Next-Gen ADM Services

Application Quality Assurance

Evaluating application development providers' capabilities, go-to-market strategies and differentiators

Customized report courtesy of:

QUADRANT REPORT | OCTOBER 2024 | APAC

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Digital transformation, cloud adoption, AI and automation drive ADM, but talent shortages and regulatory challenges pose hurdles

The application development and maintenance (ADM) market in Asia Pacific (APAC) is experiencing robust growth, fueled by an expanding digital economy and heightened adoption of advanced technologies. As per the ISG Index, ADM bundled with infrastructure services grew by 57 percent globally in Q2 2024, largely due to rising demand in emerging APAC markets. This dynamic landscape is characterised by key drivers, evolving trends, and a competitive environment that presents both opportunities and challenges.

The ADM market in APAC is largely driven by digital transformation initiatives, such as upgrading legacy systems, migrating to cloud, and integrating advanced technologies like AI and ML. Emerging technologies like blockchain, IoT and 5G are also creating new opportunities for development and maintenance services, fueled by the region's rapid economic growth and urbanisation, which increase the demand for scalable and robust software solutions. Cloud computing is a major trend, with businesses increasingly adopting cloud platforms for scalability and cost-efficiency. The rise of AI and automation is streamlining ADM processes, enhancing efficiency and accuracy. At the same time, cybersecurity remains a critical focus, emphasising the need for robust security measures in applications. Agile methodologies and DevOps practices are gaining traction as they support faster development cycles and improve application quality.

Despite a positive outlook, the market faces challenges, such as a shortage of specialised talent in data science and cybersecurity and the complexities of regulatory compliance across diverse APAC countries. Integrating new applications with existing systems also presents challenges, requiring specialised skills. The ADM landscape in APAC features a blend of local and global players; local IT service providers offer cost-effective, region-specific solutions, while global giants bring advanced technologies and best practices. Recent trends show a rise in

Providers' opportunities are driven by rising **demand for digital** solutions and a **cost-effective talent pool**.

mergers and acquisitions aimed at expanding service offerings and geographic reach. Compared to the US and Europe, APAC benefits from cost advantages, a vast talent pool with a strong focus on STEM education, and rapid digital adoption, supported by government initiatives.

Recent developments in the ADM landscape highlight accelerated cloud adoption, the rise of low-code/no-code platforms, and the integration of AI and ML. Key priorities include hyperautomation and cybersecurity, alongside a notable increase in data-driven decision-making and edge computing, spurred by IoT growth. The shift to remote work has fueled the adoption of Agile methodologies and collaboration tools, while sustainability and green IT practices are gaining importance. Overall, the ADM market in APAC is dynamic and evolving, propelled by technological advancements and digital adoption. Despite challenges such as talent shortages and regulatory complexities, the market shows strong growth prospects and abundant opportunities for innovation.

The key trends in each quadrant are as follows:

Agile Application Development Outsourcing: To keep pace with the rapid evolution of the APAC application development landscape, service providers are adapting to the increasing demand for digital transformation and advanced technologies. They are deploying next-gen applications powered by AI and ML to enhance operational efficiency, customer engagement and overall performance. Providers are increasingly focussing on cloud-native development, delivering scalable solutions on major cloud platforms to ensure flexibility and cost-efficiency. Agile and DevOps practices are being adopted to accelerate development, enable continuous integration and foster innovation. In response to rising cybersecurity threats, providers are prioritising robust security measures and compliance, while also investing in talent development in AI and cloud computing to drive regional growth.

Application Managed Services: In APAC, application managed services (AMS) providers are emphasising customisation, flexibility and scalability to meet the evolving needs of enterprises. They are integrating advanced technologies like AI and automation to enhance efficiency and support modernisation efforts. Providers are using AI-driven platforms and hyperautomation to streamline processes and deliver significant business outcomes. AMS offerings include user support, cloud operations and services focussed on resilience, cost reduction and agility. Providers focus on rapid onboarding and strong engineering, supported by global expertise and advanced analytics. They offer localised services tailored to cultural and regulatory requirements, while also leveraging global networks and partnerships to deliver end-to-end solutions that align with business objectives.

Application Quality Assurance: As APAC enterprtises undergo digital transformation, they need robust QA/testing functions to ensure seamless cloud migration, Agile development and superior digital experiences. Service providers are meeting these needs with cloud-based quality engineering, Agile testing, advanced automation and AI-driven solutions. They focus on a customer-centric approach and a broad service portfolio to deliver maximum value. Providers differentiate themselves by investing in proprietary frameworks, talent development and innovative solutions. They leverage APAC-specific strengths, such as established delivery centres and expertise in continuous testing and performance engineering. Additionally, they offer specialised services in regulatory compliance, AI quality assurance and industry-specific solutions. Advanced offerings, including continuous automation, AI-powered testing and robotic test automation, enhance efficiency, accelerate time to market, and significantly improve test coverage, execution speed and overall quality.

AI and automation are transforming the ADM market in APAC. These technologies improve development and maintenance efficiency, resulting in faster time to market and enhanced accuracy. From AI-driven code generation to automated testing, businesses are benefiting from increased productivity and cost savings.

Provider Positioning

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	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
3i Infotech	Not In	Contender	Not In
Accenture	Leader	Leader	Leader
Aspire Systems	Contender	Not In	Contender
Birlasoft	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Cybage	Contender	Contender	Contender
Datamatics	Contender	Contender	Not In
Deloitte	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
DXC Technology	Leader	Leader	Leader
Encora	Not In	Contender	Product Challenger
Eviden (Atos Group)	Not In	Product Challenger	Product Challenger
FPT Software	Rising Star ★	Contender	Contender
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Happiest Minds	Contender	Not In	Product Challenger
HCLTech	Leader	Leader	Leader
Hitachi Digital Services	Rising Star ★	Rising Star ★	Not In
IBM	Leader	Leader	Leader
Infinite Computer Solutions	Contender	Product Challenger	Product Challenger

Provider Positioning

	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Infosys	Leader	Leader	Leader
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Product Challenger	Rising Star ★
Mphasis	Contender	Product Challenger	Contender
NTT DATA	Product Challenger	Product Challenger	Product Challenger
Persistent Systems	Product Challenger	Product Challenger	Product Challenger
Planit	Not In	Not In	Leader
QA Consultants (ALTEN)	Not In	Not In	Contender
Saigon Technology	Contender	Contender	Not In
TCS	Leader	Leader	Leader

Provider Positioning

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	Agile Application Development Outsourcing	Application Managed Services	Application Quality Assurance
Tech Mahindra	Leader	Leader	Leader
TestingXperts	Not In	Not In	Product Challenger
ThoughtWorks	Contender	Contender	Not In
UST	Contender	Contender	Product Challenger
Wipro	Leader	Leader	Leader

Quadrants cover the **key capabilities** across application development, managed services and quality assurance.

- **Agile Application Development Outsourcing**
- **Application Managed Services**
- **Application Quality Assurance**

Simplified Illustration Source: ISG 2024

Definition

Leveraging the capabilities of software to integrate across all business layers, generating new data sources, and achieving enterprise agility is a critical necessity for contemporary application outsourcing. Next-Generation Application Development and Maintenance (ADM) services encompass a wide range of offerings, including consulting, design, custom development, integration of packaged software, application management and operations, quality assurance, security services, and testing.

The advent of cloud-based computing, alongside the increasing demand for automation and artificial intelligence (AI), is reshaping the landscape for cloud-native application development, bringing it into a new era of focus. The emergence of Generative AI (GenAI) and specialised aplicações (LLMs) marks a significant, albeit nascent, entry into the market. Service providers are now prioritising Agile methodologies, ensuring the continuous, secure delivery and automation of software development processes through DevSecOps. Customised roadmaps are being developed to align digital, operational, and technology objectives with client needs.

Service providers are empowering organisations to automate routine tasks and derive deeper insights into their application development processes through AI. This shift has spurred the creation of new tools and platforms that embed automation and AI capabilities, thereby speeding up development cycles, enhancing security, facilitating threat detection and vulnerability management, and elevating the end-user experience. Consequently, this enables the delivery of intuitive, engaging, and personalised applications.

This study delves into the recent advancements within the application development, application management, and quality assurance sectors, with a particular emphasis on AI. In conjunction, ISG has introduced the ISG Provider Lens™ Next-Gen ADM Solutions - Low-Code Development Platforms and No-Code Development Platforms study in 2024. This initiative aims to provide clients with a comprehensive understanding of the application solutions market.

Scope of the Report

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

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 regional 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Application Quality Assurance

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers of application quality assurance services.

Enterprises are facing numerous challenges, driving the demand for application quality assurance and testing services. Rapid digital transformation is pushing enterprises to expedite product development cycles to stay competitive, while complex technology stacks involving cloud platforms, mobile applications and IoT introduce new layers of difficulty in quality assurance. A significant skill gap in areas such as automation and performance and security testing exacerbates these challenges. High turnover rates further strain in-house teams, making it difficult to maintain specialised expertise. Additionally, the high costs of infrastructure and operational overheads make cost-effective solutions crucial.

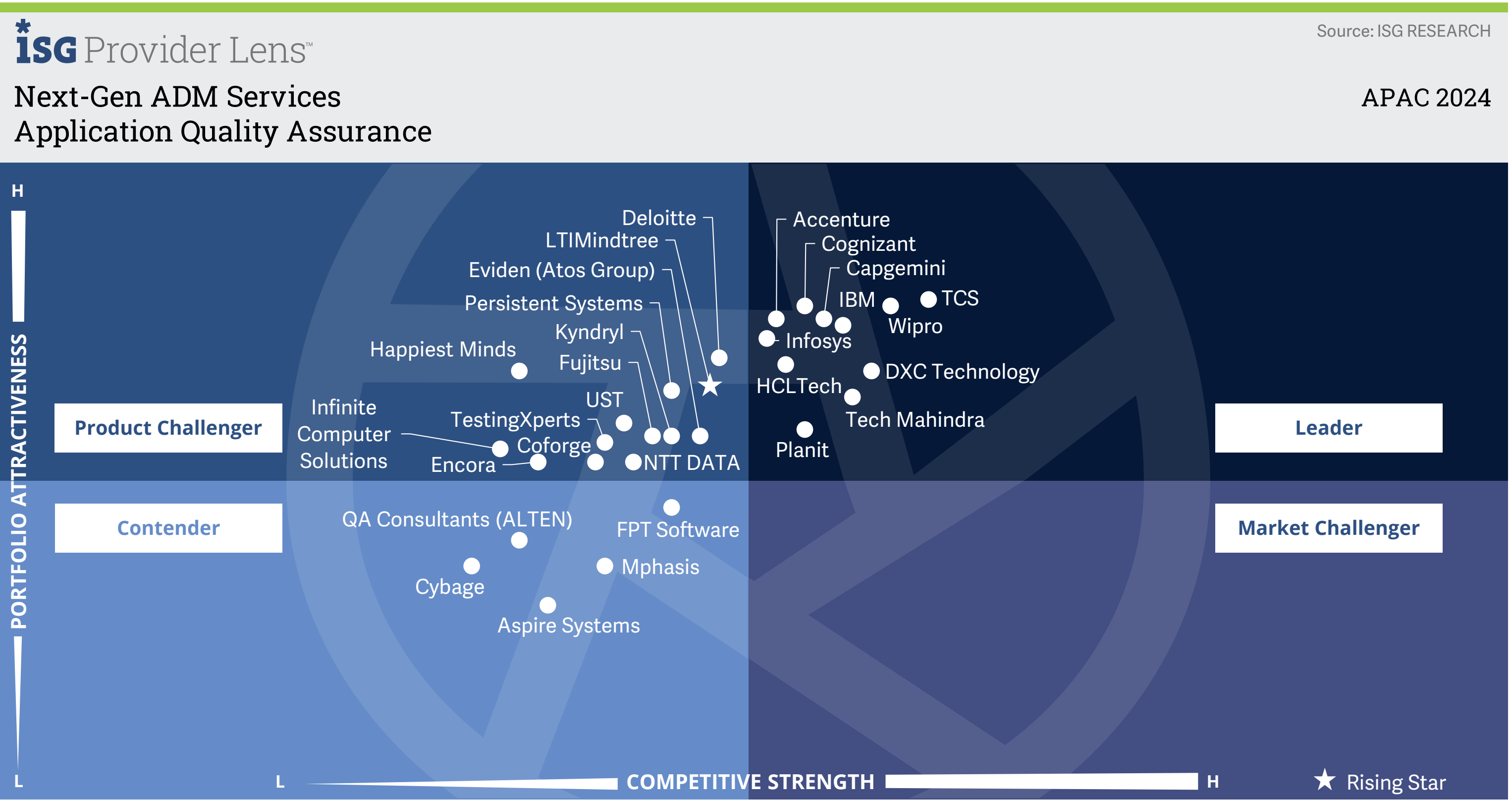
Enterprises also face challenges with scalability, as fluctuating testing demands and peak loads during product launches create pressure. The need for expertise in emerging technologies and regulatory compliance further complicates matters, prompting enterprises to outsource these functions to focus on core business operations and mitigate the risks of testing failures.

Providers offer tailored solutions to meet enterprise needs, delivering comprehensive testing suites for functional, performance, security and compatibility assessments. They utilise advanced technologies such as test automation, AI-driven testing and cloud-based infrastructure to enhance efficiency and scalability. With industry-specific expertise, they ensure regulatory compliance and optimise testing processes. Providers also offer high-quality, cost-effective testing services that support enterprises in their digital transformation.

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

Business professionals should read this report to understand partner positioning for efficient application service procurement and to achieve a favorable ROI within their industry.

Product professionals should read this report to understand the market landscape and provider offerings, which can be used to improve the production process.



The quadrant assesses **quality assurance (QA)** service providers, focussing on **process optimisation, bug detection** and quality frameworks. It evaluates their **use of AI and ML tools** for performance monitoring and training initiatives for advancing **software engineering maturity**.

Maharshi Pandya

Definition

This quadrant assesses service providers that offer comprehensive quality assurance (QA) programmes, including assessments, design, implementation and quality assurance managed services. Service deliverables include setting methods for business process optimisation, effort estimation, project planning, documentation, sprint execution timelines, criteria for a product to be deemed complete, testing strategies to identify bugs or defects in a product and the level of business process optimisation reached.

Service providers in this quadrant can design processes to attain the desired product or service quality at project and business levels, ideally covering a client's complete application portfolio. They leverage quality frameworks to support application code quality improvements, infrastructure resiliency, digital testing, security and quality assurance artifacts, and products and vendor tools.

The quality assurance service should include training and education to help clients mature their software engineering capabilities. A quality assurance programme should involve all the development teams, including experts from the outsourcing companies working for clients.

This quadrant also assesses how providers leverage production logs to extract insights for improved application quality and performance and integrate application performance management tools with AI and ML for data monitoring to predict the quality of new applications.

Eligibility Criteria

1. **Centralised QA** unit that lays down quality standards for clients' projects
2. **Comprehensive technical QA framework**, which includes planning, implementation, monitoring, review and improvements
3. **Consulting team** focussed on analysing business demands and securing development and delivery according to business requirements
4. **Applying technology to perform analytics** over logs and AI for continuous improvement in results
5. **Differentiation with proprietary tools** and leverage vendor partnerships for quality monitoring, application performance and testing tools
6. **Training and education** offerings for developers, testers and operators to develop a quality excellence mindset and ensure that the overall product or service meets the desired quality

Observations

APAC enterprises are undergoing digital transformation, highlighting the need for a robust QA/testing function. Key priorities include seamless cloud migration, Agile development and delivering exceptional digital experiences. Enterprises seek comprehensive test coverage, accelerated delivery and cost optimisation.

In response, service providers are offering cloud-based quality engineering, Agile testing methodologies, advanced automation and AI-driven solutions. A customer-centric approach and a broad service portfolio are essential for delivering value. Providers are investing in proprietary frameworks and talent development, while pioneering innovative solutions that emphasise industry insights and client collaboration.

Providers covered in this quadrant have established delivery centres and expertise in continuous testing and performance engineering. They offer specialised services for regulatory compliance, AI-driven quality assurance and industry-specific solutions. Their advanced offerings, such as continuous automation, AI-powered testing and robotic test automation, are enhancing efficiency and reducing time to market for clients.

Key trends include a focus on mobile testing driven by high smartphone use, the integration of AI and ML for intelligent test automation and a shift-left approach that incorporates testing early in the development process. There is increasing demand for cybersecurity testing, cloud-native testing, IoT testing and digital experience testing. Additionally, the growth of test automation platforms, offshore testing centres and effective test data management solutions is enhancing efficiency and ensuring compliance for clients the region.

From the 45 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture's quality engineering (QE) and testing services portfolio leverages AI, automation and GenAI investments. With strong industry expertise, Accenture delivers software quality at scale, which makes it a strategic business enabler with AI, automation and a global delivery model.

Capgemini

Capgemini's GenAI-infused services deliver robust testing solutions with skilled regional resources. With AI-driven automation, collaborative frameworks, IP, tools and accelerators, Capgemini drives impactful business outcomes.

cognizant

Cognizant's dedicated QE and QA practice focusses on advisory and transformation through platforms and frameworks, backed by proprietary tools and accelerators. The company emphasises R&D and partnerships to serve enterprises across APAC through its regional delivery centres.

DXC TECHNOLOGY

DXC Technology's quality and testing services offer AI-driven automation and Agile/DevOps capabilities to deliver high-quality outcomes. With a strong regional presence, DXC ensures standardised processes and optimised resource utilisation, streamlining client operations and aligning them with business goals.

HCLTech leverages its regional presence and skilled resources to deliver comprehensive QA services for both legacy and modern cloud applications. It has developed numerous IP and assets and utilises a product-centric QA framework that emphasises DevOps practices and the shift-left approach to quality.

IBM's QE practice advances through AI integration and workforce transformation, focussing on optimisation, automation and analytics, supported by global R&D labs. IBM emphasises collaborative teams to enhance testing processes and promotes early defect detection.

Infosys adopts a holistic QA strategy, leveraging hyperautomation, AI and customizable AI capabilities. It emphasises dedicated employees, systematic processes, strategic planning and customer-centricity, believing that continuous client engagement ensures alignment with expectations.

Planit has a strong regional presence, and it offers QE and testing services along with AI- and Agile-based QE frameworks across multiple delivery centres. It offers several tools and assets to ensure application security and promotes collaboration and excellence in service delivery.

TCS is known for its industry-centric solutions and expertise in next-gen technologies. The company invests in QE innovation and resource upskilling, prioritising QE through AI-driven testing. This integration enhances efficiency and reduces manual effort, supported by alignment with DevOps and Agile practices.

Tech Mahindra offers comprehensive testing services, leveraging its platforms and experienced resources, supported by both local and global delivery centres. The company engages with clients to understand their needs and drives innovation through R&D. Its skilled resources utilise tools to accelerate software delivery.

Wipro's quality-as-a-service approach aligns services with business KPIs, integrating AI and automation. The company invests in GenAI, AIOps and SRE, offering domain-based business assurance and specialised services such as Industry 4.0 assurance, blockchain assurance and regulatory compliance assurance.

LTIMindtree's (Rising Star) QE utilises a GenAI platform and AI-led solutions for automation, digital and data assurance, cloud assurance and QE for connected systems. Its framework evolves from QA to QE and quality intelligence through phases of discovery, project planning, implementation and governance.

Planit

Leader

"Planit specialises in comprehensive QE services, with a focus on collaborative testing and AI-driven tools. Its QA frameworks, such as QModel and Aurora, optimise software quality, while assets like Planit Amplify and Planit Strike enhance automation and security."

Maharshi Pandya

Overview

Planit is headquartered in Sydney, Australia and is a part of the NRI group. It has around 2,000 employees in five countries. The company offers a comprehensive suite of QE and Testing services aimed at delivering high-quality software products and applications. Its portfolio includes QE, advisory and consultancy, quality risk management, process optimisation and improvement and Agile-based QE frameworks. With multiple delivery centres across the region, Planit serves clients in diverse industries, including financial services and retail, and the public sector.

Strengths

QE and testing specialisation: Planit specialises in comprehensive testing and QE services, covering advisory, consultancy, risk management and execution. With expertise in functional, automation, performance and security testing, the company utilises Agile methods, QE frameworks and AI-driven tools. Its focus on collaborative QE involves engaging business stakeholders and optimising the software lifecycle from planning through deployment.

QA and QE frameworks: Planit utilises QA models and frameworks to optimise software delivery and CX. QModel integrates QE practices across the software lifecycle, ensuring high quality with reduced rework and costs. Aurora, a quality governance framework, standardises quality checkpoints, enhancing transparency and minimising risk throughout the testing lifecycle. The Planit Operating Model integrates CX, digital experience and operational experience to foster collaboration, visibility and excellence in service delivery.

Assets and tools: Planit has several tools and accelerators, including Planit Amplify, a GenAI platform that automates activities such as requirements analysis, test scenario generation and test automation. Planit DoT offers scalable data analysis and insights visualisation, while Planit Voltage accelerates automation adoption with Agile methodology support. Planit Strike ensures application security.

Caution

Planit is advised to continue innovating and investing in portfolio expansion and resource upskilling to remain competitive in the market. It should also position itself as a quality and testing services expert in a market where global and large regional providers often offer QE or testing services as part of bundled application development contracts.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till July 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Next-Gen ADM Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Sales/Marketing

▼ **Least satisfied**
Legal/Compliance

Region

▲ **Most satisfied**
Central/South America

▼ **Least satisfied**
Asia

Industry

▲ **Most satisfied**
Consumer packaged goods

▼ **Least satisfied**
Oil and Gas

Industry Average CX Score

75.2

▲ Highest CX: 95
▼ Lowest CX: 62.3

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 956

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	54.7%
Nearshore	21.3%
Offshore	24%

Appendix

The ISG Provider Lens 2024 – Next-Gen ADM Services study analyses the relevant software vendors/service providers in the APAC 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

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

Lead Author

Maharshi Pandya
Senior Lead Analyst

Maharshi Pandya is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on SAP HANA Ecosystem & Next-Gen ADM Solutions and Services. He supports the lead analysts in the research process and authors the global summary report. Maharshi also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Before this role, he has been associated with several syndicated and custom market research firms, in which he has worked on both, secondary and primary interaction-centric research projects around market sizing & forecasting, competitive benchmarking, pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media & information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.

Reviewer

Akhila Harinarayan
Senior Lead Analyst

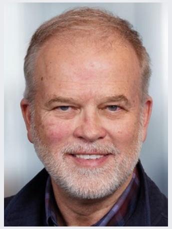
Akhila Harinarayan is Senior Lead Analyst and the lead author for ISG Provider Lens studies with a focus on Digital Business Transformation and SAP Services. She has more than 12 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions.
She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies. She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers.

Study Sponsor

Heiko Henkes
Director and Principal Analyst

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.



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 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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