Digital Business Enablement and ESG Services

This study takes a comparative look at service providers in Digital Business and ESG services.

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Innovation is mandatory. The big question is with whom to carry it out.

Enterprises that accelerate their digital projects experience better business performance. The ones that ensure speed in scaling digital solutions with digital transformation initiatives have greater competitive advantage than those that do not adopt digital solutions at the same pace.

Pilot projects often present significant results with minimal initial challenges. In general, this scenario is replicated in digital transformation, technology and data projects, as well as in agile processes. In Brazil, however, we have noticed that enterprises have great difficulty in incorporating such transformations and taking the results achieved to the market to later integrate them into their organization as a whole.

In turbulent times such as these, the pace of digital transformation is not a competitive advantage; it is a business requirement. Enterprises that accelerate pilot projects, expand them within the company and scale them up can achieve revenue gains, reduce costs and increase their long-term resilience.

Many technology service providers focus on being the ideal partner for large enterprises to address all the challenges of digital business transformation. These providers map the enterprises' entire value chain, identify areas of opportunity, and configure their resources to work through the stages of co-creation, solution design and architecture, experimentation, and implementation of the materialized idea. The leading providers offer various

Digital business **evolves and expands in Brazil.**

services, ranging from strategy definition to monitoring the use of a digital solution with data, fostering a data-driven culture.

Data engineering has been gaining traction in the Brazilian market because it helps enterprises at all levels in decision-making processes in digital business. Major IT service providers leverage data, along with their technology expertise and strong knowledge of their clients' business segments. In addition, many have innovation labs that allow them to ideate and test digital solutions based on emerging technologies, open innovation and customized applications. They also include the topic of sustainability as part of their corporate agenda.

ISG has witnessed that the most successful cases in digital solutions usually begin with the selection of the themes that have significant potential in their scope. For example, insights based on data from various areas within the organization, the use of advanced tools to accelerate time to market, tracking expected results and promoting learning cycles between the areas involved all increase the chances of achieving better business outcomes.

When leaders of the company engage in digital transformation, they achieve greater value from customer-facing solutions. In Brazil, we have identified top-performing companies as those that operationalize and embed digital solutions after accelerating their pilot projects in their markets and regions. In these cases, we also noticed cultural and operational changes, as well as the engagement of several areas not previously involved with digital initiatives. Indeed, such areas have been able to develop new capabilities so they can work differently and identify new ways to acquire customers.

In the quadrant on **digital business consulting**, we identify service providers that help organizations and their leaders raise awareness by persuading them about the need for change, and by sharing previous experience and market knowledge along with the most successful initiatives and ideas. Prepared to maximize the benefits expected from digital transformation, these companies align business and strategic objectives with the critical elements of the process. They have their own approach, using methodologies and tools in a service platform consisting of component-based models that accelerate digital transformation.

As organizations undergo digital transformation, **customer experience** (CX) becomes a differentiator. The pandemic has raised the level of demand and expectation of customers, who want a solid, coherent and consistent experience at any touchpoint, in any channel, digital or not, on any equipment, in any interaction. The challenge lies in keeping up with the pace of change and delivering the level of service that customers expect. Enterprises that have an open and flexible organizational culture are able to meet customer expectations faster, allowing innovation scenarios to sustain transformations in digital CX initiatives and enabling companies to succeed.

We all know that market recessions are transitory. However, the depth and time period matter. Many enterprises adopt standard cost reduction processes throughout their organization, while others optimize their costs based on their business priorities. However, enterprises that have performed the best during and after recessions are those that continually track their **supply chain** decisions. Such companies integrate cash flow forecasting using AI/ML and analytics to get a quick, predictive and accurate view of future scenarios, reorganizing their resources where possible, and working on pricing and portfolio management according to the identified scenarios.

We are witnessing a time when all of society, people and businesses in the private and public sector are discussing sustainability and decarbonization on a frequent basis. There is a lot of societal pressure forcing organizations to have a business model that generates value for all. Although we have witnessed many discussions on these topics, only a few significant initiatives have been made, indicating slow progress in this area in Brazil. Yet we also see a growth of service companies with proposals to identify, plan and implement solutions in the fields of sustainability and net-zero carbon emissions. Many **ESG** (environmental, social and governance) service providers use continuous innovation processes and emerging technologies to reduce carbon emissions and foster a circular economy.

Digital reality is not new in Brazil. For over 30 years, there have been virtual reality (VR) environments in the engineering departments of car manufacturers that invested in the technology and in training. Currently, with the evolution of technology and reduction in usage costs, providers are focusing on creating digital reality environments and providing solutions for this growing market to serve clients from various business segments. Companies from sectors such as education, healthcare, marketing, entertainment and gaming are increasingly investing in virtual reality, augmented reality (AR) and extended reality (XR). There are also some initiatives regarding the metaverse, a topic discussed in all conversations related to digital innovation in Brazil. Considered as an evolution of the internet and a revolution in the way of working, with virtual interaction between people, the metaverse promotes collaboration through digitally shared experiences.

Digital innovations are transforming Brazil and generating value.

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Accenture	Leader	Leader	Leader	Leader	Leader
Atile	Product Challenger	Not In	Not In	Not In	Not In
Atos	Product Challenger	Contender	Contender	Product Challenger	Product Challenger
Beenoculus	Not In	Not In	Not In	Not In	Leader
Birlasoft	Contender	Contender	Product Challenger	Not In	Not In
Blueshift	Product Challenger	Not In	Not In	Product Challenger	Not In
BRQ	Leader	Leader	Leader	Not In	Product Challenger
Capgemini	Product Challenger	Product Challenger	Not In	Not In	Not In
CI&T	Not In	Leader	Not In	Not In	Not In
Compass UOL	Not In	Not In	Not In	Not In	Leader
DB1	Contender	Contender	Not In	Not In	Not In

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Deal	Leader	Leader	Not In	Not In	Not In
Deloitte Digital	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
EY	Not In	Not In	Product Challenger	Not In	Not In
Falconi	Not In	Not In	Not In	Contender	Not In
FCamara	Product Challenger	Leader	Market Challenger	Not In	Not In
Fenix	Contender	Not In	Not In	Not In	Not In
GEP	Not In	Not In	Product Challenger	Product Challenger	Not In
Globant	Product Challenger	Rising Star ★	Not In	Leader	Leader
IBM	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
ilegra	Leader	Leader	Not In	Contender	Not In

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
Infosys	Not In	Not In	Leader	Not In	Product Challenger
Logicalis	Leader	Not In	Not In	Not In	Not In
MadeinWeb	Rising Star ★	Leader	Rising Star ★	Contender	Contender
PwC	Not In	Leader	Not In	Not In	Not In
Schneider Electric	Not In	Not In	Not In	Leader	Not In
Siemens Energy	Not In	Not In	Not In	Leader	Not In
Sinqia	Product Challenger	Product Challenger	Not In	Not In	Not In
Smart Consulting	Product Challenger	Product Challenger	Not In	Not In	Not In
Stefanini	Leader	Leader	Leader	Leader	Contender
Sustainable Carbon	Not In	Not In	Not In	Market Challenger	Not In
TCS	Product Challenger	Product Challenger	Not In	Product Challenger	Not In

Provider Positioning

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	Business Consulting Services	Customer Experience Services	Supply Chain Transformation Services	Sustainability and ESG Services	Digital Reality Services
TIVIT	Product Challenger	Not In	Not In	Not In	Not In
TOTVS Consulting	Not In	Not In	Not In	Rising Star ★	Not In
T-Systems	Leader	Product Challenger	Leader	Not In	Not In
Unisoma	Not In	Not In	Contender	Not In	Not In
V8.Tech	Leader	Product Challenger	Not In	Not In	Product Challenger
VRGlass	Not In	Not In	Not In	Not In	Leader
Wipro	Leader	Product Challenger	Leader	Leader	Product Challenger
YDreams Global	Not In	Not In	Not In	Not In	Leader

This study assesses providers generating **innovations in Digital Business and ESG.**

- **Business Consulting Services**
- **Customer Experience Services**
- **Supply Chain Transformation Services**
- **Sustainability and ESG Services**
- **Digital Reality Services**

Simplified Illustration Source: ISG 2023

Definition

For 2022, ISG has retained four previously studied quadrants: digital customer experience services, digital business consulting services, digital supply chain transformation services, and sustainability and decarbonization services. This year, ISG has added a new service line focused on immersive experience and technology – digital reality services. Blockchain services, which was focused on the U.S. and the U.K. geographies in 2021, has been removed from this year's assessment.

Scope of the Report

In this study, ISG Provider Lens™ outlines five quadrants covering the following areas: Business Consulting Services, Customer Experience Services, Supply Chain Transformation Services, Sustainability and ESG Services, and Digital Reality Services.

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

- Transparency about the strengths and weaknesses of relevant software providers
- A differentiated positioning of providers by segments
- Regional market focus

Provider Classifications

The provider position reflects the evaluation within defined market segments (quadrants) and always applies to all business sectors and company sizes. In case the service requirements are different and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation by performance is made according to the target group for products and services. ISG considers the requirements of the business sector or the number of employees, as well as the corporate structures of the customers, and positions the providers according to their area of interest. As a result, ISG differentiates them, if necessary, into two groups defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million, headquartered in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenues above US$1 billion, with worldwide activities and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four groups (Leader, Product Challenger, Market Challenger and Contender), and providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include one service provider (or more) who ISG believes has a strong potential to move into the Leader quadrant. This type of provider is 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 number 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.

Business Consulting Services

Who Should Read This

This report is relevant to enterprises across industries in Brazil for evaluating providers of digital business enablement and ESG services.

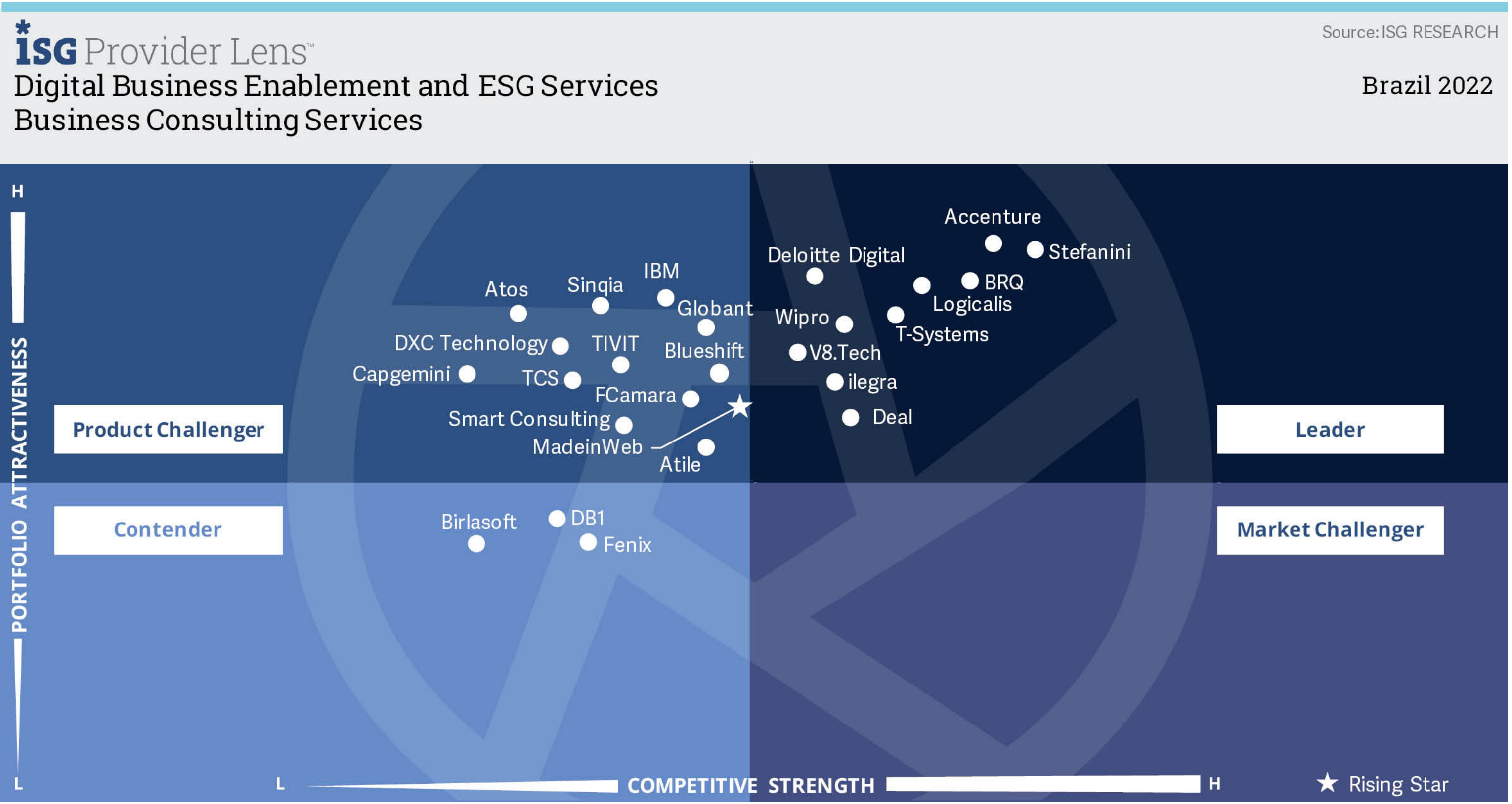
In this quadrant report, ISG highlights the current market positioning of service providers that offer digital business consulting services in the region. Enterprises seek providers that can assist in designing and delivering their still-expanding digital strategies, with ESG and customer experience now at the top of their digital agenda.

Brazilian enterprises want to be more agile and flexible in order to respond to changing customer needs. They are increasingly investing in digital technologies to drive operational enhancements to speed up delivery and to secure business continuity. In addition, they want to better align business and IT while prioritizing structural and foundational improvements, which will take them to the next level. Organizations are taking strategic approaches to accelerate their digitization efforts and are moving their systems to the cloud to achieve higher resilience. There is a high focus on digital collaboration, enhancing the employee and customer experience, and providing hybrid work options. Customers are leveraging digital platforms and open ecosystems (open APIs) to embrace new products, services, partnerships and new lines of business or revenue.

Digital professionals should read this report to understand the technology capabilities and product portfolio of providers that can help businesses to transform their services and scale up digital technologies to increase operational efficiency and potentially transform their company culture.

Technology professionals should read this report to understand how providers are leveraging technology advancements to help enterprises reimagine their businesses. The report also highlights the technical and integration capabilities of providers and their partner ecosystem.

Strategy professionals, through this report, will gain insights on providers' advisory and implementation services capabilities and their relative positioning. The report also highlights the providers' expertise in formulating digital strategies that will help enterprises to implement high-value digital technology initiatives.



This quadrant assesses providers in **Business Consulting Services** with the ability to advise customers on the **different aspects of the digital journey**, including strategy, design, data, technology, organizational change management, operations, digital culture and innovation.

Mauricio Ohtani

Definition

Business consulting services includes services provided to enterprises across customer and employee journeys, strategy, and digital business operations throughout the digital journey. These services help enterprises build new business models by making use of the existing capabilities across market opportunities. The services provided should create significant benefits for clients and drive their growth.

Providers in this space should be able to help organizations transform and optimize their operational environments through research, benchmarking, advisory and consulting services, with a focus on information technology, business process transformation, program management services and organizational change management. They should be capable of helping their clients throughout the digital journey, from conceptualizing the vision to delivering the actions needed for transformation across different industries.

Eligibility Criteria

1. Offer one or more **consulting services** across the digital journey
2. Ability to **advise clients** on the different facets of the **digital journey**, including strategy, data, technology, organizational change management, operations and consulting on industry processes
3. Help clients formulate their **digital roadmaps and build the digital strategies** for the short and long terms
4. Offer **advice and guidance** on process optimization to deliver tangible benefits
5. **Manage a** geographically dispersed **workforce** for its services across geographies

Observations

The evolution of digital innovation in Brazil has disrupted the traditional models of business. New technologies and digital transformation tools have helped organizations accelerate their initiatives, add other areas within operations and increase business competitiveness. Companies that internalize innovation in their day-to-day operations drive new solutions involving employees and consumers.

As a stimulus for innovation, there are provocative concepts such as "kill your own business" or "identify the efficient ways to make customers happy." Irrespective of the concept, the intention is to seek alternatives to the status quo, with a long-term vision of deconstructing and reconstructing the business itself. Companies with skills, strategies and long-term vision also involve partners in their transformation journeys. Service providers in digital business are constantly updating themselves, broadening their offerings and expanding their knowledge in emerging technologies. With fast-cycle approaches, qualified and multidisciplinary professionals propose improvement analyses in products and business processes.

The leading companies in digital innovation put the customer at the center of their actions. Regardless of the technology used, the result of digital transformation initiatives is to enable the best experience for customers, nurturing their loyalty and increasing their lifecycle with the brand. These companies understand that any transformation must go beyond technology, both in configuration and organizational culture.

Of the 41 companies evaluated for this study, 26 qualified for this quadrant, with 10 being identified as Leaders and one as a Rising Star.

accenture

Accenture is present in over 120 countries and is one of the largest global companies in professional services, with a broad capacity and high-quality service delivery.

BRQ

BRQ has over 150 companies on its client list, with projects implemented in eight countries. Its team of specialists is composed of more than 3,300 professionals in 350 cities in Brazil and the U.S.

Deal

Deal was born in 2004 in São Paulo and operates in 21 Brazilian states, 138 cities and two other countries. It has more than 450 operating professionals.

Deloitte Digital

Deloitte Digital is a spin-off of Deloitte that focuses on driving the digital transformation of its customers with comprehensive solutions.

ilegra

ilegra is a Brazilian services company with proprietary methodologies tested and validated by its customers. It has offices in São Paulo, Porto Alegre, Miami and Lisbon.

LOGICALIS
Architects of Change

Logicalis is a global provider of technology solutions and services with more than 3,000 professionals distributed across 11 countries in the region.

Stefanini

Stefanini is a global technology services and solutions provider that was formed in Brazil more than 30 years ago. It is present in over 40 countries with more than 25,000 employees.

T-Systems

T-Systems is part of the Deutsche Telekom Group and has been in Brazil since 2001. The company provides technological solutions that integrate the service offering in digital transformation projects.

V8.Tech is the new brand of V8 Consulting that consolidates the positioning of its subsidiaries. Founded in 2014, the company has grown its portfolio of services by expanding its list of strategic partners.

Wipro is a global company offering technology services. It has been operating in Latin America for 14 years, with 15 offices spread across seven countries in the region.

MadeinWeb

MadeinWeb (a Rising Star) is a Brazilian company that focuses on application development. It operates in Brazil and the U.S, and it also has clients in Argentina, Mexico and Portugal.

Leader

“BRQ serves the customers’ value chain with an appropriate strategy, excellence and efficiency.”

Mauricio Ohtani

BRQ

Overview

BRQ Digital Solutions is a Brazilian company that has been offering services to enable the digital transformation of its customers for 28 years. Its delivery capacity focuses on people, processes and technology, generating the best experience and convenience for its end users. It has over 150 clients in its portfolio distributed across eight countries, delivering its projects through a team of over 3,300 professionals spread across 350 cities in Brazil and the U.S.

Strengths

Business acceleration with intelligence and technology: BRQ accelerates the digital transformation journey of its customers by focusing on people, processes and technology. Through data intelligence, the company materializes high-impact strategies, helping businesses achieve their growth goals, expand their ranges of operation, gain experience and increase delivery capabilities.

Centers of excellence: BRQ helps materialize ideas through its centers of excellence, which specialize in design, advanced analytics, agile engineering and reference architecture. Through its partnerships with leading technology companies, BRQ delivers breadth and depth of knowledge and performance.

Customized and connected solutions: BRQ’s customer transformation process starts with understanding the business challenges. Then, the solution is designed using its innovation hub. Finally, the implementation is executed, and the results achieved are monitored with analytical evaluations that feed the process back to obtain continuous improvement in the projects.

Caution

Investments in security have been driven by compliance requirements, breaches, audit failures and increasing threats. BRQ must invest in and develop cybersecurity expertise to meet the growing demand in this area.

CIOs willing to contract BRQ’s services should align their expectations and budgets with resource availability and delivery schedules due to the widespread shortage of qualified technology professionals.

Customer Experience Services

Who Should Read This

This report is relevant to enterprises across industries in Brazil for evaluating providers of digital business enablement and ESG services.

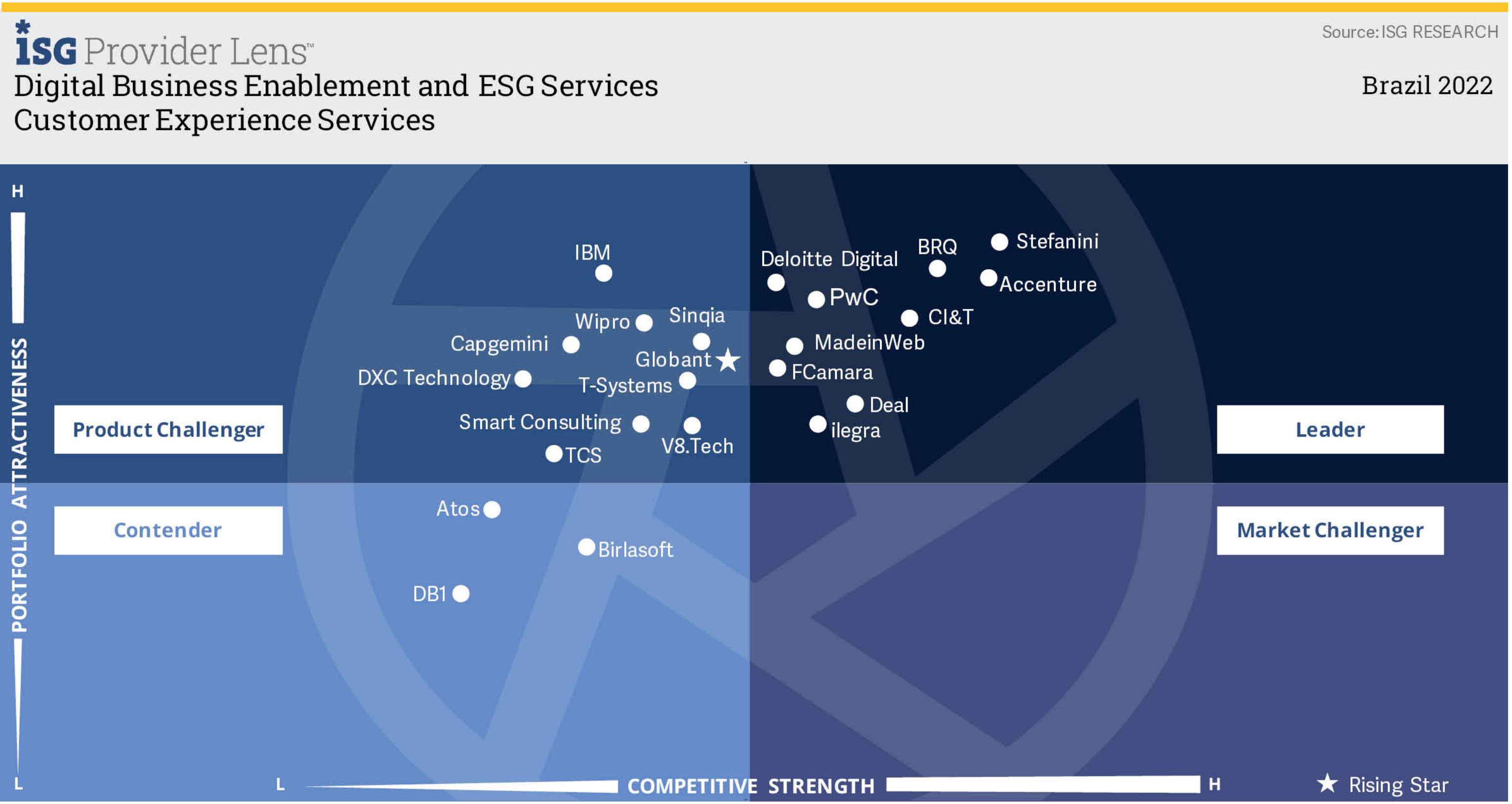
In this quadrant report, ISG highlights the current market positioning of service providers that offer digital customer experience services in the region. Customers are expecting end-to-end CX services that require orchestration across all channels to provide omnichannel customer experience.

Enterprises are increasingly using AI in analyzing the large volume of customer data in real-time to provide more personalized customer experiences. The use of AI-driven virtual assistants in customer service is gaining momentum and assists agents with complex queries. Enterprises in Brazil are focused on enhancing the employee experience and are keen to engage all of their employees in CX programs in order to improve customer results. They are also developing platforms to derive insights, to track progress and motivate actions for a better customer experience. They seek providers with in-depth business and advisory expertise to help them build their CX strategies and prioritize the goals based on Return on Experience instead of the typical Return on Investment mindset. There is increased attention on CX digital solutions and platforms, which are enabled by modern technologies.

Customer experience professionals should read this report to understand the capabilities and relative positioning of providers that deliver user-centric experience design and rebuild customer journeys. These providers are leveraging innovative technologies such as advanced analytics, automation, AI, machine learning, AR, and VR.

Digital professionals should read this report to understand the providers' capabilities in designing and implementing digital platforms and solutions across the value chain. This enables businesses to monitor and manage the interaction points across all channels.

Strategy professionals, through this report, will gain insights on providers' experience-led advisory and implementation capabilities as well as relative positioning. The report also highlights their expertise in formulating and implementing CX strategies to help enterprises reimagine the customer experience.



This quadrant assesses service providers that offer resources related to **consulting and solution implementation to improve customer experience (CX).**

Mauricio Ohtani

Definition

Providers in this quadrant should be able to provide consulting and implementation services to improve the customer experience (CX) for their clients. Customer experience design is transforming how companies organize marketing, sales, delivery and post-sales processes, with a customer-centric approach and business processes.

This quadrant focuses on conceptualizing customer journeys to create new business models and realize benefits using new technologies and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product or a brand. The design process includes technology experts, representatives from sales and marketing, and clients in a collaborative manner. Leading firms use analytics to extract insights from user data. Cognitive computing extracts data from conversations, texts and social media. The experience is measured with simple A/B tests and complex sentiment analysis captured from customer interactions.

Customer experience involves real-time monitoring and measuring of various touchpoints that drive the customer journey and the supporting technology and business processes. A customer experience team produces a continuous change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy.

Eligibility Criteria

1. Should focus on delivering an **end-to-end customer journey** to provide a differentiated value proposition supported with advance technologies such as AI, machine learning, IoT and analytics
2. Should offer **advisory, integration and managed services** to enable customer experience services
3. Must showcase **deep industry and customer knowledge** for **business transformations**, changing channels, business structures and cultural shifts
4. Must have an **established CX governance** framework
5. Should have the capability to deliver services using **innovative technologies such as augmented reality and virtual reality**

Observations

Customers are increasingly dependent on digital channels to discover new products, understand ways to use them, influence and be influenced, buy and promote products and services, or have an impactful experience that makes them loyal to the brands or companies. Thus, companies continue to invest in CX, but on a more digital basis. Customers are still at the center of digital strategies but are now inserted in a context where data helps to better define their characteristics, interests, preferences and needs. This enables the development of new products and services to further interest a target audience by offering unforgettable experiences.

The pandemic led to new practices and new brands, requiring innovations and differentiations through CX initiatives that create impact, gain loyalty and increase the lifecycle of clients' relationship with the brands. Customers, in turn, demand great personalized experience at all points of contact in their journey. This requires innovations in the internal processes of the companies and the use of more advanced technologies. Capabilities such as data analytics, AI/machine learning, chatbots and VR/AR/XR become critical for capturing customers' interest and engaging them with unimaginable and compelling experiences.

Many technology service providers use such capabilities to differentiate themselves and survive in the market and help their customers implement digital CX using these emerging technologies and best practices.

Of the 41 providers assessed for this study, 23 have qualified for this quadrant, with 10 being identified as Leaders and one as a Rising Star.

accenture

Accenture operates in 50 countries and offers strategy, consulting and technology services, along with Accenture Song, which focuses on digital marketing.

BRQ

BRQ is one of the largest Brazilian companies in technology services and offers solutions focused on people, processes and technology. It has more than 3,000 employees using the Anywhere Office model.

CI&T

CI&T was established 27 years ago, has expertise in various technologies and can accelerate the digital transformation processes of its customers.

Deal

Deal was established in 2004 and operates in 138 cities across 21 states in Brazil. It has more than 450 professionals working in data intelligence and digital transformation.

Deloitte Digital

Deloitte Digital is headquartered in London, U.K., and operates in 150 countries. It has more than 345,400 employees across 100 offices around the world.

FCamara Group

FCamara Group specializes in multiple business sectors and delivers its services through experienced, high-performance professionals.

ilegra

ilegra is a Brazilian company that provides technology services. Formed in 2002, it has offices in São Paulo, Porto Alegre, Miami and Lisbon;

MadeinWeb

MadeinWeb is a Brazilian company that was founded in 2000 and focuses on application development. It operates in Brazil and the U.S., and also has clients in Argentina, Mexico and Portugal.

PwC

PwC, one of the Big 4 companies, has been growing steadily in Brazil based on its strategy, management services and technology consulting practices.

Stefanini

Stefanini is a global services company with more than 30 years of operation in Brazil. Currently, it has a presence in more than 40 countries with a workforce of 25,000 employees.

Globant

Globant (a Rising Star) is based in San Francisco, U.S., and operates in 18 countries. It has been used as a case study in many business schools in the U.S. for its digital marketing services.

BRQ

Leader

"BRQ understands business and customer needs and converts them into appropriate CX solutions."

Mauricio Ohtani

Overview

BRQ Digital Solutions is a Brazilian company that has been offering services to enable the digital transformation of its customers for 28 years. Its delivery capacity focuses on people, processes and technology, generating the best experience and convenience for end users. It has more than 150 clients in its portfolio distributed across eight countries, delivering its projects through a team of over 3,300 professionals spread across 350 cities in Brazil and the U.S.

Strengths

Consumer-centric behavior analysis: BRQ proposes solutions developed together with its client companies, which are aligned to their current business challenges. Based on facts and data, BRQ conducts consumer-centric behavior analysis to promote products and services for increased public acceptance.

BRQ center of excellence: BRQ has a center of excellence designed to ideate, build and validate the best CX-oriented alternatives and solutions. With proofs of concept, testing and its own methodology that helps speed up implementations efficiently, BRQ performs multidisciplinary work in different business segments, involving specialists in design, technology and data.

Data-driven decisions: BRQ gives great importance to the data processed for decision-making at any stage of CX projects. Information about a product's lifecycle and hyper-personalization actions are highly relevant for generating insights, launching new products, and defining and correcting campaigns.

Caution

A large share of BRQ's revenue is still generated from clients in the financial segment. This indicates that the market demands are aligned with BRQ's offers. However, the company is not perceived as an important player in other verticals.

Enterprises looking for BRQ's services beyond the banking, financial services and insurance (BFSI) segment should increase their level of demand and validate the skills associated with their market segments.

Supply Chain Transformation Services

Who Should Read This

This report is relevant to enterprises across industries in Brazil for evaluating providers of digital business enablement and ESG services.

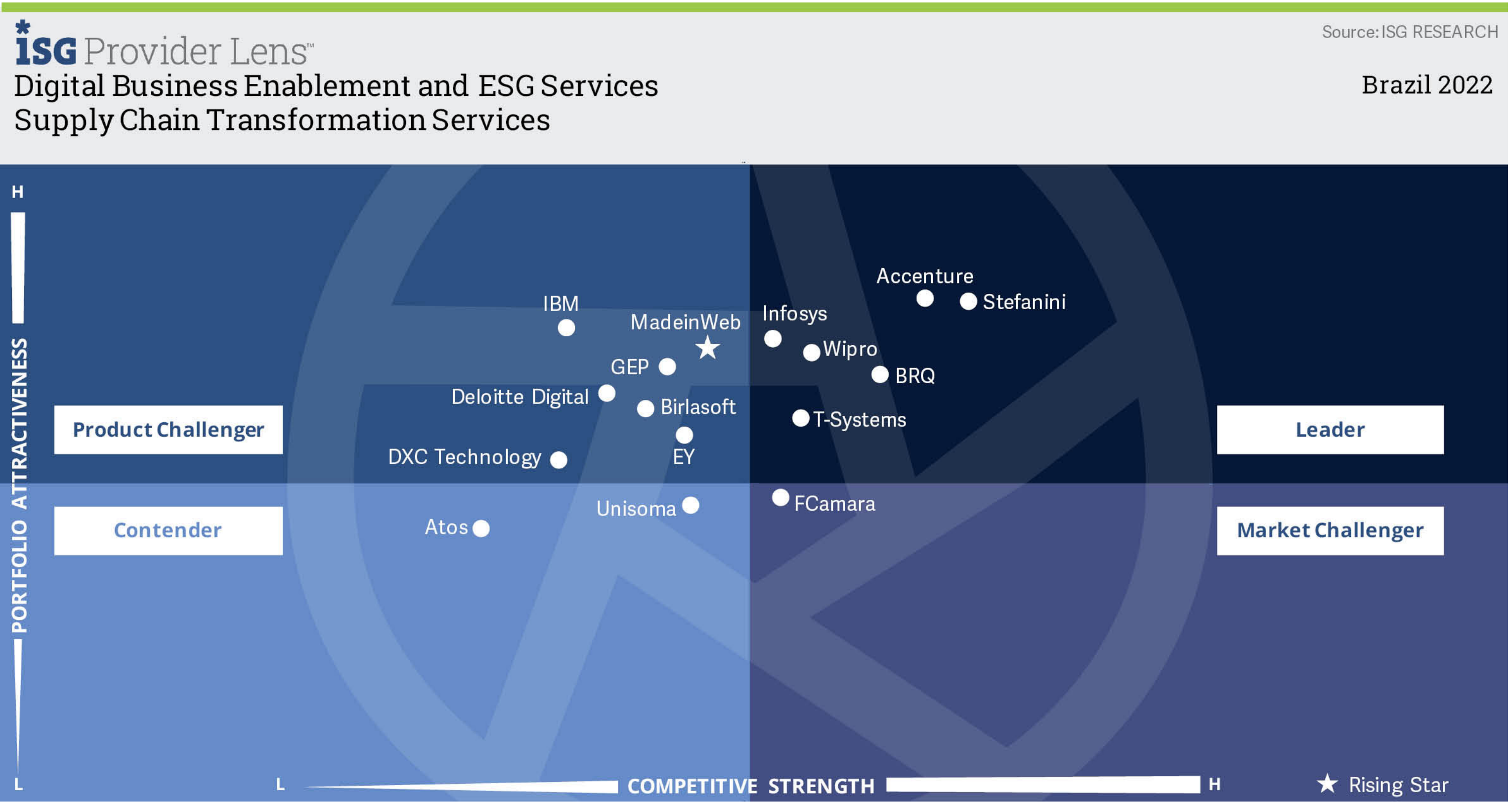
In this quadrant report, ISG highlights the current market positioning of service providers that offer digital supply chain transformation services in the region. Technology has become the key imperative for enterprises to manage supply chain dynamics and accelerate digital transformation.

The key focus areas for Brazilian enterprises that are seeking supply chain transformation services include demand forecasting, blockchain usage, portfolio optimization, logistics networks, market intelligence with smart pricing, and process hyper automation. These enterprises prioritize sustainability, risk management and resilience and want more visibility and flexibility to react quickly to changing supply or demand conditions. Applying data analytics, machine learning, and predictive forecasting techniques help them to manage costs and increase efficiency. They seek service providers with expertise in process digitalization, automated data analysis, track and trace use cases, and real-time supply chain visibility along with deep expertise in technologies such as IoT, RPA, advanced analytics, digital twin, and blockchain.

Strategy professionals should read this report to understand providers' capabilities and relative positioning in supply chain advisory and implementation services to help enterprises align their supply chain processes with their overall business strategy to build resilient supply chains.

Supply chain and logistics professionals should read this report to understand providers' capabilities and expertise in supply chain-related systems, services, and technologies. This report also gives insights into how providers can be compared with each other.

Technology professionals should read this report to understand a provider's capability in leveraging AI, IoT, advanced analytics, and blockchain for automating and improving supply chain processes and prioritizing sustainability across the value chain.



This quadrant assesses providers that offer **consulting, insights, integration, support and managed services** for the supply chain, from planning to execution.

Mauricio Ohtani

Definition

This quadrant assesses service providers that offer consulting, integration and managed services for the supply chain across planning, execution and insights, in addition to achieving ESG goals for clients. The providers should leverage a comprehensive framework to use digital technologies such as IoT, machine learning, AI and predictive analytics to enable clients to optimize their entire ecosystem of suppliers, customers, employees and third-party partners to balance their business risk profiles.

A digital supply chain enables a company to move from mainly focusing on cost savings to also monitoring inventory based on customer needs, optimizing its supply chain network and creating a predictive, self-adapting supply chain. To deliver these advanced features, digital technologies providers offer end-to-end, real-time visibility across an integrated and networked supply chain. In addition, they are helping clients to not only plan, transform and execute the technology aspect of the entire supply chain but also optimize their operations across the supply chain.

Service providers in this quadrant typically offer supply chain analytics, data management, demand and supply planning and forecasting, and order management integrated with digital technologies to deliver substantial benefits to their clients.

Eligibility Criteria

1. Must have delivered **specific sustainability services and data orchestration services** for offering a connected supply chain experience
2. Must have executed **advisory, consulting or integration** for the digital supply chain for one or more clients across regions or for a specific geography
3. Must demonstrate focus on one aspect of the digital supply chain or the **end-to-end delivery of services** across the supply chain by leveraging digital technologies
4. Must showcase expertise in **integrating modern technologies** such as IoT, blockchain and automation and deliver better user experience
5. Must have a focused and strong **regional partner ecosystem** of ISVs and other certified partners
6. Must offer **resilient digital supply chain services** that support local governance, regulation and compliance standards
7. Must offer **industry-specific solutions and expertise** in delivering supply chain services.

Observations

After the pandemic, the demand for intelligent operations has intensified. Supply chain digitalization increases efficiency and drives business growth, and it has a positive impact on sustainability. Leading companies have a unique supply chain vision that involves demand, segmentation, planning and execution with business methodologies, process optimization and risk analysis.

Seeking better performance and increased efficiency and agility, enterprises are digitally transforming their existing supply chains using data, AI/machine learning, analytics and automation to increase the quality of information and generate insights that may increase confidence in their decision-making processes. Thus, supply chain management teams in organizations gain intelligence in the segmentation of their supply chains, allowing for better planning, customization and execution.

Service providers operating in Brazil work with their clients by assessing the scenarios and the extent of supply chain operations and by identifying opportune areas for improvement in terms of efficiency and effectiveness of the processes. Their expertise includes advanced technologies such as IIoT, RFID, RPA, APIs and VR/AR/XR, as well as warehouse management system (WMS), transport management system (TMS) and labor management system (LMS) solutions, and other more specific solutions. Such service providers offer qualified resources and apply best practices that help their clients speed up processes, optimize tasks and reduce risks, boosting their business outcomes.

Of the 41 companies assessed for this study, 16 have qualified for this quadrant, with six being identified as Leaders and one as a Rising Star.

Accenture is one of the largest IT services companies in the world and is present in over 120 countries. It has extensive experience and deep knowledge in supply chain management, offering expertise in digital transformation to its customers.

BRQ

BRQ is one of the most relevant IT service providers in Brazil and is committed to partnering with its customers in all aspects of their digital transformation, including the digital supply chain segment.

Infosys is a global leader in digital services and is present in 46 countries, with more than 100,000 professionals trained in new technologies. The company has been in Brazil since 2009 and has a wide network of business partners.

Stefanini

Stefanini is a global provider of IT services based in Brazil, with about 27,000 employees distributed across all business segments in the world.

T-Systems

T-Systems is a global IT services company owned by the Deutsche Telekom Group. Its Brazilian operation has more than 1,600 employees who are distributed across 10 offices in five Brazilian states.

Wipro has been in Brazil for 15 years and has 15 offices across Latin America, sharing its global expertise and experience with specialized supply chain resources.

MadeinWeb

MadeinWeb (a Rising Star) is a technology services company that focuses on developing solutions to help customers in digital transformation.

BRQ

Leader

"BRQ helps customers develop the analytical culture around their supply chain."

Mauricio Ohtani

Overview

BRQ Digital Solutions is a Brazilian company that has been offering services to enable the digital transformation of its customers for 28 years. Its delivery framework focuses on people, processes and technology, generating the best experience and convenience for end users. It has over 150 clients in its portfolio distributed across eight countries, delivering its projects through a team of over 3,300 professionals spread across 350 cities in Brazil and the U.S.

Strengths

Discovery method: BRQ developed a digital transformation method for the supply chain, which in the discovery phase considers mapping and developing hypotheses for improvement using tools, knowledge, experience and techniques including business design and a customer-centric approach.

Design lab: BRQ has developed a lab focused on research, comparative analysis and exploring new technologies, as well as adopting and testing the emerging technologies available. Enabling connected supply chains through a control tower, BRQ helps its customers by offering machine learning techniques, predictive analytics and IoT implementation.

Introducing a culture of continuous innovation: BRQ deals everyday with the challenge of innovation both internally and with its customers. Enterprises depend on their partners to innovate, and BRQ responds to this demand by promoting a culture based on people, processes and technology, always considering the maturity level and limitations of each enterprise.

Caution

The demand for digital transformation services in the supply chain has increased exponentially with the pandemic. BRQ should expand its customer base and showcase more success stories in this area.

Enterprises should align their supply chain priorities with BRQ's delivery capabilities due to the lack of qualified resources in the market.

Sustainability and ESG Services

Who Should Read This

This report is relevant to enterprises across industries in Brazil for evaluating providers of digital business enablement and ESG services.

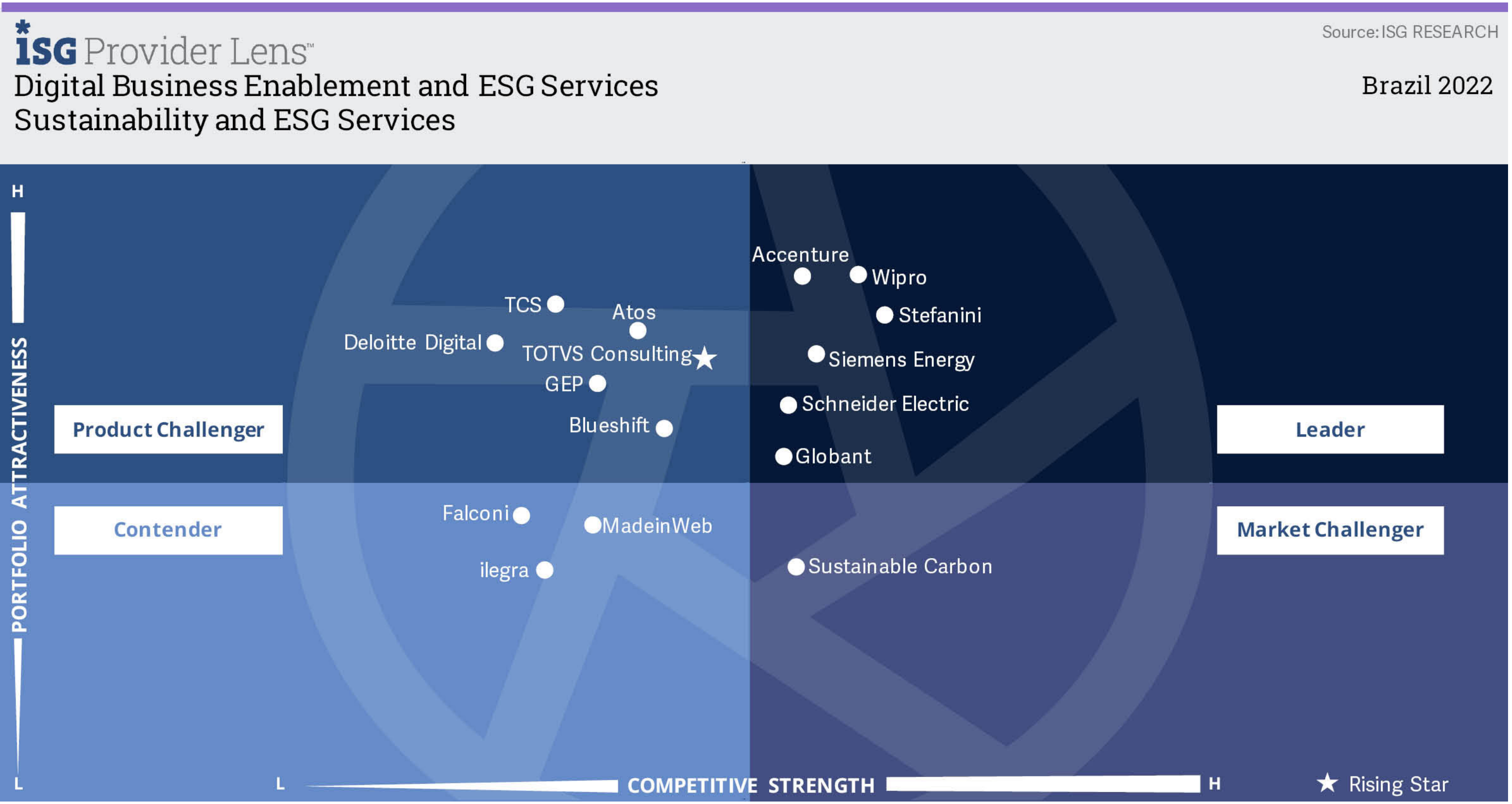
In this quadrant report, ISG highlights the current market positioning of service providers that offer sustainability and ESG services in Brazil. Enterprises are redefining their overall business strategies to embed sustainability principles, because consumers expect brands to extend beyond profits and want to become eco-empowered.

Brazil is committed to implementing climate actions to reduce greenhouse gas (GHG) emissions by 43 percent by 2030 compared to the levels in 2005. The government is implementing policies, plans, and projects for addressing challenges in GHG emission across several industries, such as transportation, agriculture, and steel production. Companies are placing a stronger emphasis on decreasing carbon emissions through resource and energy efficiency. They want to digitize and automate reporting to meet the growing demand and increase efficiency. Product life cycle, eco-efficiency, lower plastic pollution levels, decarbonization, and green finance have become focus areas among businesses in the region. Automation of disparate data sources, use of integrated reporting platforms, transitioning from manual ESG report creation, and identification of ESG industry-specific metrics are also gaining momentum.

Technology professionals should read this report to understand the relative positioning and capabilities of providers that can help them with their sustainability targets, measure and track their ESG performance, and build sustainable business with the adoption of digital technologies.

Strategy professionals, through this report, will gain insights into how providers build and implement sustainability-related strategies, enabling them to integrate ESG into their businesses as a key differentiator.

Digital professionals should read this report to understand a provider's ability to deliver seamless sustainability and decarbonization solutions that leverage digital capabilities. The report also gives insights into how providers can be compared with one another.



This quadrant assesses service providers that **internally execute and deliver sustainability services**, helping enterprises reduce their carbon footprint and promote a circular economy.

Mauricio Ohtani

Definition

The Sustainability and ESG Services quadrant assesses service providers' ability to internally apply sustainability actions as well as provide their own expertise to their clients.

Technologies powering digital transformation generate a significant carbon footprint. However, digitalization is also a means to achieve sustainability and decarbonization. With world leaders taking a pledge to address climate change issues, it is imperative for businesses to achieve net neutrality in carbon emission and remain sustainable, besides reaping the other benefits of digital transformation.

Sustainable business innovation across enterprises is aligned with the United Nation's 17 Sustainable Development Goals (SDG) that are targeted to be achieved by 2030. The Climate Pledge for mitigating climate change, signed in 2016 in Paris by approximately 196 countries, has steered organizations to focus on net-zero carbon emissions and 100 percent renewable energy. With these imperatives, services providers are helping their clients in their sustainability efforts while addressing their digital transformation initiatives.

The providers in this quadrant should be able to help clients achieve carbon neutrality and improve their environmental, social and governance (ESG) performance.

Eligibility Criteria

1. Should have helped their clients in **achieving at least one of the SDG and ESG goals**
2. Should have solutions for businesses to **achieve their sustainability goals**
3. Should offer **sustainability services** as a separate offering or as a part of their digital services
4. Should have **helped clients** achieve sustainability in Brazil
5. Should be able to **measure and report revenue** from sustainability services delivered to clients

Observations

Society as a whole shows interest in taking immediate actions to combat climate change and reducing carbon emissions, thereby promoting greater sustainability. Many Brazilian companies are taking more responsibility and demonstrating some progress in ESG. The pace of engagement in the climate agenda is still slow in Brazil, with many discussions taking place in all business segments, but only a few concrete decarbonization projects or net-zero commitments by 2030 or beyond.

The number of carbon credits (CBIOs) traded on the B3 stock exchange is growing. In addition, certificates are issued to companies that commit to reducing greenhouse gas emissions, and the Brazilian Development Bank requires accounting of carbon to release loans to the private sector. Enterprises in Brazil can accelerate their ESG initiatives and take the country to a leading position when compared to other regions by using bilingual communication on financial performance and sustainability.

Companies that offer consulting services on sustainability are maturing and expanding in several regions of Brazil. The portfolios of such service providers include practices that combine data collection with the use of analytics and software solutions. These initiatives not only contribute to the implementation of change and digital innovation, but also allow organizations to identify opportunities for improvement, with depth of understanding and breadth of action in ESG, generating social, financial and sustainable impact.

Of the 41 companies assessed for this study, 16 have qualified for this quadrant, with six being identified as Leaders and one as a Rising Star.

accenture

Accenture is a global company offering consulting and technology services that help enterprises incorporate sustainability into all areas of business.

Globant

Globant is headquartered in San Francisco, U.S., and operates in 20 countries. In 2012, it started its operation in Brazil after the acquisition of the Brazilian company TerraForum.

Schneider Electric

Schneider Electric is a global company with over 180 years of history. It operates by enabling its customers to take advantage of the available energy and resources, aligning business growth with sustainability.

Siemens Energy

Siemens Energy focuses on the energy value chain. With about 91,000 employees worldwide, the company proposes to be a partner in the energy transformation process of its clients.

Stefanini

Stefanini is a company that has been growing continuously and globally, with about 27,000 employees worldwide. Its understanding of shared value goes beyond sustainability and it uses innovation to have a positive impact throughout the supply chain.

Wipro is a global IT services company that has operated in Brazil for the past 15 years. Wipro has incorporated measures into its own operations and suppliers as well as created industry partnerships to achieve its sustainability and decarbonization goals.

TOTVS

TOTVS (a Rising Star) is a leading developer of enterprise management software in Brazil and has a strong presence across Latin America. Its consulting practice offers support to enterprises in implementing ESG initiatives.

Digital Reality Services

Who Should Read This

This report is relevant to enterprises across industries in Brazil for evaluating providers of digital business enablement and ESG services.

In this quadrant report, ISG highlights the current market positioning of service providers that offer digital reality services in the region. Digital reality services are still a niche market in Brazil. Most initiatives in this space are currently in the proof-of-concept phase.

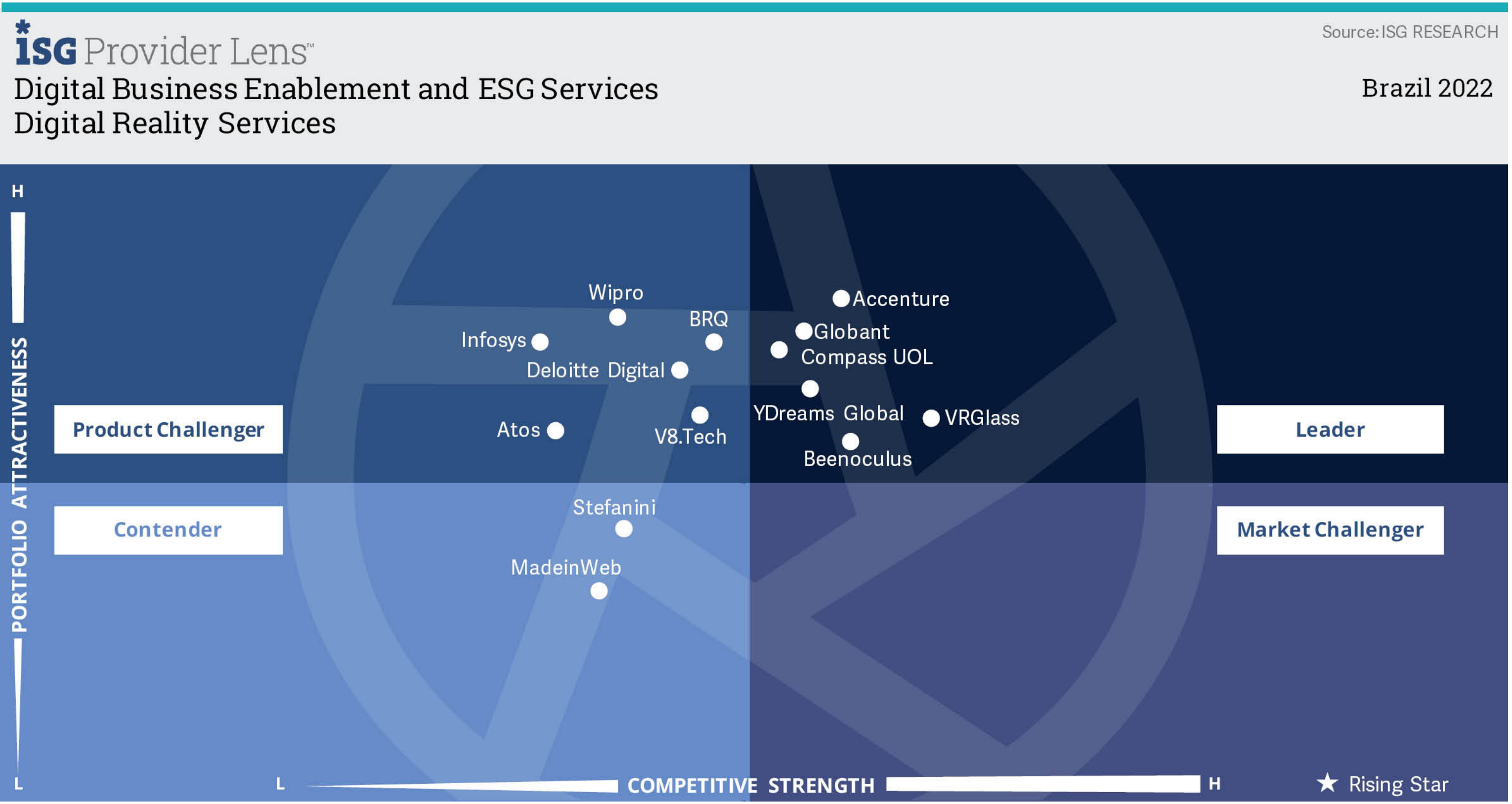
Remote assist, metaverse solution, AR solutions, digital twin assets, virtual training, and on-boarding are gaining traction among enterprises in the region. Digital health services are especially gaining prominence in the market, and the demand for less invasive diagnostics and patient-facing mobile applications is rising.

Providers need to invest in digital platform integration services and develop remote monitoring solutions, surgical robotic tools and digital solutions powered by 3D interaction, real-time simulation, 3D web, IoT, AI, 5G, cloud computing, and data analytics. Though there is growing interest among enterprises to use immersive virtual platforms for gaming, shopping, and business collaboration, network reliability has become a top priority when it comes to adoption.

Strategy professionals should read this report to understand the capabilities and relative positioning of providers across strategy consulting and implementation of digital reality services that enable enterprises to integrate AR, VR, and mixed reality into their strategy and operations.

Technology professionals, thorough this report, will gain insights into providers' technology expertise in helping enterprises to adopt and integrate technologies such as AI, advanced analytics, digital twins, computer vision, AI, machine learning, and 3D with their IT systems.

Digital professionals should read this report to understand providers' capabilities in building and implementing digital reality solutions for specific use cases and their strategic alliances and partner ecosystem.



This quadrant assesses providers' ability to assist in the **strategic definition and use** of technologies that simulate reality in a variety of ways, including **augmented reality (AR), virtual reality (VR) and mixed reality (MR)**.

Mauricio Ohtani

Definition

The Digital Reality Services quadrant assesses service providers offering strategy consulting, integration and delivery services to support clients in integrating reality services. In addition to these, providers can also showcase their capabilities for advising clients on digital reality services roadmap development, industry-specific solutions, thought leadership and experience in delivering one or more use cases. The providers need to work along with enterprise clients through ideation, consulting, assessment, storyboarding, prototyping and user testing. They also must leverage a comprehensive framework or methodology to use digital technologies such as IoT, machine learning, AI and advanced analytics to ensure a 360-degree immersive experience, while meeting business requirements and challenges.

Digital reality represents the next transformation in terms of how technology is addressed through a 360-degree immersive experience that puts human users at the center of the design. It comprises a wide range of technologies and products that simulate reality in a variety of ways, including augmented reality (AR), virtual reality (VR) and mixed reality (MR). Enterprises and organizations in all industries are embracing the need for AR, VR and MR.

The adoption of technologies such as blockchain, IoT, AI, machine learning, digital twins and computer vision is further reshaping digital reality services offerings.

Eligibility Criteria

1. Must have **expertise and** interdisciplinary **capabilities** for AR, VR and MR
2. Must have developed industry-specific **solutions, tools, accelerators** and other intellectual property
3. Experience in **integrating one or more technologies**, such as IoT, advance analytics, digital twins, computer vision, AI, machine learning and 3D
4. Service providers need to **create MR solutions; AR and VR application** development for multiple industries; **AR, VR and MR environments**; and content management, data security and governance frameworks
5. Experience in **integrating digital reality services** with other IT systems, such as ERP, CRM and learning management systems
6. Must showcase **use cases** delivered or **proofs of concept** ready for pilot implementation
7. Strong **product and innovation** roadmap for this service line comprising the strategy for talent, upskilling, R&D projects and partner ecosystem, covering both hardware and software providers
8. Strong **thought leadership** capabilities

Observations

Technology has been breaking barriers, creating new practices and significant experiences for users. Great innovations arise from good ideas and can be tested differently depending on the technology used. Several business sectors can create business models, enter new markets, test different products and experience the reactions, favorable or not, to their new services. Widely used with Industry 4.0, technologies such as VR, AR and XR are expanding their role and are also essential in metaverse environments.

Digital-native companies define their actions by centering them on the customer. A customer can exist in physical or digital environments through resources that have been improved over 30 years, as is the case with VR, which was widely used in the 1990s by automotive and aviation companies in Brazil. With new solutions and lower costs, the market has created opportunities with immersive experiences for different segments such as communications, retail, tourism, civil engineering, education, medical services, entertainment and games.

In Brazil, global companies providing technology services are importing capabilities that are already developed in foreign markets to bring practical solutions to their customers that can be applied in a variety of sectors. Meanwhile, some companies are further accelerating the placement of solutions in the local market with their own "diction" and characteristics that are closer to the profile of Brazilian clients. These emerging companies have been receiving different levels of investment and are growing their operations in new regions and countries.

Of the 41 companies assessed for this study, 14 have qualified for this quadrant, with six being identified as Leaders.

accenture

Accenture is one of the forerunners of the metaverse concept, adopting the various resources of digital reality such as VR, AR and XR and other emerging technologies.

Beenoculus

Beenoculus is a Brazilian company involved in communication, training and process improvement, with the capacity to develop end-to-end solutions in XR for large and midsized enterprises.

Compass UOL

Compass UOL is a Brazilian services company that offers next-generation technology solutions. It has been operating in Brazil for over 20 years, with strong business growth in several segments of the economy.

Globant

Globant is headquartered in San Francisco, U.S., and operates in 20 countries. In 2012, it started its operation in Brazil after the acquisition of the Brazilian company TerraForum.

VRGlass

VRGlass was established in Brazil in 2011 and has been improving its expertise in software and hardware development for XR, VR and AR. The company has been gaining recognition and extending its reputation to other continents.

YDreams Global

YDreams Global has operations in Brazil and Canada. Founded in 2007, the company develops products and services using immersive technologies, and it has produced over 1,300 experiences for major clients in Brazil and globally.

Appendix

The ISG Provider Lens™ 2023 – Digital Business Enablement and ESG Services research study analyzes the relevant software vendors/service providers in the Brazil market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:
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Swathi Amin

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

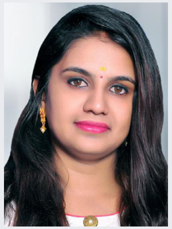
The study was divided into the following steps:

1. Definition of Digital Business Enablement and ESG 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

Author

Mauricio Ohtani
Lead Author and Senior Consultant

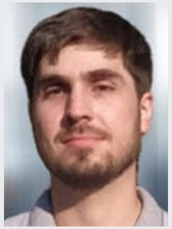
Analyst and author, Mauricio Ohtani brings extensive experience in the research business of Brazilian and Latin America service markets. Mauricio is a senior consulting partner at TGT Consult in Brazil. With more than 30 years of experience, he developed and served different roles in the information technology market for diverse vertical industries, supporting many countries in Latin America. Before TGT and ISG, Mauricio was area vice president at Gartner Inc., responsible for the research and advisory business in Brazil and Latin America.



Research Analyst

Monica K
Research Specialist

Monica K is a research specialist and a digital expert at ISG. She supports and co-authors ISG Provider Lens™ studies on the Internet of Things (IoT), digital business transformation, blockchain, Enterprise Application as a Service, and cybersecurity. She has created content for the aforementioned Provider Lens™ studies, as well as content from an enterprise perspective, and she is the author of the global summary report. Monica K brings over eight years of experience and expertise in technology, business and market research for ISG clients. Prior to ISG, Monica worked for a research firm specializing in technologies such as IoT and product engineering, as well as vendor profiling and talent intelligence. She has also been in charge of delivering end-to-end research projects and collaborating with internal stakeholders on various consulting projects.



Research Analyst

Gabriel Sobanski
Research Analyst

Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on the ServiceNow ecosystem, the Salesforce ecosystem, the Microsoft ecosystem, MarTech services, cybersecurity solutions and services, and SAP HANA ecosystem services. He supports the lead analysts in the research process and co-authors the global summary report with market trends and insights. Gabriel also develops content from an enterprise perspective. Gabriel has helmed his current role since 2021.

Prior to this role, he has worked as an IT consultant, where he acquired experience and technical capabilities in collecting, analyzing and presenting quantitative and qualitative data. His areas of expertise include industry, logistics and market research.

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

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

ISG Provider Lens™

JANUARY 2023

REPORT: DIGITAL BUSINESS ENABLEMENT AND ESG SERVICES