ISG Provider Lens™

Procurement Services

Supplier Management and Contract Lifecycle Services

Assessment of services for strategic sourcing, procurement modernization, supplier and contract management

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Infosys®

QUADRANT REPORT | APRIL 2025 | GLOBAL

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Report Author: Tarun Nathooram Vaid

Technologies such as AI, GenAI and RPA drive transformation projects in core procurement operations

In today's rapidly evolving global landscape, the need for greater efficiency, transparency and resilience drives the digital transformation of procurement. Global dynamics such as wars, rising tariffs and geopolitical unrest have led enterprises to make procurement a strategic priority as they seek to mitigate risks and ensure supply chain continuity. A prominent shift has been noted in the perception of procurement, from being viewed as a cost center a few years back to being regarded as one of the key innovation drivers. Globally, chief procurement officers (CPOs) are prioritizing technologies that enhance data analytics, automation and supplier collaboration and enable data-driven procurement decision-making.

Service providers are increasingly diversifying their offerings to include procurement operations modernization services, strategic sourcing and category management services, and supplier management and contract lifecycle management services. Each service line comes with its challenges, adoption patterns and anticipated future trends.

Globally, modern procurement services have become a cornerstone for enterprises seeking to drive efficiency, innovation and sustainability across their supply chains. This year's assessment has observed almost 75 percent of service providers focusing on enhancing their source-to-pay (S2P) capabilities and considering procurement as a strategic business function that can potentially influence and transform end-to-end supply chain management (SCM) value chain and the S2P ecosystem. Leaders are focusing on transforming procurement by integrating analytics, AI and automation, leveraging both proprietary and partner solutions. They are enhancing procurement using technologies such as AI, advanced analytics, RPA and generative AI (GenAI) and dedicated procurement CoEs to deliver highly customized and tailored solutions.

Data-driven procurement transformation is growing, with cost savings being core objective.

ISG observes that many leading service providers are shifting toward data democratization; they are using orchestration tools to help shift the focus of procurement from cost control to enabling better user experience, process agility and embedded compliance.

When asked about the key capabilities and functions that enterprise clients will prioritize in the near future, providers identified a strategic mix of standard procurement solutions (S2P), consulting-led approaches, AI-enabled solutions, sustainability and compliance. Clients are looking beyond cost savings toward optimized processes and faster time to market.

- **Integration of AI and advanced technologies:** Most leading service providers emphasized the growing need to integrate AI and GenAI into procurement processes to enhance efficiency, decision-making and operational outcomes.
- **Focus on ESG and sustainability:** Clients unanimously recognize the growing importance of ESG in procurement, which is reflected in their demand for sustainable practices and transparency. They are focusing on circular economy practices for the appropriate use of raw materials, carbon emission tracking, more resilient supply chains and ESG compliance.
- **Demand for analytics and real-time insights:** Service providers are consistently innovating their advanced analytics capabilities to offer more real-time insights and visibility into procurement processes, which is crucial for effective decision-making and strategic management.
- **Talent development and upskilling:** Service providers have agreed on the need for enhanced upskilling to keep pace with the evolving technological landscape and drive digital transformation initiatives. They prefer having a strategic mix of business and technology consultants, procurement domain experts and industry consultants.
- **Enhanced security and risk management:** With digital procurement on the rise, service providers are also prioritizing robust cybersecurity measures and integrating strong risk management capabilities within procurement frameworks. In the last 12 months, service providers, mainly the leading providers, have significantly increased their R&D spend. They are focusing on more tailored offerings such as industry-specific solutions, hyperpersonalized services and technology-agnostic tools, such as GenAI, for supplier management and contract lifecycle management to improve efficiency and agility, make procurement more responsive and accelerate the time to market. Service providers are committed to transforming their traditional procurement functions and have significantly innovated their supplier management and collaboration services, integrated spend management solutions, risk management and change management. Such developments collectively address clients' requirements for digitally transformed procurement operations, better visibility into spending and ethical procurement practices.

Procurement BPO and managed services enable flexible operations to fulfill their strategic expectations. Although procurement outsourcing activities continue to witness encouraging growth, references on end-to-end S2P transformation are limited owing to their siloed and fragmented nature. Most use cases of outsourcing activities are inclined toward spending data management, strategic sourcing, tail spend management, and supplier risk and performance management. Work around purchase requisition (PR) to purchase orders (PO) management, procurement technology management, asset management and sourcing governance has been minimal but is picking up pace.

ISG identifies the following key disruptive trends shaping the procurement services market, some of which have been continuing since 2024, as they enhance the efficiency of the procurement function.

- **AI and automation adoption:** Providers are integrating even more advanced capabilities such as AI, GenAI and automation to streamline procurement with smart contracts, spend analysis and risk assessment, thus reducing manual tasks and increasing accuracy in decision-making.

- **Data-driven insights:** Advanced analytics capabilities provide granular visibility into spending patterns, supplier performance and market conditions, empowering CPOs with proactive and strategic decision-making capabilities.
- **Strategic sourcing evolution:** Strategic sourcing is recording an increase in outsourcing activity, emphasizing data benchmarks, best practices and global reach. Providers are optimizing sourcing strategies to maximize value and enhance client-supplier relationships.
- **Robust risk management:** This framework identifies and mitigates supply chain vulnerabilities, ensures continuity and minimizes disruptions. It enables proactive risk assessment with real-time data, enhances supplier reliability and supports compliance. In an unstable global environment, it ensures procurement resilience and sustainability.
- **Circular procurement:** Circular economy in procurement emphasizes sustainability by reducing waste, reusing resources and recycling materials in the supply chain. This trend is crucial to reducing environmental impact, complying with regulations and achieving long-term cost savings. It drives innovation in sourcing strategies, enhances brand reputation and meets growing consumer demand for eco-friendly practices, thus ensuring business resilience.

Based on ISG's discussion with over 25 procurement service providers, we forecast that over the next 12-24 months, the procurement services market will witness an increasing use of advanced AI, predictive analytics and modern tools for efficiency improvements and strategic value. Clients will emphasize refining sourcing practices, enriching UX and fortifying supply chain collaboration for better agility, compliance and risk management. The market will also see end-to-end data utilization and innovative solutions driving transformation and value creation through better data orchestration. Meanwhile, consulting capabilities will be key service provider selection criteria, wherein providers must offer a healthy mix of strategic and technology consulting. Capabilities around risk management, change management, transformation readiness check, assessment and process intelligence will also be critical for both enterprise clients and providers. With rising geopolitical unrest and uncertain economic conditions, industrial operations are expected to slow down, which may lead to delays in overall procurement transformation projects. Such conditions will give providers the opportunity to showcase their initiatives on short-term cost savings and their ability to nurture client loyalty and engagement by prioritizing customer preferences and fostering hyperpersonalized experiences while driving positive outcomes.

The market competition among Accenture, GEP, WNS Procurement, Genpact, Infosys and IBM is intense, with each provider showcasing robust capabilities. Differentiation now hinges on their client-centric approaches, global delivery models, growth trajectories and expertise depth. With all contenders offering strong solutions, the competition ultimately depends on who best meets client needs and adapts to market demands.

> Although procurement outsourcing activities continue to witness encouraging growth, references to end-to-end S2P transformation are limited as they are more siloed and fragmented.

Provider Positioning

Page 1 of 3

	Procurement Operations Modernization Services	Strategic Sourcing and Category Management Services	Supplier Management and Contract Lifecycle Services
Accenture	Leader	Leader	Leader
Bristlecone	Product Challenger	Contender	Contender
Capgemini	Leader	Leader	Product Challenger
Chain IQ	Product Challenger	Product Challenger	Product Challenger
Cognizant	Rising Star ★	Product Challenger	Rising Star ★
Conduent	Contender	Contender	Product Challenger
Corbus	Product Challenger	Product Challenger	Product Challenger
Corcentric	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
Dragon Sourcing	Not In	Product Challenger	Not In

Provider Positioning

Page 2 of 3

	Procurement Operations Modernization Services	Strategic Sourcing and Category Management Services	Supplier Management and Contract Lifecycle Services
EXL	Product Challenger	Product Challenger	Market Challenger
EY	Market Challenger	Market Challenger	Market Challenger
Genpact	Leader	Leader	Leader
GEP	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Leader
Koczer	Contender	Contender	Contender
Lifecycle Management Group	Contender	Contender	Contender
LogicSource	Contender	Not In	Not In

Provider Positioning

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	Procurement Operations Modernization Services	Strategic Sourcing and Category Management Services	Supplier Management and Contract Lifecycle Services
Nexdigm	Contender	Contender	Contender
ProcureAbility	Product Challenger	Rising Star ★	Product Challenger
Proxima Group	Product Challenger	Product Challenger	Contender
PwC	Market Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Rising Star ★	Rising Star ★
Wipro	Product Challenger	Product Challenger	Leader
WNS Procurement	Leader	Leader	Leader

This IPL study focuses on services that **enable and drive the strategic advancement** of enterprises' procurement functions and organizations.

Procurement Operations Modernization Services

Strategic Sourcing and Category Management Services

Supplier Management and Contract Lifecycle Services

Simplified Illustration Source: ISG 2025

Definition

Accelerated business transformation and growing pressure from external factors such as recession and geopolitical unrest are reshaping the scope and value of procurement services that enterprises seek and use. Over the next two years, ISG expects procurement organizations to continue focusing on their core mission of driving significant cost reductions, aided by advances in intelligent automation, while emphasizing sustainability, operating business model innovation and optimized processes.

Events such as geopolitical unrest, stringent data and compliance requirements have resulted in supply chain disruptions, prompting a global focus on diversifying and localizing suppliers to mitigate risks and simplifying procurement. The recession threat propelled organizations to increase their focus on cost reductions, more than ever, in 2024. Rapid advancements in the capabilities and value of AI, including GenAI, have catalyzed the growth of analytics. Adopting non-human, task-specific decision-making processes has accelerated cost-saving opportunities and expanded spend management for procurement organizations.

This 2025 ISG Procurement Services Provider Lens™ study includes three quadrants to better represent clients' changing procurement business requirements: Procurement Operations Modernization Services, Strategic Sourcing and Category Management Services, and Supplier Management and Contract Lifecycle Services.

Each of these quadrants includes aspects of BPO and transformation services featured in ISG's past Procurement studies. These, along with the ability to deliver cost savings, change management, risk management and targeted operating model transformation capabilities, remain key to procurement outsourcing engagements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: Procurement Operations Modernization Services, Strategic Sourcing and Category Management Services and Supplier Management and Contract Lifecycle 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
- Focus on Global market

This ISG Provider Lens™ study offers IT-decision makers: 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 provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

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

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

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

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

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

Supplier Management and Contract Lifecycle Services

Who Should Read This Section

This report is valuable for service providers offering supplier management and contract lifecycle services to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the global market positioning of such procurement service providers and offers in-depth insights into how they address enterprise clients' unique challenges. Enterprises can use this report to understand market dynamics, explore new capabilities with incumbent providers and evaluate new service providers that can support their sourcing activities.

Procurement professionals

Should read this report to understand providers' relative positioning and capabilities to help them effectively plan their strategic capabilities to increase efficiency.

Chief procurement officers

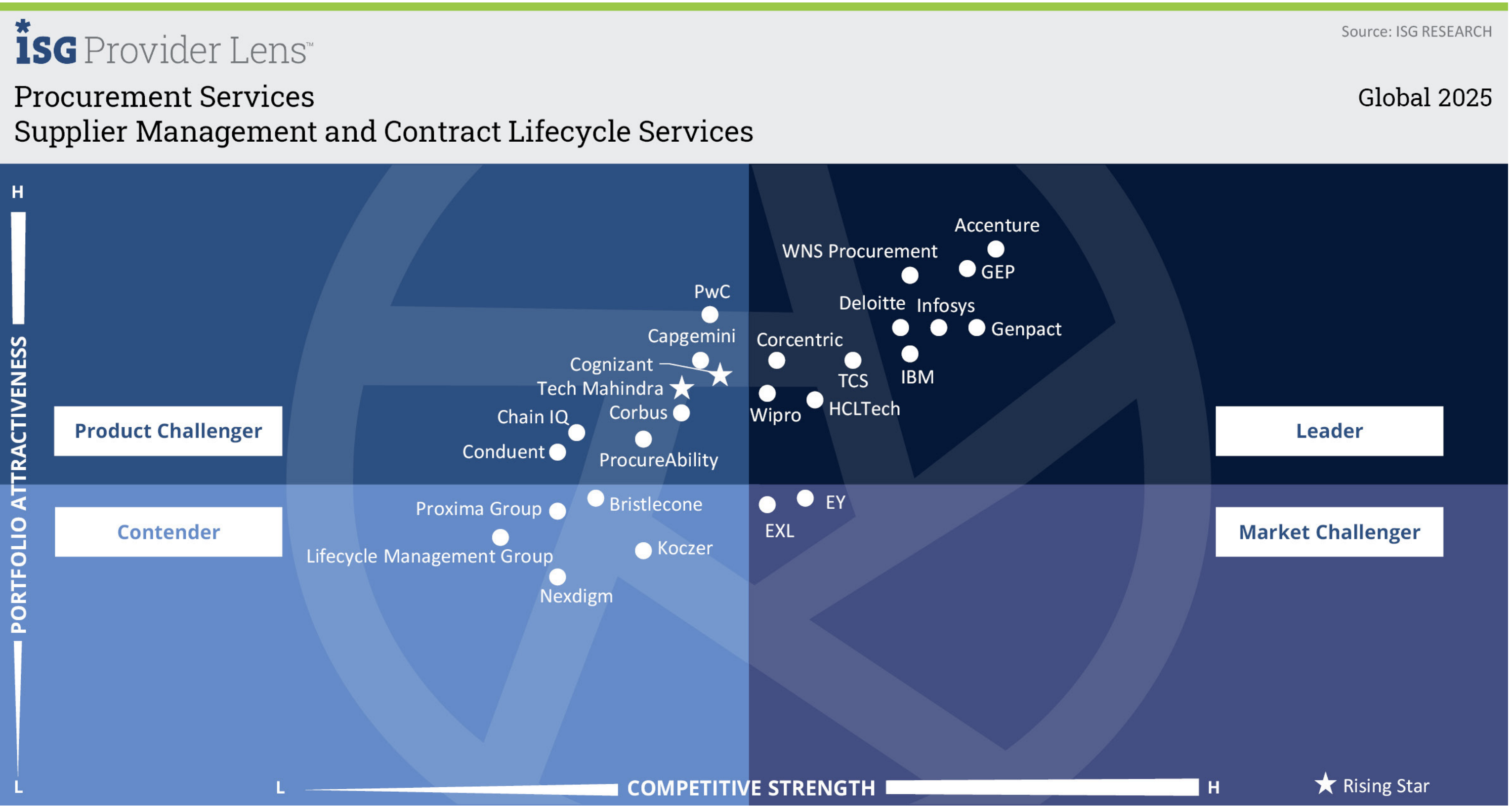
Should read this report to understand the global landscape of procurement BPO service providers and their capabilities to meet the market demands.

Chief technology officers

Should read this report to understand the technology landscape in the procurement business and how technologies are used to improve process effectiveness.

Digital professionals

Should read this report to get deeper insights into agile, data-driven digital solutions to meet strategic goals and prepare for dynamic market trends and demands.



This quadrant assesses providers that ensure cost efficiency, **compliance, risk management, strong supplier relationship and performance management, and optimized contracts** using supplier performance data integrated with AI and GenAI.

Tarun Nathooram Vaid

Definition

This quadrant assesses providers' expertise in offering supplier management and contract lifecycle services, including supplier performance management, relationship management, onboarding and offboarding, contract administration, change order negotiation, centralized contract management, performance monitoring, technical QA, compliance and third-party risk management (TPRM), and diversity, equity and inclusion (DEI)/ESG tracking and reporting. They are crucial procurement components that optimize vendor savings, reduce risks and maximize value from supplier relationships and contracts.

Providers are expected to leverage advanced analytics and AI to provide valuable insights into contract performance, root cause analysis and supplier relationships, aiding in strategic decision-making. Using cloud-based contract lifecycle management (CLM)/VM/software resource management (SRM) platforms will streamline supplier management and contract lifecycle processes.

This approach offers improved efficiency, collaboration, cost savings, regulatory compliance and data-driven insights for enhanced business performance. ISG addresses this quadrant for direct and indirect spend.

Eligibility Criteria

1. **Core and end-to-end** capabilities for supplier management and contract lifecycle management
2. **Robust risk management and compliance management,** addressing supplier performance risk, sourcing risk and compliance to monitor regulatory requirements
3. **Strong experience in integrating** other enterprise systems such as ERP, SCM, finance, procurement, QA and CLM/VM/SRM platforms to ensure **data consistency and streamline workflows**
4. **AI and ML to automate** various processes, reduce manual processes and identify patterns
5. **Proven deep domain expertise** in technology and its application, including cloud, blockchain and emerging technologies such as GenAI
6. **Portfolio of referenceable case studies** in assisting clients in optimizing and streamlining their supplier management and contract lifecycle management
7. Experience in delivering benefits such as **enhanced cost savings, better collaboration, and improved performance, quality management and strategic decision-making**

Observations

AI technologies transform supplier and contract lifecycle management, enhancing efficiency, accuracy and strategic decision-making. Key applications of AI include contract creation and authoring using ML to generate and standardize contracts; contract review and analysis using NLP to identify risks and ensure compliance; and informed supplier evaluation and selection through GenAI-driven data analysis. AI is also leveraged for continuous supplier performance monitoring, predictive analytics for risk management and secure collaboration during contract negotiations. In addition to advanced risk monitoring, the technology improves data extraction, cleaning and categorization processes, streamlines workflows and provides valuable insights for risk assessments and decision-making.

Meanwhile, GenAI revolutionizes supplier management and contract lifecycle management in procurement by automating and optimizing processes. It enhances supplier selection through predictive analytics, ensures compliance by identifying contract risks and streamlines contract creation with NLP. It, thus, helps increase efficiency, reduce costs and improve decision-making capabilities.

Providers are taking a comprehensive approach, integrating technologies such as AI and GenAI, sustainability, regional supplier base and expert insights. They are also emphasizing sustainability and compliance with Scope 3 emissions and recognizing the importance of a diverse and resilient supplier base.

From the 38 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture revolutionizes contract management with AI-driven tools such as Contractizer, ensuring strategic, compliant practices. The company's holistic supplier management enhances performance and risk mitigation, fostering strong partnerships that optimize cost and quality.

corcentric

Corcentric integrates AI-driven Supplier Management and Contract Lifecycle Management (CLM) solutions to automate processes, enhancing accuracy and supplier relationships. Corcentric's strong market presence and outcome-based pricing models ensure flexibility and client success.

Deloitte.

Deloitte's robust CLM services and solutions are powered by next-gen tools and frameworks that allow complete end-to-end visibility across supplier and contract management.

genpact

Genpact employs AI-driven market intelligence to optimize supplier management and procurement operations. Its transformative milestones include high-accuracy contract processing and strategic supplier segmentation to optimize performance and foster valuable partnerships.

GEP INSIGHT DRIVES INNOVATION

GEP SMART™ automates the contract lifecycle through a centralized repository, which enhances compliance and efficiency. GEP's consulting services integrate sustainability measures, while GEP GREEN™ promotes responsible sourcing and advanced ESG initiatives, boosting social responsibility.

HCLTech

HCLTech's Procurement Command Console uses the Sense-Alert-Act framework for a holistic view of operations. The company's commitment to upskilling 70,000 employees in GenAI drives adaptability and operational excellence.

IBM

IBM integrates advanced AI and analytics to optimize procurement, embedding predictive insights for data-driven decisions. Its sustainability focus enhances brand reputation, while continuous process improvement drives operational efficiency.

Infosys enhances supplier relationship management (SRM) through advanced segmentation, which drives performance and efficiency. Its tech-powered solutions ensure accuracy, foster strong ties with suppliers and streamline compliance, leading to substantial cost savings.

TCS implements a robust approach toward supplier management by leveraging its SRM Process Framework. Its Cognix™ platform optimizes sourcing operations across various domains while offering holistic assistance.

Wipro offers a comprehensive supplier management framework supported by next-gen technologies. It supports end-to-end digitalization while focusing on offering AI and GenAI-based services and solutions.

WNS Procurement leverages SmartRisk for continuous supplier risk monitoring and TrustHall for automated CLM, enhancing collaboration. The company's AI-driven insights and metrics optimize supplier performance and bolster client satisfaction.

Cognizant (Rising Star) stands out as a key player with its well-planned innovation road map powered by AI and GenAI. The company leverages AI-led analytics to optimize procurement operations and improve compliance and cost savings.

Tech Mahindra (Rising Star) has a strong set of digitally enhanced services to optimize procurement and sourcing operations. Its diverse practical tools and platforms enhance supplier management services to drive best-in-class outcomes.

Infosys

Leader

"Infosys' proprietary AI capabilities, business consulting offerings, robust risk management and expertise in AI and analytics enable it to be a strong leader in supplier management and contract lifecycle services."

Tarun Nathooram Vaid

Overview

Infosys is headquartered in Bengaluru, India. It has more than 317,700 employees across 274 offices in 56 countries. In FY24, the company generated $18.5 billion in revenue, with Financial Services as its largest segment. Infosys BPM delivers supplier management solutions, including supplier performance and contract performance management, tailored to optimize relationships. The firm offers robust CLM services and digital solutions leveraging AI for intelligent sourcing and risk prediction.

Strengths

Tech-powered SRM and CLM: Infosys delivers sustainable value through tech-powered SRM and CLM solutions. Cloud systems, AI and analytics enhance procurement processes, ensuring data accuracy and operational efficiency. Tools such as Xtract Edge and the Digital Command Console empower clients to achieve cost savings and build strong supplier relationships. Some of the strategic partners are Aerchain, TYS, Axiom and Zycus.

Excellence in compliance and risk management: Infosys has created customized compliance frameworks for clients, ensuring adherence to regulations, tracking changes and assessing risk impacts. It has AI-powered solution on Supplier Risk Prediction (TOPAZ) that has inbuilt robust risk management framework to prescribe risk mitigation strategies for high-risk suppliers. The firm's CLM tool offers standardized contracting processes, policy-driven workflows and role-based security, while compliance in SRM is embedded in vendor management, with checks from onboarding through to the end of the lifecycle.

Advanced supplier segmentation for targeted excellence: Infosys leverages a sophisticated supplier segmentation strategy to enhance SRM and CLM. By categorizing suppliers based on strategic importance and risk, Infosys enables tailored engagement and focused resource allocation, driving superior supplier performance, compliance and overall operational efficiency.

Caution

Infosys offers robust services and tools for supplier and contract management but should focus on winning more new deals in this growing service line, as competitors are significantly ahead in showcasing their expertise, resulting in increased wins.

Appendix

The ISG Provider Lens 2025 – Procurement Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

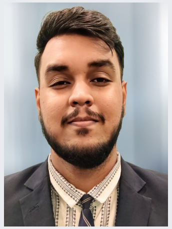
1. Definition of Procurement Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever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

Lead Analyst and Author

Tarun Nathooram Vaid
Manager and Principal Analyst

Tarun Vaid brings over 12 years of experience in technology research and advisory. At ISG, Tarun is a Senior Lead Analyst for Digital Business Enablement and ESG, SAP Ecosystem, Supply Chain, and Procurement Services studies for U.S. geography. Tarun brings nearly a decade of experience in technology research and consulting. Tarun is majorly focused on the latest technology trends and is responsible for providing actionable insights through research and analysis about the market and provider's profile.

Tarun also keeps a keen interest in the software market, the impact of AI, automation and analytics, and brings in a strong background in this segment.



Research Analyst

Arnab Das
Research Analyst

Arnab Das is a research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Procurement Services. He supports the lead analysts in the research process and authors the global summary report. Arnab is a part of ISG since 2024. Prior to this role, he has worked in different firms and was involved in preparing compelling and engaging drafts demonstrating technological research, and business and technical writing.

Arnab comes with 2.5 years of experience across business, technology and academic research and writing.

Research Analyst

Priyanka A
Research Analyst

Priyanka is a Research Analyst at ISG and supports and coauthors ISG Provider Lens™ Procurement Services studies. She supports Lead Analysts in the research process and authors global summary reports and quadrant reports. She also collates and analyzes secondary data to provide insights into ongoing trends. Being a part of ISG since 2024, she has expertise in managing indirect procurement, procure-to-pay cycles, RFx and contract management.

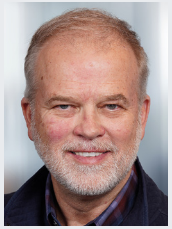
Priyanka is a data-driven Procurement Analyst with five years of experience analyzing market trends and managing end-to-end purchase cycles. She is proficient in supplier identification, spend analysis and stakeholder engagement, with a strong focus on streamlining operations and adding value through strategic sourcing solutions. This expertise has significantly contributed to her work on procurement study, enhancing the quality and impact of her research.

Study Sponsor

Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program. She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

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 partner 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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

APRIL, 2025

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