ISG Provider Lens™

AWS - Ecosystem Partners

Consulting Services Providers

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HEXAWARE

December 2020

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2020 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.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

Providers (and AWS) Build for the Post-COVID Digital Cloud Reality

With the outbreak of the COVID-19 pandemic in 2020, the range, and pace of enterprise spending on cloud-based IT have increased dramatically. Sudden and massive disruption in the allocations and locations of workforces and resources, in supplier and customer relationships and communication as well as business planning and operations, have accelerated digital transformation worldwide. To quote several providers interviewed for this study, the core goal for enterprises in 2020 is, "more digital, more quickly."

Surprisingly to some, many enterprises are still working to respond effectively to the COVID-19 disruptions. Providers interviewed in this study report as many as 60 percent of their enterprise clients have yet to initiate any significant remote work or work-from-anywhere (WFA) capability. The result is that the global scale of cloud adoption and use witnessed before 2020 is minor compared to what most enterprises and providers are experiencing now, and what they will continue to experience for several years to come. This, in turn, helps boost the resource utilization of hyperscale cloud providers such as Amazon Web Services (AWS) to levels beyond what had been expected or even considered. Also, savvy IT services providers are adjusting, extending and promoting their services and capabilities to build on this growth.

The effects on services providers partnered with AWS are summarized as follows:

Consulting Services: Most providers are moving beyond digital enablement and initial operational improvements to provide clients with more refined digital business strategies. The primary focus for most engagements has shifted from cost reduction to improved business outcomes. This is leading to more consultative approaches by providers, which, in turn, is driving more client interest in change management and design thinking that closely ties cloud IT investment with business impacts. DevOps has become a core component of providers' portfolios, especially as clients investigate the benefits of cloud-native development and infrastructure-as-code.

Data Analytics and Machine Learning: Work-from-anywhere environments are spurring a huge wave of enterprise data discovery. Enterprise IT and business leaders are focusing more on what data exists across all aspects of the enterprise, rather than in specific functional areas. The scope and affordability of a huge range of IoT capabilities are adding to this. The result is accelerating interest and investment in analytics within business operations, especially including the use of machine learning (ML). More enterprises now see the benefits of using ML and artificial intelligence (AI) within business applications to process and learn from the massive scope of available data quickly and effectively.

IoT: Interest and investment in the Internet of Things (IoT) had been growing rapidly prior to the outbreak of COVID-19. We witnessed increasingly affordable and integrable capabilities to improve and manage productivity, processes, devices and environments. However, work-from-anywhere realities have helped broaden and accelerate enterprise IoT investigations and investments. Work from anywhere greatly expands the scope of devices connected to enterprise systems beyond traditional industrial sensors and data. More devices, along with different types of data and more connections, have spurred enterprise and provider investments in edge computing, networking, security, application programming interfaces (APIs) and data analytics.

Managed Services Providers: As noted in previous ISG cloud ecosystem and services studies, the role and value of managed service providers (MSPs) have been rapidly expanding into areas traditionally thought of as systems integration. The impact of COVID-19 on cloud adoption and integration requirements has pushed MSPs farther into system integrator territory. As one of the MSPs in our Leader quadrant put it, the primary role of MSP today is "integration, security, integration, security, and integration," although traditional MSP roles as transactional service providers continue. The Leaders in our study recognize the changing MSP reality, and are investing in more skills, expanding their roles with AWS, and are acquiring more technology and tools providers.

Migration and Container Services: A longstanding assumption in technology circles has been that not everything will move to cloud. The expectation for more than a decade has been that large-scale, complex and customized enterprise software environments would remain at least 50% on-premise, with cloud layered on top and between apps and databases. However, with the growth of digital business, we see many enterprises with major applications are not able to adapt quickly enough to changed business environments. This sparked a global move toward rationalizing and modernizing traditional business software environments. Currently, COVID-19 has catalyzed this transformation, and we see many enterprises each moving most of their applications (and databases) into AWS and other hyperscale platforms. The ubiquity of affordable and adaptable container technologies such as Kubernetes and Docker has further accelerated interest and investment by enterprises and services providers.

SAP Migration and Implementation: SAP is the major enterprise app modernization and migration service provider. The company itself is pushing customers to move to cloud-based versions of its software by establishing cutoff dates to support on-premises versions within the next few years. This has helped catalyze some of the business app modernization and data discovery trend, which, in turn, leads to increased need of better analytics and MSP capabilities. Meanwhile, the larger trend toward enterprise-scale, cloud-based software as a service (SaaS) is inspiring more enterprises to outsource ongoing management of their SAP applications and environments.

At the bottom line, initial digital transformation is rapidly morphing into unified everything-as-a-service, and service providers building with AWS are witnessing massive opportunity and, therefore, business change. Providers themselves report some significant business challenges not only because they are adapting to widespread work from anywhere themselves, but also as more client work is done remotely. Most providers report either lean presence or no presence within client spaces. As environments become more complex, this could strain communications and relationships. Also, AWS itself is changing. The hyperscaler has been making huge investments in tools to enable new capabilities and services beyond its traditional platform position. AWS is also heavily spending on partnerships with service providers. We see few significant providers without strategic co-development, co-marketing agreements with AWS. In the emerging cloud-first, post-COVID digital business reality, each one is a critical appendage of the other.

Introduction

Definition

AWS continues to expand its presence and influence as a global provider of IT-as-a-service, while its AWS Partner Network (APN) grows even larger, as providers of technologies and services leverage AWS to develop and deliver an expanding array of enterprise IT and business services.

The 2020 ISG Provider Lens™ AWS Ecosystem Partners study analyzes the AWS partner landscape in the U.S. and Germany with regard to everyday service needs, emerging challenges, market changes and other important issues. ISG consultants and user clients can use this information to evaluate current supplier relationships and the potential for establishing new relationships.

This ISG Provider Lens™ report offers the following to the IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by important segments according to market segments.
- A perspective on U.S. market.

This study serves as an important decision-making basis for provider positioning, key relationships and go-to-market considerations.

Definition (cont.)

Scope of the Report

Our AWS Ecosystem 2020 study examines and positions providers in the following six quadrants based on AWS competencies, solution types and related services:

Simplified Illustration

AWS – Ecosystem Partners 2020	
Consulting Service Providers	Data Analytics and Machine Learning
Internet of Things (IoT)	Migration and Container Solutions
Managed Services Providers	SAP Workloads

Source: ISG 2020

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

AWS - Ecosystem Partners - Quadrant Provider Listing 1 of 5

	Consulting Services Providers	Data Analytics and Machine Learning	Internet of Things (IoT)	Migration and Container Solutions	Managed Services Providers	SAP Workloads
1Strategy	Not in	Product Challenger	Not in	Contender	Not in	Not in
2nd Watch	Not in	Product Challenger	Not in	Not in	Rising Star	Not in
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
AllCloud	Contender	Product Challenger	Contender	Contender	Contender	Not in
Arvato Systems	Market Challenger	Not in	Not in	Not in	Not in	Not in
Asavie	Not in	Not in	Product Challenger	Not in	Not in	Not in
Atos	Not in	Market Challenger	Not in	Market Challenger	Product Challenger	Not in
Ayla Networks	Not in	Not in	Contender	Not in	Not in	Not in
Blue Sentry	Contender	Not in	Not in	Contender	Contender	Not in
Brillio	Contender	Not in	Not in	Contender	Not in	Not in
Cambridge	Not in	Not in	Not in	Not in	Contender	Not in
Capgemini	Leader	Leader	Leader	Leader	Leader	Leader
Cascadeo	Not in	Not in	Not in	Not in	Contender	Not in
CenturyLink	Not in	Not in	Not in	Not in	Product Challenger	Not in

AWS - Ecosystem Partners - Quadrant Provider Listing 2 of 5

	Consulting Services Providers	Data Analytics and Machine Learning	Internet of Things (IoT)	Migration and Container Solutions	Managed Services Providers	SAP Workloads
Clearscale	Contender	Contender	Contender	Contender	Not in	Not in
CloudHesive	Not in	Not in	Not in	Not in	Product Challenger	Not in
Cloudreach	Contender	Product Challenger	Not in	Product Challenger	Product Challenger	Not in
Cloudticity	Product Challenger	Contender	Not in	Not in	Not in	Not in
Cognizant	Leader	Leader	Leader	Leader	Leader	Leader
Corecompete	Not in	Not in	Not in	Not in	Contender	Not in
Deloitte	Leader	Leader	Leader	Leader	Leader	Leader
DLT Solutions	Not in	Not in	Not in	Not in	Market Challenger	Not in
DXC	Leader	Leader	Leader	Leader	Rising Star	Leader
ECS	Not in	Not in	Not in	Product Challenger	Contender	Not in
EdgeIQ	Not in	Not in	Product Challenger	Not in	Not in	Not in
Ensono	Not in	Contender	Not in	Not in	Product Challenger	Not in
EPAM	Not in	Not in	Market Challenger	Not in	Not in	Not in
Extreme Networks	Not in	Not in	Product Challenger	Not in	Not in	Not in

AWS - Ecosystem Partners - Quadrant Provider Listing 3 of 5

	Consulting Services Providers	Data Analytics and Machine Learning	Internet of Things (IoT)	Migration and Container Solutions	Managed Services Providers	SAP Workloads
HashiCorp	Not in	Not in	Not in	Contender	Not in	Not in
HCL	Leader	Not in	Not in	Not in	Leader	Not in
Hexaware	Leader	Not in	Leader	Not in	Not in	Not in
HPE	Leader	Not in	Not in	Not in	Not in	Not in
IBM	Leader	Not in	Market Challenger	Leader	Leader	Leader
Infosys	Leader	Leader	Not in	Leader	Leader	Leader
Kilka Tech	Not in	Not in	Contender	Not in	Not in	Not in
Lemongrass Consulting	Not in	Not in	Not in	Not in	Not in	Rising Star
LTI	Product Challenger	Rising Star	Leader	Rising Star	Product Challenger	Rising Star
Mindtree	Not in	Leader	Not in	Not in	Not in	Not in
Mphasis	Product Challenger	Rising Star	Product Challenger	Leader	Not in	Product Challenger
nClouds	Not in	Contender	Not in	Contender	Not in	Not in
NTT DATA	Market Challenger	Not in	Not in	Market Challenger	Leader	Not in
Pariveda	Not in	Not in	Contender	Not in	Not in	Not in

AWS - Ecosystem Partners - Quadrant Provider Listing 4 of 5

	Consulting Services Providers	Data Analytics and Machine Learning	Internet of Things (IoT)	Migration and Container Solutions	Managed Services Providers	SAP Workloads
PowerUp Cloud	Contender	Not in	Not in	Not in	Not in	Not in
Protera	Not in	Not in	Not in	Not in	Not in	Contender
PwC	Not in	Not in	Not in	Not in	Not in	Leader
Rackspace Technology	Market Challenger	Leader	Leader	Leader	Leader	Market Challenger
Slalom	Contender	Contender	Not in	Contender	Not in	Not in
Smartronix	Contender	Not in	Not in	Product Challenger	Contender	Not in
Reply	Not in	Not in	Contender	Not in	Not in	Not in
SugarCRM	Not in	Contender	Not in	Not in	Not in	Not in
Symmetry	Not in	Not in	Not in	Not in	Not in	Contender
TCS	Leader	Not in	Leader	Not in	Leader	Leader
Tech Mahindra	Rising Star	Contender	Leader	Leader	Leader	Product Challenger
TechEdge	Not in	Not in	Not in	Not in	Not in	Contender
TechWave	Not in	Not in	Not in	Not in	Not in	Contender
TensorIoT	Not in	Not in	Product Challenger	Not in	Not in	Not in

AWS - Ecosystem Partners - Quadrant Provider Listing 5 of 5

	Consulting Services Providers	Data Analytics and Machine Learning	Internet of Things (IoT)	Migration and Container Solutions	Managed Services Providers	SAP Workloads
ThingLogix	Not in	Not in	Product Challenger	Not in	Not in	Not in
To The New	Contender	Product Challenger	Not in	Not in	Contender	Not in
Trek10	Not in	Not in	Product Challenger	Not in	Not in	Not in
Trianz	Product Challenger	Not in	Not in	Not in	Product Challenger	Not in
Unisys	Not in	Not in	Not in	Not in	Market Challenger	Not in
Velocity	Not in	Not in	Not in	Not in	Not in	Contender
Virtusa	Rising Star	Leader	Rising Star	Product Challenger	Not in	Not in
Vision33	Not in	Not in	Not in	Not in	Not in	Contender
Wipro	Leader	Leader	Leader	Leader	Leader	Leader

AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

Consulting Services Providers

This report is for U.S.-based enterprises evaluating providers of consulting services related to the AWS platform.

In this quadrant report, ISG assesses the current market positioning of providers of AWS consulting services. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

Even during current times of economic and business uncertainty, ISG sees a growing demand for consulting services that assess and address the changing enterprise business IT needs. Typically, these include IT architecture and infrastructure change, application modernization, workload migration and improvement, digital business and workplace transformation and training, tech and provider governance and data security risk and compliance – almost anything to do with managing the disruption and improvement of business and IT. The prevalence of AWS as a core IT platform means that demand for consulting service providers, partnered with AWS, is increasing in tandem. The range of competencies among providers (practices, skills and abilities) makes it a challenge (more than ever) to identify and engage with the most suitable partners.

Who should read this report:

Marketing and sales leaders should read this report to understand how consulting service providers can help them develop and improve business planning, go-to-market strategy and related activities using AWS platform-based capabilities.

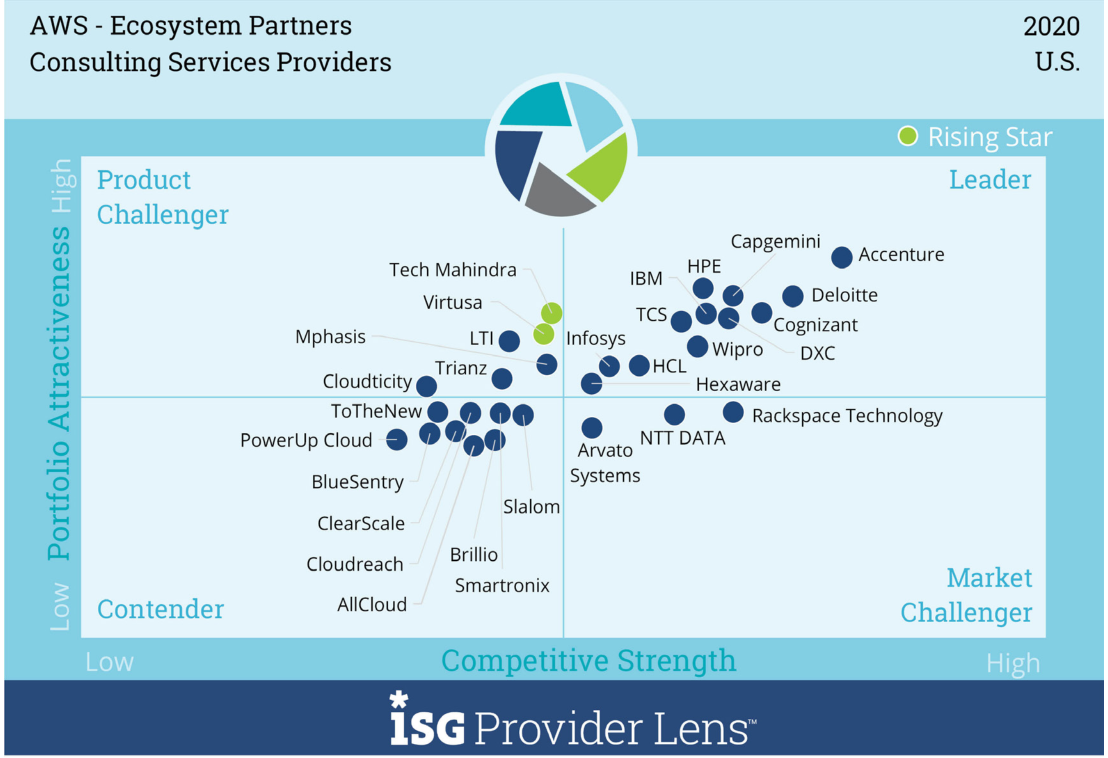
Operational leaders and finance leaders should read this report to understand ways to differentiate, engage with and manage relationships with AWS consulting services providers that enable optimal return on investment, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of providers offering AWS-related consulting services, including their offerings, capabilities, market presence and strengths, relationships with AWS and the way they employ the latest technologies and capabilities to deliver reliable offerings in keeping with enterprise business and market change.

CONSULTING SERVICES PROVIDERS

Definition

Consulting partners comprise the single-largest group in the APN ecosystem. The providers in this quadrant offer training, analysis, insight and guidance across a range of business and IT needs, including cloud strategy, business case development and support, and client needs for (and delivery of) governance, risk and compliance (GRC). To be considered Leaders in this quadrant, providers must not only offer critical technologies, architecture, security and industry-specific solutions, but also deliver business value for clients through their consulting services.



Source: ISG Research 2020

CONSULTING SERVICES PROVIDERS

Eligibility Criteria

- Availability, experience and requisite certification of staff supporting and delivering relevant offerings;
- Scope of AWS competency and service delivery offerings and certifications;
- AWS-focused consulting roadmap and innovations (current and planned);
- Ability to demonstrate client value through business outcomes or other measurable improvement parameters;
- Scope and availability of enabling programs for customer success (for example, planning workshops and training)
- Scope of security tools, technology and services used;
- Number and credible references with regard to services and solutions on AWS;
- Pricing model suitability, maturity and adaptability.

Observations

AWS' consulting services partners are completely involved in digital transformation and are beginning to consolidate and coordinate their offerings into more organized portfolios to improve their own efficiencies. A great deal of this effort stems from the global impact of COVID-19 on providers' clients and on the providers themselves. Providers were forced to quickly address organizational and portfolio challenges and inefficiencies to enable their own newly distributed workforces to be productive and support clients in new ways.

Overall, these providers tend to share similar practice areas and approaches. The greatest differentiators are in how each provider combines its own capabilities and approaches with AWS competencies, certifications and services to develop and deliver value to clients. Our observations include the following:

- **Accenture** combines an unmatched range of AWS competencies, partner program participation and AWS certifications with exceptional market presence.
- **Capgemini** offers similar scope of capabilities as Accenture, but with emphasis on more than 15 vertical/industry-specific AWS competencies.
- **Cognizant** is certified in all AWS consulting and solution types used by ISG to assess providers in this quadrant.

CONSULTING SERVICES PROVIDERS

Observations (cont.)

- **Deloitte** combines a strong finance and accounting presence with a growing range of AWS competencies and partner program membership to extend and enhance its already-strong presence.
- **DXC Technology's** AWS center of excellence (CoE) includes more than 700 certified AWS professionals that help the firm consolidate and distribute expertise into new and enhanced offerings.
- **HCL** is one of the several Leaders that leverage their own capabilities into joint offering development and go-to-market initiatives with AWS.
- **Hexaware** is fast growing and enters the Leaders quadrant in this study due, in part, to its advanced use of automation in reducing engagement complexity and cost for clients.
- **HPE** offerings incorporate all 23 of the AWS service delivery programs used by ISG to assess providers in this quadrant.
- **IBM** continues to leverage its unmatched legacy presence among large enterprises as it transitions from traditional data center focus to a cloud-based services reality.
- **Infosys,** an India-based company, continues to build on its business improvement and design-thinking-based approach as it shifts from traditional IT outsourcing and services to cloud-first digital enablement and transformation.
- **TCS** continues to aggressively invest in AWS training and certification for its staff as it also shifts business emphasis to a cloud-first, services-centric approach.
- **Wipro,** one of AWS' original premier partners, is the only provider in this quadrant to address all of the offering and solution types used by ISG to assess providers in this quadrant. It incorporates all 23 of the AWS service delivery programs used in our assessment into its offerings.
- **Tech Mahindra,** a Rising Star, is quite competitive with other Leaders mentioned above, and as it adds AWS competencies and certifications in this discipline, it should move toward the Leaders quadrant in a relatively short time.
- **Virtusa,** a Rising Star, enters into a strategic collaboration with AWS developing solutions for enterprises and software providers that constitute most of its client base.

HEXAWARE

Overview

Hexaware Technologies is a rapidly growing IT service provider headquartered in Mumbai, India, with offices in seven locations in the U.S. The innovative company invests heavily in automation and AI within its offerings and has made recent acquisitions that not only boost its own offerings but also its ability to compete against the largest IT services firms. With its Mobiquity subsidiary, Hexaware leverages AWS tools and services to design, build and manage cloud-native solutions for web, mobile, IoT, chat and call center services. Hexaware's Mobiquity subsidiary is an AWS premier consulting partner.

Strengths

Intelligent, holistic and automated transformation: Hexaware's core strategy builds on a holistic digital work environment, leveraging AWS services to optimize business processes and operations. The company builds on three areas of services, which include cloud transformation, cloud innovation and cloud adoption. A heavy emphasis on and investment in AI-driven automation enables Hexaware to compete effectively against larger providers in complex cloud environments.

AWS partnerships: Like other Leaders, Hexaware partners with AWS on joint projects, including as a launch partner for AWS Digital Innovation group. AWS is also a Hexaware customer. Among other initiatives, Hexaware has built apps and a platform to help AWS better manage events and event participants.

Automation-centered innovation: Hexaware's patent-pending Amaze cloud offering enables seamless re-platforming and transformation to the cloud for Java and .Net-based applications, typically reducing manual effort and time by up to 75%. The Hexaware industrialized cloud adoption framework (HiCAF) is an industry-adaptable, guided approach to cloud adoption, migration and optimization. It is comprised of pragmatic best practices, architecture frameworks, regulatory considerations, automation tools and cloud program governance templates.

Caution

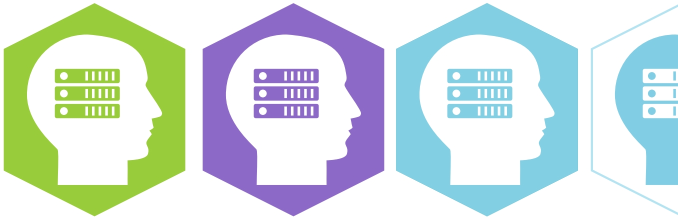
Although Hexaware has broad and deep experience within and across AWS offerings, it lacks several AWS certifications as compared with other Leaders in this quadrant. Hexaware is in the process of finalizing these.

Hexaware, like some other Leaders in various quadrants in this study, charges a premium for certain top-level support. Buyers should take this into consideration early in the request-for-information and bidding processes.

2020 ISG Provider Lens™ Leader

Hexaware is an agile and responsive consulting service provider positioned to grow rapidly, as it continues to build its digital transformation business.

Methodology



METHODOLOGY

The research study “ISG Provider Lens™ AWS - Ecosystem Partners” analyzes the relevant software vendors/service providers in the Germany market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of AWS - Ecosystem Partners 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Bruce Guptill, Author

Author, Global Lead Analyst & Distinguished Analyst, ISG Research

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Since the 1980s, Bruce has worked with IT market pioneers and innovators in business planning, product and service development, market analysis, and go-to-market strategy in desktop business computing, mobile telephony, electronic commerce, cloud IT, and now, digital business disruption and market transformation.

Within ISG, Bruce has helped develop and lead enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

Srinivasan PN, Enterprise Context and Global Summary Analyst

Senior Analyst

Srinivasan is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on AWS Ecosystem and Insurance BPO Industry. His area of expertise lies in the space of engineering services and digital transformation. Srinivasan has over 6 years of experience in the technology research industry and in his prior role, he carried out research delivery for both primary and secondary research capabilities. Srinivasan is responsible for developing content from an enterprise perspective and author the global summary report. Along with this, he supports the lead analysts in the research process and writes articles about recent market trends in the industry.

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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.

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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.