

Intelligent Automation – Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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Intelligent automation solutions play a crucial role in driving business growth strategically

The intelligent automation services market in the U.S. and around the globe is undergoing dynamic changes driven by the integration of advanced technologies, a focus on hyperautomation, the shift towards cloud-centric solutions, increased emphasis on security and compliance and a growing trend towards customer-centric offerings. IT service providers play a pivotal role in shaping and delivering these trends as they cater to businesses' evolving needs in an increasingly automated landscape.

The intelligent automation consulting services market is undergoing a shift towards strategic alignment, holistic optimization and a strong focus on change management and skill development. Security and compliance considerations are integral to today's automation consulting offerings and industry-specific capabilities, reflecting the

heightened importance of data integrity in automated processes. Furthermore, the emphasis on scalability and flexibility underscores the dynamic nature of business operations and the need for adaptive automation solutions. Global IT service providers are pivotal in shaping these trends, offering consultative services beyond implementation to drive sustainable business transformation through intelligent automation.

Emphasis on scalability and flexibility is emerging as a value pivot for intelligent automation consulting services offerings from provider partners. Providers are acknowledging the evolving nature of business requirements and the need for scalable, flexible, cloud-based automation solutions. Global IT service providers are also developing agile and scalable intelligent automation frameworks, allowing clients to adapt their automation strategies in response to changing business conditions. The security and compliance integration aspects of intelligent automation consulting are also gaining importance, as manifest in major providers' strategies and roadmaps of intelligent automation service offerings. The increasing

Enterprises and Service providers are **strategically collaborating** to embed **transformative capabilities** to solve **critical business challenges.**



Executive Summary

complexity of automation ecosystems, security and compliance are the key levers that are pushing providers are using to integrate security, governance, risk and compliance aspects at the forefront of intelligent automation consulting services. IT service providers are addressing security concerns by integrating robust measures into automation solutions, helping to ensure their clients' data integrity and regulatory compliance.

The emphasis on change management and skill development, the other key aspect of IA consulting, stems from practitioners recognizing automation's impact on workforce dynamics. Consulting service providers are prioritizing change management strategies to ensure smooth transitions. Service providers are actively involved in skill development initiatives, equipping client teams with the necessary capabilities to work alongside automated systems effectively. Holistic process assessment and optimization are also being integrated into this people aspect of IA consulting services. Those services place a strong emphasis on conducting comprehensive assessments of existing business and

workforce optimization processes and setting benchmarking-based targets on process efficiencies, effectiveness and experience before and after implementing intelligent automation, with governance, risk and compliance (GRC), auditability and controls.

Next-gen intelligent automation services incorporate GenAI capabilities to foster creativity in problem-solving and innovation. Global IT service providers are investing in research and development to implement GenAI algorithms that can autonomously create content, designs, and solutions, enhancing the overall automation experience. There is exponential Growth in natural language generation (NLG). NLG is emerging as a key component of next-gen intelligent automation services, enabling systems to generate human-like language for monitoring and alerts, reports, summaries, and communications at all execution levels, development roadmap and strategies. IT service providers are leveraging NLG to enhance the communication between automated systems and human users to improve the interpretability and user-friendliness of automation processes.

Next-gen intelligent automation services also incorporate GenAI capabilities to foster creativity in problem-solving and innovation. IT service providers are investing in research and development to implement and integrate GenAI algorithms within their automation platform offerings that can autonomously create content, designs and solutions, enhancing the overall automation experience.

There is also an increasing focus on ethical AI and responsible automation, thanks to all the recent policy meetings and decisions taken at top government levels, for example, by the U.S. president and in the recent summit of top government and technology leaders in the U.K. Next-gen services are now being pushed to emphasize the critical need for integrating ethical considerations in AI and automation to address bias, fairness and accountability issues. Global IT service providers proactively incorporate ethical AI principles into their offerings, to promote responsible and transparent use of intelligent automation technologies.

Dynamic process orchestration and autonomous systems are also emerging

as a key trend towards dynamic process optimization. They involve creating flexible and adaptive workflows that respond in real-time to changing business conditions. Global IT service providers are exploring the development of autonomous systems, where intelligent agents can make decisions and execute tasks independently, and thereby contribute to increased operational efficiency. Service providers are also developing solutions that provide clear insights into AI decision-making processes, addressing accountability trust, and compliance concerns in automated systems.

The next-gen technologies leverage trends in the intelligent automation services market as part of a dynamic shift towards advanced technologies like RPA, AI, and ML. Integrating these technologies and focusing on hyperautomation and cloud-based solutions is shaping the landscape for IT service providers in sync with their clients' digital business process automation needs, demands and priorities. The emphasis on cognitive automation and NLP reflects a growing interest in enhancing the sophistication of automation processes for a wide range of business applications. Cloud



adoption is the apparent rational follow-through key trend in the intelligent automation services market, providing flexibility, scalability and accessibility for adopting automation solutions and advanced AI-ML technologies.

Core RPA adoption is driven by the need to reduce costs and errors. That is leading to increased demand for RPA solutions from IT service providers and proactive and predictive improvement use cases powered by advanced AI, ML and integrated generative AI (GenAI) capabilities. For example, extended use of reinforcement learning, a focus on explainable AI (XAI) and a commitment to augmenting human intelligence impact human productivity, creativity and lateral thinking, thereby improving business outcomes. These outcomes are transforming the science of the possible into the art of realized value through collaboration with rapidly advancing AI. Global IT service providers are at the forefront of these trends, driving innovation and shaping the future of Intelligent Automation services.

Intelligent automation service providers are exploring ways to augment human intelligence through seamless collaboration with AI

systems. Providers are developing solutions that facilitate this synergistic relationship between humans and AI, allowing for more effective problem-solving, decision-making, and creativity.

The focus on explainable AI is a crucial driver for intelligent automation services that prioritize transparency and interpretability that are enabled by integrating XAI algorithms into the AI use cases integrated with automation. With the increasing complexity of AI models, there is a growing emphasis on making AI systems more transparent, interpretable and hence understandable. That's why IT service providers are integrating explainable AI techniques into intelligent automation services to provide clients with insights into the decision-making processes of automated systems, enhancing trust and accountability.

Reinforcement learning is also gaining prominence in next-gen intelligent automation. It is being used for dynamic decision-making and continuous learning, with a strong focus on explainability and transparency.

The evolution towards dynamic process orchestration and the development of autonomous systems are reshaping how businesses approach automation. The emphasis on ethical AI underscores the commitment of global IT service providers to responsible and inclusive automation practices. These trends collectively highlight next-gen intelligent automation services' transformative potential to redefine automated systems' capabilities and ethical considerations.

Service providers are developing intelligent automation solutions to address business challenges across their enterprise portfolios. These solutions improve efficiency, accelerate value delivery, and identify strategic opportunities.





Provider Positioning

Page 1 of 4

	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Accenture	Leader	Leader	Leader
Aspire Systems	Contender	Contender	Not In
Birlasoft	Product Challenger	Not In	Contender
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Not In	Leader
DXC Technology	Product Challenger	Product Challenger	Market Challenger
Eviden (Atos)	Product Challenger	Product Challenger	Product Challenger
EXL	Product Challenger	Not In	Product Challenger
EY	Not In	Not In	Product Challenger





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
GAVS	Not In	Contender	Not In
Genpact	Leader	Not In	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Not In
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Leader
ITC Infotech	Product Challenger	Not In	Not In
KPMG	Not In	Not In	Product Challenger
Kyndryl	Not In	Rising Star ★	Not In
LTIMindtree	Leader	Leader	Leader





Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Marlabs	Market Challenger	Not In	Contender
Microland	Not In	Rising Star ★	Not In
Movate	Contender	Product Challenger	Not In
Mphasis	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Market Challenger	Market Challenger	Contender
Persistent Systems	Rising Star ★	Product Challenger	Product Challenger
PwC	Product Challenger	Not In	Leader
Softtek	Product Challenger	Not In	Not In
Sonata Software	Contender	Contender	Not In
Sutherland	Product Challenger	Not In	Not In





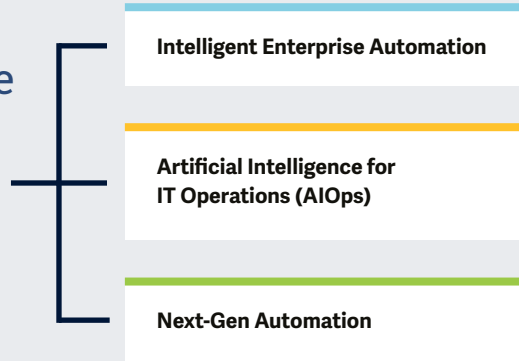
Provider Positioning

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	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader
WNS-Vuram	Leader	Not In	Product Challenger
Xceedance	Not In	Contender	Not In
Zensar	Not In	Product Challenger	Not In



Focus on the service provider's ability to **automate** and **transform** the **IT landscape**, **business services** and **corporate functions**.



Simplified Illustration; Source: ISG 2023

Definition

The Intelligent Automation Services and Solutions study focuses on the capabilities of automation service providers and global system integrators (GSIs) to offer consulting, implementation and support services across enterprise portfolios. The evaluation covers the GSIs' and service providers' ability to harness automation for transforming business services, corporate functions and the IT landscape, with proprietary solutions and accelerators and using a lifecycle management approach.

Intelligent automation (IA) services are advancing into a critical maturity phase to design solutions for complex business processes and industry focus areas. IA is expanding across boundaries and silos of IT, business and functional regions to drive service providers to build proprietary platforms. These services are evolving rapidly, accommodating internal and external components and elevating the quality and capability of existing solutions.

The IA services market is becoming more competitive and consolidated as leading players expand their capabilities across the IA stack

and offer end-to-end solutions for enterprise-wide automation. The market proliferates as service providers leverage their domain expertise, technology partnerships and delivery models to provide value-added services for IA implementation, integration, management and optimization.

GenAI has emerged as a significant trend, leading many service providers and GSIs to invest heavily in developing and facilitating the integration of GenAI capabilities for enterprise clients. These advancements hold tremendous potential for enhancing business productivity and uncovering untapped value within organizations. Currently, service providers and GSIs are aggressively partnering with hyperscalers and specialized GenAI ISVs to train large language models (LLMs) for enterprise use.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services and solutions: Intelligent Enterprise Automation, Artificial Intelligence for IT Operations (AIOps) and Next-Gen Automation.

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 (quadrants)
- Focus on the U.S. market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market 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 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.





Intelligent Enterprise Automation

Intelligent Enterprise Automation

Who Should Read This Section

This quadrant report is relevant to U.S.-based enterprises for evaluating service providers that offer intelligent enterprise automation (IEA) solutions. In this report, ISG highlights the market positioning of IEA providers in the U.S. and shows how each provider addresses the challenges enterprises face. Enterprises can use the report findings to understand market dynamics and explore new capabilities with incumbent providers. The report can also aid in evaluating new service providers that can support their digital transformation initiatives.

In the last few years, most U.S. enterprises have already embarked on their automation journey. As technology matures, more enterprises are exploring opportunities to implement end-to-end automation. However, automation is still a major challenge for a few moving beyond the pilots and scaling. Others face challenges such as fragmented processes, lack of IT involvement and identifying the right automation candidates.

The IEA market in the U.S. is the largest in the world. Factors driving growth in this region include digital transformation as a core strategy, adoption of hyperautomation across industry verticals, scaling automation, advances in AI and ML and meeting compliances and security. Service providers work hand in hand with clients to mitigate their challenges and meet their requirements. They offer end-to-end automation solutions that are modular and easily scalable. Also, providers offer low-code/no-code automation platforms that make it easy to create and deploy automation solutions faster. With the advent of GenAI, providers are showcasing potential use cases and integrating them into their solutions.



Strategy professionals should read this report to understand providers' relative positioning and capabilities in assisting end-to-end IEA solutions to deliver benefits efficiently and effectively.



Digital professionals should read this report to understand how IEA solutions fit their digital transformation initiatives and how providers can be compared to one another.



Technology professionals should read this report to understand how IEA providers integrate the latest technologies, including GenAI, and capabilities into their offerings to gain a competitive edge.

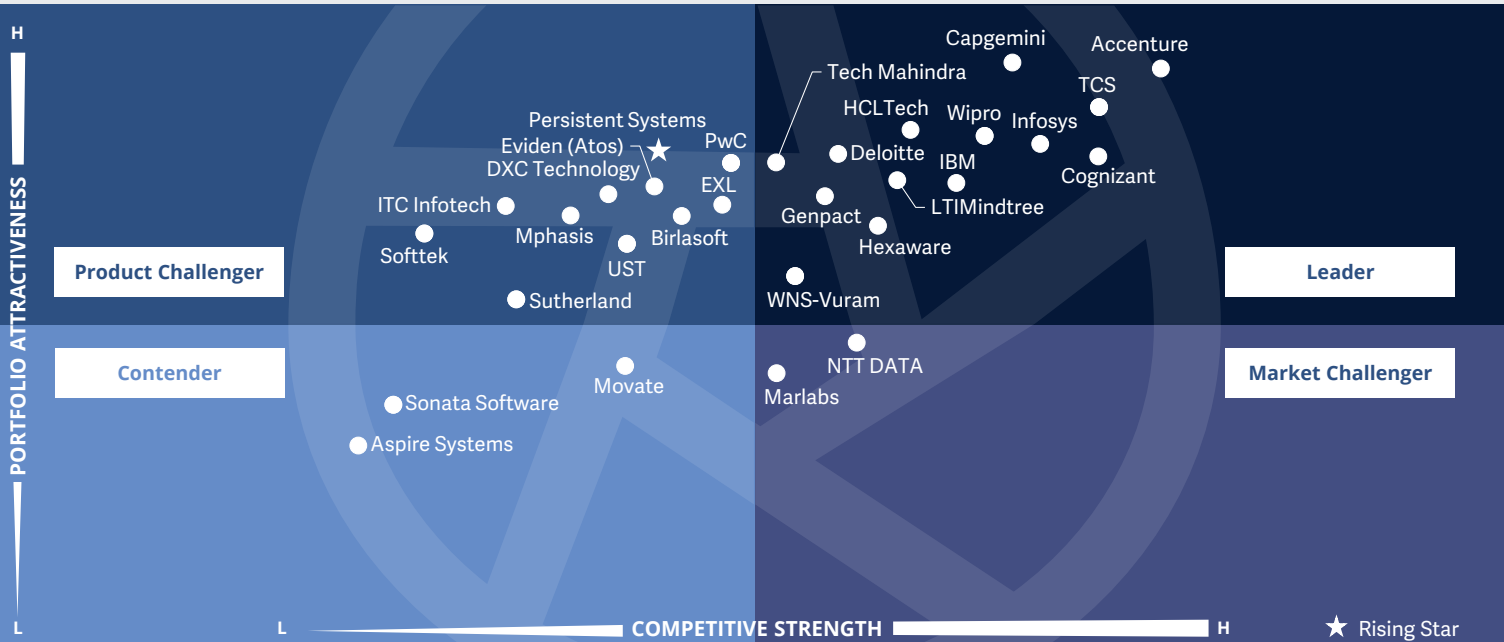


Procurement professionals should read this report to better understand the current landscape of IEA service providers.



Intelligent Automation – Services and Solutions
Intelligent Enterprise Automation

U.S. 2023



This quadrant assesses service providers' ability to design, define and deliver automation solutions across business and organizational portfolios. **Innovation, domain knowledge and industry expertise** drive the intelligent enterprise automation charter.

Ashwin Gaidhani



Intelligent Enterprise Automation

Definition

This quadrant analyzes providers for services offered across business process outsourcing and corporate functions using automation and proprietary AI platforms, solutions and frameworks, long with associated services that enable enterprises to augment their respective workforce's capabilities. These solutions and platforms can be implemented in any area of an enterprise, thus expanding the scope of automation from business services to internal corporate functions that involve repetitive and manual processes but are primarily used in finance and accounting (F&A), HR, procurement and supply chain functions. The solutions supplement automation with advanced analytics and AI technologies, such as computer vision, ML or deep learning and NLP to digitally transform an enterprise's business operations at scale. They aim to eliminate inefficiencies and facilitate reduced costs, increased productivity, improved data accuracy and enhanced employee and

customer experiences. As Gen AI capabilities in the form of text, image and code generation can enhance operational efficiency and business outcomes, service providers and GSIs are avidly exploring opportunities to improve their core competencies in intelligent enterprise automation.

***Note 1:** *Associated services include consulting, advisory, implementation and ongoing support for proprietary offerings.*

***Note 2:** *By 'proprietary solution,' we mean a solution built or grown by own effort, assembled of products and services, that might be open source or under commercial license but not predominantly tied to a specific vendor.*

DISCLAIMER: *ISG automation and other standalone intelligent automation players are not considered in this quadrant.*

Eligibility Criteria

- 1. Proprietary automation AI platform:** Must offer a proprietary automation AI platform and solutions, along with packages specific to industries and functions, as well as perpetual support
- 2. End-to-end business and corporate function transformation:** Capability to design, develop and deploy solutions using next-gen technologies such as automation, AI and advanced analytics
- 3. Integration with enterprise data and applications:** Must support integration with different enterprise applications such as CRM and ERP systems for access to customer data, finance and existing IT infrastructure
- 4. Customization and personalization of solutions:** Capable of offering out-of-the-box APIs, multi-tenancy and secure deployment of platforms
- 5. Automation opportunity assessment capabilities:** Must facilitate automation with strong advisory capabilities for internal buying and guide through business transformation journey, showcasing how advisory expertise and pretrained models can result in positive business outcomes
- 6. Industry- or function-specific solutions and packages:** Must have experience in advising, developing and deploying industry-focused and function-specific (for example, finance, procurement and HR) automation/AI proprietary solutions
- 7. Demonstrate GenAI capabilities:** Must have GenAI capabilities across various enterprise use cases. Solutions must either be in the beta phase or currently leveraged with the existing corporate and business enterprise operations
- 8. Showcase GenAI strategy and partnerships:** Must highlight the current strategy to use GenAI and emphasize any partnerships with hyperscalers or ISVs. Should have invested in R&D and made road maps for future applications and development



Intelligent Enterprise Automation

Observations

The world of intelligent enterprise automation (IEA) is changing rapidly, and we're seeing remarkable improvements in how businesses operate across different sectors as IT service providers are actively engaging to help build these solutions. IEA is crucial in driving digital transformation, streamlining operations and adding strategic value to companies. It's not just a tool for operational efficiency but a strategic approach to automation that consolidates effort and optimizes investment. Automation combined with domain expertise and a clear technological roadmap can revolutionize how businesses operate and deliver value. The focus on broader impact metrics ensures that automation benefits are comprehensive, thereby driving growth and competitiveness in an increasingly digital world.

- IEA technologies are increasingly tailored to specific functional domains, leading to more effective and efficient automation solutions. This specialization enables enterprises to leverage finance, HR, and supply chain automation more precisely, which enhances

performance and competitive advantage. Service providers are transforming into strategic partners by integrating domain expertise and automation skillsets. These efforts are leading to more context-aware systems that understand the nuances of each business function.

- As enterprises adopt IEA, technology consulting has become crucial for shaping the strategic roadmap. Expert consultation helps enterprises align their automation initiatives with broader organizational portfolios and goals. This alignment involves assessing the current technological landscape, identifying potential areas for automation and crafting a phased approach to implementation that aligns with long-term business objectives. The focus is not just on adopting new technologies but on integrating them to transform business processes and drive innovation. GenAI is a good example, as it is being tested to support and enhance mainstream enterprise operations.

- While the initial appeal of IEA lies in its potential to reduce operating costs, its value extends far beyond. Enterprises are increasingly focusing on measuring the of automation's impact on improved customer experience, enhanced employee satisfaction, increased agility and innovation. By doing so, they can capture a more holistic view of the benefits of automation, which include higher customer retention rates, improved employee engagement and a stronger ability to adapt to market changes.

From the 46 companies assessed for this study, 30 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture's extensive industry experience and technical expertise, coupled with numerous GenAI projects, make it an ideal choice for enterprises that have reached a certain level of automation maturity and are seeking to reinvent themselves.

Capgemini

Capgemini's self-automation capabilities, expert-led advisory, GenAI and an extensive array of accelerators make it stand out in the market.

cognizant

Cognizant added a significant number of clients in the U.S. by employing targeted domain strategies within segments where it holds a strong position.

Deloitte

Deloitte acquired several AI, ML and data science specialist firms in 2022, significantly expanding its technological expertise and AI talent pool. This has solidified Deloitte's position as a competent industry leader.



Intelligent Enterprise Automation



Genpact's vision of an autonomous enterprise is well supported by its AI- and ML-driven automation, accelerators, other IP and a robust partner ecosystem.

HCLTech

HCLTech is swiftly expanding its partnerships with major hyperscalers to develop joint GenAI solutions by establishing centers of excellence and training resources to build necessary skills.



Hexaware's go-to-market (GTM) strategy over the recent years has been highly effective, solidifying its market position in the intelligent enterprise automation (IEA) market.



IBM's recent advances in foundation models (FMs), such as Granite FMs, and its early GenAI products are already gaining interest from enterprises.



Infosys leverages its automation frameworks, accelerators and other intellectual property to identify, prioritize and operationalize automation opportunities.



LTIMindtree continued to reap the benefits of synergies from the merger of LTI and Mindtree in building a robust IEA offering. This is evident in its exceptional performance in securing new logos last year.



TCS' extended partnership with Google in GenAI assists in designing and deploying GenAI-powered automation solutions. This partnership has helped TCS develop a large GenAI-ready talent pool through required skilling programs.



Tech Mahindra employs a unique approach to provide GenAI-enhanced solutions to enterprises at various levels of automation maturity.



Wipro's core frameworks, including APaaS, 3E, 4M and E-AI, enable the company to provide enduring IEA solutions that deliver tangible business value to enterprise clients.

WNS-Vuram

WNS-Vuram has a premier partnership with Appian and has built several plug-and-play solutions and accelerators that help reduce the development lifecycle, especially for Appian clients.

Persistent Systems

Persistent Systems (Rising Star) has brought to market a wide range of use cases and offerings powered by GenAI, focusing on BFSI and healthcare and life sciences sectors. Many of these solutions have already been successfully implemented for clients.



Capgemini



“Capgemini leads the way in technological innovation and sustainable frameworks, guiding enterprises to build autonomous enterprises.”

Ashwin Gaidhani

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. It offers intelligent automation solutions through its proprietary Capgemini Enterprise Automation Fabric. It has more than 600 clients globally, supported by more than 30,000 resources and automation experts. Financial services, healthcare and pharma are some of the key verticals served. The company has announced an investment of €2 billion in AI over three years and created a separate GenAI practice offering.

Strengths

Enabling frameworks for sustainability:

Capgemini provides net zero intelligent process automation (IPA) based on the Capgemini Sustainable Framework. It offers a net zero strategy with newer business models, sustainable products and services, sustainable operations, IT and monitoring and reporting.

Strong partner ecosystem: Capgemini leverages its robust partner network to deliver intelligent enterprise automation projects in the U.S. It has more than 100 core and growth partners with whom Capgemini also co-creates several industry automation platforms, SaaS and intelligence. Some notable local partners include UiPath, Pega, WorkFusion, SS&C, Blue Prism and others.

Developing AI talent and training:

Capgemini University has created a learning platform to develop AI capabilities called the Data and AI Campus. It focuses on three broad areas — AI for delivery, AI for management and AI for solutioning — across various specific roles. Also, custom learning programs for GenAI, including GenAI solutioning and integration with automation solutions will help develop GenAI ready talent pool for IEA services. Further efforts will boost Capgemini’s commitment to doubling data and AI resources with an investment of €2 billion in AI over three years.

Caution

Capgemini is one of the leading providers in the U.S. However, the growing number of competitors doubling down on IEA backed by their GenAI integration capabilities could pose challenges in sustaining its leadership position.





Artificial Intelligence for IT Operations (AIOps)

Artificial Intelligence for IT Operations (AIOps)

Who Should Read This Section

This report is relevant to enterprises in the U.S. for evaluating AIOps service providers. In this report, ISG highlights the market positioning of AIOps service providers in the U.S. and shows how each provider addresses the challenges enterprises face. Enterprises can use the report findings to understand market dynamics, explore new capabilities with incumbent providers or evaluate new ones.

The global AIOps market is led by the U.S., primarily driven by factors such as increased adoption of automation across industries, advances in AI and ML, growing penetration of cloud-native infrastructure and shift from reactive to proactive approach toward IT operations in hybrid or multicloud environments. However, some challenges remain among enterprises, such as a lack of quality data, integration with legacy systems, effective change management, clear and defined KPIs for measuring outcomes, and cybersecurity concerns.

Enterprises focus on providers with an agile approach to handle complex situations in their hybrid and multicloud environments. They look to reduce manual work and achieve high observability of their IT operations for improved insights and faster decision-making. They also look to reduce MTTD (mean-time-to-detect) and MTTR (mean-time-to-response) while gaining automatic remediation.

Service providers rely on the latest AI and ML techniques to provide an integrated and holistic approach to handling IT operations. It includes functionalities such as anomaly detection, proactive alerts, automatic remediation, AI-powered incident management, end-to-end visibility and zero-touch resolutions. Providers have also started exploring potential use cases of GenAI in IT operations.



Strategy professionals should read this report to understand providers' relative positioning and capabilities that can help them effectively plan and enhance their digital transformation initiatives.



Technology professionals should read this report to understand providers' technical capabilities to undertake IT transformation initiatives and use the latest technologies such as GenAI.



Digital professionals should read this report to understand how AIOps providers fit in with their intelligent-automation-led digital transformation initiatives and how they can be compared with each other.

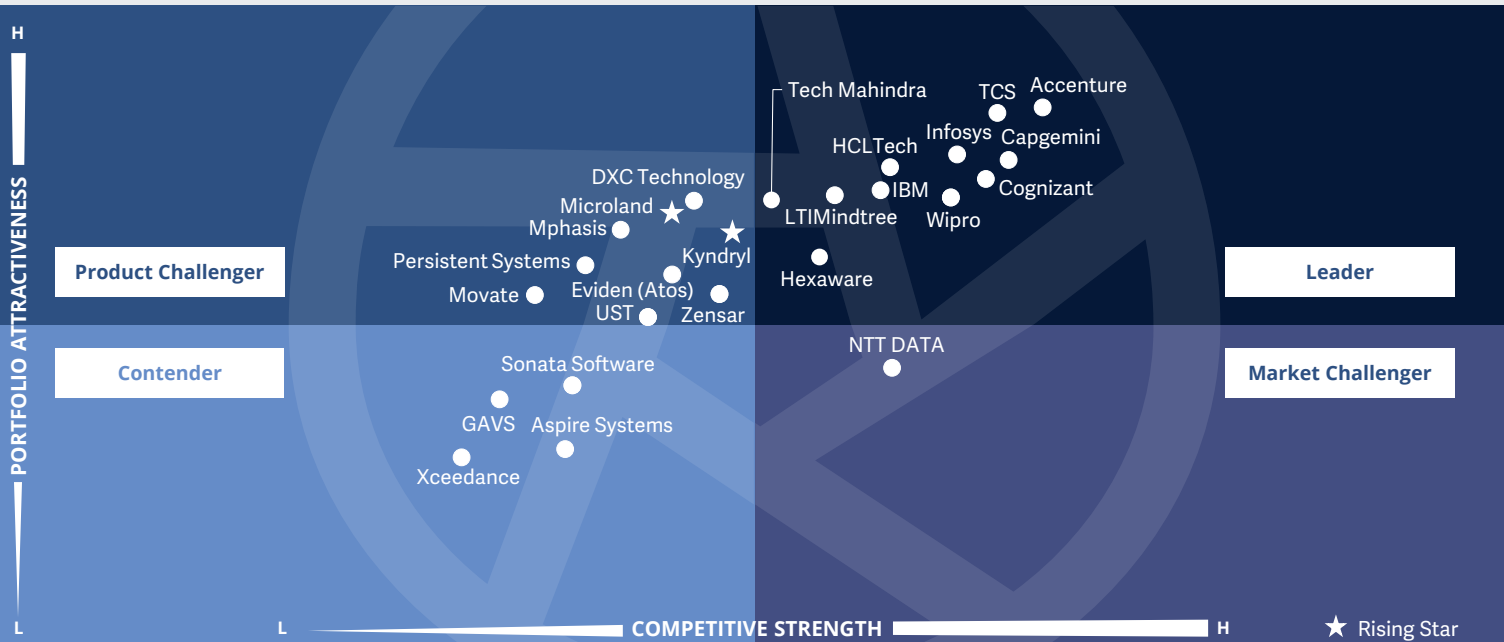


Procurement professionals should read this report to better understand the current landscape of AIOps service providers and their suitability for RFPs.



Intelligent Automation – Services and Solutions
Artificial Intelligence for IT Operations (AIOps)

U.S. 2023



This quadrant assesses the proficiency of service providers that offer **cloud and infrastructure monitoring services**.

Providers focus on enhancing business availability through expertise in **AI, ML, analytics and automation to improve IT operations**.

Ashwin Gaidhani



Artificial Intelligence for IT Operations (AIOps)

Definition

This quadrant analyzes IT service providers that offer proprietary AIOps solutions, platforms and frameworks that enable enterprises to monitor a distributed IT infrastructure, understand IT behavior under dynamic conditions and orchestrate workflows or automated corrections. AIOps is a solution and framework that facilitates the understanding of a company's multicloud IT workloads and analyzes data to facilitate automated operations. It also offers real-time, minimal-cost solutions that allow companies to detect issues before they cause an adverse effect on the business. Such solutions and frameworks redefine the model of an IT operation by combining data patterns and human intelligence to provide full visibility into the IT landscape of an enterprise. GenAI applications use text, image and code generation to aid algorithms in improving anomaly detection, observability, predictive maintenance, log analysis and event correlation. These capabilities aim to maximize the performance

of distributed, heterogeneous, multicloud IT workloads, reducing costs and ensuring compliance and security with higher efficiency.

***Note 1:** *This quadrant encompasses solutions/platforms/ecosystems/frameworks developed by IT service providers by investing in AI, ML and big data capabilities to help companies ensure that their multicloud workload operation can be supported autonomously.*

***Note 2:** *By "proprietary solution," we mean a solution built in-house and includes products and services that might be open source or under commercial license but not predominantly tied to a specific vendor.*

DISCLAIMER: *ISG Automation and other standalone intelligent automation players are not considered in this quadrant.*

Eligibility Criteria

- 1. Proprietary AIOps platform and framework:** A custom-built solution to manage and administer IT infrastructure, application and CloudOps
- 2. Event management and exception handling ability:** Must consolidate events from all sources (alerts and incidents) and categories and classify, evaluate and take predefined intelligent actions, including resolution, assignment and related subsequent steps
- 3. AI-driven scalable prebuilt solutions:** Provide companies with highly scalable, real-time data, along with an AI-driven prescriptive and proactive analysis to provide visibility into an IT landscape
- 4. Data visualization and projection capabilities:** Must offer data injection through multiple sources and provide automated pattern discovery and detection through the big data platform
- 5. Solution identification and recommendation:** Apply AI and ML in automated services to improve resilience and reduce the mean time to repair (MTTR)
- 6. Touchless IT operations:** Must act as a smart orchestration engine in workflow creation for a company's managed IT infrastructure, with a nearly zero- and one-touch approach
- 7. Solution customization and personalization:** Out-of-the-box APIs for multicloud and multitenancy and secure deployment of platforms
- 8. Demonstrate GenAI capabilities:** GenAI capabilities across various enterprise use cases. The solution must either be in the beta phase or currently leveraged by the existing IT operations
- 9. Showcase GenAI strategy and partnerships:** Must highlight the current strategy of using GenAI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development



Artificial Intelligence for IT Operations (AIOps)

Observations

AIOps is a mature stream with cloud intervention and hybrid infrastructure enterprise setups. AIOps leverages AI to transform not only IT but business operations and services. The new horizons include service monitoring and experience monitoring, which is changing how enterprises manage their IT landscapes and how this, in turn, influences their overall business strategies and stakeholders. AIOps is revolutionizing the way businesses approach IT and operations management. By integrating IT with business operations, service providers automate key processes and focus on governance, risk and compliance (GRC) security. AIOps offers a comprehensive solution that enhances operational efficiency and drives better business outcomes. This innovative approach makes enterprises more agile, secure and aligned with their business goals in an increasingly digital world.

- AIOps stands at the forefront of blending IT operations with business processes, fostering an environment of seamless

integration. By leveraging predictive analytics and real-time data processing, AIOps enables businesses to anticipate IT issues before they impact operations, ensuring continuous service delivery. This integration results in more agile decision-making, aligning IT performance closely with business goals and objectives, ultimately improving operational efficiency and business outcomes.

- Service providers are improvising observability solutions on top of standard ISV solutions to enhance AI capabilities to manage complex tasks. Reducing manual work is a standard expectation from such platforms. The focus is on driving an intelligent automation approach that can autonomously predict, prevent and respond to issues. This shift from reactive to proactive IT management streamlines operations, reduces downtime and enhances service reliability. The demand of enterprises is the prescriptive dashboarding and continuous real-time view of IT estate with actual financial and operational impact.

- With the ever-increasing complexity of IT environments and rising cybersecurity threats, AIOps is giving more attention to governance, risk and compliance. By incorporating artificial intelligence (AI) into security protocols, AIOps provides a much more robust framework for managing compliance and mitigating risks building a resilient IT infrastructure estate that can adapt to new risks and regulations.

From the 46 companies assessed for this study, 25 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture's myWizard® AIOps platform delivers predictive data-driven insights and automation capabilities for infrastructure, applications and cloud. As of 2023, the platform boasted more than 3,800 enterprise customers and had experienced over 15,000 client engagements.

Capgemini

Capgemini offers GenAI capabilities for automating code, document generation, data sanitization and data validation to cater to increased privacy requirements and reduce bias. Its QAIF operational framework embedded within the AIOps offering ensures enterprise security.

cognizant

The **Cognizant** Neuro® IT Operations platform offers comprehensive IT landscape visibility through ML, automation, analytics and collaboration. It offers in-depth insights, real-time monitoring and intelligent incident detection to minimize downtime for rapid resolution.



Artificial Intelligence for IT Operations (AIOps)

HCLTech

HCLTech, through its IntelliOps platform, offers AI and observability across the full IT stack through bundled offerings comprising intelligent automation, end-to-end business flow observability, unified reporting, FinOps, cloud lifecycle management and cognitive assistance.



Hexaware's Tensai® for prescriptive AIOs combines prescriptive AI with IT operations and automation. The platform leverages GenAI capabilities to deliver in-depth insights and automated elucidations to improve mean-time-to-metrics, accelerating root cause analysis.



IBM Cloud Pak® for Watson AIOps retrieves insights from multiple data sources, such as metrics, logs and events, and automates diverse data sets from hybrid environments. It leverages GenAI to provide personalized recommendations to enhance system performance.



Infosys' AIOps solution includes the LEAP platform, an application management platform providing observability and event correlation to enhance UX. The company has invested in over 35,000 cloud assets and more than 1,200 reusable scripts to enable rapid time to market.



LTIMindtree's Canvas AIOps platform provides a single pane for visibility into IT operations and contextualization through the PS Aware Neural Schema. In July 2023, it launched Canvas.ai, an enterprise-ready GenAI platform mainly addressing data privacy and security.



TCS Cognix™ is an AI-driven human-machine collaboration suite powered by MFD™, digitizing the technology landscape at the intersection of the application layer, business processes and IT infrastructure. The platform has more than 100 out-of-the-box automation use cases.



Tech Mahindra advanced to a Leader from being a Product Challenger through its advanced workflow optimization and network fault management systems. Its amplifAIO->∞ suite of AI offerings democratizes and scales deployment of AIOps and enables seamless delivery across the IT landscape.



Wipro HOLMES™ leverages its BEE model and MEIR framework to deliver AIOps. It offers AIOps-managed services such as design, consulting and implementation for application performance and automation platforms using proprietary technology competencies and partnership propositions.

Kyndryl

Rising Star **Kyndryl's** Bridge and MCMP platforms aid clients in managing workloads across multiple clouds and data centers. These platforms offer visibility and control across IT estate and support traditional ITIL and DevOps cloud-native methodologies.

Microland

Microland's (Rising Star) Intelligeni Observe AIOps platform uses knowledge graphs to forge semantic relationships and integrates with the standardized automation Intelligeni platform comprising 200 bots. Its health computational model reflects the performance of the system components.





“Capgemini delivers AIOps focusing on outcomes that clients realize in their production environment.”

Ashwin Gaidhani

Capgemini

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini integrates observability, automation and orchestration capabilities into its AIOps platform. The offerings include enterprise automation fabric orchestration, intuitive chatbots for service request automation and a self-healing application with auto-remediation features. AI Glass Box, One View MLOps, A2B and Control Tower are the accelerators and proprietary toolkits the company provides to scale enterprises' AIOps offerings.

Strengths

Bridging diverse technologies with AIOps solutions:

Capgemini has a strategic vision for AIOps, combining data, knowledge and automation. AIOps combines disparate technologies for data collection, processing, analysis and visualization and couples them with automation tools and solutions. The combined capabilities are the key to applying AI – observability, orchestration and automation.

AIOps adoption within IT operations:

Capgemini offers services to simplify AIOps' implementation approach by framing AI application across three key pillars – observability, orchestration and automation. Capgemini's approach to AIOps can enable clients to predict outages better and identify performance degradation.

Increased speed in delivering new

functionalities: Capgemini takes a benefits-oriented view of AIOps in IA services that help clients achieve speed and stability for IT systems and newly released product features that are essential moving forward. Digital business leaders today seek help from IT to transform their operations and guide them in deriving value from the troves of available data with more reliability, scalability and customer centricity while lowering the TCO.

Caution

Capgemini's focus on client outcomes can become industry benchmarks on the value, impact and benefits achieved via AIOps in different industries. It can accomplish this through continued efforts toward integrating the technology landscape to better gauge system and service monitoring.





Next-Gen Automation

Who Should Read This Section

This report is relevant to U.S.-based enterprises for evaluating next-gen automation providers. In this report, ISG highlights the market positioning of next-gen automation solution providers and how each provider caters to sustainable automation needs and addresses the challenges enterprises face. Enterprises can use the report findings to understand market dynamics and competition while exploring new capabilities with incumbent providers or evaluating new ones.

Next-gen automation involves using the latest innovation, organizational change management (OCM), design thinking and other frameworks to build future-ready automation solutions. Its adoption is currently limited to large enterprises with high automation maturity but is expanding slowly. A shift in approach toward integrating the latest technologies and involving more stakeholders as an enablement strategy is driving market growth.

However, some of the key challenges faced are inadequate IT infrastructure readiness, OCM hurdles, integration complexities with legacy systems, lack of stakeholder buy-ins and talent and skills gap.

The U.S. houses some of the largest companies in the world and is an early adopter of emerging technologies, making it a lucrative market for next-gen automation.

Therefore, service providers continue to invest in innovation, build/acquire emerging technologies capabilities, develop strategic partnerships with technology vendors and devise upskilling and reskilling programs for their resources. They offer roadmap design for sustainable automation practices, create automation CoE, develop OCM strategies and implement responsible AI frameworks to keep enterprises ahead of the automation curve and bring differentiation in the market.



Strategy professionals should read this report to understand providers' capabilities in offering next-gen sustainable automation solutions and executing them through different innovative approaches.

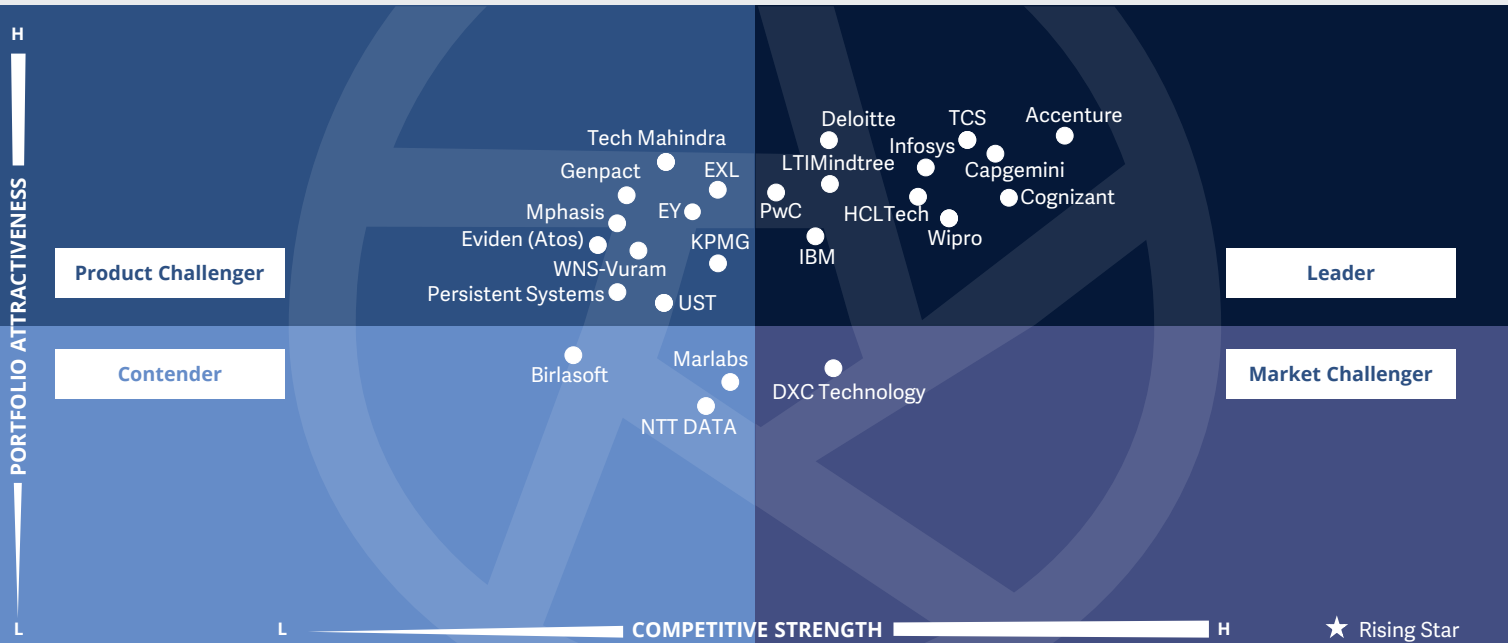


Digital professionals should read this report to understand how next-gen automation providers align with their digital transformation programs, acquire future-ready talent and compare with one another.



Technology professionals should read this report to understand how ITO and BPO service providers are involved in the investment and adoption of advanced next-gen automation technologies.





In this quadrant, we evaluate a service provider’s **strategy and approach** to help enterprises adopt and adapt to new automation initiatives. Their **talent strategy, innovation and change management** are crucial in determining enterprise growth trajectory and sustainability.

Ashwin Gaidhani



Next-Gen Automation

Definition

The Next-Gen Automation quadrant assesses providers' approaches to building a sustainable automation road map, covering innovation, organizational adoption of automation and bot development using the latest technologies and frameworks. It also encompasses using low-code/no-code (LCNC) development platforms, tools and software. This quadrant concentrates on the human aspect in terms of emerging skills to enhance the benefits of automation, thus safeguarding resource interest. This quadrant also evaluates the service providers' ability to augment organizational change management, education and technology upgrade in sync with the new releases on platforms. Next-gen automation readiness, which is a pathway to a sustainable automation strategy, includes technology, social and business objectives to build a sustainable operating model. Providers should have a design thinking approach toward automation solution provisioning to establish a structured path for innovation. They should also have platform certifications, functional knowledge, industry expertise and a clear road map and strategy for resource upskilling and

cross-skilling via partner training programs. As GenAI, in the form of text, image and code generation, continues to evolve with emerging new use cases, providers should also have a strong viewpoint and/or emerging offerings around GenAI.

Eligibility Criteria

- 1. Organizational change management frameworks:** A seamless transition across users and stakeholders ensures that external (clients) and internal (employees) entities are well managed and educated on the automation activity
- 2. Demonstrate ability to innovate through various frameworks:** Ability to build future-ready solutions, leveraging the latest technologies
- 3. Implementation and integration capabilities:** Ability to drive these capabilities using the latest, innovative technologies
- 4. Frameworks, methodologies and reference architecture:** Uses these to develop bots DevOps, CI/CD and LCNC
- 5. Generative AI:** Ability to design and incorporate GenAI solutions across portfolios, including business and technology domains. GenAI includes text and image generation capabilities
- 6. Showcase GenAI strategy and partnerships:** Must highlight the current strategy to use GenAI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development
- 7. Security tools:** Ability to use frameworks and practices that ensure both security and governance, risk and compliance (GRC)



Next-Gen Automation

Observations

Enterprises and service providers are investing heavily in building generative AI (GenAI) advancements, the next-gen automation. This advance redefines the landscape of business operations and innovation, transforming talent strategies and new business solutions. Next-gen automation with GenAI is a transformative force, ushering in an era of enhanced productivity, innovation and specialized applications. By leveraging GenAI for knowledge automation, adopting reinforcement learning for advanced problem-solving, and creating industry-specific models, businesses are poised to harness AI's full potential. As a result, they can drive growth and competitive advantage in an increasingly digital world.

- GenAI is revolutionizing productivity and knowledge automation in various industries. It can generate code, create content and automate complex design tasks, thereby enhancing human capabilities and enabling businesses to achieve more with less effort. In knowledge-intensive sectors, GenAI is utilized to synthesize information, provide

insights, and assist in decision-making, accelerating innovation and reducing time-to-market.

- The true potential of GenAI lies in creating industry- and function-specific models built on top of foundational AI models. These models are trained to understand the nuances of specific sectors or functions, resulting in more accurate and relevant outputs. For instance, businesses can use these specialized models to perform highly contextual and sophisticated healthcare, finance or retail tasks, resulting in personalized customer experiences and efficient operations.
- Utilizing GenAI is crucial in developing personalized content for effective change management. With this technology, companies can create customized content that resonates with their intended audience, leading to more efficient change management strategies. Self-help solutions are increasingly adopting GenAI to connect and consolidate data sets within the enterprise perimeter for providing relevant and valuable information.

From the 46 companies assessed for this study, 25 qualified for this quadrant, with 11 being Leaders.



Accenture's myConcerto streamlines and expedites business transformation processes. In 2023, Accenture announced an investment of \$3 billion to enable clients to adopt AI rapidly. The company aims to double its AI resources to 80,000 and provide pre-built AI models across 19 industries.



Capgemini Invent boosts innovation and organizational change management (OCM) capabilities through its Fahrenheit 212 and frog acquisitions. In July 2023, the company announced that it aims to invest €2 billion to develop advanced technologies, predominantly GenAI, and increase its AI employees to 60,000 in three years.



Cognizant's AI and software experts, with their technology and business advisory services in Cognizant Studios, enable enterprises to integrate GenAI solutions into their businesses by jointly establishing dedicated AI labs and providing easy access to AI models through partner support.



Deloitte fuels AI recommendations, along with business and technology expertise, through its CortexAI™ platform. In April 2023, Deloitte launched a GenAI practice by establishing an incubator that promotes the rapid development of enterprise's PoCs, demos and fine-tuning LLMs.



Next-Gen Automation

HCLTech

HCLTech's suite of solutions for next-gen automation comprises a consult-to-operate structure aligned toward providing preconfigured models, automation solutions and strategic framework and platform through ADvantage DPA, iONA, digitalCOLLEAGUE, and DRYiCE IntelliOps.



IBM became a leader from being a market challenger due to GenAI applications in its next-gen automation services. In May 2023, it launched GenAI CoE, comprising 1,000 consultants. The CoE utilizes IBM's GenAI stack and foundation models for curating domain-specific ML accelerators.

Infosys

Infosys' next-gen automation services include C-level advisory, automation, cloud and cybersecurity. Infosys Innovation Network, facilitated by Infosys' global innovation ecosystem, identifies, scales and certifies startups to provide innovative, enterprise-ready services to clients.



LTIMindtree drives next-gen automation through OCM strategies, process assessment and optimization and proprietary tools and platforms unified with partners' value propositions. It plans to scale its AI capabilities and emerging technologies by investing \$40-\$50 million in FY24.

PwC

PwC became a Leader after being a Product Challenger due to accelerating next-gen offerings and \$1 billion investment plans in GenAI in its U.S. operation over three years. PwC utilizes Azure's enterprise-grade solutions coupled with AI-optimized infrastructure.



TCS expanded its partnership with Google Cloud in May 2023 to use the hyperscaler's GenAI solutions to build custom business solutions. The company has implemented GenAI use cases across AIOps and digital twins and has over 25,000 Google Cloud engineers.



Wipro ai360, Wipro's AI-first ecosystem, merges AI across all solutions used within the organization. It is offered to enterprises to unfold commercial opportunities in advanced AI, especially GenAI. Its Lab45 innovation hub provides resource training, co-innovation and research capabilities.





“With next-gen AI and automation, such as GenAI-powered software engineering automation, Capgemini is at the forefront of disruptive innovation.”

Ashwin Gaidhani

Capgemini

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Through Capgemini Invent, the company provides its advanced offerings in strategic consulting and automation services. In 2023, it established a joint center of excellence with Google for GenAI solutions that features co-innovation labs, knowledge-sharing workshops and joint funding for innovation-focused projects.

Strengths

Software engineering automation:

Capgemini is developing and delivering capabilities using GenAI. This helps improve efficiency and quality across the software lifecycle by facilitating large modernization programs for legacy software. It also enables increased security with a reduced attack surface by automatically identifying bugs or vulnerabilities and proposing adjustments to software development teams.

GenAI for CX: This capability enhances customer experience with dedicated GenAI assistants. It allows hyperpersonalized customer experience with a synthetic design assistant, elevates customer self-service with personalized chatbots and augments customer care services with a content and knowledge assistant. The capabilities also

boost sales teams’ performance through a knowledge assistant.

GenAI strategy for enterprises: Capgemini enables CXOs to define and prioritize the most relevant GenAI use cases for their business and demonstrate achievable tangible value. Custom GenAI for Enterprise enables enterprises with sensitive data to have custom GenAI assistants fine-tuned with their key proprietary data to get maximum business value impact.

Caution

Capgemini’s innovative GenAI applications can be further augmented for effectiveness in an enterprise landscape through integrated GRC and industry regulations, especially the recently published U.S. regulatory guidelines.





Appendix

The ISG Provider Lens 2023 – Intelligent Automation – Services and Solutions study analyzes the relevant software 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 November 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 Intelligent Automation – Services and Solutions 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



Lead Author

Ashwin Gaidhani
Research Partner

Ashwin Gaidhani is an enterprise governance and digital business transformation expert. He is a research partner at ISG and has extensive experience in enterprise service management and transformative technologies. Ashwin's business technology expertise revolves around technology business management, work design methodologies and enterprise governance. He is a creative leader who designs, describes and implements strategies to drive digital transformation. With over 22 years of experience, he is a practice leader, executive-level advisor and

influencer. Ashwin leads the Enterprise Service Management (platforms and services), Intelligent Automation (Platforms and Services), AWS Ecosystem, ServiceNow and Workday Ecosystem studies. Ashwin is highly qualified and experienced in service management, with lifecycle experience in technology operations, business consulting and advisory roles for large global system integrators (GSIs), independent software vendors (ISVs) and technology product companies.



Co-author, Enterprise Context and Global Overview

Mukesh Ranjan
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Mukesh has around seven years of experience in the market and industry research. He currently serves as a research specialist with a key interest in emerging technologies. In his current role, he is responsible for supporting and co-authoring Provider Lens™ studies on intelligent automation, IoT, and others. His areas of expertise are automation, Internet of Things (IoT), procurement and emerging technologies. He is also involved in authoring enterprise context and the global summary report with market trends and insights.

Mukesh has been part of several custom research engagements in areas of automation, competitive intelligence and others. In his earlier roles, he was primarily conducting secondary and primary research on competitive benchmarking, SWOT analysis, industry assessment, vendor briefing decks, among others.





Enterprise Context and Global Overview

Sameen Mohammed Siddique
Research Analyst

Sameen is a research analyst with ISG, with a key interest in the market and industry research across emerging technologies. She supports and co-authors Provider Lens™ studies on intelligent automation, mainframes, Google Cloud Platform (GCP) ecosystem and others. She is also involved in authoring enterprise context and global summary reports with market trends and insights. Her areas of expertise are automation, telecommunication, and retail.

Sameen has been a part of diverse market, business, and consumer research teams, effectively transforming market data into actionable insights and intelligence reports for several leading companies. In her prior roles, she has worked on qualitative and quantitative research, market feasibility studies, SWOT assessment, and competitive analysis.



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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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.





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