ISG Provider Lens™

# Next-Gen ADM Services

## Application Managed Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

**QUADRANT REPORT | SEPTEMBER 2023 | EUROPE**

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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 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

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| | 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 |
| Tietoevry | 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.

**Agile Application Development Outsourcing**

**Application Managed Services**

**Application Quality Assurance**

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.

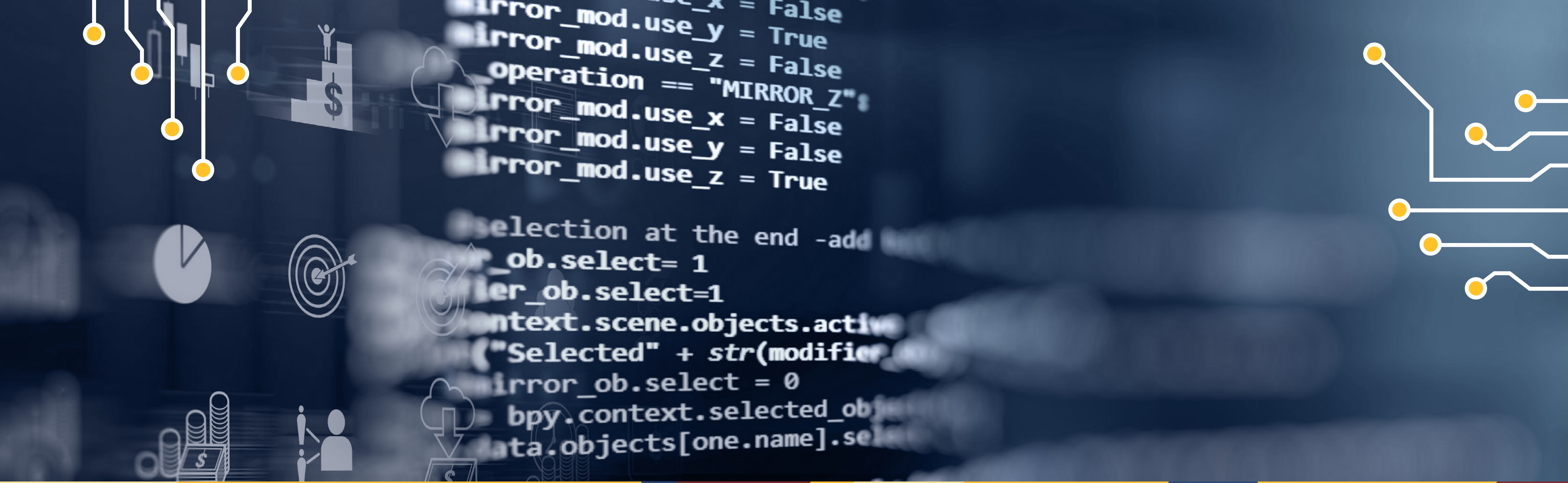
**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**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.

**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.




# Application Managed Service

### Who Should Read This Section

European enterprises seeking to evaluate application managed service providers will find invaluable insights and guidance in this report. The ISG quadrant report outlines the providers' current market position in Europe and their strategies to tackle key enterprise challenges.

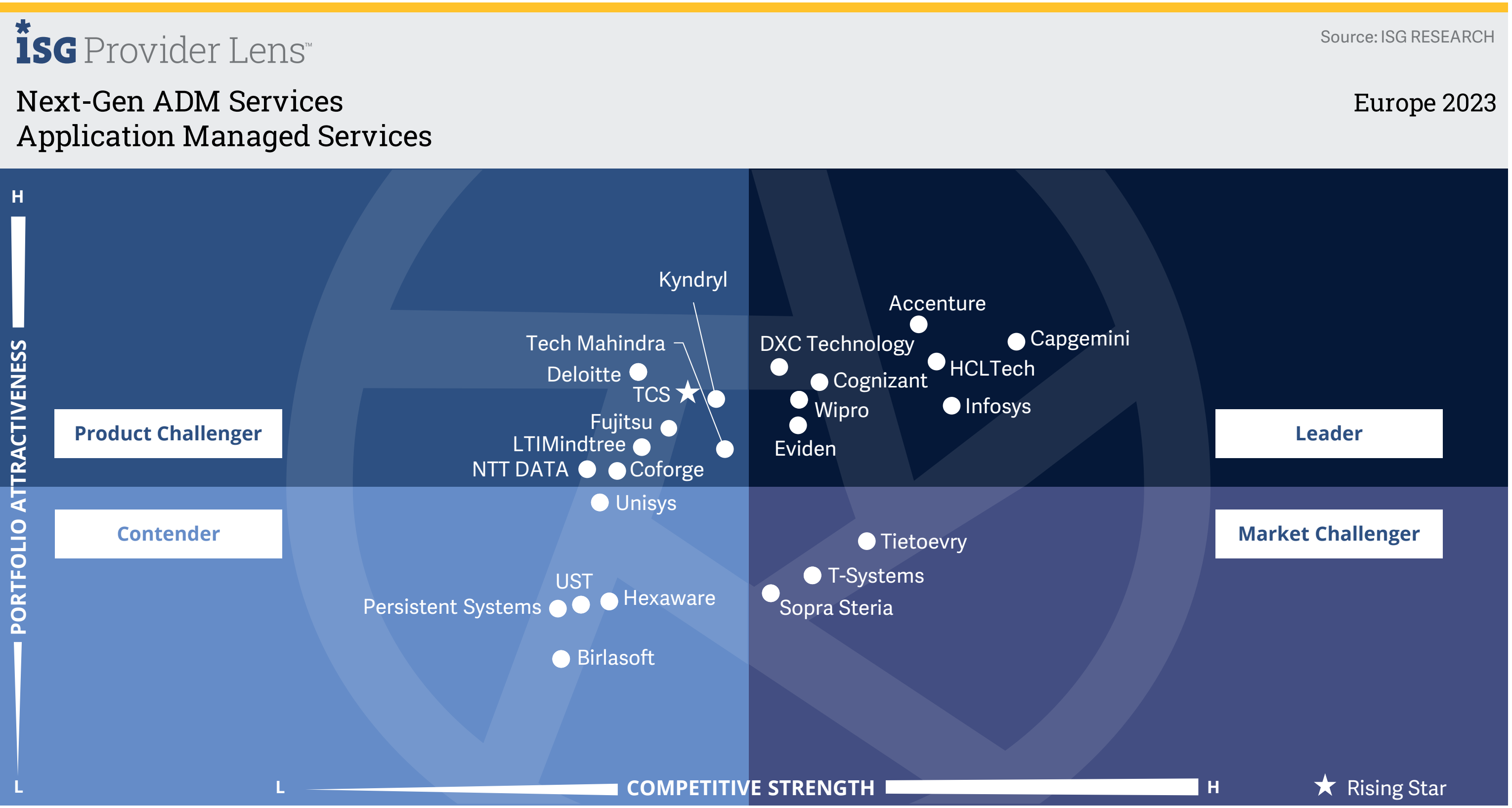
Enterprises require solutions that demonstrate technological prowess and align effectively with business objectives, offering scalability and improved operational efficiency. While the European application management services (AMS) market holds significant potential, service providers must continually evolve to keep pace with the ever-changing technological and business landscape. Generative AI has considerable potential in the AMS market as it empowers service automation, customization and optimization. Its ability to generate predictive models and recommendations could significantly enhance performance, streamline processes and mitigate risks.

Rapid adoption of advanced technologies such as AI, ML and automation among enterprises compels service providers to push the boundaries of traditional AMS. Leading providers differentiate themselves by offering agile, customer-centric services for application development, maintenance and quality assurance. These services are seamlessly integrated into comprehensive end-to-end solutions, using integrated platforms and open proprietary solutions without disrupting the existing environment. As security becomes increasingly important in application management, providers enhance their offerings to counter evolving cybersecurity threats. Some large providers are leading the charge in redefining the European AMS landscape, emphasizing digital offerings, strategic partnerships and customer success.

**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.

**Procurement managers** should read this report to understand providers' ecosystem for application maintenance services in Europe and how various providers compare with one another.

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




This quadrant assesses AMS service providers that **seamlessly** integrate **agile, flexible and customer-centric** application development, maintenance and QA services into a **comprehensive end-to-end solution** that supports **legacy and modern** technologies alike.

*Oliver Nickels*

## Definition

This quadrant assesses service providers responsible for managing clients' defined application portfolios (applications in production). It does not include niche application specialists. Application managed services (AMS) comprise application support, enhancements, platform upgrades, application security, bug fixing, troubleshooting, and merging enhancements and development backlogs under Kanban or similar methodologies. The leading service providers in this quadrant offer application monitoring, release management, version control, defect identification, and resolution and database query performance.

Typical service levels include the time taken to resolve an incident or service request, service availability, the defect rate, user satisfaction or Net Promoter Score (NPS), and user experience. Service transition and client onboarding should include application documentation, service ticket records, knowledge transfer and expert transfer/hire optionally. Continuous service delivery starts after the transition period ends and often includes quality improvement programs and service knowledge refresh.

Large, long-term ADM contracts may include AMS in application outsourcing deals comprising Agile development, application modernization and quality assurance services. This quadrant specifically focuses on the AMS services offered by providers.

### Eligibility Criteria

1. **Deployment and operation of service platforms** for performance and defect management, including troubleshooting, application tickets and service requests
2. Employment of **vendor-certified experts** in packaged e-commerce, ERP or CRM (at least one of these commercial applications)
3. Clearly supports **Microsoft and Oracle technologies**, Java programming and relational databases (such as MySQL, Oracle Database, PostgreSQL and SQL Server); mainframe and other technologies can add to a provider's rating but are not required for inclusion
4. **Integration of more than two service platforms**, such as Atlassian Jira, SAP Solution Manager, ServiceNow and application platforms, such as AWS, Google Anthos, IBM Rational and Microsoft Azure
5. Contracts are based on **fixed service fees or outcomes**, providing clients with options; staff augmentation is an accepted exception

**Observations**

The accelerating adoption of advanced technologies, such as AI, ML and automation, drives service providers to innovate beyond traditional AMS boundaries. Key providers differentiate themselves through offerings encompassing agile, flexible and customer-centric application development, maintenance and QA services.

Leading providers seamlessly integrate these services into a comprehensive end-to-end solution built on integrated platforms and proprietary but open solutions without forcing clients to change their environment. Another trend is the growing importance of security in application management, with providers strengthening their services to meet the ever-evolving cybersecurity threats. Companies such as Accenture, Capgemini and Infosys are leading the way in redefining the AMS landscape in Europe through robust digital offerings, strategic alliances and customer success centricity.

To ensure continued success, service providers must deliver solutions that are not only technologically advanced but also capable of aligning with business objectives, offering scalability and driving operational efficiency. Thus, The European AMS market presents significant opportunities but demands service providers to constantly evolve in tune with the changing technological and business environment.

Generative AI plays a critical role in AMS, as it empowers the automation, customization and optimization of services. This technology can generate predictive models and recommendations to enhance performance, streamline processes and mitigate risks.

From the 100 companies assessed for this study, 24 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

**Accenture** heavily focuses on business value via intelligent automation, Agile DevOps and analytics. Its AI platform, myWizard®, enhances IT efficiency and creates a future-ready client talent pool via its Adaptive Talent strategy.

**Capgemini** aligns IT with business objectives using automation and Lean processes. Its ADMnext platform leverages AI and cloud technology for application management. The Enterprise Automation Fabric optimizes IT operations, enhances efficiency and reduces downtime.

**Cognizant** modernizes and manages applications using AI, automation and analytics. Its AIOps, Cognizant Neuro®, improves resilience and reduces complexity in IT operations. With a platform-centric approach, Cognizant integrates AI automation into application management.

**DXC Technology** focuses on performance improvement while reducing costs using automation and analytics. Its Platform X, supporting Agile methodologies and DevOps, enhances operational efficiency. DXC Application Service Automation employs AI and ML for predictive maintenance.

**Eviden** offers a comprehensive AMS suite, handling everything from legacy to modern, cloud-based applications. Its holistic approach combines infrastructure and data management expertise, focusing on modernizing and optimizing applications. Eviden emphasizes robust security measures.

**HCLTech** blends technical expertise, industry knowledge and advanced technologies for smooth operations and continuous transformation. Its AIOps platform enables effective operations and proactive problem resolution. ASM 2.0 ensures automated, intelligent support operations.

**Infosys** offers comprehensive end-to-end AMS with an AI-first strategy. Its offering includes Agile web/mobile application development, low-code/no-code solutions, app security and legacy modernization. The AIOps methodology enables proactive IT services and operational resilience.

**Wipro** optimizes IT landscapes with AI, automation and cloud technologies. Its modernization approach focuses on standardizing operations with AI-enabled automation, scaled DevSecOps, engineering practices for agility and AI-driven platform-led application management.

**TCS (Rising Star)** offers comprehensive AMS, enhancing business value with AI and automation. TCS' global network and local presence, strong partnerships with hyperscalers and experience in legacy system modernization underline its comprehensive technology understanding.

Leader

"DXC Technology shines in Europe's application managed services landscape, deftly enhancing application performance through automation, analytics and a comprehensive suite of services."

*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.

With many clients spreading across European countries and regions, Europe accounts for the majority of DXC's AMS revenue. DXC covers European countries with a large and expanding network of delivery centers. Its dedicated Secure Hubs provide services for multiple public sector accounts that have special security requirements across Belgium, U.K., Italy, Denmark and other countries.

## Strengths

**Proprietary solutions:** DXC Platform X is a comprehensive and modern platform offering various application development and management services. Built on an open architecture, the platform supports quick deployment, smooth integration and seamless scalability. It combines Agile methodologies, DevOps and advanced analytics, promoting rapid application development and enhanced operational efficiency.

**Operational efficiency and business agility:** DXC Application Management Core is a transformative, industrialized service for cohesive management of complex application portfolios integrated with the DXC Platform X offering. With DXC Application Service Automation, the company offers a comprehensive suite of hyperautomation capabilities, applying AI- and ML-based analysis to enable predictive maintenance and AWS and Azure cloud-native toolsets.

**Full AMS services suite:** DXC provides a full suite of services, including management, modernization, testing and security. DXC's AMS offering typically focuses on maintaining and improving the performance of applications while reducing costs. The company uses automation and analytics to optimize application performance and drive continuous improvement. It also provides specific services for clients with extreme security requirements, such as those in the public sector.

## Caution

DXC has an opportunity to enhance its market position by raising its average annual contract value (ACV), which currently trails some competitors. The company should promote its experience and capabilities to secure large contracts.

# 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*

## 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.

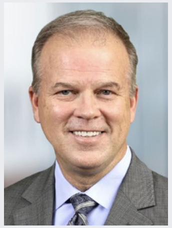
Oliver holds a degree in computer sciences of the University of Bremen and is a certified marketing assistant and business model developer.

*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.

## ISG Research™

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 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 isg-one.com.

SEPTEMBER, 2023

REPORT: NEXT-GEN ADM SERVICES