ISG Provider Lens™

Cyber Security - Solutions & Services

Strategic Security Services

A research report comparing provider strengths, challenges and competitive differentiators

Germany 2020

Quadrant Report

Customized report courtesy of:

Computacenter

August 2020

About this Report

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The market research and analysis data presented in this report includes research information from the ISG Provider Lens™ program and from ongoing ISG research programs, discussions with ISG advisors, briefings with service providers and analysis of publicly available market information from various sources. The data compiled in this report is based on information last updated on 27th February 2020 - 30th April 2020. Interim mergers and acquisitions and the related changes are not included in this report

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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

General Trends

Within the scope of digitization and the industrial Internet of Things (IoT), business processes are increasingly being shifted to IT. With the growing need to ensure the protection of IT and communication systems in companies, IT security has been transformed into company security.

Data and IT infrastructures are constantly exposed to criminal threats. Hazards emerging from negligence in user companies are not uncommon. In addition to self-protection, legal regulations such as the basic Data Protection Regulation (DSGVO) in the EU force companies to implement stronger security measures to prevent cyber-attacks. The current COVID-19 crisis also poses a challenge for IT security, as the increased use of the home office and the resulting external connections of employees make IT systems more vulnerable.

IT security has thus emerged as an important topic. However, IT managers often struggle with the task of legitimizing investments in IT security vis-à-vis company stakeholders, especially the CFO. Unlike other IT projects, it is not always possible to prove the return on investment in this case, nor is it easy to quantify threat risks. Therefore, security measures often remain on low priority and are not always sufficient to counter advanced threats.

On the other hand, the problem is often not solely on the technical side; several attacks, such as Trojan and phishing attacks, can be attributed to careless behavior by users. In addition to modern IT security equipment, consultation and user training continues to play an important role in this regard.

Identity and access management (IAM)

After a period of average demand development, identity and access management (IAM) has been revived as an important security topic and will continue to play a major role in the future. The main reason is that the increasing digitalization of all areas drive the need to protect not only users and their identities, but also machines and certain areas of the company (keyword: Industry 4.0).

The software market as a whole is also witnessing a shift from on-premise operations to the cloud with respect to IAM solutions. Most providers have adapted to this transformation and offer both on-premise and cloud operation (identity as a service). Cloud-native companies are also emerging rapidly, while bundling and integration are playing a more important role.

In the course of this supplier investigation, 22 companies have been identified as relevant manufacturers in the IAM market in Germany, of which 5 were positioned as Leaders.

Data leakage/loss prevention, data security

Interest in data loss prevention (DLP) solutions has increased significantly in recent years. Various factors contribute to this, affecting the security of data in a company. The increased business use of private end devices poses a challenge in defending against undesired data outflows. In addition to the mobility and variety of functions for end devices, IT trends of big data, social business and cloud computing make it difficult to control data movements and place high demand on DLP solutions.

In the course of this supplier investigation, 25 companies have been identified as relevant manufacturers in the DLP market in Germany and 10 of them were able to position themselves as Leaders.

Strategic security services

Companies are facing various challenges concerning IT security and data protection. The increase in cyber risks, coupled with the lack of resources, drives the need for orientation around these topics. In addition, regulatory requirements on data security and data protection are increasingly enforced.

Owing to their complex IT (security) landscapes and projects, large companies are still among the main customers for strategic security services. However, even mid-tier companies are increasingly using these services owing to the lack of specialist staff and the need to keep pace with modern security systems.

In the course of this supplier investigation, 27 companies were identified as relevant service providers of strategic security services in Germany and 10 of them were able to position themselves as Leaders.

Technical security services

Companies are relying more on external service providers to keep their IT security systems up to date. Careless behavior on behalf of users is also taken advantage of by cyber criminals, for e.g., in the case of Trojan and phishing attacks. In addition to modern security equipment, training for users continues to play an important role.

IT security projects are often demanding and diverse. This is why service providers that offer a wide range of technical security services from a single source and address numerous IT security solutions have an advantage. Those that cooperate with renowned technology providers and have employees with numerous high-quality certifications can also set themselves apart.

In order to be successful in the demanding technical security services market for large customers, providers should demonstrate extensive and international experience in this market segment with a broad range of solutions. Teams that are strong and internationally represented should be available to provide support. Mid-tier companies often appreciate the local presence of service providers for their proximity and reliable support.

Owing to their complex IT (security) landscapes and projects, large companies are still among the most important customers for Technical Security Services. However, even mid-tier companies are making increasing use of these services and are, therefore, a target group with above-average market growth.

In this study, 22 companies have been identified as relevant service providers of technical security services in Germany and 11 of them were able to position themselves as Leaders.

Managed security services

Scarce qualified resources, high frequency of security incidents and their growing sophistication, as well as the necessary up-to-date specialist knowledge contribute to the rise in demand for managed security services.

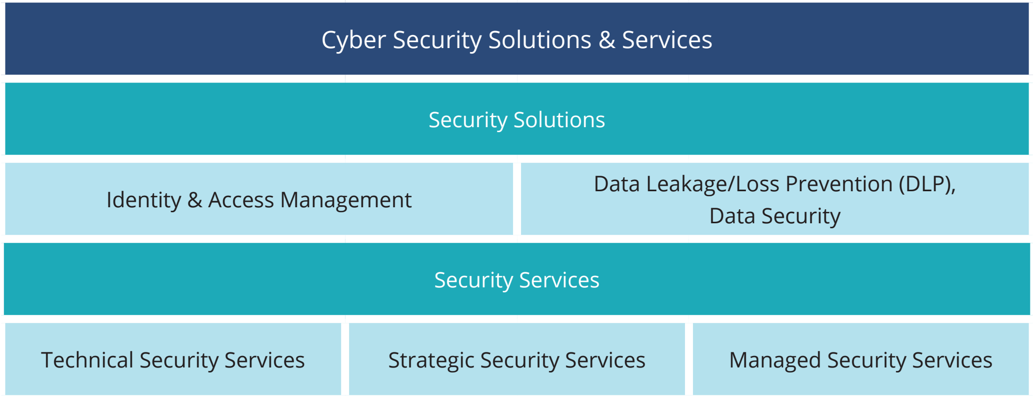
Large and mid-tier customers are turning towards security operations centers (SOCs) based in Germany due to the growing need for data protection. Moreover, it is important for both target groups to ensure the reliability of managed security services and a high level of innovation in order to stay a step ahead of cyber-criminals. This includes the expansion of SOCs towards Cyber Defense Centers.

For large companies, globally distributed SOCs play a special role due to their growing international presence. Owing to their complex IT security systems, large companies also give importance to a broad range of security topics that are covered by managed security services providers. German-speaking contacts play an important role in SOCs, especially for mid-tier customers.

In this report, 25 companies were identified as relevant manufacturers in the managed security services market in Germany. Ten of them were able to position themselves as Leaders.

Introduction

Simplified Illustration



Source: ISG 2020

Definition

This study examines five subject areas in the cyber security market in Germany. It is focused on creating a distinction between security solutions and security services. In this study, security solutions cover software and cloud services, based on proprietary software, from product providers.
The topics considered are identity & access management (IAM) and data leakage/loss prevention (DLP). Security services for security solutions include strategic security services, technical security services and managed security services.

Definition (cont.)

Scope of the Report

The ISG Provider Lens™ Cyber Security - Solutions & Services 2020 study aims to support IT decision makers in making the best use of their limited IT security budgets.

The ISG Provider Lens™ study offers the following to IT decision-makers:

- Transparency about the strengths and weaknesses of the providers
- Differentiating positioning of providers according to market segments
- Focus on local markets (in this case on the German market; further studies in the current wave deal with the U.S., Brazil, Great Britain, France, Switzerland and Australia)

This study serves as an important basis for decision making on positioning, building key relationships and go-to-market planning. ISG consultants and corporate customers also use the information from ISG Provider Lens™ report to assess their current supplier relationships and the potential to build new relationships.

The five security topics examined in this study are defined as follows:

Identity & Access Management (IAM): IAM products are used to capture, record and manage user identities and the associated access authorizations. These products ensure that access rights are granted in accordance with defined guidelines. In order to deal with existing and new requirements of applications, security providers are increasingly required to incorporate mechanisms, frameworks and automation (for e.g., risk assessment) into their management suites, enabling them to carry out real-time user profiling and attack profiling. The influence of social media and mobile users imposes additional requirements to cover the security needs of customers, which was previously the case with web-related and context-related authorization management. This category also includes cloud services from product providers.

Data leakage prevention/Loss Prevention (DLP), Data Security: DLP products are used for the identification and monitoring of sensitive data, ensuring that it is only accessible to authorized users and that there are no data leaks. These products are becoming increasingly important as the control of data movement and transfer is becoming more difficult for companies. The number

Definition (cont.)

of (mobile) end devices in companies on which data can be stored is growing. These end devices usually have their own connection to the Internet, allowing data to be sent and received without using the central Internet gateway. In addition, the end devices have a variety of interfaces (such as USB, Bluetooth, WLAN, NFC) through which data can also be exchanged. This category also includes cloud services from product providers.

Strategic Security Services: This quadrant primarily covers consultation for IT security solutions. It examines service providers that have no exclusive focus on in-house products or solutions.

Technical Security Services: These services mainly cover integration, maintenance and support of IT security solutions. This quadrant examines service providers that do not have an exclusive focus on their respective in-house products and are able to implement and integrate dealer solutions.

Managed Security Services: Managed security services include the operation and management of IT security infrastructures for one or more customers through a security operations center (SOC). Typical services include security monitoring, behavior analysis, recording of unauthorized access, advice on preventive measures, penetration tests, firewall operation, anti-virus operation, IAM operation, DLP operation and other (operational) services in order to guarantee constant protection in real time without loss of performance. This category considers service providers that are not exclusively focused on in-house products but can manage best-of-breed security tools. They can handle the entire life cycle of a security incident, from identification to resolution.

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 therefore have 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 usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an 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 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 to 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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Cyber Security - Solutions & Services - Quadrant Provider Listing 1 of 5

	Identity & Access Management	Data Leakage/Loss Prevention (DLP)	Technical Security Services	Strategic Security Services	Managed Security Services
Absolute Software	Not In	Contender	Not In	Not In	Not In
Accenture	Not In	Not In	Leader	Leader	Leader
All for One	Not In	Not In	Not In	Market Challenger	Not In
All for One Group	Not In	Not In	Market Challenger	Not In	Not In
Atos	Leader	Not In	Leader	Leader	Leader
Axians	Not In	Not In	Leader	Product Challenger	Leader
Bechtle	Not In	Not In	Leader	Market Challenger	Leader
Beta Systems	Product Challenger	Not In	Not In	Not In	Not In
Brainloop	Not In	Product Challenger	Not In	Not In	Not In
Broadcom	Not In	Leader	Not In	Not In	Not In
Broadcom	Product Challenger	Not In	Not In	Not In	Not In
BT	Not In	Not In	Not In	Not In	Not In
CANCOM	Not In	Not In	Leader	Market Challenger	Leader
Capgemini	Not In	Not In	Leader	Leader	Leader
CenturyLink	Not In	Not In	Not In	Not In	Product Challenger

Cyber Security - Solutions & Services - Quadrant Provider Listing 2 of 5

	Identity & Access Management	Data Leakage/Loss Prevention (DLP)	Technical Security Services	Strategic Security Services	Managed Security Services
CGI	Not In	Not In	Product Challenger	Product Challenger	Contender
Clearswift	Not In	Market Challenger	Not In	Not In	Not In
Cognizant	Not In	Not In	Contender	Product Challenger	Contender
Computacenter	Not In	Not In	Leader	Leader	Product Challenger
Controlware	Not In	Not In	Leader	Market Challenger	Product Challenger
CoSoSys	Not In	Market Challenger	Not In	Not In	Not In
DELL/RSA	Leader	Not In	Not In	Not In	Not In
Deloitte	Not In	Not In	Product Challenger	Leader	Product Challenger
Deutsche Telekom	Not In	Not In	Leader	Not In	Leader
DeviceLock	Not In	Product Challenger	Not In	Not In	Not In
Digital Guardian	Not In	Product Challenger	Not In	Not In	Not In
DriveLock	Not In	Leader	Not In	Not In	Not In
DXC	Not In	Not In	Leader	Leader	Product Challenger
econet	Product Challenger	Not In	Not In	Not In	Not In
EY	Not In	Not In	Not In	Leader	Not In

Cyber Security - Solutions & Services - Quadrant Provider Listing 3 of 5

	Identity & Access Management	Data Leakage/Loss Prevention (DLP)	Technical Security Services	Strategic Security Services	Managed Security Services
Fidelis Cybersecurity	Not In	Contender	Not In	Not In	Not In
Forcepoint	Not In	Leader	Not In	Not In	Not In
ForgeRock	Product Challenger	Not In	Not In	Not In	Not In
Fortinet	Contender	Not In	Not In	Not In	Not In
GBS	Not In	Leader	Not In	Not In	Not In
HCL	Not In	Not In	Product Challenger	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader	Leader	Leader
Infosys	Not In	Not In	Contender	Contender	Not In
itWatch	Not In	Product Challenger	Not In	Not In	Not In
KPMG	Not In	Not In	Not In	Leader	Not In
Matrix42	Not In	Leader	Not In	Not In	Not In
McAfee	Not In	Leader	Not In	Not In	Not In
Micro Focus	Product Challenger	Not In	Not In	Not In	Not In
Microsoft	Leader	Leader	Not In	Not In	Not In
MobileIron	Not In	Leader	Not In	Not In	Not In

Cyber Security - Solutions & Services - Quadrant Provider Listing 4 of 5

	Identity & Access Management	Data Leakage/Loss Prevention (DLP)	Technical Security Services	Strategic Security Services	Managed Security Services
Netskope	Not In	Product Challenger	Not In	Not In	Not In
NEVIS	Product Challenger	Not In	Not In	Not In	Not In
Nexus	Product Challenger	Not In	Not In	Not In	Not In
NTT	Not In	Not In	Product Challenger	Product Challenger	Product Challenger
Okta	Leader	Not In	Not In	Not In	Not In
One Identity	Contender	Not In	Not In	Not In	Not In
OneLogin	Product Challenger	Not In	Not In	Not In	Not In
OpenText	Not In	Product Challenger	Not In	Not In	Not In
Oracle	Market Challenger	Not In	Not In	Not In	Not In
Orange Cyberdefense	Not In	Not In	Market Challenger	Market Challenger	Leader
Ping Identity	Product Challenger	Not In	Not In	Not In	Not In
Proofpoint	Not In	Market Challenger	Not In	Not In	Not In
PwC	Not In	Not In	Not In	Leader	Not In
SailPoint	Product Challenger	Not In	Not In	Not In	Not In
SAP	Market Challenger	Not In	Not In	Not In	Not In

Cyber Security - Solutions & Services - Quadrant Provider Listing 5 of 5

	Identity & Access Management	Data Leakage/Loss Prevention (DLP)	Technical Security Services	Strategic Security Services	Managed Security Services
Saviynt	Product Challenger	Not In	Not In	Not In	Not In
Secureworks	Not In	Not In	Not In	Product Challenger	Product Challenger
Solarwinds	Contender	Not In	Not In	Not In	Not In
Sopra Steria	Not In	Not In	Not In	Market Challenger	Leader
TCS	Not In	Not In	Product Challenger	Product Challenger	Product Challenger
Thales/Gemalto	Product Challenger	Not In	Not In	Not In	Not In
Trend Micro	Not In	Leader	Not In	Not In	Not In
Trustwave	Not In	Product Challenger	Not In	Not In	Product Challenger
Unisys	Not In	Not In	Market Challenger	Market Challenger	Market Challenger
Varonis	Not In	Product Challenger	Not In	Not In	Not In
Verizon	Not In	Not In	Not In	Product Challenger	Product Challenger
WatchGuard	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Not In	Not In	Product Challenger	Product Challenger	Product Challenger
Zscaler	Not In	Contender	Not In	Not In	Not In

Cyber Security - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Strategic Security Services

This report is relevant to enterprises across industries in Germany for evaluating providers of strategic security services that comprise consultations for cyber security solutions.

In this quadrant report, ISG highlights the current market positioning of providers of strategic security services in Germany and the way they address the key challenges faced by enterprises in the region.

Germany, like other markets, understands the increasing importance of cyber security, and is concurrently witnessing an expansion of strategic security services. The demand for strategic security services is growing because of the risks faced by enterprises due to the increase in number and types of attacks on their online assets. Also, enterprises need to comply with the European Union's General Data Protection Regulation (GDPR). In ISG's experience, companies in Germany discern providers based on their ability to provide experienced security professionals locally as part of a service engagement.

IT and technology leaders should read this report to understand the relative positioning and capabilities of strategic security services providers. The report also compares the consulting capabilities of the various service providers in the market.

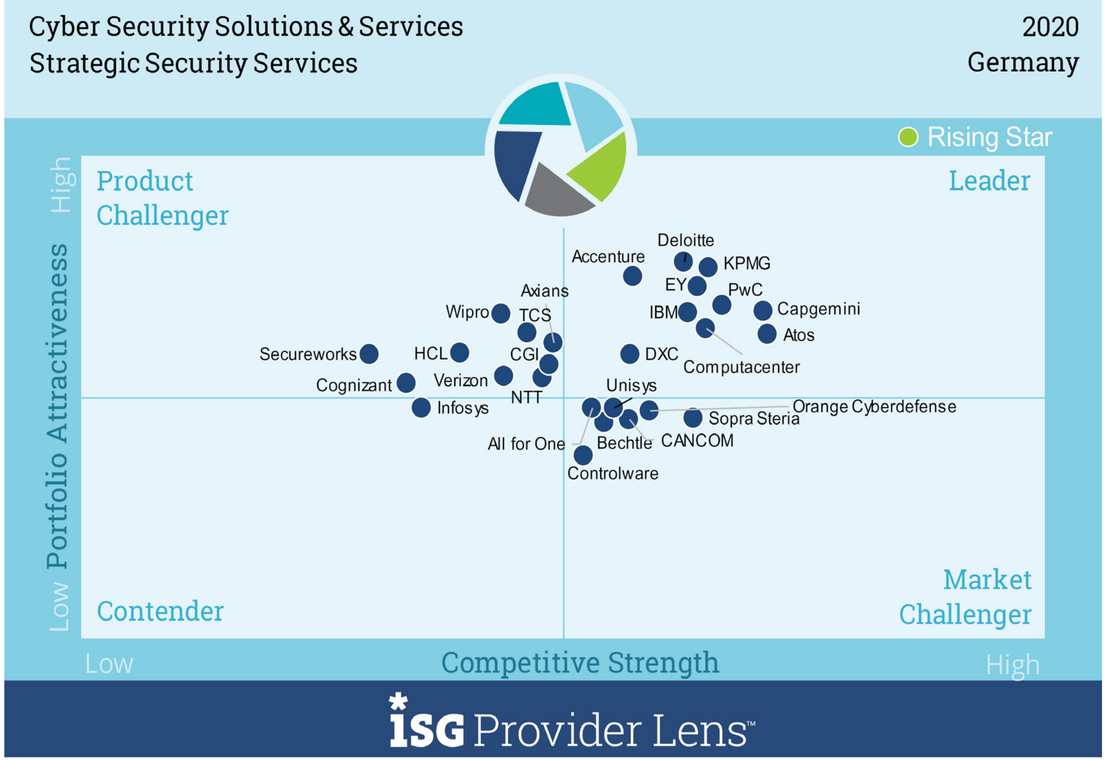
Security and data professionals should read this report to understand identify how strategic security services providers can be compared with each another in terms of their competence in offering security.

Business executives, including C-suite and board members, should read this report to understand the landscape of strategic security services as it determines how a business avoids cyberattacks and retains its credibility.

STRATEGIC SECURITY SERVICES

Definition

Strategic security services primarily cover consultation for IT security solutions. This quadrant examines service providers that have no exclusive focus on in-house products or solutions.



Source: ISG Research 2020

STRATEGIC SECURITY SERVICES

Eligibility Criteria

- Proven experience in IT security consulting for companies in Germany
- No exclusive focus on in-house products or solutions

Observations

Companies are facing various challenges concerning IT security and data protection. The increase in cyber risks, coupled with lack of resources, drives the need for orientation around these important topics.

The increase in sophisticated cyberattacks makes it difficult for companies, from large to small-tier enterprises, to protect their IT systems. The lack of IT specialists further complicates the situation. Mid-size companies in particular are suffering from the intense shortage of skilled IT security professionals. They often lag behind the larger companies that usually provide better conditions in this respect.

In addition, regulatory requirements for data security and protection are increasing. An important example is the Basic Data Protection Regulation (DSGVO), which is many small and mid-tier enterprises find it difficult to comply with even after it came into force more than two years ago.

Due to these factors, many companies require external support. This often starts with consultation on strategies, solutions and technology providers to meet the security and data protection requirements. In addition, the COVID-19 crisis has stirred a need for additional consultation services as IT systems are now

STRATEGIC SECURITY SERVICES

Observations (cont.)

more vulnerable owing to the increased practice of remote working and the resulting need for stronger external connections among employees.

Owing to their complex IT (security) landscapes and projects, large companies are still among the most important customers for strategic security services. Mid-tier companies are also increasingly using these services and have thus become another target group with above-average market growth.

Service providers in this market segment fall into two groups: (i) IT security service providers whose portfolios also cover security consultation and (ii) consultation firms whereby the "Big Four" auditors comprising Deloitte, EY, KPMG and PwC play a prominent role.

In the course of this provider investigation, 27 companies have been identified as relevant service providers of strategic security services in Germany. Ten of them were able to position themselves as Leaders.

- **Accenture's** success is attributed to a deep understanding of technology and access to the highest levels of management of clients.
- **Atos** is a BSI-certified IT security service provider and has a convincing holistic security approach.
- **Capgemini** offers a wide range of consultation services combined with a special approach to customer care.
- **Computacenter's** comprehensive consultation services are an important part of its holistic approach to security services.
- **Deloitte** benefits from its deep business expertise in the IT security consultation domain.
- **DXC's** broad thematic competence enables it to implement integrated IT and cyber security solutions.
- **EY** has been expanding it client base through its competence and customer-orientation approach.
- **IBM's** customers benefit from the firm's integrated service portfolio and deep technical knowledge.
- **KPMG** has strategic competence coupled with strong business and technical understanding.
- In addition to its large global presence, **PwC** is able to distinguish itself by leveraging its various competencies.

COMPUTACENTER

Overview

Computacenter is a British IT service provider. It offers a portfolio for IT security services under its Digital Trust proposition.

Caution

Computacenter's business focus lies more on large companies with 5,000 or more employees. It should pay more attention to the mid-tier client segment, which is showing above-average growth in this space.

Strengths

Wide range of services: Computacenter's range of consultation services and the security topics covered are extensive.

Holistic approach: Computacenter has positioned itself as a strategic partner with a holistic security approach and a strong understanding of the infrastructure and business requirements of its customers. Security, in general, is an integral part of most projects and services at Computacenter, but can also be obtained as a separate service.

Large security team: Computacenter employs a Security Services team in Germany with numerous specialists.

2020 ISG Provider Lens™ Leader

Computacenter's comprehensive consultation services are an integral part of its holistic approach to security services.

Methodology

METHODOLOGY

The research study "2020 ISG Provider Lens™ Cyber Security - Solutions & Services" analyzes the relevant software vendors/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 2020 ISG Provider Lens™ Cyber Security - Solutions & Services, German 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. 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

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His research Focus: Digital Business Transformation, Cloud and Edge Computing, Mobile Business, Change Management and Mixed Reality

ISG Provider Lens™ | Quadrant Report
August 2020

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