

# Mainframes — Services and Solutions

## Mainframe Technology Consulting

A guide to extending mainframe capabilities and modernizing applications to integrate cloud services

QUADRANT REPORT | MARCH 2026 | U.S. PUBLIC SECTOR, GLOBAL

Customized report courtesy of:

**DXC** TECHNOLOGY



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**Effective use of AI and agentic AI is creating new opportunities to modernize mainframes**

**Overview**

The challenges associated with operating and maintaining mainframe applications and systems remain relevant. GenAI and agentic AI are presenting new solutions to ongoing issues related to poorly documented mainframe applications and the aging pool of professionals who understand them. Software costs also remain a significant expense for public sector organizations. Finding new ways to improve efficiency in the current infrastructure helps mitigate some of these costs.

**The U.S. Public Sector**

**Funding environment**

The end of the COVID-19 era stimulus funding, such as the American Rescue Plan Act (ARPA), has brought public sector funding

back to normal levels after a period of above-average growth. With these funds running out and the Department of Government Efficiency (DOGE) cutting funds at the federal level, significant disruption has created an environment of uncertainty.

While the beginning of 2025 was adversely affected by this disruption, the second half seems to be bouncing back and the sector is experiencing renewed growth. Many providers report that new deals and RFPs will come through in the latter part of 2025.

**Increasingly unsustainable in-house management**

In many cases, state and local governments manage their mainframes in-house, with an aging workforce. Like many industries, this sector faces major challenges as its workforce ages; when experienced employees retire, they take with them the specialized knowledge needed to run these machines. Most systems lack proper documentation, and there are few professionals with the right skills available to learn these legacy systems. In the public sector, this problem is particularly acute as there is less

GenAI and agentic AI present new solutions to the long-standing problems posed by legacy mainframes.



documentation and fewer resources available. The disruption and uncertainty surrounding government funding are creating an increased incentive for these professionals to retire.

Secondly, the responsibility of funding mainframe maintenance is increasingly being shifted to smaller groups within agencies. In the past, mainframe maintenance costs were borne by several groups or departments. As more groups migrate applications and workflows to the cloud, a major share of the financial burden to maintain these machines falls on the remaining teams. This factor is expected to drive the growth of mainframe services in the public sector over the next few years.

Public sector mainframes are mission-critical, and constituents rely on them daily. Service disruption is not an option.

### **High security and costs**

Public sector agencies have consistently sought to maintain robust security while controlling costs. As AI and quantum computing enable new methods of launching advanced cyberattacks, the public sector must stay vigilant to ensure mainframes remain secure.

### **Offshoring gaining wider acceptance**

Limits on where sensitive government data can be stored have made it difficult for state and local governments to take advantage of low-cost offshore resources. However, the growth of hybrid architectures and mainframe optimization strategies, such as DevOps, APIs and microservices, is easing the offshoring of less sensitive code and data to lower-cost regions. Governments are increasingly accepting offshore teams, provided developers do not have access to sensitive data.

### **Reimagining mainframe modernization**

Mainframe modernization strategies are becoming increasingly focused. Rather than having clients assess the seven or five R's of Rehost, Refactor, Replatform, Repurchase, Retire, Retain, or Replace strategies, providers emphasize helping clients in deciding where they want their applications to continue operating. Providers have developed strategies around staying on the mainframe, integrating with the cloud, or getting off the mainframe. By focusing more on business outcomes rather than technology, buyers and providers

can effectively achieve their desired goals. AI and agentic AI capabilities are making each of these strategies more accessible.

The emergence of AI and its use in optimizing mainframes is motivating organizations to keep their applications on the platform. AI can document mainframe applications and extract business rules, helping developers gain a better understanding of how these complex, undocumented applications work and simplifying their maintenance.

Even if organizations choose to keep applications on the mainframe, access to this vital data is important for both applications and to train AI models on the cloud. Investments in secure APIs and connecting mainframe data to cloud ecosystems is an important capability. Leading providers are also leveraging model context protocol (MCP) servers to make AI tools and agents available to partners, enabling them to collaborate on mainframe modernization.

For those that want to shift applications off the mainframe, AI plays a key role in reverse engineering, forward engineering and building test cases to ensure that the resulting

applications are effectively maintained and produce parallel functionality.

Providers are at different stages of integrating AI into their tools and platforms. More advanced players are using AI to document applications and break down functionality into smaller blocks that can be analyzed, documented, refactored and tested. Those that are integrating industry knowledge and schemas into this document phase are even further along the journey.

It is essential to the success of AI implementation in modernization that mainframe experts are involved in the process. Projects without guardrails and robust testing strategies are less likely to succeed. Providers that continue to invest in mainframe training and testing will be in a significantly better position to maximize the benefit of the future mainframe modernization.

### **Mainframe as a valuable platform**

#### **AI on the mainframe**

The release of the SPYRE cards and AI acceleration on the IBM z17 are repositioning



## Executive Summary

the mainframe as a platform for running AI applications and models. The mainframe possesses significant computing power and has robust security capabilities. These factors make it an ideal platform for running AI models. When running models on the mainframe, the required sensitive data can stay on the mainframe without being moved to a less secure cloud. While the mainframe is a potentially powerful platform for running code, there is little evidence that organizations are migrating workloads to this platform.

### Quantum safe security

The new z17 supports quantum-safe security, enabling quantum computing innovation while defending against quantum threats. Building on these capabilities, providers are developing quantum-secure encryption that takes current encryption algorithms from 256 bytes to quantum encryption at 3,366 bytes.

### Software modernization in the public sector


The U.S. public sector has unique requirements that mainframe modernization software vendors must meet to compete. They must

adhere to strict governance frameworks and prioritize risk management while minimizing disruption.

Providers that can fully understand mainframe code and applications before transformation commences are in a much better position to avoid disruptions. Software providers that offer visibility into and control over the migration process are more in demand in the public sector. Vendors that rely on software black boxes are less likely to be successful working with SLED organizations.


By focusing on business outcomes rather than technology, buyers and providers can collaborate effectively to achieve their desired goals.



 Provider Positioning **Page 1 of 5**


	Mainframe Technology Consulting	Mainframe as a Service	Application Modernization Services	Mainframe Application Modernization Software (Global)
Accenture	Leader	Product Challenger	Leader	Not In
Amdocs	Not In	Not In	Rising Star ★	Leader
Atos	Rising Star ★	Product Challenger	Product Challenger	Not In
Avanade	Not In	Not In	Product Challenger	Product Challenger
AveriSource	Not In	Not In	Product Challenger	Leader
AWS	Not In	Not In	Not In	Leader
BASE100	Not In	Not In	Not In	Product Challenger
BlueHill Data Services	Not In	Contender	Not In	Not In
Capgemini	Leader	Market Challenger	Leader	Not In
CloudFrame	Not In	Not In	Not In	Rising Star ★



 Provider Positioning **Page 2 of 5**


	Mainframe Technology Consulting	Mainframe as a Service	Application Modernization Services	Mainframe Application Modernization Software (Global)
Cognizant	Market Challenger	Rising Star ★	Product Challenger	Not In
CPT Global	Contender	Not In	Not In	Not In
Deloitte	Product Challenger	Not In	Market Challenger	Not In
DXC Technology	Leader	Leader	Leader	Not In
Ensono	Leader	Leader	Leader	Not In
EvolveWare	Not In	Not In	Not In	Product Challenger
FNTS	Product Challenger	Leader	Not In	Not In
FreeSoft	Not In	Not In	Not In	Contender
Fujitsu	Not In	Not In	Contender	Not In
Google	Not In	Not In	Not In	Leader



 Provider Positioning **Page 3 of 5**


	Mainframe Technology Consulting	Mainframe as a Service	Application Modernization Services	Mainframe Application Modernization Software (Global)
HCLTech	Product Challenger	Product Challenger	Product Challenger	Not In
Heirloom Computing	Not In	Not In	Not In	Leader
HPE	Not In	Not In	Contender	Not In
IBM	Product Challenger	Not In	Product Challenger	Product Challenger
Infosys	Leader	Product Challenger	Leader	Not In
INNOVA	Not In	Not In	Contender	Not In
Karsun Solutions	Not In	Not In	Contender	Product Challenger
Kobee	Not In	Not In	Not In	Contender
Kyndryl	Leader	Leader	Market Challenger	Not In
LRS	Not In	Not In	Not In	Contender



 Provider Positioning **Page 4 of 5**

	Mainframe Technology Consulting	Mainframe as a Service	Application Modernization Services	Mainframe Application Modernization Software (Global)
mLogica	Not In	Not In	Contender	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Not In
NTT DATA	Not In	Not In	Leader	Leader
PalmDigitalz	Not In	Not In	Not In	Product Challenger
PSR	Not In	Contender	Not In	Not In
Raincode	Not In	Not In	Not In	Contender
Recovery Point Systems	Not In	Market Challenger	Not In	Not In
Rocket Software	Not In	Not In	Not In	Leader
TCS	Leader	Leader	Leader	Not In
Tech Mahindra	Product Challenger	Not In	Product Challenger	Not In



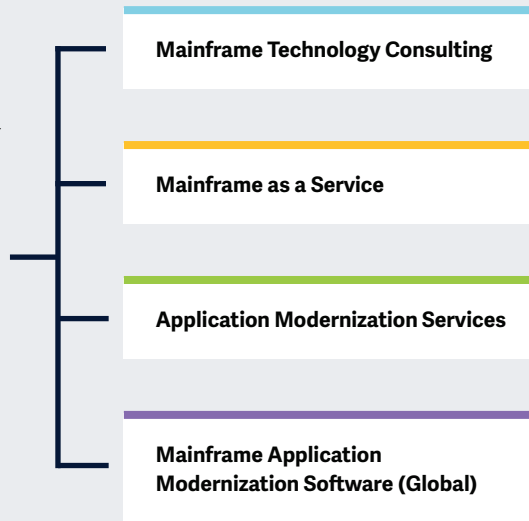
 Provider Positioning **Page 5 of 5**

	Mainframe Technology Consulting	Mainframe as a Service	Application Modernization Services	Mainframe Application Modernization Software (Global)
TmaxSoft	Not In	Not In	Not In	Leader
TSRI	Not In	Not In	Product Challenger	Leader
Unisys	Leader	Market Challenger	Contender	Not In
Updraft	Not In	Not In	Not In	Contender
Verang	Not In	Not In	Contender	Not In
Virtel	Not In	Not In	Not In	Contender
VirtualZ Computing	Contender	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Not In



# Key focus areas for Mainframes – Services and Solutions 2026 study.

Simplified Illustration Source: ISG 2026



## Definition

The mainframe market is undergoing a fundamental change as enterprises balance modernization with resilience. Cloud innovation is pushing organizations to reevaluate the way mainframes integrate with hybrid IT landscapes, with growing attention on seamless data access, software licensing optimization and use of middleware and third-party tools. Concurrently, cloud-native application development has become the new standard, driving enterprises to adopt microservices, APIs, containers, serverless computing and AI-driven engineering practices. These shifts are challenging established mainframe application management models and accelerating the demand for modernization strategies.

Generative AI (GenAI) has further transformed this environment. In the past year, it has redefined automation and application transformation approaches, impacting refactoring, replatforming, rehosting, rewriting and reengineering. Providers are increasingly embracing GenAI and AIOps to deliver self-healing systems, automated troubleshooting, reduced technical debt and

rapid responsiveness to business change. These are also reshaping development workbenches and software engineering. This study assesses providers offering mainframe consulting, mainframe as a service (MFaaS) and system integration services for modernization and migration. It also evaluates global vendors of automation and transformation tools for modernization. Organized into four quadrants, the report examines the way providers and vendors leverage GenAI and AI analytics, and take cloud-native approaches to improve quality, ensure cost efficiency, focus on innovation and achieve desired business outcomes.



### Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: Mainframe Technology Consulting, Mainframe as a Service, Application Modernization Services and Mainframe Application Modernization Software (Global).

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional markets

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

### Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

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

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

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





**Provider Classifications: Quadrant Key**

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**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.

**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.





# Mainframe Technology Consulting

## Who Should Read This Section

This report is valuable for providers offering **mainframe technology consulting** in the **U.S. public sector** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### **Chief information officers**

Should read this report to assess the strengths and weaknesses of mainframe technology consulting providers in terms of offerings, delivery capabilities, market presence and deployment of latest technologies. Understanding the mainframe market advancements is critical for IT executives to shape effective, future-proof modernization strategies and ensure their organizations maintain competitive agility and resilience.

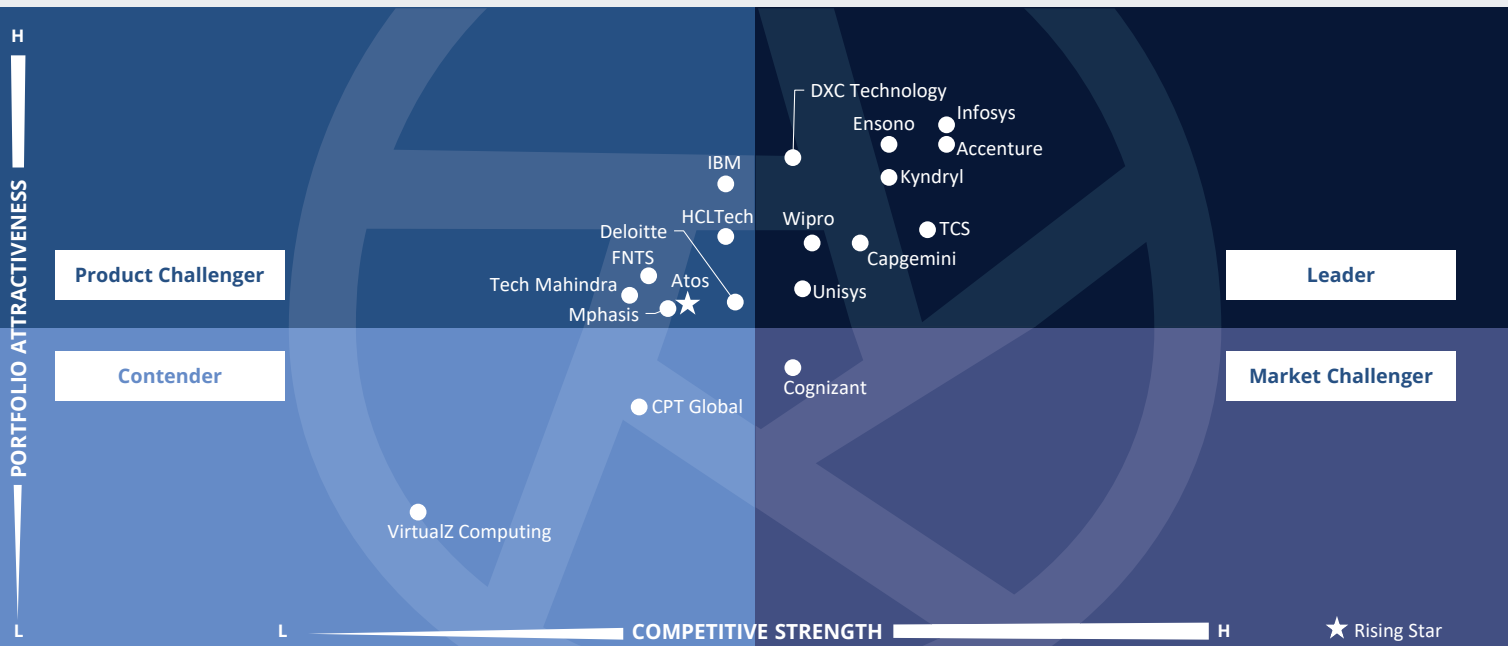
### **Directors of infrastructure and operations**

Should read this report to evaluate their enterprises' current and future IT infrastructure needs to manage and design IT strategies. A mainframe technology consulting engagement enables enterprises to create definitive objectives for sub-functions related to business units and define efficient procedures to determine mainframe budgets.

### **Sourcing, procurement and vendor management professionals**

Should utilize this report to better understand mainframe technology consulting services' current landscape and partner ecosystem in the U.S. public sector. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver immediate value and sustainable long-term benefits.





Improving the operation of mainframes is crucial to support efficient operations. The Mainframe Technology Consulting quadrant assesses project-based technology services to improve mainframe operation.

Peter Crocker



## Mainframe Technology Consulting

### Definition

Providers in this quadrant are consulting firms that specialize in supporting enterprises in maintaining, updating and integrating mainframe systems with their broad IT landscape. The services are typically project-based and include upgrading operating systems, middleware and application languages for secure, efficient and resilient operations. The providers also advise on lifecycle management, workload optimization and MIPS reduction to avoid obsolescence and extend the value of legacy investments for clients. They are also increasingly deploying advanced technologies such as AI, ML and AIOps for automation, self-healing and intelligent monitoring, and fostering adaptive development environments through DevOps, code repositories, AI assistants and automated testing in mainframe practices. They further drive innovation by using GenAI to document legacy code, improve management and enable seamless integration with hybrid cloud and modern software delivery models.

### Eligibility Criteria

1. Demonstrate **innovative client case studies** across IBM Z®, IBM iSeries/AS400, HP, Bull or Unisys mainframes
2. Hold **partner certifications** or authorizations to deploy new systems, middleware and upgrades
3. Showcase expertise in **updating application** languages and legacy codebases
4. Deploy **DevOps, AI and automation** within legacy programming environments to improve CI/CD practices
5. Deliver comprehensive portfolio, **workload and application assessments** as a part of client engagements
6. Provide clear **technology road maps**, covering innovation, testing and quality assurance tooling
7. **Enable hybrid cloud integration** by decoupling legacy codes and ensuring secure data access
8. Offer **advisory services** for future-state governance, compliance and lifecycle planning
9. Employ considerable **certified mainframe experts** with proven COBOL and mainframe system experience



## Mainframe Technology Consulting

### Observations

Mainframe Technology Consulting is a new quadrant in the Mainframes — Services and Solutions 2026 study. This quadrant notices a shift in focus among public sector organizations and enterprises in managing mainframe challenges. In the past, many of these organizations sought to migrate off their mainframes and shut them down. However, the outlook is evolving and they are looking to leverage the mainframe as a more inclusive part of their IT estate. Large organizations are realizing that transitioning completely off the mainframe is an extremely complex, costly and time-consuming process. At the same time, AI and agentic AI organizations are helping providers to better understand how mainframes operate and how they can be optimized and integrated with modern technologies. Such changes are encouraging organizations to remain on the mainframe while running operations and applications efficiently. With many organizations' sensitive and most important data residing on the mainframe, more

applications and data remain on the platform. This limits access to cloud-based applications, driving demand for secure integrations.

Service providers that can effectively help clients address these problems and maximize their mainframe investments are leading the industry.

From the 49 companies assessed for this study, 19 qualified for this quadrant, with 9 being Leaders and one Rising Star.

### accenture

**Accenture** is a global IT and business consulting provider. The company is one of the world's largest consulting firms, leveraging its deep business and IT expertise to deliver superior business outcomes for its clients.

### Capgemini

**Capgemini** is a global consulting company based in France. However, it also serves many clients in the U.S. public sector. The company's strategy focuses on developing a broad talent base to deliver services in the mainframe technology consulting market.

### DXC TECHNOLOGY

**DXC Technology** is a global IT service provider headquartered in the U.S. The company's mainframe strategy focuses on optimizing the mainframe and addressing the challenges of maintaining its infrastructure and applications.

### ensono

**Ensono** is a mainframe services specialist with a strong presence in the U.S. public sector. This specialization contributes to its superior offerings and services, driving growth faster than its more diversified competitors.

### Infosys

**Infosys** views the U.S. public sector as an important strategic driver and is positioning the organization to capitalize on it. The company offers a broad range of products and strategic partnerships.

### kyndryl

**Kyndryl** is the spinoff of IBM's service business, which provides it with unparalleled knowledge of IBM operating systems and access to new technology. The company also has one of the largest mainframe businesses globally.

### TCS

**TCS** is one of the largest global IT companies, providing mainframe technology consulting and support services. Its mainframe business is a key source of revenue. The company's specific IP helps differentiate it from the rest of the market.

### unisys

**Unisys**' ClearPath is a set of technologies and platforms that run legacy Unisys mainframe operating systems on modern enterprise servers. The company is primarily focused on servicing this technology.



## Mainframe Technology Consulting



**Wipro** is increasing investments in value-added services and innovation, building on its role as a traditional systems integrator. The company is also working to capture internal expertise and knowledge to help train better AI models to support future consulting engagements.

### Atos

**Atos** (Rising Star) is a France-based IT service provider recovering from a few challenging years marked by strategic and financial roadblocks. The company has now rebounded and is positioned for growth.





“DXC Technology has a well-defined strategy to help clients remain on the mainframe by eliminating the challenges associated with running applications on the mainframe.”

*Peter Crocker*

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 120,700 employees across over 70 countries. In FY25, the company generated \$12.9 billion in revenue. DXC has over 5,500 certified mainframe employees globally supporting mainframe services. The public sector is a key revenue contributor to the mainframe consulting practice, generating 14 to 18 percent of revenues. The company’s primary objective is to increase market share in the public sector mainframe by minimizing the TCO.

## Strengths

**Optimization focus:** DXC is dedicated to optimizing the mainframe, enabling customers to further leverage the platform. By making mainframes increasingly efficient and manageable, the company aims to eliminate the need to migrate off the platform. Modernizing in place negates the cost and risks associated with complex migration projects.

**Development tools and services:** DXC’s holistic approach to mainframe services focuses on harmonizing tooling across mainframe and non-mainframe ecosystems to streamline development. The company also provides on-demand development and testing environments to support innovation, testing and pilots.

**Quantum-safe encryption:** DXC has improved its mainframe security capabilities to include quantum-safe encryption. This capability protects against next-generation cyberattacks.

**Unique hardware utilization capabilities:** DXC has negotiated unique IBM hardware contracts that allow DXC to migrate MIPS across various mainframe environments. This capability enables more efficient use of mainframe capacity and the recovery of previously unutilized MIPS. It also provides clients with new ways to reduce costs.

**Linux capabilities:** DXC has the capability to migrate Z/OS workloads to zLinux without changing architecture or code. This capability enables cost takeout with limited disruption.

## Caution

Still working out their AI strategy and platform with OASIS, the company’s AI platform, not generally available. DXC’s holistic approach and focus on standardizing tooling may limit its ability to experiment with AI and different use cases, slowing AI development.





# Appendix

## Methodology & Team

The ISG Provider Lens® 2026 Mainframes — Services and Solutions study analyzes the relevant software vendors/service providers in the U.S. PS, Global markets, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Study Sponsor:**

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

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

The study was divided into the following steps:

1. Definition of Mainframes — Services and Solutions 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 & Editor Biographies

*Lead Author (U.S. Public Sector)*



**Peter Crocker**  
**Lead Analyst**

Peter leads the Microsoft Ecosystem Provider Lens research for ISG for the United States and the US public sector. He is an experienced IT market analyst, entrepreneur, and content creator with over 15 years of experience covering software applications and services. Peter has founded multiple companies and has worked with many boutique research and consulting firms delivering marketing services and insights to software vendors, IT service providers, and telecom equipment vendors. His primary area of expertise is in mobile, cloud, digital transformation, and enterprise applications.

In addition to evaluating markets and IT service providers for ISG, Peter works with clients to produce thought leadership and product marketing messaging and content in the information technology sector. Peter holds an MBA in marketing from the College of William and Mary and BA in psychology from Rollins College.

*Lead Author (Global)*



**Pedro Luís Bicudo Maschio**  
**Distinguished Lead Author**

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.



## Author & Editor Biographies



Research Analyst

**Manoj M**  
**Research Specialist**

Manoj is a research analyst at ISG and supports ISG Provider Lens® studies on Private/Hybrid Cloud – Data Center Services, Mainframes and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors. He has considerable expertise in predicting the automation

impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.



Study Sponsor

**Heiko Henkes**  
**Director & Principal Analyst, Global IPL Content Lead**

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding

of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.



## Author & Editor Biographies



*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 research director, principal analyst 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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## **\*ISG**

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

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

For more information, visit [isg-one.com](http://isg-one.com).





**MARCH, 2026**

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**REPORT: MAINFRAMES — SERVICES AND SOLUTIONS**