

Roaring out of a Global Pandemic: How Airlines and Hotels can Structure for Recovery



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Introduction: Current Crisis Affecting the Airlines and Hotel Industry

In the wake of the COVID-19 pandemic, no other businesses have fallen as hard and as fast as airlines and hotels. The global travel industry that spurred over 4 billion trips a year is now staring at \$880 Billion in losses owing to country-specific international flight restrictions and trip cancellations¹.

The COVID-19 pandemic has brought the aviation and hotel industries to a standstill, not to mention triggering massive job and revenue losses. Statistics on the magnitude of the disruption brought about by the virus are staggering. With hotel occupancy rates plummeting by more than 85 percent, many hotels are closing their properties and imposing massive furloughs and layoffs. In the U.S., about 4 million people will be losing their jobs, which represents 44 percent of the total hotel workforce nationwide².

In the U.S. airline industry has agreed to \$25 Billion in federal aid to pay and keep workers employed through September.

Hilton and Marriott alone have let go of nearly 60,000 employees so far. According to the IATA, annual loss in passenger business is expected to be between \$113 Billion and \$252 Billion for the airline industry alone³. Air Canada has temporarily laid off 15,200 employees and Boeing is considering reducing its workforce by 10 percent.

Currently, both industries are looking for creative revenue streams and are implementing social responsibility initiatives. A few major carriers such as Southwest Airlines are offering low-cost roundtrips with lifetime validity, and American Airlines is using its parked passenger planes for cargo-only flights to deliver critical supplies around the world. Several hotels are offering their rooms for free or at heavily subsidized rates to the government for healthcare professionals and to quarantine foreign travelers.

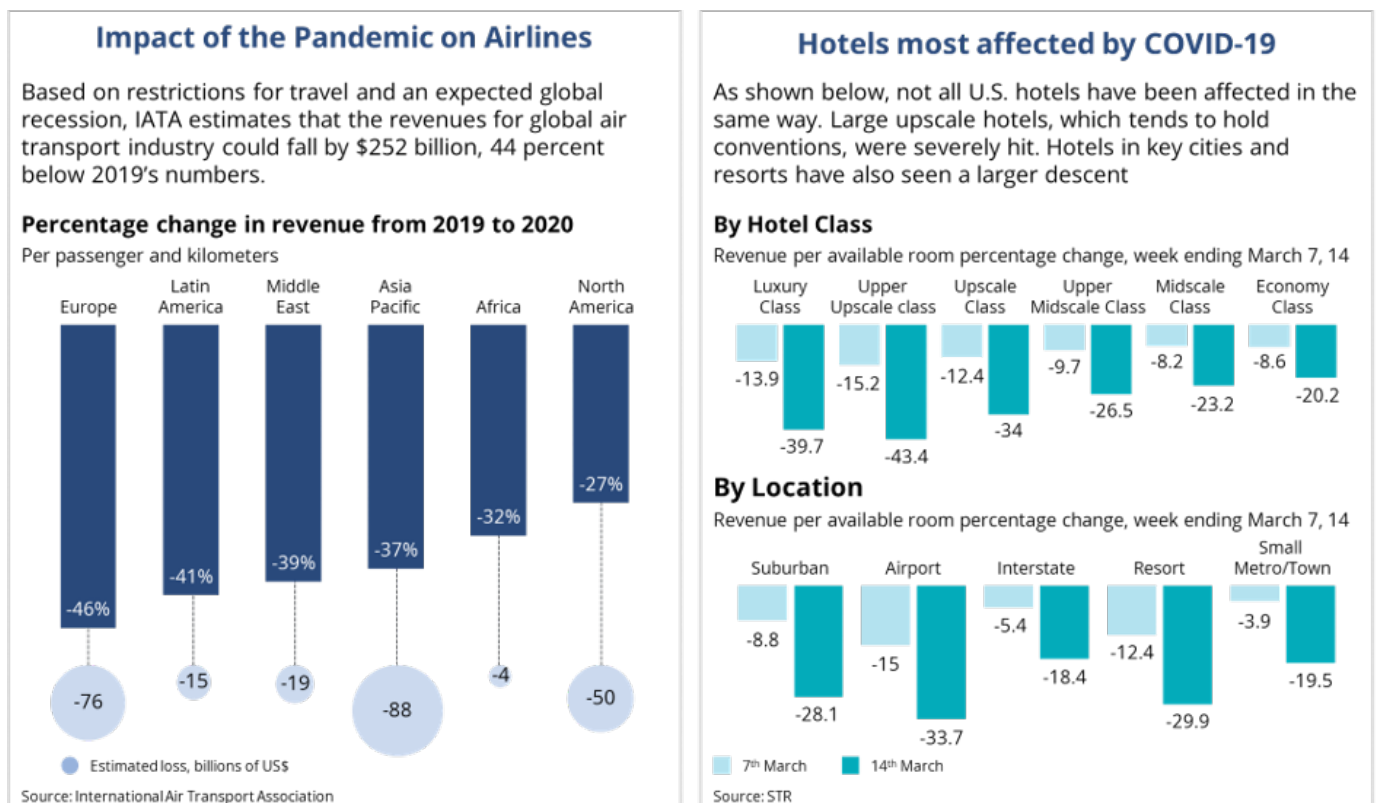


Figure 1 - Impact of COVID-19 on Airlines and Hotels

Introduction: Current Crisis Affecting the Airlines and Hotel Industry (continued)

Governments are taking proactive financial steps to mitigate the impact. The U.S. passed the Coronavirus Aid, Relief, and Economic Security (CARES) Act, which offers \$2.1 trillion to individuals and businesses impacted by the coronavirus pandemic. The first phase allocated \$350 Billion to small businesses under the Paycheck Protection Program, which provides 100 percent federally guaranteed loans to small businesses. The federal government also offered the airline industry \$25 Billion in payroll support, \$25 Billion in loans for passenger airlines, and more than \$10 Billion in grants and loans for cargo airlines and aviation contractors. The Department of the Treasury will take an equity stake in airlines that receive the grants. Similarly, France, Switzerland, Spain and many other countries are offering financial support to rescue businesses hit by the coronavirus.

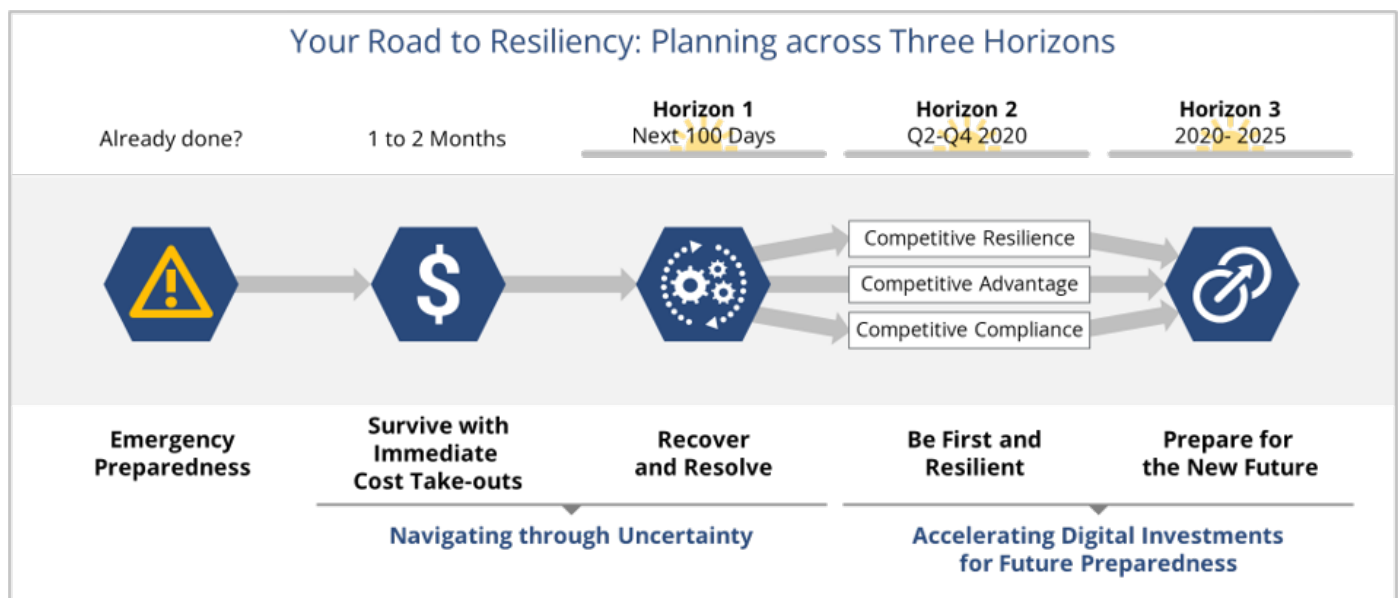


Figure 2 – Your Road to Resiliency has Several Stages that need Planning

So, what will it take to see a light at the end of the tunnel? For airline and hotel businesses to emerge stronger from the COVID-19 crisis, they must take a data-driven, action-oriented approach. They will need to have a stringent focus on restructuring the business to ensure operational resilience while building the foundation to weather such storms in the future. In this paper, ISG presents a point of view on how the airlines and hotel industries can restructure themselves once they resume operations and leverage technology to combat any future crises.



Navigating Through Uncertainty in the Business Landscape

In these uncertain times, business leaders need to think rationally, keep their focus on the long-term game and start planning now to ensure that their business remains viable. ISG believes businesses should implement a three-pronged methodology as shown in the figure below to ensure their operational continuity during and after the crisis:

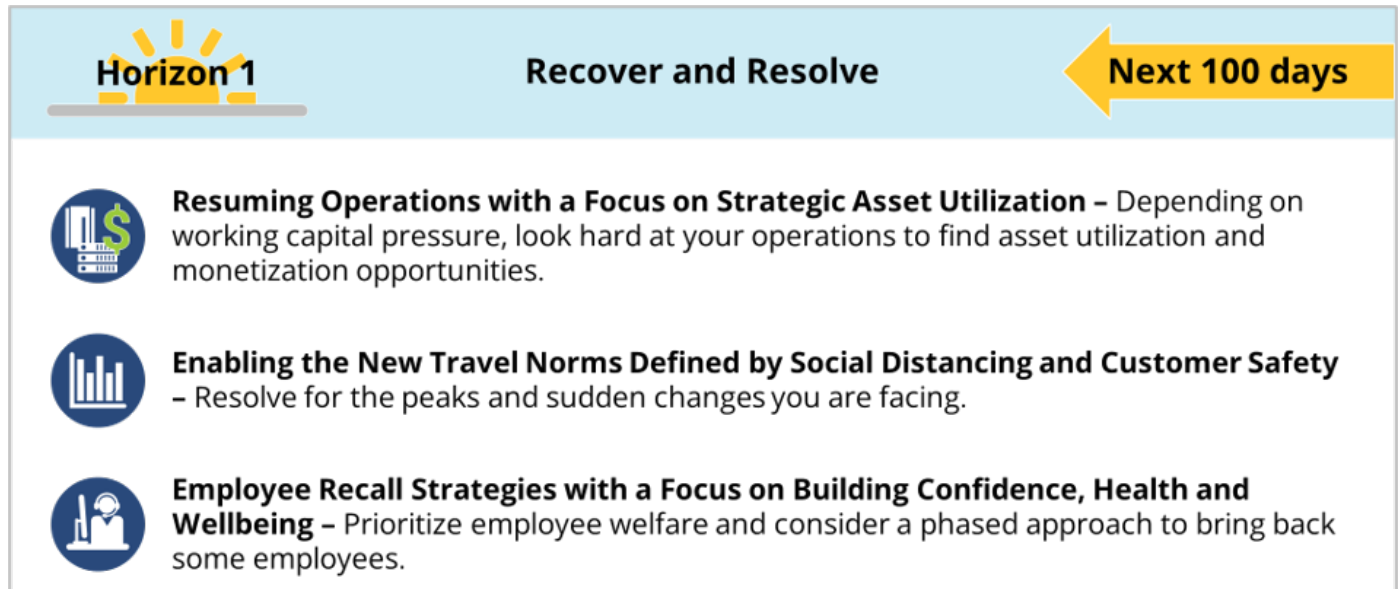


Figure 3 – Immediate Focus Areas

Resuming Operations with a Focus on Strategic Asset Utilization

Those who manage the economic impacts of this crisis unambiguously and compassionately will generate more value for their organizations and emerge stronger.

A key step when resuming operations is to reassess and prioritize funding for IT projects. With the airline and hotel industries operating at their lowest capacities, enterprises will have to recalibrate their IT strategies to optimize their processes and systems. For example, initiatives to improve communication platforms that might benefit internal operations or help improve the customer base will take precedence once businesses restart. This will help with strategic decisions related to effective asset utilization or asset disposal.

As countries gradually ease their lockdown restrictions, hoteliers will have to undertake a risk assessment before reopening their assets. With more than 90 percent of domestic hotels in China resuming their operations by the end of February 2020, hotel bookings have been increasing from business travelers, which accounts for the largest segment⁴. Hotels located near transportation hubs have been the most popular choices. Airlines, on the other hand, will witness few domestic and repatriation flights opening up with minimum capacity. A comparison with industry recovery after the 9/11 disaster or even the 2008 economy crash is of limited help. It was definitely easier to predict customer confidence and resilience for those events. Now, minus a vaccine, there are no certainties for demand increases and the predictions change daily.

Navigating Through Uncertainty in the Business Landscape (continued)

What we can predict is domestic leisure travel will recover before corporate, with international travel a distant third. This progression will require dramatic fleet calibrations by the airlines. The A380 era is over, the 777X future is uncertain, 757s and 767s are facing permanent retirement, Boeing has called off the Embraer merger, the 737 MAX recertification is on the back burner, China and Russia are increasing their production of new models, and Airbus is now shifting its focus to single-aisle aircraft. All of the above will likely result in the airlines emerging with smaller fleets than they had in January 2020.

Increased automation must be a part of all future-state planning.

Airlines should contemplate introducing long-haul, narrow-body aircraft that will suit international networks as they change from hub-and-spoke models to ones based on point-to-point flying. Even with historically low fuel prices, operations costs from flying empty are depleting even the strongest balance sheets. To mitigate the demand floor, some airlines have converted their fleets to transport cargo including lifesaving medical supplies and equipment. Cathay Pacific Airways, Korean Air Lines and American Airlines are putting their grounded passenger planes back into the air to haul goods to counter the slump. Air Canada has even gone so far to convert turbo-prop commuters into freighters.

Lastly, having a strong contingency plan in place will help airlines and hotels build resilience and react more swiftly to any future crisis. Marriott recently announced its business contingency plan implementation to mitigate the negative financial and operational impacts of COVID-19⁵. The right contingency plan needs to deal with four major areas as stated below:

- Taking actions to cut fixed costs.
- Ascertaining operating standards and procedures that can be modified to reduce variable costs without damaging the loyalty of the regular customer base.
- Tapping sources of revenue that were previously overlooked or were believed less advantageous.
- Ensuring remote working systems are running well and have necessary security patches.

Organizations may have a disaster recovery plan already in place that can provide a useful blueprint, although some plans may not cover pandemics. COVID-19 provides a good lesson that business contingency planning should be expanded, strengthened and structured to provide geographic and labor resilience. Increased automation must be a part of all future-state planning.

Navigating Through Uncertainty in the Business Landscape (continued)

Enabling the New Travel Norms Defined by Social Distancing and Customer Safety

To bring back customer confidence, hotel, airline and airport operators need to stimulate demand and incentivize travelers. They have already waived rescheduling or cancellation fees to boost customer confidence for future bookings. When travel is restored, customer experience is likely to be changed forever and social distancing may become a daily part of our lives. Since airports are places that attract large crowds, one useful solution would be to apply effective queue management processes and systems that will reduce wait times and enhance the passenger experience. For example, Delta Air Lines launched virtual queuing to notify customers when their seat is boarding, and Gatwick Airport and easyJet recently tried out a boarding technique to avoid queues and congestion at gates. Airport administrators need to think about how they can apply innovation in other places that can become crowded, such as check-in areas and customs/immigration checkpoints.

Organizations will have to put measures in place to identify travelers who are at a higher risk of contracting the virus. Thermal scanners and temperature sensors to capture body temperature along with CCTV cameras and surveillance platforms could be used to spot travelers who are showing potential signs of falling ill. Emirates, in association with the Dubai Health Authority, became the first airline to conduct on-site rapid COVID-19 screenings for passengers before boarding. Other airlines are planning to rapidly scale up testing capabilities soon. Health certificates could be developed to help determine whether a person poses a health risk to others. For example, the Civil Aviation Authority of Thailand has mandated a Fit to Fly Health Certificate that declares the passenger poses no undue risk of being infected by the coronavirus disease and must be issued no more than 72 hours prior to the departure date.

Customer experience is likely to be changed forever and social distancing may become a daily part of our lives.

Similarly, paying greater attention to in-flight experience, traveler hygiene and sanitation concerns will be non-negotiable. Airlines and hotels need to showcase their cleaning methods for aircraft and facilities to convince customers that properties and assets are being regularly sanitized, fumigated and disinfected. Airlines will have to reexamine their flight schedules because they probably will need more time to thoroughly clean cabins before the next set of passengers board. They also must

consider implementing the seat-separating approach in which every alternate seat is left unoccupied. Airlines such as Delta, Alaska and Spirit are adopting early protective measures by abolishing their middle seat booking.

Instilling guest confidence in health and safety measures will be the hotel industry's greatest challenge. To dissipate anxiety over disease transmission in confined spaces, the hotel industry's health protocols need to be reviewed and revamped considering the present crisis to provide stronger protection against future pandemics or new waves of this one. Hotels have many guest touchpoints that need to be sanitized, such as guest transport vehicles, reception and concierge stations, elevators, rooms, restaurants, recreational areas, pools, gyms, spas and business centers.

Navigating Through Uncertainty in the Business Landscape (continued)

Almost all large hotel chains are training staff in sanitization procedures that meet the hygiene and safety regulations provided by the World Health Organization (WHO) and the Centers for Disease Control and Prevention (CDC) in the U.S. Over the next few months, Marriott will use advanced technologies including electrostatic sprayers with hospital-grade disinfectants to sanitize surfaces. To ease post-coronavirus travel fears, Singapore is launching a new audit system to certify that its hotels are clean and safe. Hotels can help reassure their guests by showcasing certifications and reiterating that the facility is following local governmental guidelines through publicity channels and by updating their websites and social media platforms.

“The move to sell socially distanced seats may have immediate demand gen value but is not sustainable.”

– Todd Dirks, Director for ISG’s Travel, Transportation, & Hospitality Business Unit.

Airlines and hotels need to enhance their loyalty programs by extending points, status levels and more. Staycations are considered the top travel trend for 2020 because travelers are expected to feel more comfortable staying local or traveling domestically rather going abroad. Travelers will likely be more aware of their domestic health services and medical resources and may well feel safer traveling in their own country for some time. Therefore, for now, travel businesses should focus more on their domestic markets by dedicating more budget toward in-country advertising.

Employee Recall Strategies with a Focus on Building Confidence, Health and Wellbeing

Dealing with their workforce – with care and empathy – while readjusting their budget and forecast estimates will be a key organizational responsibility for hotels and airlines. Those that manage the economic impacts of this crisis unambiguously and compassionately will generate more value for their organizations and emerge from the pandemic tougher than ever before.



Navigating Through Uncertainty in the Business Landscape (continued)

To equitably balance the business needs with employee welfare, organizations should adopt a “recall in waves” approach. Leaders should opt for a gradual process of bringing back their employees with a focus on frontline teams, but with revised safety regulations. Enterprises can look into categorizing their employees as “essential critical workers” that can help sustain operations once demand picks up.

Employee recall strategies will also require organizations to regain employee confidence and commitment. Hotels, airports and airlines need to take steps to keep their workers safe, especially those who engage with customers and keep everything working on the ground. Cleaning a variety of touchpoints and sanitizing surfaces regularly touched by customers and employees is pivotal. Some recommendations include maintaining as much distance as possible, staggering shift start and end times, and limiting the number of workers in any area at one time.

Airlines should focus on installing protective screens at check-in desks, providing safety visors and other personal protective equipment in addition to masks and gloves, and establishing policies for what to do if a fellow employee or a passenger displays symptoms of the virus. For example, Dubai International Airport installed thermal scanners to monitor temperatures of all employees as well as protective barriers at each check-in desk to provide added safety. Emirates started serving food to passengers in bento-style boxes to minimize contact between crew and customers during meal service.

Sanitization measures should be ingrained as enterprise policy to ensure their employee health and wellbeing for a longer term.

Similarly, many major hotel chains are installing physical barriers and placing reference markers on floors to help maintain distance between employees and guests. They are implementing additional measures to keep public areas clean and to sanitize touchpoints more frequently. All repeatedly touched surfaces (such as counters, door handles and elevator buttons) need to be disinfected throughout the day. Items used by staff – such as computers, telephones, housekeeping carts and

vacuums – need to be disinfected at the start and end of each shift. Hotels can install hands-free, automated hand sanitizer stations throughout public areas and keep disinfectant wipes beside public phones.

In food and beverage departments, employers are imposing scheduled and monitored handwashing and many hotels are changing their food-serving protocols. Stand-alone properties should consider online check-in and allow guests to fill in registration information on a device to avoid paper check-ins.

All the above measures should not be practiced only for a brief period but should be ingrained as enterprise policy to help ensure employee health and wellbeing over the long term. The major chain hotels, independent properties and airline companies are all educating their management staff on protocols for dealing with employees who are ill or have tested positive for COVID-19. Hotels and airlines can also consider providing their frontline workforce with additional insurance coverage, which may include no-cost treatment and reimbursement of medical expenses for any possible fallout from COVID-19.

Accelerating Digital Investments for Future Preparedness

Enterprises are progressively evolving from the COVID-19 triage to generating new standards for operations by facilitating a future-ready workforce while laying the groundwork for innovation. Taking the right steps toward strategic digital investments at the right time will help put enterprises on a smoother path to recovery and prepare them for what may come next.

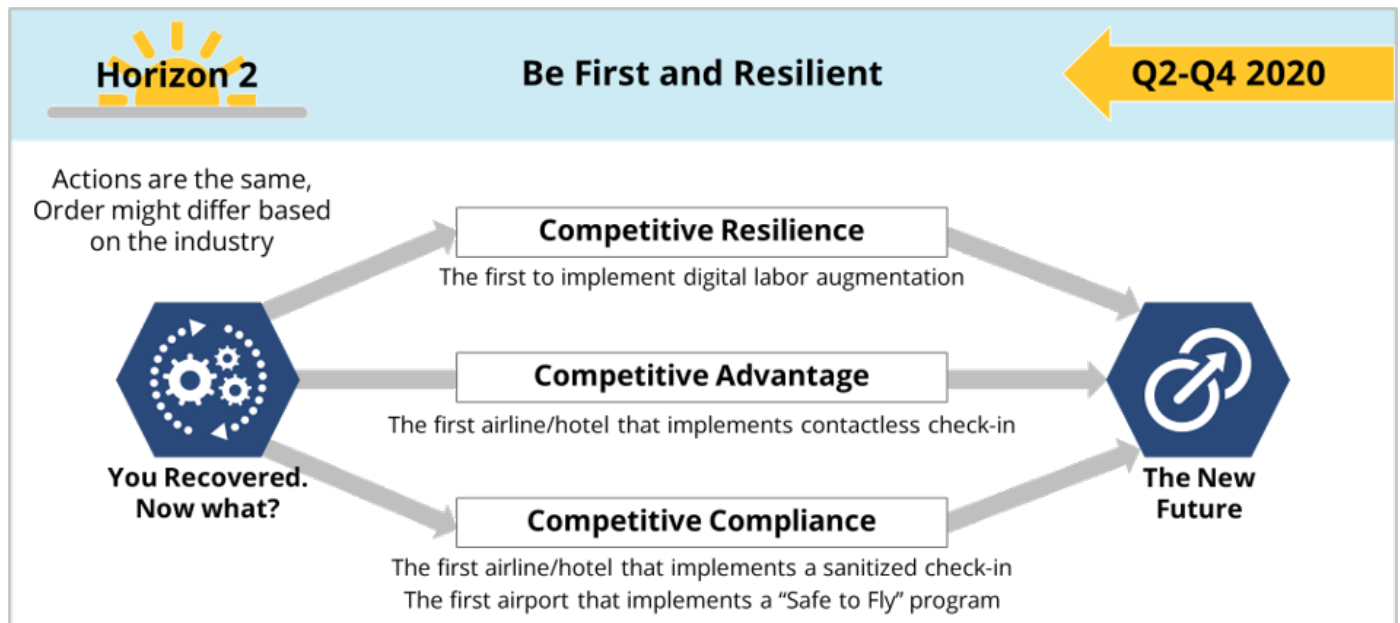


Figure 4 – Seize the Opportunities in 2020 and be Poised for what's next

Using Digital to Reinvent Travel and Create Long-term Value for the Consumer

Hotels and airlines will need to focus on making the consumer travel journey safe, with minimal physical touchpoints. To do that, enterprises will need to accelerate their investment in technologies that reduce dependency on the human workforce, such as robotics, automation and biometrics. When customers start to travel again, they will want to have touch surfaces and interact with agents as little as possible, and therefore it will be essential to automate as many processes as possible. Using facial recognition biometrics, contactless payments and digital wallets will be the new normal for hoteliers.

Contactless payment use may get a boost because UK Finance, an industry group with more than 250 members, raised the spending limit for contactless card payments from £30 to £45. Etihad Airways is testing a range of contactless, self-service technologies, developed by Elenium, that will revolutionize a customer's processes for checking in, baggage drop, using customer service kiosks, boarding and duty-free shopping.

Touchless interactions with kiosks and the use of personal devices to check-in, navigate through the terminals and hotel lobbies, manage in-flight and in-room entertainment, and even interact with agents will be on the rise. This also creates an opportunity for airlines and hotels to convince customers to use their apps for regular and ancillary services.

Accelerating Digital Investments for Future Preparedness (continued)

For a speedy and effective recovery, hotels and airlines will require increased use of predictive analytics on data gathered about the spread of the virus, flight restrictions being levied and customer sentiment to influence strategy planning for early rebooking and reviving customer confidence. Hotels can use AI and machine learning to show travelers personalized offers and amenities based on their preferences to improve customer retention. Hotel Data Cloud, a Dubai-based software company, is launching an AI and machine learning-enabled recommendation engine that it says will improve click-through rates across online bookings by more than 35 percent. Airlines and hotels also should simplify their points redemption process through automation and offer customers round-the-clock support through AI-enabled chatbots. With interactive chatbots, businesses can respond to customer queries in less time, which is especially valuable when query volume is heavy. The technology can be a lifesaver in a crisis like this because it does not need any human intervention.

Using Technology to Improve Operational Efficiency and Resume Production at Pace and Scale

Adopting next-gen employee safety programs will help enterprises to resume operations quickly and efficiently.

Cloud technology will become increasingly critical to the hospitality industry. While cloud services have been around for a while now, the industry needs to accelerate its move-to-cloud strategy to help reposition and sail through any future crises. Property management systems on the cloud will facilitate hoteliers to manage much of their properties wholly off-site, from managing reservations to establishing rate cards. As an add-on to property management systems, cloud-

based guest messaging systems permit hoteliers to speak with their guests about reservation amendments, cancellation guidelines and refunds – all from anywhere and at any time. Cloud capacity, especially from the hyperscale vendors, is what will help enterprises adapt to a sudden shift because of the economies of scale. With the increased phishing attacks, cloud providers are offering virtual desktop and VPN solutions with identical or even improved data and cybersecurity capabilities as they did in an on-premises setting. This will help systems adapt to a remote working culture at scale in case of any future crisis.

Both airlines and hotels will be looking to reduce costs and make operations more efficient by reducing energy bills. The use of Internet of Things (IoT) solutions will be vital for many travel operators because it allows essential devices to be monitored and repaired or replaced before they stop functioning. For example, hotel staff can be alerted if a radiator or light bulb starts to deteriorate. The Internet of Things can also be deployed for aircraft fuel management and digital aircraft maintenance (internal and MRO) to help replace aircraft components at the right time, hitting the ideal balance between gaining maximum value and providing safety.

Accelerating Digital Investments for Future Preparedness (continued)

Early detection is key to helping businesses stay resilient and be better prepared for any future crisis. AI algorithms will assist in drilling through reports, social media and other online platforms around the world to help professionals realize the risk of a possible threat even before it reaches pandemic scale. BlueDot, a Canadian startup, uses natural language processing to skim through millions of news articles and analyzes air traffic information to monitor human and animal health and predict the spread of infectious diseases.

The accelerating need of cloud strategy to support remote workforce has increased the demand of hyperscale vendors.

A report from National Geographic explains how examining the internet or social media can help detect the initial stages of a probable crisis⁶. Successful predictive modeling implementations will give real-time, market-based predictions and to help prepare for the consequences of bookings and cancellations. Analytics gained through big data along with IoT inputs can help in real-time analysis and to decentralize processes. The data can also help create precision-targeted marketing and promotions, offer tailored guest services based on past preferences, and enable more personalized interactions with hotel staff.

Technology Strategies to Safeguard Employee Health and Safety

With employees working from home organizations need to ensure that their IT infrastructure can respond to new demands from increased remote access. Cybersecurity measures need to be strengthened and airlines and hotels must accelerate their plans to build a robust remote working infrastructure and take advantage of virtualization, the cloud and collaboration tools that keep their employees safe and productive during the ongoing crisis.

Wearable technology is evolving rapidly as manufacturers and frontline professionals are assessing their potential to tackle health and safety concerns. Hotel chains including Marriott and Hilton have announced plans to provide their employees with wearables by the end of 2020 to help keep them safe. All employees will have access to employee safety devices (ESDs) and hoteliers are committed to invest in and train resources as necessary. Present-day ESDs use Bluetooth beacon technology that pinpoints their exact GPS coordinates. This way, hotel staff are assured that their security is managed by an integrated and intuitive safety platform.



Accelerating Digital Investments for Future Preparedness (continued)

React Mobile, a hospitality safety technology provider, offered its staff safety platform to its customers for free in April and May 2020 to help alleviate the growing impact of COVID-19. Developers are using the React Mobile API to build applications and platforms to add SOS-alerting capabilities to smartwatches.

In another example, the Dubai Health Authority used 3D printing technology to develop protective face gear for all frontline workers. The new mask provides protection to the eyes, unlike typical masks that barely cover the nose and mouth, and part of it can be reused after sterilization. The Dubai Police Force has also introduced smart helmets to help detect COVID-19. The helmet is fitted with an infrared camera that can scan the temperature of vehicle drivers and passengers. The helmet is AI-enabled for face recognition and vehicle license number reading. Airlines and hotels can draw inspiration from such examples to keep their employees safe and secure.

A mobility-as-a-service solution leveraging IoT could open up an entirely new spectrum that providers can take advantage of to make airports of the future. Potential use cases including enabling passengers and guests to book and pay for airport transfers, handle travel documents, track baggage, provide digital beacon-linked maps for easier routing and order added services.

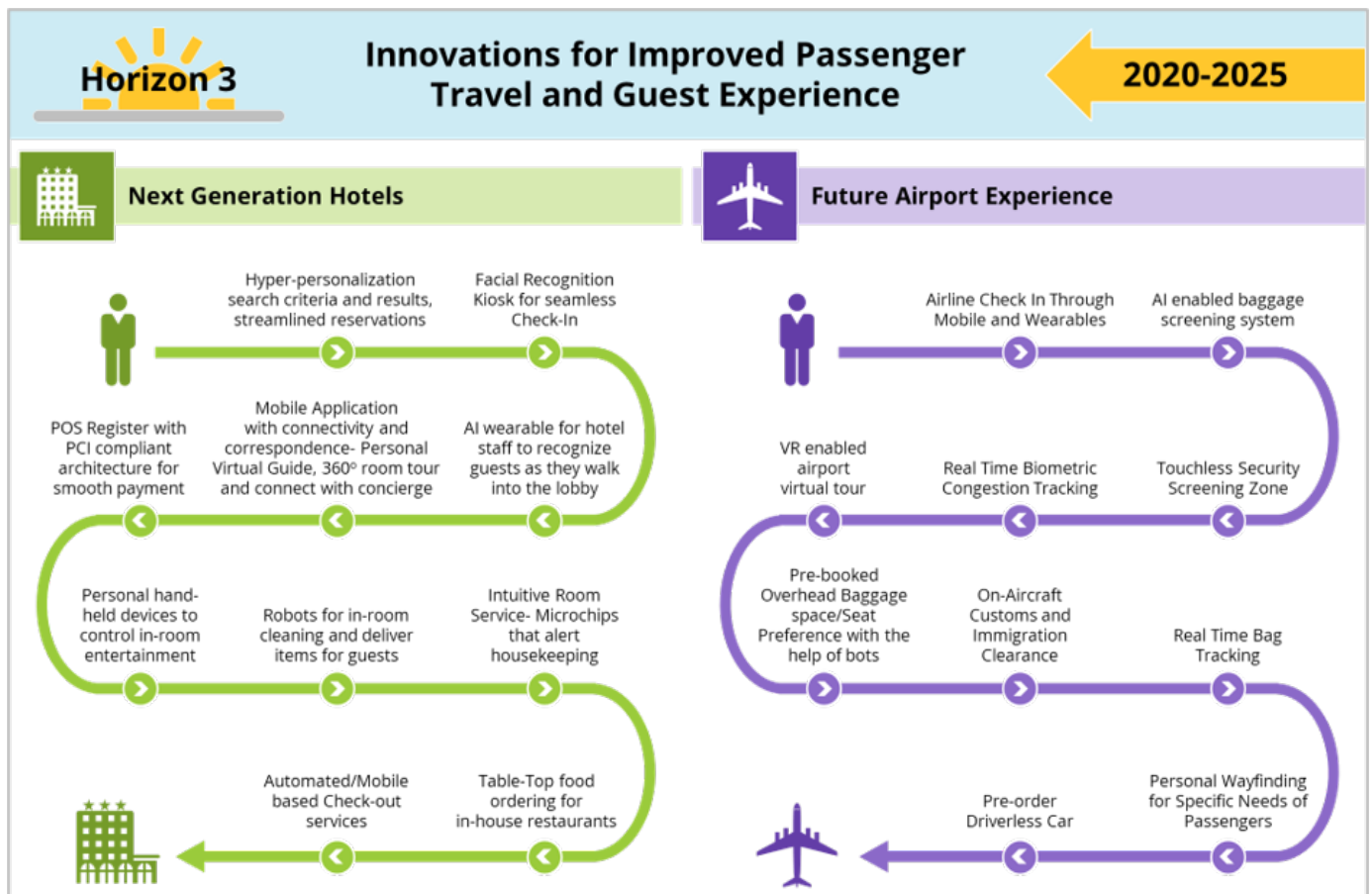


Figure 5 – Looking Out 1-5 Years – How will your Business Change Forever?

Conclusion

It is still too early to have a detailed sense of the extent of damage that the COVID-19 outbreak will cause. A long-term downturn in the economic activity resulting from the pandemic crisis has dampened travel sentiment. As the airline and hotel industries strive hard to return to normalcy, their leaders will actively seek solutions to help them structure for recovery. Enterprises will have to start carving out a holistic IT strategy like the one detailed in this paper and take into account not only near-term implications but their long-term business goals.

The post-coronavirus commercial environment will see digital labor augmentation become even more pervasive. Market competition and the new disruptors we've seen in recent years will be relentless post-COVID-19, and we are likely to see more M&A activity. This will drive an intense focus on security for data and physical assets, not to mention employees. As companies pay attention to their workers' health and wellbeing, environmental sustainability initiatives will take precedence and drive substantive, sustainable initiatives.

Market competition and new disruptors will become even more relentless post-COVID-19 and we are likely to see more M&A activity.

We've noticed in the past couple of years that vendor fatigue with incumbents is pushing hotel and airline clients to implement a multi-provider services environment. Clients are willing to take on more risk and work with niche players that can infuse innovation and ideation into their ecosystem. Service providers and partners that can do things quickly and substantively impact the bottom line will have a distinct advantage.

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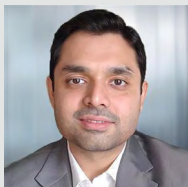
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