# **isg** Provider Lens™

# Engineering Services

Automotive – Product Engineering

Germany 2019

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators















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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 was current as of 30, June 2018. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

The lead authors for this report is Rainer Suletzki. The report was edited by Heiko Henkes.

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**İSG** Provider Lens

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#### **EXECUTIVE SUMMARY**

For quite some time, engineering services have been included in outsourcing and outtasking contracts; companies from technology-driven industries often leverage external suppliers that take over a significant share of the required engineering tasks. Traditionally, the focus was on constructing and designing the required components; specifically, the automotive industry uses such external services to a large extent and some of these companies have complete categories of parts such as gear units mostly developed by external providers. Similar to many other markets, the market for engineering services has been impacted by the digital transformation, which means that in the wake of technologies such as mobile connectivity, cloud data storage, IoT etc. the share of engineering services where software is key will increase significantly. To account for this trend, this study examines providers of engineering services with a focus on the digital transformation. We can distinguish the following main groups of providers:

- Companies that have been active as providers of traditional engineering services for
  quite some time and are advancing their portfolio to address the increasing relevance of
  digital components.
- Companies that have their roots in the IT services market and are leveraging these competencies to address current technological trends and provide a powerful engineering services offering.

Companies that continue to focus on traditional engineering services are not analyzed. The market for engineering services with a high share of software is relatively young; as we have observed, no classification of these services has been established yet. We have differentiated between industries and also accounted for functional differences. For the purpose of this study, our classification combines functional aspects (product engineering, process/plant engineering, software/digital & platform engineering) with industries (automotive and process industries); a more detailed description can be found under "Scope of This Study". Also, there are providers where the share of services with a focus on the digital transformation is insufficient or where it was not possible to make a reliable assessment, based on available information. Therefore, these companies were not rated, which has, of course, limited the number of analyzed providers within the individual segments.

Many of the examined providers are globally active companies with headquarters outside Germany and delivery organizations in various regions. Service providers with a focus on Germany, mostly on the automotive sector, are also engaged in global activities, but are mostly servicing locations of customers with headquarters in Germany.

Additional relevant and differentiating aspects include the following:

- The maturity of contracting models, e.g., the share of services rendered on a time & material basis in relation to services based on an agreed outcome.
- The share of projects for specific components in relation to the development of software of general usability which has to be customized by the customers for their specific use cases.



## Introduction

#### Definition

#### SCOPE OF THE REPORT

For the purpose of this study, the service categories were classified in a way that combines functional aspects with industries. The following industries were selected:

- 1. Automotive sector
- 2. Process industry with a focus on chemicals and oil & gas
- 3. Process industry with a focus on life sciences and consumer packaged goods (CPG)

The process industry was broken down to account for the fact that the life sciences and - to a smaller extent - the CPG industry must comply with regulatory requirements that clearly differ from those of the chemicals and the oil & gas industries. Within the life sciences category, we have also included medical devices, although traditionally, they fall partly under the discrete manufacturing category. However, as a result of the digital transformation, this differentiation is often not as clear as it used to be and therefore, it makes sense to include medical devices within the context of this study. For instance, pharmaceutical companies use medical devices (e.g., injectors) for interacting directly

Simplified illustration

Engineering Services						
Automotive - Product Engineering	Chemicals and Oil & Gas - Manufacturing and Plant/	Life Sciences & CPG - Manufacturing &				
Automotive - Manufacturing and	Process Engineering	Plant/Process Engineering				
Plant/Process Engineering	Chemicals and Oil &	Life Sciences & CPG –				
Automotive - Software/Digital and Platform Engineering	Gas - Software/Digital and Platform Engineering	Software / Digital & Platform Engineering				

Source: ISG 2018

## Definition (cont.)

with patients to administer medication and these devices fall under the discrete manufacturing category.

The geographical coverage of this study is Germany; considering the global activities of engineering services customers, providers' global presence also played a relevant role for the analysis.

Functionally, the following categories were analyzed:

#### 1. Product Engineering

Product engineering services (PES) are related to the development of physical products or product sub-sections utilizing capabilities that include embedded electronics – semiconductor engineering, hardware engineering, embedded systems software, verification & validation and IoT-related services, as well as overall product and systems level engineering.

#### 2. Manufacturing & Plant / Process Engineering

Manufacturing & plant / process engineering services are related to planning, designing, modifying, optimizing and maintaining plant or manufacturing systems and equipment – with a focus on industrial IoT / Industry 4.0 applications such as connected factories, digital asset management, predictive maintenance, 3D printing, robotics / automation etc.

#### 3. Software / Digital & Platform Engineering

Software / digital / platform engineering services consist of application software development, independent of specific hardware. It also includes IoT software applications such as connectivity, mobility, predictive maintenance, OT data analytics (OT data refers to data pertaining to sensors, machines, location etc.), digital supply chain etc., and engineering platforms related work: such as IoT, PLM, MES etc. ERP platforms are not included in the study.

#### **Provider Classifications**

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

### Leader

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

## Product Challenger

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

## Market Challenger

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

## Contender

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

## Provider Classifications (cont.)

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

## Rising Star

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

### Not In

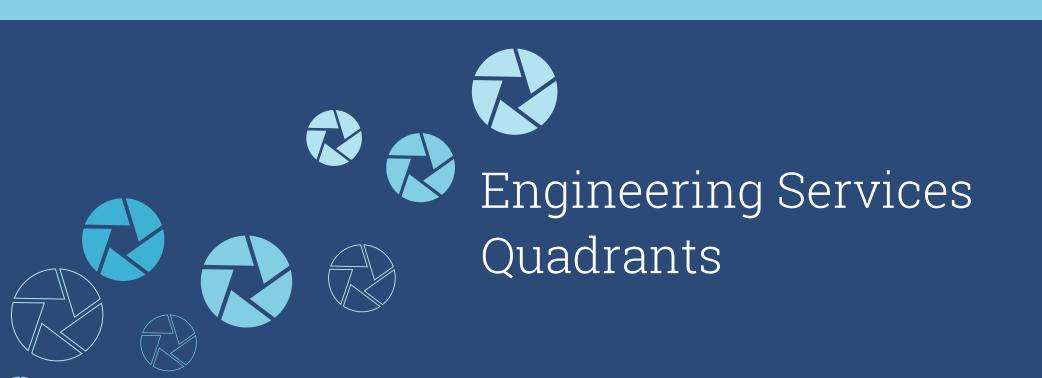
This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

## Engineering Services-Quadrant Provider Listing 1 of 2

	Automotive - Product Engineering	Automotive - Manufacturing and Plant/Process Engineering	Automotive - Software/Digital and Platform Engineering	Chemicals and Oil & Gas - Manufacturing and Plant/Process Engineering	Chemicals and Oil & Gas - Software/ Digital and Platform Engineering	Lifesciences & CPG - Manufacturing and Plant/Process Engineering	Lifesciences & CPG - Software/Digital and Platform Engineering
Akka Technologies	Contender	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Alten	Product Challenger	Not In	Not In	<ul><li>Not In</li></ul>	<ul><li>Not In</li></ul>	Product Challenger	Not In
Altran	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Rising Star</li></ul>	<ul><li>Rising Star</li></ul>
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>
Bertrandt	Market Challenger	Not In	Market Challenger	Not In	Not In	Not In	Not In
Capgemini	<ul><li>Rising Star</li></ul>	Not In	Product Challenger	<ul><li>Not In</li></ul>	Not In	Market Challenger	<ul><li>Leader</li></ul>
Cognizant	Product Challenger	Not In	Product Challenger	Contender	Not In	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>
EDAG	Contender	Contender	Not In	<ul><li>Not In</li></ul>	Not In	Not In	Not In
EPAM	Not In	Not In	Product Challenger	<ul><li>Contender</li></ul>	Product Challenger	Contender	Contender
HCL	<ul><li>Leader</li></ul>	Market Challenger	<ul><li>Leader</li></ul>	Not In	<ul><li>Contender</li></ul>	Not In	Product Challenger

## Engineering Services-Quadrant Provider Listing 2 of 2

	Automotive - Product Engineering	Automotive - Manufacturing and Plant/Process Engineering	Automotive - Software/Digital and Platform Engineering	Chemicals and Oil & Gas - Manufacturing and Plant/Process Engineering	Chemicals and Oil & Gas - Software/ Digital and Platform Engineering	Lifesciences & CPG - Manufacturing and Plant/Process Engineering	Lifesciences & CPG - Software/Digital and Platform Engineering
Infosys	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>
Innominds	Not In	Not In	Contender	<ul><li>Not In</li></ul>	<ul><li>Contender</li></ul>	Not In	Contender
in-tech	Not In	Not In	Contender	Not In	Not In	Not In	Not In
ITK Engineering	Not In	Not In	Contender	Not In	Not In	Not In	Not In
KPIT	Product Challenger	Contender	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
L&T Technology Services	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	Product Challenger
QuEST Global	Product Challenger	Product Challenger	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	Product Challenger	Product Challenger	Contender
TCS	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>	<ul><li>Leader</li></ul>
Tech Mahindra	Product Challenger	Contender	Product Challenger	• Not In	Not In	Not In	Not In
Wipro	• Leader	Market Challenger	• Leader	Not In	Not In	Not In	Not In

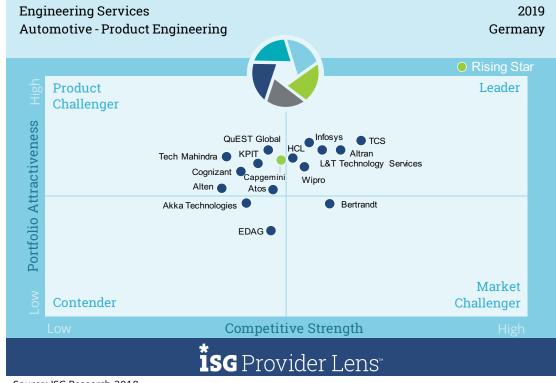


# AUTOMOTIVE - PRODUCT ENGINEERING

#### Definition

ES in automotive is helping in providing automotive players mechanism and ways to reinvent their role - focusing on core activities and creating efficient ecosystems with strategic partners. The automotive industry is facing a revolution. Innovation-related challenges are reshaping traditional auto industry structures and relationships — in particular, by threatening the existing distribution of profits and the boundaries between OEMs and tier-one or tier-two suppliers, as well as between automotive and tech companies.

Product engineering services (PES) consists of the development of physical products or product sub-sections utilizing capabilities that include embedded electronics - semiconductor engineering, hardware engineering, embedded systems software, verification & validation and IoT-related services, as well as overall product and systems level engineering. Pure play legacy mechanical engineering without digital elements is out of scope.

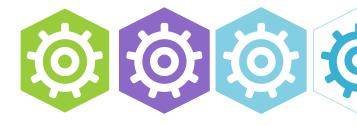


Source: ISG Research 2018

# AUTOMOTIVE - PRODUCT ENGINEERING

#### Observations

- Compared to the other segments, the number of providers that are active in this segment is rather high.
- Providers have a different focus and some of them take over complete responsibility for the development of vehicle components with a dominating share of software.
- Some providers also address relatively new areas such as e-mobility and autonomous driving.
- Providers' presence in Germany varies. There are providers with a regional focus on Germany as well as providers with a global coverage and delivery centers in various regions, including Germany, due to the strong position of the automotive sector in Germany.



#### **ALTRAN**



## Overview

Altran provides a comprehensive portfolio with a clear focus on engineering and R&D. The regional focus is on Europe and North America. The services are available for a broad scope of industries.

The company pursues a clear strategy to implement trends within the digital transformation and, thus, has a strong position in the segments that are part of this study.



## Strengths

Altran's automotive product engineering service portfolio comprises all relevant technologies (e.g., chassis, interior fittings and new trends such as connected cars). Altran has many years of experience in these areas.

The scope of services comprises consulting across all concept and design phases during the development process up to the final development of the respective components.

Altran is engaged in customer relationships with several major car manufacturers and automotive suppliers in various regions, including Germany. With some of these vendors, a strategic partnership exists with Altran development centers close to the respective customer's location.

Many reference projects covering multiple components, including highly complex undertakings, underline Altran's high competence and experience in this area. These reference projects also address new trends such as e-mobility and autonomous driving.

Altran has a clear strategy with the goal to enhance their long-standing traditional engineering experience with a strong focus on the digital transformation.



## Caution

In the wake of the digital transformation partnerships with key technology providers (e.g., Google, Apple) are recommended.



## 2019 ISG Provider Lens™ Leader

Altran is a global automotive product engineering player with great competence and many years of experience.

#### HCL



## Overview

HCL is a global provider who enjoys a strong position in the traditional IT services market and has a clear focus on the digital transformation of their customers' core business processes. The engineering services examined in this study are among the main offerings of the HCL portfolio.



## Strengths

HCL has know-how of all key areas of vehicle development and is a powerful and capable partner for companies from the automotive industry.

The portfolio covers all relevant automotive product engineering areas (consulting, conceptualization & design, development, homologation). HCL also runs several innovation labs for specific technology topics, e.g., smart devices, verification & validation, product testing. Specific strengths include the powerful infrastructure for performing key tests during vehicle development.

HCL has a comprehensive network of partnerships, including established technology providers as well as universities and research institutions, ensuring that current trends are included in concrete development initiatives.

HCL has many references and use cases related to the development of multiple components, also for German vehicle manufacturers, demonstrating their technological competences within the areas analyzed within this segment.

HCL pursues the targeted strategy of leveraging existing best practices across multiple industries, if possible and technically practicable, to achieve respective efficiency gains.



## Caution

Besides developing individual components, the provider should take managed over project responsibility for complex initiatives to limit the share of T&M services.

The provider should strengthen their presence in Germany (delivery centers, reference projects etc.).



## 2019 ISG Provider Lens™ Leader

HCL is a powerful and competent partner to help customers develop all kinds of vehicle components.

#### INFOSYS



## Overview

Infosys is a global provider whose portfolio comprises traditional IT services as well as digital transformation services across industries to address customers' core business processes, with a specific focus on agile implementation. The engineering services examined within this study are one of several focus areas within the Infosys portfolio.



## Strengths

Infosys is a powerful partner for the automotive industry, who leverages and applies their existing and broad IT know-how to address respective specific goals.

The Infosys portfolio covers all relevant automotive product engineering aspects (core areas such as chassis and interior fittings as well as new trends such as connected cars and autonomous driving) and is engaged in many long-standing customer relationships. Compared to other providers, the share of managed projects is relatively high, and Infosys often takes over development responsibility, for instance, in the context of co-innovation approaches.

Infosys can rely on a comprehensive network of partners, universities, research institutions and industry forums to advance their portfolio, based on current trends. The provider also runs their own labs and centers of excellence.

Infosys is driving agile methods for project development purposes.

The scope of competencies regarding covered industries as well as functionality is very broad; there is no dominating industry or functional area.



## Caution

The provider should also focus on e-mobility.

The provider should strengthen their position in Germany (through delivery centers, reference projects etc.).



## 2019 ISG Provider Lens™ Leader

Infosys is a powerful partner for developing all kinds of vehicle components, based on agile methods.

#### L&T TECHNOLOGY SERVICES



## Overview

L&T Technology Services is a global IT service provider with a specific focus on engineering and research & development. Services include product development, product life cycle management, engineering analytics, machine-to-machine connectivity and IoT.

The company has presences in all relevant regions and enjoys a strong position in Germany.



## Strengths

The L&T Technology Services portfolio for automotive has a clear focus on efficiency-enhancing solutions and innovative approaches.

Within this segment, L&T Technology Services has a focus on provisioning reusable software tools that increase the productivity and can be used in multiple environments. The functionality of these tools includes areas such as design, testing and preparation of production.

L&T Technology Services has a broad customer base, also in Germany, and has long-standing experience in this segment. The offering covers all kinds of vehicle categories, not only normal passenger cars, but also trucks and other commercial vehicles.

Solutions addressing innovative vehicle concepts such as e-mobility and hybrid vehicles constitute key elements of the portfolio.

The share of managed projects, where the provider takes over vehicle development responsibility, is relatively high.

L&T Technology Services has a network of partnerships and is actively engaged in key industry technology forums, which enables the provider to incorporate current developments into their portfolio short-term.



## Caution

Considering the digital transformation and respective new players, the provider should engage in partnerships with key IT technology providers such as Apple or Google.



## 2019 ISG Provider Lens™ Leader

L&T Technology Services is a competent automotive product engineering partner, combining broad industry-specific knowledge with innovative approaches to achieve efficiency gains.

#### **TCS**



## Overview

The TCS portfolio provides a very comprehensive coverage of industries and a very broad functionality of services. The provider covers traditional IT services as well as current trends and the digital transformation, also within the engineering services context which are analyzed within this study. The company has delivery centers in all important regions, including Germany.



## Strengths

TCS has know-how of key areas of vehicle development; due to their strong global presence, the provider is a powerful and capable partner for companies from the automotive industry.

The provider covers key relevant technologies such as connected cars, autonomous driving and telematics. Another focus is on model-based development (e.g., physics-based modeling, model-based testing, simulation), verification & validation and prototyping; the latter addresses both the actual vehicle and the required production capacities.

The future topic of e-mobility is already addressed through a specific center of excellence.

The share of managed projects, where the provider takes over vehicle development responsibility, is relatively high.

TCS operates their own innovation labs that hold many patents.

The provider can rely on a comprehensive network of partners, universities, research institutions and industry forums to advance their portfolio, based on current trends.



## Caution

The provider should work to become a preferred partner among key German customers within this industry.



## 2019 ISG Provider Lens™ Leader

TCS is a powerful automotive development partner and is already engaged in activities to address key future technologies such as e-mobility.

#### **WIPRO**



## Overview

Wipro is a global provider who enjoys a strong position in the traditional IT services market and has a clear focus on the digital transformation of their customers' core business processes. The engineering services examined in this study are among the main offerings of the Wipro portfolio.



## Strengths

Wipro has know-how of all key areas of automotive development. One focus is on the impact of the digital transformation on product development aspects.

The portfolio covers areas such as consulting, conception and design, development and homologation. Wipro has dedicated teams for topics such as connected cockpit, autonomous driving, infotainment etc. and makes significant investments into respective capabilities.

Wipro has a good network of partnerships, including established technology providers as well as universities and research institutions, ensuring that current trends are included in concrete development initiatives. Wipro also operates their own innovation labs and has delivery centers in all key regions.

Another focus is on the provisioning of solutions for product life cycle management, specifically for the Engineering for Automotive product.



## Caution

The provider should strengthen their customer base in the product engineering segment for the automotive industry and should build up more use cases.

The provider should increase the share of managed projects, i.e., take over development responsibility accordingly.



## 2019 ISG Provider Lens™ Leader

Wipro is a powerful product engineering partner for automotive companies and has a clear focus on specific areas of technology.

#### RISING STAR: CAPGEMINI



## Overview

Capgemini is a provider of all kinds of IT services with a focus on North America, Europe and India. Based on their strong position within the traditional IT services segment the Capgemini portfolio has a clear focus on the digital transformation of core business processes of their customers within multiple industries. The engineering services examined in this study are among the main offerings of the Capgemini portfolio.



## Strengths

Capgemini has many years of experience with traditional IT service provisioning and can transfer this experience into product engineering for the automotive sector, which positions this provider as a powerful player in this segment who has the potential to achieve a leading position.

A key focus of the broad functional portfolio is on the connectivity between the driver and the vehicle (digital cockpit and infotainment) and also between the vehicle and external instances (connected car, real-time vehicle-focused analytics).

Capgemini provides very flexible models for geographical service provisioning distribution (rightshoring), which replace delivery centers in the various regions efficiently.

The portfolio has a strong focus on the provider's own IP and related patents, e.g., for product life cycle management or a test automation framework.

Capgemini has a comprehensive network of partner companies, specifically key IT technology providers, cooperates with universities and is a member of industry-specific forums, which enables the provider to advance their portfolio and include respective current trends.

Capgemini has a strong presence in Germany.



## Caution

The provider should increase the share of managed projects, i.e., take over joint responsibility for vehicle development projects.

The provider should improve the presentation of existing customer references.



## 2019 ISG Provider Lens™ Rising Star

Capgemini demonstrates a rapid development within the product engineering segment for the automotive industry and is on their way to achieve a leading position in this market.



#### **METHODOLOGY**

The ISG Provider Lens™ 2018 – Engineering Services research study analyses the relevant software vendors and service providers in the German 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 Engineering Services market
- 2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
- Interactive discussions with service providers/vendors on capabilities& use cases
- 4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)



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

# Authors and Editors



## Rainer Suletzki, Author

Senior IT Management Advisor, Germany

Mr. Suletzki relies on a deep understanding of core business processes and in-depth know-how of IT management. He has more than 30 years of experience as Senior IT Manager, Senior Project Manager and – at the beginning of his career – as IT consultant. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution

Rainer acts as independent consultant with a focus upon application management for SAP and specifically for SAP HANA. On behalf of ISG he conducts studies within the framework of ISG Provider Lens and takes on client projects with definition of IT strategy and the resulting sourcing decisions.

Before becoming an independent consultant, Rainer worked more than 30 years for a global German Life Science corporation.

Rainer holds graduate degrees in Economics and Computer Sciences.

# Authors and Editors



## Heiko Henkes, Editor

Director Advisor, ISG Research Lead

Mr. Henkes is a Director Advisor at ISG; in this role, he is responsible for strategic business management and acts as leader of ISG's team of research advisors. He is also in charge of bringing together IT trend topics within the digital transformation context and acts as keynote speaker on current and future IT trends.

Since 2013, Heiko has advised both ICT providers and users on current digital transformation topics such as Cloud Computing, Artificial Intelligence and the Mobile Enterprise.

In his work with IT Providers, he has a focus on go-to-market strategies and strategic portfolio development as well as on the strategic marketing and sales development. Heiko also analyzes and evaluates business processes, product-specific target markets and IT provider through classical competitive analyses. Within this context, Heiko supports companies to undergo continuous transformation, combining IT competencies with sustainable business strategies and change management.

His primarily focus lies on business development activities, further development and internationalization of the ISG Provider Lens™ (IPL) product-related processes beside his role as IPL Topic Leader to guide and sync all analyst team members.

Before joining ISG (Experton Group), Heiko worked as analyst manager for TechConsult GmbH.

Heiko holds a degree in economics with a major business informatics and marketing of the University of Kassel and is fluent in English.

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