADM services and solutions, but a clear strategy is yet to be seen on the horizon.

Localization, a key factor in Europe

In the European market, ADM providers must adhere to stringent regulations such as GDPR for data protection. Along with this, they need to comply with different industry-specific regulations, such as PSD2 in the banking sector, as well as environmental regulations. Localization is key, involving language support and cultural sensitivity in user interfaces. Data sovereignty laws may require local data centers for specific sectors. A robust partner ecosystem is essential to ensure comprehensive service provision. Successful providers exhibit flexibility, tailoring solutions to customer needs, and demonstrate commitment to innovation, incorporating cutting-edge technologies such as AI and ML to enhance their offerings.



Multiple regulations

While the European Union has overarching regulations such as GDPR for ADM, their implementation varies among member states. For example, more lenient countries do not adopt Germany's stringent implementation standards. An increased emphasis on digital sovereignty, particularly in France and Germany, influences ADM sourcing and data management strategies. Post Brexit, the U.K. has introduced diverging data protection rules. Some countries also enforce specific national IT security laws and linguistic regulations. While regional variations are minimal, federal countries like Germany may see minor differences due to state-managed sectors.

Generative AI

Generative AI's transformative potential is undoubtedly capturing attention in the ADM landscape in 2023. While small, more agile firms readily adopt the technology, large global service providers are navigating its implementation cautiously, largely due to the challenges associated with rolling out such innovations across expansive teams.

The speed at which generative AI has developed in the past two years is immense and continues to rise. Generative AI has been successful in specific tasks, notably boosting productivity in code creation and testing automation. ISG expects a fast expansion of its capabilities in ADM and other sectors. At the time of this writing, generative AI can create code snippets out of written descriptions and requirements, independently check its own or other code for errors and correct them, streamline test identification and scripting, report and correct scripting errors, and suggest application code improvements. This saves time and significantly enhances applications' quality, reliability and security. Generative AI can also interpret and document undocumented code, which might have a huge impact on the speed and effectiveness of legacy application modernization.

However, it is important to note that the technology does not yet write logic or program flow, and the implementation of proprietary code remains a hurdle. Providers could not show objective evidence to state that individual productivity can change the project length.

Even then, generative AI proves to be valuable in interpreting, describing and fixing applications, making it an indispensable tool for application managed service (AMS) providers. In the European context, generative AI's influence on the Next-Gen ADM market is expected to be profound as long as data privacy challenges, code ownership and scaling across large teams can be adequately addressed.

Prevalent skill shortage

Skill shortage is a pressing issue in the European Next-Gen ADM market. Specific expertise demanded by digital transformation and evolving technologies such as AI, cloud computing and cybersecurity is currently in short supply. The most sought-after skills include proficiency in programming languages such as Python, Java and JavaScript, along with knowledge of DevOps, ML, data analytics and cloud architecture. The growing demand for generative AI will further increase the skill shortage in this area.

Additionally, there is an increasing need for soft skills, such as critical thinking, problem-solving and adaptability, to handle complex projects.

The skill shortage is particularly prevalent in the German, France and U.K. markets due to their high technical activity and strong economies. The skills gap drives companies to increasingly invest in training, education and competitive recruitment strategies. Besides offering large nearshoring and offshoring capabilities to execute projects, providers address enterprises' demands and cater to specific training programs and services to find, educate and retain highly skilled staff.

User experience

The European Next-Gen ADM market is witnessing an enhanced focus on user experience (UX). Given the digital-first approach due to the pandemic, businesses realize that a superior UX is crucial for user engagement and retention. Therefore, providers prioritize intuitive interfaces, smooth navigation and personalized content. They incorporate UX designs early into the development cycle, ensuring seamless interaction between users and applications. Some providers have been expanding their UX offerings with acquisitions of specialized companies and agencies and



Executive Summary

are leveraging analytics to understand user behavior to improve UX iteratively. This shift enables customer satisfaction, brand loyalty, localization efforts and business growth.

Generative AI is poised to redefine the ADM landscape, accelerating test case identification, script writing and error rectification, thus amplifying productivity and bolstering application quality. Its potential to transform operations, reduce testing time and drive unparalleled efficiency is evident. Generative AI represents the future of agile, effective and innovative application development and management.




Provider Positioning

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	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Accenture	Leader	Leader	Leader
Aspire Systems	Not In	Not In	Product Challenger
Birlasoft	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
Cigniti	Not In	Not In	Contender
Coforge	Not In	Product Challenger	Contender
Cognizant	Leader	Leader	Leader
Datamatics	Not In	Not In	Contender
Deloitte	Leader	Product Challenger	Product Challenger
DXC Technology	Leader	Leader	Leader
Eviden	Leader	Leader	Not In



 Provider Positioning

	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Fujitsu	Product Challenger	Product Challenger	Contender
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Contender	Contender
IBM	Market Challenger	Not In	Contender
Infosys	Leader	Leader	Leader
Kyndryl	Not In	Product Challenger	Not In
LTIMindtree	Rising Star ★	Product Challenger	Rising Star ★
N-iX	Rising Star ★	Not In	Not In
NTT DATA	Product Challenger	Product Challenger	Not In
Persistent Systems	Market Challenger	Contender	Not In
Quinnox	Contender	Not In	Not In

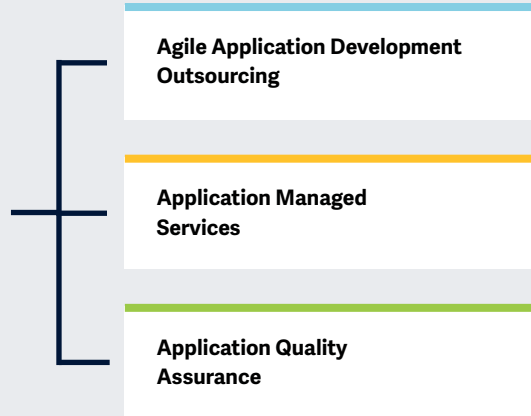


 Provider Positioning

	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Sopra Steria	Product Challenger	Market Challenger	Leader
Stefanini	Contender	Not In	Not In
TCS	Leader	Rising Star ★	Product Challenger
Tech Mahindra	Product Challenger	Product Challenger	Not In
TestingXperts	Not In	Not In	Product Challenger
Tietoenvry	Product Challenger	Market Challenger	Rising Star ★
T-systems	Market Challenger	Market Challenger	Product Challenger
Unisys	Not In	Contender	Not In
UST	Contender	Contender	Not In
Wipro	Leader	Leader	Leader



Three quadrants cover the **key capabilities** in planning, development, quality control and deployment of software applications.



Simplified Illustration; Source: ISG 2023

Definition

Leveraging software capabilities to integrate all business layers, create new data sources and gain enterprise agility is an indispensable requirement for modern application outsourcing.

Next-Gen ADM services include consulting, design, custom development, packaged software integration, application management and operations, quality assurance, security services and testing.

Cloud-based computing and the rising demand for automation and AI drive the market for cloud-native application development and give it a new focus. Service providers emphasize Agile methodologies and the continuous, secure delivery and automation of software development processes with DevSecOps, Tailor-made roadmaps combine digital, operational and technology goals to meet clients' objectives.

Service providers enable organizations to automate routine tasks and gain deeper insights into their application development processes using AI. This has led to the development of new tools and platforms that

incorporate automation and AI capabilities to accelerate development cycles; ensure security, threat detection and vulnerability management; and improve end-user experience; this, in turn, helps deliver intuitive, engaging and personalized applications.

This study focuses on the recent developments that have taken place across the application development, application management and quality assurance markets. Simultaneously, ISG is launching the 2023 ISG Provider Lens™ Next-Gen ADM Solutions - Low-Code/No-Code Development Platforms 2023 study to offer clients a broader understanding of the application solutions market.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services: Agile Application Development Outsourcing, Application Managed Services and Application Quality Assurance.

The ISG Provider Lens™ Next-Gen ADM Services 2023 study offers the following to businesses and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including Brazil, Europe and the U.S.

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

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$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 service providers that ISG believes have 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.





Agile Application Development Outsourcing

Agile Application Development Outsourcing

Who Should Read This Section

This report evaluates agile application development outsourcing service providers in Europe. ISG highlights their market positions based on service depth and presence.

Enterprises look for application development services aligned with digital transformation, requiring seamless cloud, AI and analytics integration. Providers are shifting from traditional ADM to Agile, DevOps and DevSecOps as enterprises seek faster development, collaboration and security. Demand for expedited development drives interest toward low-code/no-code tools for non-tech contributors and generative AI for lifecycle automation. Providers are expected to adopt DevSecOps across development and deployment to enable robust application security.

Enterprises seek measurable business benefits beyond coding, valuing architecture, Agile, DevOps and cloud-native services. As trust and localization are vital in the European market, providers must understand regional nuances, languages, cultures and regulations, including data privacy and cybersecurity.

Establishing local centers and acquiring startups within the country are attractive strategies for enterprises seeking to improve communication and collaboration, thereby fostering a stronger relationship between clients and providers.

The providers in the region prioritize client-centric approaches and integrate cutting-edge technologies such as AI, cloud, IoT and blockchain into application development. They emphasize business outcomes and CX using Agile, DevOps, and DevSecOps. Providers modernize legacy systems leveraging their significant technical expertise and accelerate the adoption of generative AI. Security is paramount and is ensured through a focus on cloud-native technologies and early cybersecurity integration.



IT professionals should read this report to determine service providers' strengths and weaknesses in ADM and their ability to integrate cutting-edge technologies for market advantage.



Business professionals should review this report to understand partner positioning for efficient application service procurement and favorable ROI in their businesses or industries.

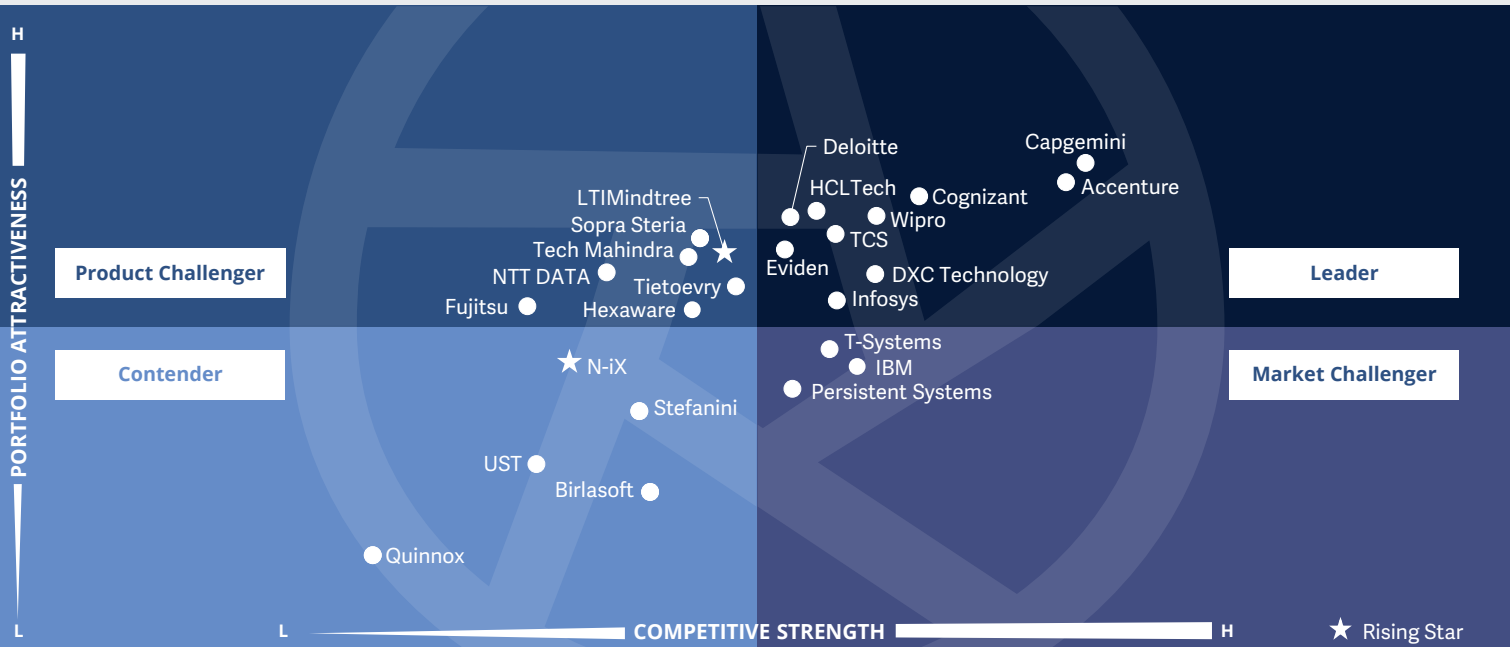


Operations professionals should read this report to understand how service providers can help generate more business value while simplifying business operations and processes.



Next-Gen ADM Services
Agile Application Development Outsourcing

Europe 2023



This quadrant assesses **pan-European** application outsourcing service providers that take over the responsibility for the **strategic planning and execution, business integration, outcomes and risks** of an **entire** application services **organization**.

Oliver Nickels



Agile Application Development Outsourcing

Definition

This quadrant assesses service providers that offer ADM expertise with the use of different technologies, spanning the complete application development and management landscape and most industry verticals, in outsourcing deals that are based on the delivery capacity for a specific time frame (three- to five-year contracts, renewable).

ADM outsourcing offers capacities, regardless of the number and size of projects and programming languages, to support clients' application portfolios or business units. It covers large and highly complex application landscapes that can span multiple geographic locations, lines of businesses and organizational entities. One of its roles is to break up silos in both organization and technologies, create unified technology platforms for the application development landscape, and thus allow faster and more innovative go-to-market on a large scale.

This study evaluates how service providers use project management tools, platform as a service (PaaS), software as a service (SaaS),

low-code/no-code platforms or other accelerators to elevate clients' application development and management capabilities.

A typical service provider in this quadrant has extensive consulting expertise and high-end technology partnerships to implement CI/CD pipelines, application testing and DevOps to enable clients to achieve high performance while reducing time to market.

Eligibility Criteria

1. Management of more than 20 squads for a single client or being able to **scale up to more than 1,000 developers**, working simultaneously on several projects
2. Ability to **rapidly scale up or down** and add more than 100 developers in a week to meet the demands of a client as necessary
3. **Comprehensive Application Development Platform** that covers resource allocation, portfolio management, backlog prioritization, Agile methods, Waterfall methods, system integration, application modernization, cloud-native application development and other services to optimize development teams
4. **Certified to transform and deploy Agile** teams under frameworks such as Scaled Agile Framework (SAFe) and Large-Scale Scrum (LeSS)
5. **Certified experts** in Scrum, Kanban, Lean development or other Agile methodologies



Agile Application Development Outsourcing

Observations

The Next-Gen ADM market in Europe continues to evolve dynamically, driven by rapid digital transformation and increased adoption of cloud technologies, AI and advanced analytics. Traditional ADM services are transitioning to a more Agile-, DevOps- and DevSecOps-oriented model. The latest trends in the market include the use of low-code/no-code development tools, the introduction of citizen developers, and the use of generative AI in application development, management and testing.

Application security has become a critical concern for organizations. Providers are expected to work with DevSecOps, an extension of DevOps where security (Sec) is deeply embedded into the process. This allows clients to make everyone responsible for security involved in the development and deployment process, thus ensuring that security is not an afterthought but a core part of the entire lifecycle.

Leading providers deliver a clearly defined and measurable business benefit for clients beyond traditional coding and programming, including architecture design and planning, the Agile and DevOps methodologies, and cloud-native development.

Localization is an important factor for providers in the European market to win clients' trust, covering the region's many languages, local cultures, requirements and regulations, especially regarding the data privacy and cybersecurity norms in different European countries. The providers in this study generally seek to expand their local presence by establishing in-country delivery centers, acquiring local providers and tech startups, and expanding sales and execution teams into Strategic Countries and other regions.

From the 100 companies assessed for this study, 25 have qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture adopts a client-centric, innovative approach, infusing AI, cloud, IoT and blockchain into application development. Its strategy unifies teams and focuses on business value, leveraging generative AI, hyperautomation and adaptive talent to enhance value.

Capgemini

Capgemini's value-centric transformation and delivery approach goes beyond frameworks and tools. Emphasizing business outcomes and customer experiences, the company leverages Agile@Scale, DevOps and DevSecOps for quality delivery, with strong investments in European Agile hubs.

cognizant

Cognizant's tech-centric approach leverages deep technical knowledge and industry expertise, excelling in modernizing legacy systems and digital engineering. The company provides extensive digital skills, while Cognizant Neuro® AI accelerates generative AI adoption.

Deloitte.

Deloitte integrates software and product development, underscoring a commitment to innovation. Leveraging its extensive consultancy heritage, Deloitte offers a multi-disciplinary approach, seamlessly converging domains like Strategy, Engineering, and Operations.

DXC TECHNOLOGY

DXC Technology emphasizes legacy system modernization, integration with digital solutions and security. Its approach uses Agile/DevOps, proprietary platforms and a data-backed Apps Modernization Studio to streamline complex application landscapes.

EVIDEN

Eviden highlights business-tech integration, AI, ML and data analytics. It emphasizes agility, innovation and automated processes. With its robust cloud-native focus, the company ensures security by design, integrating cybersecurity early in application development.



Agile Application Development Outsourcing

HCLTech

HCLTech combines engineering, advanced technology and business consulting in application development. It focuses on continuous improvement with AI-driven ASM 2.0. CloudSMART, its end-to-end cloud migration solution, leverages full cloud capabilities for application modernization.

Infosys

Infosys excels in AI-infused application development and business transformation. Leveraging advanced analytics via DevSecOps and Live Engineering Platforms, the company offers flexible, outcome-based as-a-service contracts for diversified needs.



TCS leverages its Business 4.0™ model to drive transformation via digital technologies, focusing on mass personalization and exponential value creation. With deep local expertise and proprietary platforms, TCS provides individualized AI-powered solutions.



Wipro emphasizes digital-first business transformation and user experience, integrating AI and automation into its services. Its investments in AI and metaverse boost innovation. It leverages proprietary solutions and focuses on DevSecOps to increase clients' efficiency.



LTIMindtree (Rising Star) integrates Next-Gen ADM and hyperscalers for modernization, focusing on digital business transformation through consulting. With around 5-7 percent of its revenue dedicated to AI and ML, LTIMindtree develops platforms for improved decision-making and analytics.

N-iX

N-iX (Rising Star) emphasizes co-innovation and Agile methodologies in end-to-end software development. Headquartered in Ukraine, the company provides a strong delivery network and cost-effectiveness to clients. Its key case studies across industries show its deep understanding of client needs.





“DXC Technology brings an unmatched legacy of expertise to application development outsourcing in Europe, underpinned by a holistic approach that ensures seamless digital integration and evolution.”

Oliver Nickels

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. and operates in 70 countries. It has more than 132,800 employees across over 130 global offices. In FY23 the company generated \$14.4 billion in revenue, with Global Infrastructure Services as its largest segment.

DXC offers a holistic perspective on application development, management and quality. A majority of DXC’s application development personnel reside in Europe. The company has 16 delivery centers across Europe. Recently, it opened new technology centers for business intelligence, software engineering and hyperautomation in Spain.

Strengths

Rich modernization legacy: DXC has a rich legacy in IT services. Its application services typically target modernizing legacy systems and integrating them with digital solutions. The company aims to provide end-to-end services, from application design and development to modernization, management and maintenance. DXC’s application development approach strongly emphasizes security and cloud-based solutions.

Agile processes and expertise:

DXC continues to invest in Agile/DevOps to enable its workforce and platforms, including the DevCloud delivery platform, the TALON Agile framework and rolling out DXC’s Continuous Transformation Framework, to identify and resolve bottlenecks in software delivery value streams proactively.

Proprietary platforms and frameworks:

With its modernization experience, DXC offers platforms and solutions to modernize, containerize and operate complex application landscapes. DXC Apps Modernization Studio is a suite of integrated modernization toolsets that manage modernization initiatives. The suite is underpinned by data generated from 1.7 million evaluated applications across more than 640 clients, containing detailed application specifications, portfolio enhancement and transformation management.

Caution

DXC demonstrates proficiency in AI. However, it should accelerate its AI development efforts to match the pace of its competitors. Enhancing its AI capabilities could unlock new opportunities and strengthen its competitive position.





Appendix

The ISG Provider Lens™ 2023 – Next-Gen ADM Services study analyzes the relevant software vendors/service providers in the European 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 August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Next-Gen ADM 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Oliver Nickels
Lead Analyst

Oliver Nickels has in-depth technical and business knowledge and more than 25 years of experience as management consultant, IT-analyst, marketing manager, and start-up entrepreneur to contribute to ISG customer projects. His focus areas are Organizational Change through digital & AI-based technologies, Internet of Things and the Digital Customer Journey.

Oliver works as free-lance consultant to help ISG customers with all issues related to the digital customer journey and digital marketing. Before, Oliver worked many years in various national and international roles for a leading global IT company, in his last position as digital marketing manager

with responsibility for the digital customer communications of a business unit and as advisor for the management board.

Oliver holds a degree in computer sciences of the University of Bremen and is a certified marketing assistant and business model developer.

Enterprise Context and Global Overview Analyst



Maharshi Pandya
Research Analyst

Maharshi Pandya is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on SAP HANA Ecosystem & Next-Gen ADM Solution and Services. He supports the lead analysts in the research process and authors the global summary report. Maharshi also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Prior to this role, he has been associated with several syndicated and custom market research firms, in which he has worked on both, secondary and primary interaction centric research projects around market sizing & forecasting, competitive benchmarking,

pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media & information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.





IPL Product Owner

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

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

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



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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