ISG Provider Lens™

Analytics – Solutions and Service Partners

Data Science Services

U.K. 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 October 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

Data Analytics: four Service Domains Emerge from a Plethora of Changes

Unlike many other initiatives, data analytics projects have not suffered a backlash through the impact of measures against COVID-19. Many enterprise leaders are aware that the need for insight, anticipation and rapid reactions has increased to keep their core business on track. Many more decisions must be taken based on solid evidence in uncertain times. Data analytics that provide increased and early insight into customer experiences and product and service adoption are paramount to building resilient and future-ready businesses. Organizations increasingly seek to gather, store and analyze data from varied sources. But they often lack the resources and experience to implement a holistic data management strategy effectively. This has led to the increased demand for services in the areas of data science, data engineering, analytics cloud integration and data lifecycle management, as depicted in Figure 1.

Additional observations about analytics market development in the U.K. and worldwide are summarized below.

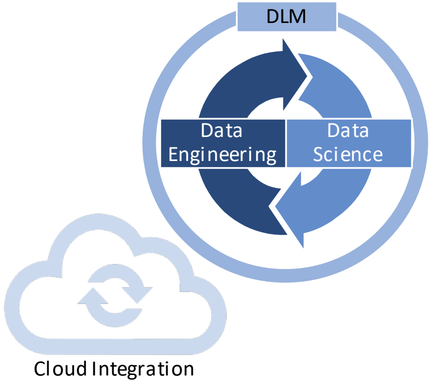
- **Data science growth is currently limited by a skills shortage:** Hiring new talent is difficult and enterprise clients and service providers are reverting to training their existing staff for effective analytics use. Staff retention is another challenge they face.
- **Data Science Services are potentially threatened by automation:** High-value data science services will be threatened by automation and hyperscaler programming tools. Google Cloud Smart Analytics is starting to compete with the services provided by data scientists.
- **Data Engineering Services still form the bulk of the data analytics activities:** Organizations are increasingly serious about tackling the challenges of building the right architecture for data collection, storage and processing.
- **The demand for Data Engineering Services increases with the multitude of non-central data sources:** As customers are (re)building data lakes to capture data from the edge and elsewhere and integrate them with existing infrastructures, their demand for services increases.
- **Demand for Cloud integration of Data Analytics Infrastructure is growing:** As more businesses shift to digital operations, the cloud has become the inevitable investment choice for the data analytics infrastructure, applications and platform.

- **Most enterprise clients do not have the internal resources or the skillsets to architect an overarching cloud infrastructure framework for data analytics:** This raises the appetite for integration services with the leading hyperscalers.
- **The increasing reliance on data analytics for business decisions makes expertise in data lifecycle management more important:** The sheer enormity of data causes organizations to face continuous operational challenges in governance and data management.
- **Data Lifecycle Management complexity is a call for professional services from external providers:** Data handling and lifecycle management, including storage, archiving and deletion for compliance requirements, are being trusted to external partners.
- **Self-Service Analytics is enjoying high growth as companies are becoming reliant on metrics that can be drawn on universally and quickly:** The demand for solutions that allow business users to assemble their analytical dashboards without any mathematical or specialized BI knowledge is rising.
- **Software as a service is the key delivery model to decision-making aids used by business departments based on analytics:** The decision criteria for selecting a suitable solution increasingly include the delivery model via SaaS.
- **Visualization and Reporting Solutions are gaining importance in many departments:** Business decision makers request analytics reporting solutions that can deliver insightful visualizations with capabilities to generate real-time reports across different platforms and devices on demand.
- **Ad-hoc delivery of meaningful business reports has become a mainstream expectation:** Managers and budget holders from many business departments are now requesting real life data to be made available on request in business meetings before reaching decisions.

Data Analytics: Four service domains emerge from changes in technology, governance, business application and representation

Data Lifecycle Management (DLM) Services get renewed attention in light of restructuring data analytics infrastructure, processing and treatment with rising edge requirements, new governance rules and more distributed company requirements.

Cloud Integration Services: Companies are ramping up investments in **cloud architectures and data integration** to raise the flexibility and business adaptability to uncertain market environments.



Data Science Services are growing: Automation and self-service are increasingly deployed to overcome the skill shortage of qualified data scientists.

Data Engineering Services still form the bulk of the data analytics activities. As customers are (re)building data lakes to capture data from the edge and elsewhere, integrate with classic MDM, enable self-service data engineering and prepare for compliance with new rules, the corporate data infrastructure remains a building site with a high need for implementation services.

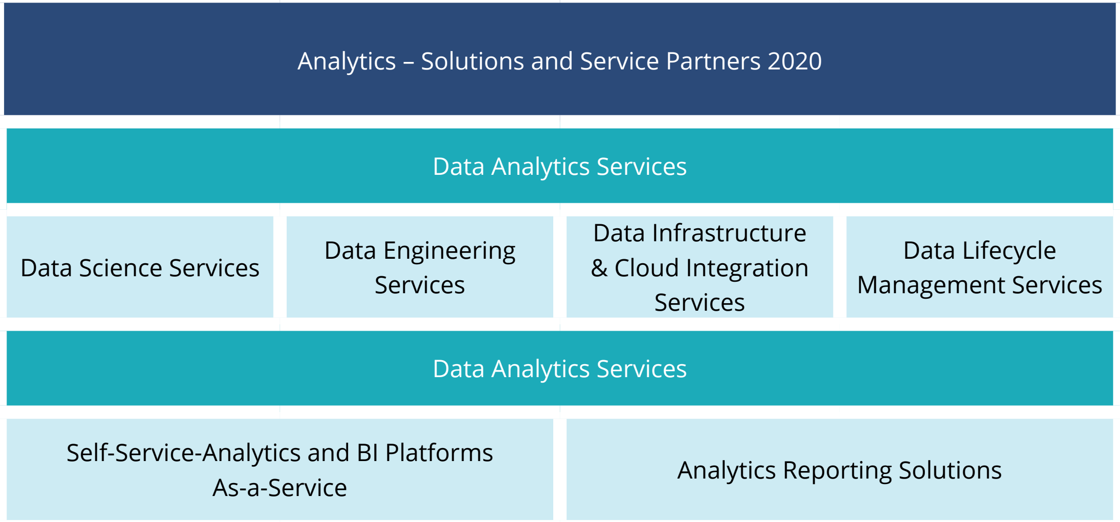
Barriers are conceptual rather than technology-based.

Most enterprise customers still have no clear data analytics strategy and no clear global concept for an optimized application of all exploitable data pools. There is renewed activity through business departments, but these are too often limited to one or two departments.

There is a growing demand for services as more corporate IT departments are getting empowered to prepare for a global data analytics approach. Data lifecycle management, data science and data engineering are areas in which requests for external support are growing.

Introduction

Simplified illustration



Source: ISG 2020

Definition

The digital transformation continues to make headway across verticals and is being viewed as the journey that allows organizations to sustain and succeed in the prevailing business environment. Data analytics, which can provide increased and early insight into customer experiences, products and service adoption, is paramount to building resilient and future-ready businesses. Organizations increasingly seek to gather, store and analyze data from varied sources. However, they lack the discipline and know-how to build effective statistical models that leverage strong scientific processes. This has led to increased demand for data scientists capable of discerning complex business problems and extracting actionable insights and meaningful conclusions from the vast amount of organizational data.

Definition (cont.)

Recruiting an army of data scientists is no answer for effective analytics use because these resources are rare. Besides, people are just one component. Organizations often need to contend with the challenges of building the right architecture to collect, store and process data. Business leaders struggle with traditional data warehousing structures that lack the necessary scalability and processing capabilities, given the enormous rise in data volumes. Organizations rely on specialized data engineering service providers with capabilities to implement the necessary infrastructure to achieve efficient data pipelines and scalable data lakes that drive effective analytics.

As more businesses shift to digital operations, the cloud has become the inevitable investment choice for infrastructure, applications and the platform, due to its cost, scalability and availability benefits. Organizations looking at running their analytics in such an environment are overwhelmed with the range of services available and the complexity of integration with the existing infrastructure for data storage. This development has led to the demand for service providers with strong cloud consulting and integration capabilities as well as partnerships with leading cloud providers.

Organizations also face continuous governance and management challenges data due to the sheer enormity of data. Other challenges include the complexity of data capture and preparation, segregating structured and unstructured data, curating and cataloguing data to drive efficient analysis, and managing storage in line with ongoing enterprise and regulatory requirements. Expertise in data handling and data lifecycle management, including storage, archiving and deletion, are gaining importance as business decisions are increasingly relying on data analytics.

The growing reliance on data analytics by multiple organizational functions to improve their operations and achieve business metrics has warranted the need for self-service analytics solutions. There is significant demand for solutions that can produce analytical reports with an intuitive user interface and simple querying capabilities. The drive toward cloud where analytics is provided as a service is seen as a platform-based solution necessity, and business leaders are demanding analytics reporting solutions that can deliver insightful visualizations with capabilities to generate real-time reports across different platforms and devices.

Scope of the Study

This ISG Provider Lens™ study offers the following to IT and business decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Perspective on different markets, including the U.K., Nordics, Germany, Brazil and the U.S.

Our study serves as the basis for important decision-making in terms of 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.

This report analyzes solutions and services providers in the analytics environment. For solutions, it will attempt to understand, analyze and evaluate the various tools falling under the data analytics umbrella and being adopted by clients to overcome real-world digital challenges.

For service providers, this report makes available the positioning of most important players in different markets, including the U.K., the Nordics (including the Baltics), Germany, Brazil and the U.S. This positioning is based on services providers' capacity to deliver differentiated analytics services in the different regions and their respective market presence.

The purpose of this report is to assist IT and business decision makers in selecting service providers presenting several aspects such as vision, technology, understanding of the local market and proven track record of successful implementations. This report does not have the aim to recommend services providers. Instead, it will give decision makers a clear overview of strengths and success cases of providers in order to support executive decision-making.

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 US$20 million and US$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 US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

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 cover¬age 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 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 fall 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 still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential 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) 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 (exceptions are possible).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Analytics – Solutions and Service Partners - Quadrant Provider Listing 1 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
1010Data	Not In	Not In	Not In	Not In	Not In	Product Challenger
Accenture	Leader	Leader	Leader	Leader	Not In	Not In
Apadmi	Market Challenger	Not In	Not In	Contender	Not In	Not In
Applied	Product Challenger	Not In	Not In	Not In	Not In	Not In
Atos	Leader	Leader	Leader	Leader	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Product Challenger	Not In
Beyond Analysis	Product Challenger	Not In	Not In	Not In	Not In	Not In
Blue Yonder	Contender	Contender	Not In	Not In	Not In	Not In
Board	Not In	Not In	Not In	Not In	Contender	Not In
Bosch	Not In	Not In	Not In	Not In	Not In	Leader
Bridgei2i	Not In	Not In	Not In	Not In	Not In	Contender
BrightBlue	Contender	Not In	Not In	Not In	Not In	Not In

Analytics – Solutions and Service Partners - Quadrant Provider Listing 2 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
BT	Not In	Not In	Contender	Not In	Not In	Not In
Buxtonco	Not In	Not In	Not In	Not In	Not In	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Not In	Not In
Castle Computer Services	Not In	Not In	Product Challenger	Not In	Not In	Not In
CDQ	Not In	Not In	Not In	Contender	Not In	Not In
CGI	Not In	Not In	Contender	Not In	Not In	Not In
Claranet	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
Cognizant	Leader	Leader	Market Challenger	Contender	Not In	Not In
Custard	Not In	Not In	Market Challenger	Not In	Not In	Not In
Dark Swan	Contender	Not In	Not In	Not In	Not In	Not In
Data Reply	Product Challenger	Product Challenger	Not In	Market Challenger	Not In	Not In
Datameer	Not In	Not In	Not In	Not In	Contender	Not In

Analytics – Solutions and Service Partners - Quadrant Provider Listing 3 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
datapine	Not In	Not In	Not In	Not In	Product Challenger	Not In
Datawatch	Not In	Not In	Not In	Not In	Contender	Not In
Deeper Insights	Product Challenger	Contender	Not In	Not In	Not In	Not In
Deloitte	Leader	Market Challenger	Not In	Leader	Not In	Not In
doubleSlash	Not In	Product Challenger	Contender	Not In	Not In	Not In
DXC	Leader	Leader	Leader	Leader	Not In	Not In
eoda	Not In	Product Challenger	Not In	Not In	Not In	Not In
Ernst & Young	Market Challenger	Market Challenger	Not In	Leader	Not In	Not In
Google	Not In	Not In	Not In	Not In	Market Challenger	Not In
HCL	Rising Star	Leader	Leader	Product Challenger	Not In	Not In
Hexaware	Rising Star	Not In	Not In	Not In	Not In	Not In
IBM	Leader	Leader	Leader	Market Challenger	Leader	Product Challenger

Analytics – Solutions and Service Partners - Quadrant Provider Listing 4 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
Infor Birst	Not In	Not In	Not In	Not In	Not In	Leader
Infosys	Leader	Leader	Leader	Product Challenger	Not In	Not In
Kortical	Not In	Not In	Not In	Market Challenger	Not In	Not In
KPMG	Not In	Market Challenger	Market Challenger	Leader	Not In	Not In
Light it	Contender	Not In	Not In	Not In	Not In	Not In
Logi Analytics	Not In	Not In	Not In	Not In	Contender	Not In
Magellan Solution	Not In	Not In	Not In	Contender	Not In	Not In
Merantix	Not In	Contender	Not In	Not In	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Not In
MicroStrategy	Not In	Not In	Not In	Not In	Product Challenger	Not In
Mindtree	Not In	Not In	Product Challenger	Not In	Not In	Not In
mVise	Contender	Contender	Not In	Not In	Not In	Not In

Analytics – Solutions and Service Partners - Quadrant Provider Listing 5 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
N-iX	Product Challenger	Rising Star	Product Challenger	Not In	Not In	Not In
NTT DATA	Not In	Not In	Rising Star	Leader	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Product Challenger
Orange Business Services	Not In	Not In	Not In	Market Challenger	Not In	Not In
PTC	Not In	Not In	Not In	Not In	Not In	Leader
PwC	Market Challenger	Market Challenger	Contender	Leader	Not In	Not In
Qlik	Not In	Not In	Not In	Not In	Leader	Not In
Reply	Not In	Not In	Not In	Product Challenger	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Leader	Leader
SAS	Not In	Not In	Not In	Not In	Leader	Not In
Sisense	Not In	Not In	Not In	Not In	Leader	Not In
Software AG	Not In	Not In	Not In	Not In	Not In	Contender

Analytics – Solutions and Service Partners - Quadrant Provider Listing 6 of 6

	Data Science Services	Data Engineering Services	Data Infrastructure & Cloud Integration Services	Data Lifecycle Management Services	Self-Service-Analytics and BI Platforms As-a-Service	Analytics Reporting Solutions
Splunk	Not In	Not In	Not In	Not In	Not In	Product Challenger
STATWORX	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
Tableau	Not In	Not In	Not In	Not In	Leader	Leader
TCS	Leader	Product Challenger	Leader	Leader	Not In	Not In
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star	Not In	Not In
Teradata	Not In	Not In	Not In	Not In	Product Challenger	Not In
TIBCO	Not In	Not In	Not In	Not In	Leader	Leader
Wipro	Not In	Not In	Market Challenger	Product Challenger	Not In	Not In
Woodmark	Not In	Not In	Contender	Not In	Not In	Not In
Yellowfin	Not In	Not In	Not In	Not In	Product Challenger	Not In

Analytics – Solutions and Service Partners Quadrants

ENTERPRISE CONTEXT

Data Science Services

In this quadrant, ISG evaluates the changing dynamics of data science services. These services are offered by service providers that use science-based methods, processes, algorithms and systems to extract knowledge, patterns and conclusions from both structured and unstructured data. ISG lays out the current positioning of data science service providers in the U.K. with relative strengths.

Data science consulting services are largely enabling enterprises to establish digital business processes. Enterprises are adopting AI, machine learning (ML) and natural language processing (NLP) due to the increasing collection of data from millions of users and machines in the business and Internet of Things (IoT) environment, respectively.

During the ongoing COVID-19 pandemic, enterprises are relooking at their expenditures and shifting toward onshore providers. They are seeking more consultative approach that involves data strategy, data lake tools and techniques, advisory for business use cases, and tech roadmap for data transformation.

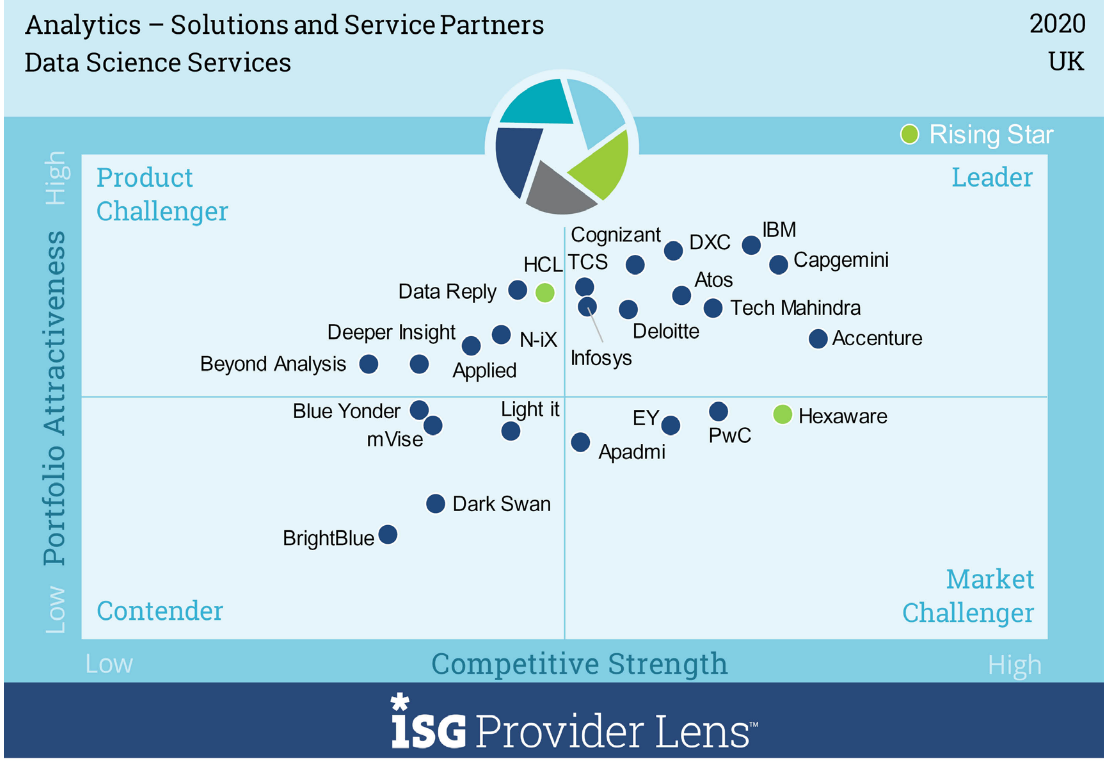
Who can use this report to identify and evaluate different service providers:

- **IT leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their business.
- **Innovation leaders** should read this report to understand a provider's capability to deliver seamless solutions, leveraging blockchain, AI and analytics. The report will also give an insight on how the providers can be compared with one another.
- **Business strategy leaders**, through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.

DATA SCIENCE SERVICES

Definition

Data science services are offered by service providers that use science-based methods, processes, algorithms and systems to extract knowledge, patterns and conclusions from both structured and unstructured data. The aim is to define and deploy the right questions to filter out relevant information from vast amounts of data streams.



Source: ISG Research 2020

DATA SCIENCE SERVICES

Eligibility Criteria

- Strategy, vision and consulting expertise
- Approach methodology and range of the service portfolio
- Competence and number of data science experts in the respective regional markets
- Technological expertise and competence for independent consultation and choice of solution providers

Observations

Overall, data science services providers reach a leading position by combining their service offering with solutions and technologies that are used to enable comprehensive go-to-market strategies.

- **Accenture** could improve the fit of its services beyond the large enterprise segment. The leader has ample room for further growth by bringing its services to midsize and smaller enterprises. This can also be achieved by revising the pricing.
- **Atos** has a solid leading position in the Data Science Services quadrant and serves clients of different sizes and across industries.
- **Capgemini** combines a strong business strategy-led data science engagement approach with a skilled workforce and sound technology deployment.
- **Cognizant's** leading position in the U.K. market relies on solid data science service offerings, including advanced algorithms.
- **Deloitte's** Advanced Analytics & Modelling (AAM) practitioners provide end-to-end data science business solutions.
- **DXC** has a strong leading position in the U.K. thanks to the breadth and depth of its offerings across verticals.

DATA SCIENCE SERVICES

Observations (cont.)

- **IBM's** data science offerings are a lighthouse in the data science services for the U.K. market.
- **Infosys** provides strong data science services in U.K. Its talent pool is complemented by a comprehensive solution set.
- **TCS** provides data science services with a strong focus on compliance and security.
- **Tech Mahindra** is a strong leader in data science services with a specific focus on selected industry verticals.
- **HCL** (Rising Star) has a strong unique sales proposition strengthened by a solid partner ecosystem in the U.K. market.
- **Hexaware** (Rising Star) combines an innovative data science technology platform with a usage-orientated pricing model and a strong client base in the financial sector.

RISING STAR: HEXAWARE

Overview

Hexaware Technologies is an IT and BPO service provider company based in Navi Mumbai, India that was founded in 1990 and has turnover of nearly $800 million. Data analytics is a rising contributor to the revenue. The company's Decision Sciences Lab is a data science solution designed to enable objective decisions via the outcomes of AI and machine learning models.

Caution

Hexaware must reinforce its delivery capability in the UK by hiring local data scientists and strategically structuring its go-to-market model for data scientist engagements to leverage its strong UK position.

Strengths

Cutting-edge data science technology platform: Hexaware has integrated its Decision Science Lab with a comprehensive set of open source technologies such as R and Python, commercial tools such as DataIku, DataRobot, Databricks and Snowflake and support for all three major hyperscalers, Azure, AWS and GCP.

A flexible and usage-orientated pricing model: Hexaware's integrated platform is provided with the analytic models on a subscription basis using cloud and SaaS-based billing options. Additional pricing plans give the option to pay for services based on parameters like data transactions and user interactions.

Strong client base across industries in the UK: Hexaware has delivered successful data science engagements to British clients, including the ML based model deployed for a specialist Insurance firm, a global Shipping Port Services firm and other UK based firms. Hexaware is in a strong position to win projects in the UK market.

2020 ISG Provider Lens™ Rising Star

Hexaware is providing relevant data scientist services via a cutting-edge technology platform combined with flexible pricing.

Methodology

METHODOLOGY

The research study “ISG Provider Lens™ Analytics - Solutions and Service Partners & Solutions 2020” analyzes the relevant software vendors/service providers in the U.K. 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 2020 ISG Provider Lens™ Analytics - Solutions and Service 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 and use cases.
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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

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Mr. Dransfeld is a thought leader regularly publishing on trends related to the mobile enterprise, the digital workspace and IoT markets. As an analyst, ICT strategist and go-to market expert he has developed deep insights into portfolio development and changing customer requirements. Through his experience as analyst and marketing strategist, he is in a strong position to support the definition and execution of go-to-market strategies for ICT services.

Henning is a known expert in the evaluation of supplier strategies, competitive landscapes and differentiation with over 20 years of experience in the ICT sector.

In addition, Henning advises providers on key messages in marketing and sales communications. In the context of in-depth market analyses on the German supply side through vendor benchmarks, he derives sustainable strategies for the digital transformation. Henning is an experienced trilingual speaker on international conferences.

Henning holds a Ph.D. from the University of Wales, Swansea College in management science and wrote his theses on “Interactive TV and its potential for retailing in the luxury car industry”; he also holds a Diplôme d’Etudes Superieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.

Authors and Editors

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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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