

Oil and Gas Industry – Services and Solutions

Enterprise Asset Management

A research report comparing provider strengths,
challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2023 | NORTH AMERICA

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The oil and gas industry's digital evolution aims for enhanced efficiency

Geopolitical tensions, fluctuating energy demands, environmental concerns and the increase in renewable energy sources have posed multiple challenges for the traditional fossil fuel sector. Despite the shift toward sustainable energy sources, investments are ongoing, especially in the upstream segment, to meet the expected peak oil and gas demand in the 2030s. North America records the highest investments, accounting for more than one-third of the global investments. Despite price volatility and environmental and production concerns, the region's shale oil and gas production has transformed it into a major energy exporter.

Oil and gas innovation in North America has undergone transformative changes over the past few decades, driven by technological advancements, evolving market dynamics, and increasing environmental concerns.

The industry is witnessing innovation across the value chain, including exploration, production, transportation, and sustainability.

Energy transition at the center of all technology implementation: Changing consumer preferences and global efforts to mitigate climate change while achieving net zero have driven energy transition to be the center of all technology implementations in the oil and gas industry. The energy transition has made oil and gas companies reconsider their existing business models and invest in decarbonizing efforts to categorize themselves as energy companies, not just oil and gas companies. Policies and regulations significantly shape these transitions; therefore, oil and gas producers engage with policymakers to advocate for supportive regulations and align their strategies with national and international goals.

ISG, as an advisor, has helped several of the world's leading oil and gas companies to navigate their digital journeys. It believes that building a successful, competitive and future-proof energy company requires strengthening its technical and digital

Energy transition forms the **core** of all technology implementation in the oil and gas industry.



Executive Summary

foundation, transforming operations, continuously improving cybersecurity, digitally enabling the workforce and improving CX through digital channels.

ISG notes the following trends in the North American oil and gas industry:

Optimizing operations: Oil and gas companies continually invest in optimizing operations to enhance efficiency while reducing costs. They invest in deploying advanced technologies such as AI, IoT and data analytics to monitor equipment, predict maintenance needs and minimize unplanned outages or downtime. These technological solutions help monitor production processes in real time, enabling timely adjustments for optimal output. Automation also streamlines routine tasks, improving safety and freeing up skilled personnel for more complex tasks, especially given the talent shortage in the industry. Data-driven insights enable better decision-making in areas such as reservoir management, drilling operations and supply chain logistics. Companies also leverage digital twin technology to accurately simulate and optimize various scenarios

before implementing changes, mitigating risks and maximizing performance.

Streamlining capital strategy: Oil and gas companies use advanced technologies to streamline their capital strategy across project evaluation, portfolio diversification, risk management, financing options, emissions control and sustainability goals. These technologies also help companies become agile in response to market conditions and enhance the transparency of stakeholder communication. With the industry facing uncertainty for more than a decade, streamlining capital strategy has become a prime focus in sustaining operations while moving toward cleaner energy sources. Most capital investments in 2022 were directed at brownfield projects to enhance the existing oil fields and make them more sustainable, moving a step closer toward environmental and sustainability goals. By adopting a comprehensive and strategic approach to capital allocation, the oil and gas industry can evade challenges, capture opportunities and contribute to a more sustainable energy future while delivering value to shareholders and stakeholders.

A shift in investment portfolios: With increasing maturity and complexity, the oil and gas industry is gauging its investments carefully now more than ever. Legacy oil and gas companies prioritize efficient investments to remain competitive as the market shifts away from hydrocarbon energy over the long term. The high oil prices have created financial opportunities for portfolio optimization, paving the way for sustainable energy sources and decarbonization initiatives in line with the 2030 and 2050 goals. Oil and gas companies are also increasingly investing in green technologies such as carbon capture, usage and storage (CCUS), green hydrogen and renewable fuels to diversify their portfolio and evade risks related to existing fossil fuels operations.

The energy trilemma: Oil and gas companies are currently experiencing *the energy trilemma*, an endeavor to balance energy transition, security and diversification. Achieving progress in one dimension often presents difficulties in the other aspects. While companies must optimize their investments in transitioning to low-carbon energy amid evolving low-carbon technologies (currently in nascent

infrastructure and low returns), they must also invest in energy security, given the strong and resilient demand due to lower oil prices. Oil and gas companies deal with a third aspect energy diversification, which focuses on the demand, production, supply or trade of energy resources and limited energy choices for consumers. Balancing these three aspects requires thoughtful policies, technological innovations and international cooperation.

Energy workforce: The energy workforce in North America is diverse and evolving, influenced by technological advancements, market dynamics, regulatory changes and environmental concerns. The ongoing shift toward sustainable practices and the imperative to reduce carbon emissions are transforming this sector. Professionals increasingly engage in R&D, seeking innovative solutions for energy security and environmental concerns. As the North American energy landscape evolves, this dynamic workforce will be pivotal in shaping the region's future. Whether it is managing aging infrastructure, embracing disruptive technologies or reaching for ambitious



Executive Summary

sustainability goals, the professionals in the energy workforce remain at the forefront of these endeavors, driving innovation and progress.

Uncertainty regulatory environment:

Historically, the oil and gas industry operated within a complex regulatory landscape. Shifts in government administrations at the federal, state and provincial levels have led to changes in regulatory priorities. Environmental concerns have played a major role in shaping regulations along with activism by the public, social movements and the global trend toward decarbonization. Technological advancements have also introduced new complexities where techniques such as hydraulic fracturing and deepwater drilling have raised environmental and safety concerns, prompting regulators to continuously assess their oversights and adapt accordingly. In this evolving landscape, oil and gas companies will face uncertain regulatory changes in the future.

Oil and gas companies are experiencing *the energy trilemma*, striving to balance energy transition, security and diversification. Achieving progress in one dimension often presents difficulties in others.





Provider Positioning

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	Enterprise Asset Management	Next-Gen IT/OT Services	Capital Projects Management	Data Management and Cloud Computing	Energy Transition Services
Accenture	Leader	Leader	Leader	Leader	Leader
Birlasoft	Product Challenger	Leader	Not In	Leader	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader
CGI	Contender	Product Challenger	Not In	Product Challenger	Contender
Coforge	Contender	Contender	Contender	Contender	Contender
Cognizant	Leader	Leader	Product Challenger	Leader	Product Challenger
Computacenter	Not In	Contender	Not In	Contender	Not In
Cyient	Product Challenger	Product Challenger	Contender	Product Challenger	Product Challenger
Deloitte	Leader	Leader	Leader	Leader	Leader
DXC Technology	Contender	Product Challenger	Not In	Product Challenger	Not In





Provider Positioning

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	Enterprise Asset Management	Next-Gen IT/OT Services	Capital Projects Management	Data Management and Cloud Computing	Energy Transition Services
Evoke Technologies	Not In	Contender	Not In	Not In	Not In
EY	Product Challenger	Product Challenger	Market Challenger	Product Challenger	Product Challenger
Faithful+Gould	Contender	Not In	Product Challenger	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader	Rising Star ★
Hitachi Digital Services	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader
KPMG	Not In	Product Challenger	Not In	Not In	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
LTIMindtree	Leader	Leader	Leader	Leader	Leader





Provider Positioning

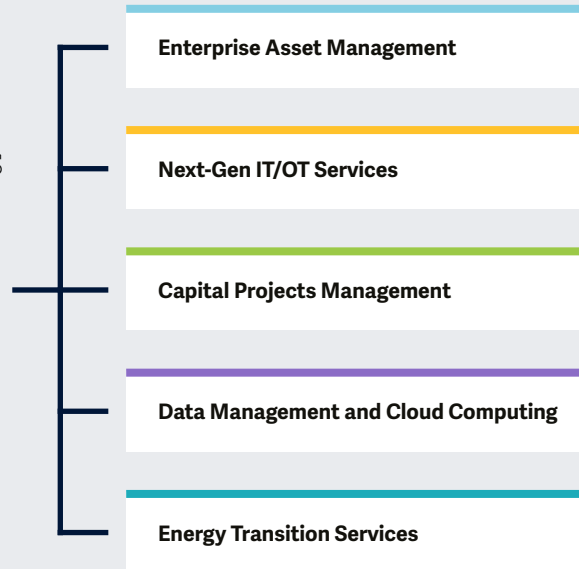
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	Enterprise Asset Management	Next-Gen IT/OT Services	Capital Projects Management	Data Management and Cloud Computing	Energy Transition Services
LTTS	Leader	Product Challenger	Rising Star ★	Product Challenger	Product Challenger
Microland	Not In	Contender	Contender	Contender	Not In
NTT DATA	Not In	Not In	Not In	Contender	Not In
Perficient	Product Challenger	Contender	Contender	Contender	Contender
PwC	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Leader
Quest Global	Contender	Product Challenger	Not In	Contender	Contender
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Leader	Product Challenger	Leader	Product Challenger
T-Systems	Not In	Contender	Not In	Contender	Not In
Wipro	Leader	Leader	Leader	Leader	Leader



Key focus areas for Oil and Gas Industry – Services and Solutions 2023.

Simplified Illustration; Source: ISG 2023



Definition

The oil and gas (O&G) industry involves exploring and refining O&G deposits to produce intermediate and end products. Key segments of the industry include upstream (exploration and production), oilfield services (equipment and drilling services), midstream (transportation and storage) and downstream (refining and retail markets). The industry comprises national oil companies (NOCs), integrated O&G companies (majors) and independent O&G companies.

The study aims to understand O&G companies' requirements and service providers' capabilities in the digital era.

Digitalization continues to be the key focus in achieving net zero goals. The further tightening of oil supply by OPEC+ for the remainder of 2023 will increase prices because of the decline in global oil inventory, demand increases and rising geopolitical tensions.

According to a global research and consultancy group, investments in the upstream sector will continue to increase and are expected

to cross the \$450 billion mark, but half of the investments will be used to cover inflationary costs.

The energy transition is a key focus area of the O&G industry for 2023 and beyond, with four main factors: carbon-free energy systems, energy efficiency, the emergence of new customers and digitalization. Many companies have been transforming their portfolios by replacing maturing legacy assets with low-carbon resources. These companies are increasingly geared toward digital innovation and operational efficiency by adopting nextgen IT/OT technologies. However, they face challenges around oil price volatility, worker safety, data and information access, remote asset monitoring and so forth.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Enterprise Asset Management, Next-Gen IT/OT services, Capital Projects Management, Data Management And Cloud Computing and Energy transition services.

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 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.





Enterprise Asset Management

Enterprise Asset Management

Who Should Read This Section

This report is relevant to North American oil and gas enterprises for evaluating enterprise asset management (EAM) solution and service providers. ISG highlights the current market positioning of EAM service providers in the regional oil and gas industry.

The ongoing conflict between Russia and Ukraine is exacerbating the global energy crisis, affecting the supply chain and causing price volatility in the oil and gas industry. In response to these challenges, North American companies are implementing new technologies to improve their processes and cybersecurity within organizations. The industry is also undergoing significant changes to address the roadblocks in managing complex assets across multiple locations and altering its mode of operations.

Companies increasingly rely on EAM solutions to maximize asset utilization, ensure worker safety and minimize downtime. A centralized asset monitoring system can help reduce costs and improve the operational efficiency of businesses in asset-heavy industries such as oil and gas. Innovative technologies such as drones monitor corrosion in assets such as liquefied natural gas and conventional deepwater wells to avoid physical intervention. These solutions and innovations have bolstered the asset maintenance capabilities of enterprises in North America.



Asset Management Leaders focused on understanding the service providers' utilization of existing technology assets to ensure operational efficiency, should read this report.



Procurement Leaders such as CPOs focused on understanding the current landscape of EAM solutions and services across North America, should read this report.

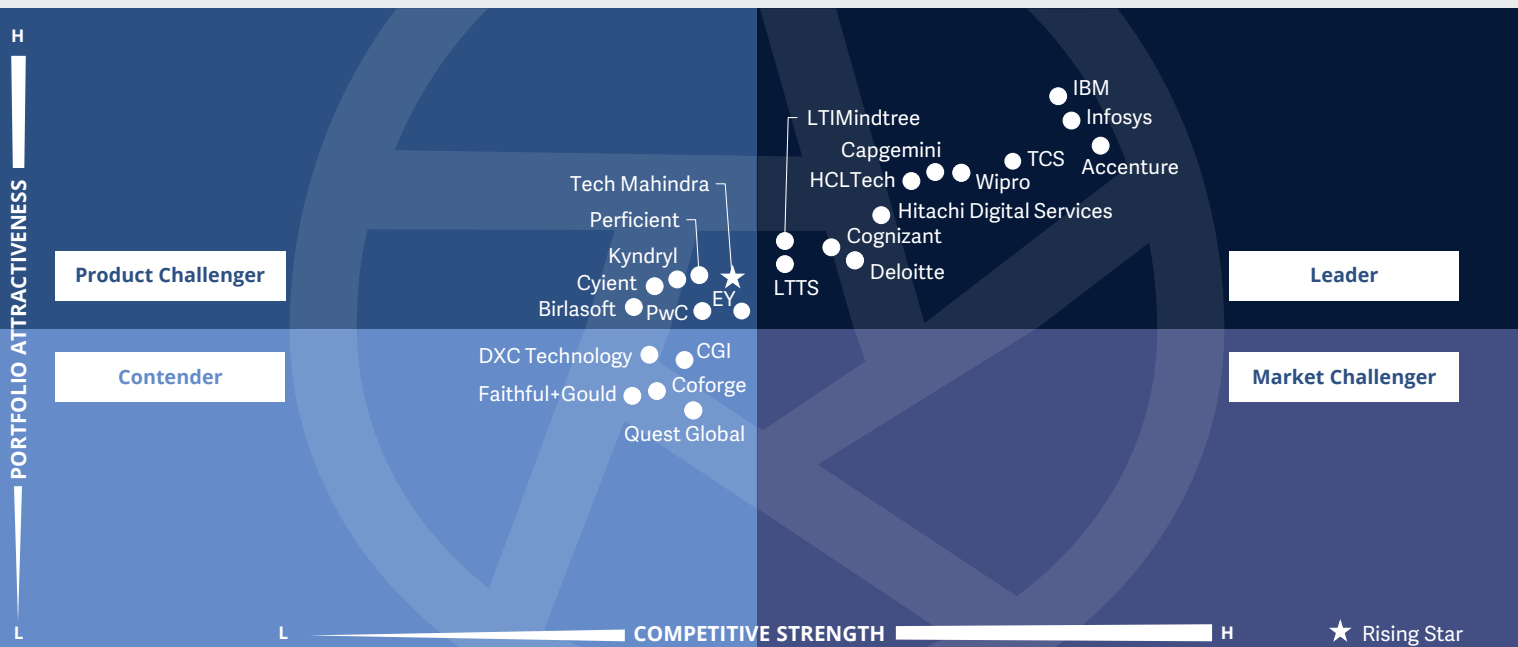


Strategy Leaders focused on initiatives that would strengthen the capabilities of EAM such as continuous upskilling of the workforce, and creating toolkits and frameworks, should read this report.



Oil and Gas Industry – Services and Solutions Enterprise Asset Management

North America 2023



This quadrant assesses service providers offering enterprise asset management (EAM) services and solutions to the oil and gas industry. These **services** enable companies to **increase asset performance, extend useful life and reduce operating costs.**

Harish B



Enterprise Asset Management

Definition

This quadrant assesses service providers that offer enterprise asset management (EAM) services and solutions to clients in the O&G industry. The services cover asset lifecycle management; maintenance, repairs and overhauls (MROs); labor management; control management; application maintenance and support; supply chain solutions; cloud services; asset health management; geographical information system (GIS); digital enablement service; and remote monitoring. These services enable companies to increase asset performance, extend useful life and reduce operational costs.

The oil and gas industry is one of the most asset-intensive industries in the world, and huge capital expense is incurred in purchase, maintenance and repair of these bulky assets. The need for the reliability of oil and gas industry is among the top priority as global transportation and industrial sector is depended on the output of the industry.

To optimize the quality and utilization of assets throughout their lifecycle, increase productive uptime and reduce operational costs oil and gas industry needs effective EAM solutions which is a combination of software and services. EAM solutions track asset health across multiple location and helps in asset maintenance, planning and scheduling, work management, supply chain management and environmental, health and safety (EHS) initiatives.

Eligibility Criteria

1. Exposure **to working in EAM for clients** in the O&G industry in the country or region
2. **Successful EAM-related engagements** (in the past or present) with at least three O&G companies
3. **Provide offerings and services** in at least four of the following areas related to EAM:
 - * Asset health management
 - * Failure prediction
 - * Work and labor management
 - * Inventory management
 - * MRO management
 - * Controls management
4. Demonstrate **strong partnerships with industry** associations, regulatory bodies, technology firms and startups specializing in the O&G industry
5. Offer **referenceable O&G case studies** for various services and solutions across the value chain
 - * Warranty management
 - * Geographical information system
 - * Digital EAM solutions
 - * Analytics and reporting



Enterprise Asset Management

Observations

The demand for high-functioning assets and uninterrupted uptime is common across many industries. The pressure to maintain continuous operations while managing costs is high in the oil and gas industry. EAM enables oil and gas companies to easily manage a complex array of assets, including drilling rigs and pipelines to refineries and storage facilities, in real time. Using advanced technologies, such as EAM integration with digital twins and blockchain, and pushing sustainability as part of the EAM solutions empower companies to maximize their asset utilization while addressing unplanned outages and sustainability aspects. The Leaders in the quadrant have continued to not only build strong partnerships with various other prominent oil and gas companies but are also focusing on creating innovative solutions in the EAM space.

Leading providers are actively looking to acquire various companies to build and develop various EAM solutions. These M&A have helped providers or businesses develop and create a plethora of capabilities around IT and OT.

Providers are also looking to offer cleaner and more efficient operations through advanced asset management and digital workforce management, which empower field workers with remote monitoring and mobile-based work management capabilities, thus creating a digital workplace.

From the 41 companies assessed for this study, 24 qualified for this quadrant, with 12 being Leaders and one a Rising Star.



Accenture's Intelligent Asset Management (IAM) services and digital solutions help oil and gas clients optimize asset efficiency using tools such as robotics, AI and ML, which provide insights into how assets perform.



Capgemini delivers end-to-end digital asset management solutions. These solutions help run complex asset management transformation programs successfully, from business case and design to EAM implementation.



Cognizant has a track record of over two decades in successful transformations and implementation programs for over 30 global oil and gas companies across the industry value chain.

Deloitte

Deloitte delivers oil and gas services through 28 delivery centers. The company has established strong relationships with more than 300 technology partners and alliances.

HCLTech

HCLTech Asset Management Solution enables clients to plan, procure, deliver, manage and improve their assets' reliability, availability and efficiency, supporting core business objectives.



Hitachi Digital Services, through its parent company Hitachi, is a leading provider of enterprise asset performance, field force and works management solutions for asset-intensive industries such as oil and gas and power and utilities.



The **IBM** Maximo EAM platform uses advanced analytics tools and IoT data to improve operational availability, extend asset lifecycles and optimize maintenance performance.



Infosys has more than 12 innovation centers focusing on areas such as IoT, 5G, cloud and industries and over 30 delivery centers in North America supporting its oil and gas clients.



LTIMindtree addresses its oil and gas clients' EAM requirements through its robust partner ecosystem with more than 200 partners, over 250 co-innovated solutions and innovation centers worldwide.



Enterprise Asset Management

LTTS

LTTS is one of the pure-play engineering service providers for the oil and gas industry. It operates over 102 R&D innovation labs and 22 global design centers. It invests heavily in R&D and has developed over 270 accelerators and solutions.



With over 30 years of expertise in EAM, **TCS** has cultivated proficiency in IoT and digital engineering and has delivered more than 100 projects.



Wipro has more than 1,200 consultants and specialists, multiple EAM solutions and over 75 EAM digital transformation leaders supporting its oil and gas customers worldwide.



Tech Mahindra (Rising Star) is a key provider of EAM systems and a credible partner offering a one-stop shop with more than 200 asset management consultants and a diverse partner ecosystem in niche areas.





“Hitachi Digital Services, with rich engineering experience of more than 100 years in the energy and industrial sectors, addresses EAM requirements through the Lumada digital ecosystem, as well as its domain and services expertise.”

Harish B

Hitachi Digital Services

Overview

Hitachi Digital Services, a wholly owned subsidiary of Hitachi, provides digital infrastructure, data management, analytics and digital solutions. Through Lumada and GlobalLogic, the company intends to further expand its digital transformation business and apply its industrial and digital capabilities to its client's data and application. The Lumada suite for EAM, asset performance management (APM) and field service management (FSM) support assets worth over \$4 trillion globally by leveraging data and using capabilities that help customers with industrial IoT solutions.

Strengths

One Hitachi solutions: Hitachi Digital Services and Hitachi Energy work closely to develop and sell products and digital solutions for the oil and gas sector. The company's go-to-market strategy includes joint sales and product marketing through direct customer interactions, events and webinars with partners such as DTECH, Digital Oilfields, CIGRE, IEEE Energy Day, T&D World, IIoT World and POWER magazine.

Strong EAM capabilities: Hitachi Digital Services, through its parent company, is a leading provider of enterprise asset performance and field force/works management services for asset-intensive industries such as oil and gas and power and utilities. Lumada EAM and APM have modules across asset and work management,

material and procurement management, and safety and compliance management. The company is also focusing on areas such as regulatory compliance as well as feature enhancement of Hitachi Energy Trading and Risk Management (ETRM) products and Lumada FSM/tracking.

Dedicated R&D efforts: Hitachi Digital Services has a large R&D division that builds specific and targeted AI and ML solutions for the oil and gas industry, mainly in the upstream and midstream value chain segments. These include APM and anomaly detection models, pipeline inspection robotics and visual analytics, and digital oilfield solutions such as 'rig-in-a-box.'

Caution

In North America, the company provides engineering and maintenance services for large-scale accounts and provides services to small- and midsize companies through its partners. The company should focus on increasing its regional presence to further consolidate its market position.





Appendix

The ISG Provider Lens™ 2023 – Oil and Gas Industry – Services and Solutions 2023 study analyzes the relevant software vendors/service providers in the North America 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 September 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 Oil and Gas Industry – 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



Author

Harish B
Lead Analyst

Harish brings more than 15 years of technology, business and market research experience and expertise to ISG clients. He has rich experience in executing market/competitive intelligence (MI/CI) and strategy/management consulting projects for Oil & Gas as well as Energy & Utilities industry. Prior to ISG, Harish has worked with leading market research/analytics and consulting firms including Frost & Sullivan and Genpact.

At ISG, He is focused on ISG Provider Lens™. His research and analysis for ISG clients is focused on Oil & Gas market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.



Enterprise Context and Global Overview Analyst

Swetha Tadepalli
Research Analyst

Swetha Tadepalli is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Workday Ecosystem, and Oil & Gas studies, respectively. Swetha has experience in the technology research industry. She carried out research delivery for both primary and secondary research capabilities.

She is also involved in authoring enterprise context and global summary reports with market trends and insights. She also supports the advisors with her research skills about the latest market developments in the industry.





IPL Product Owner

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

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

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



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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