ISG Provider Lens®

Mainframes – Services and Solutions

Mainframe as a Service

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

Customized report courtesy of:

DXC TECHNOLOGY

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

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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 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

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	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

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	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

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	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

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	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

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	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.

- Mainframe Technology Consulting
- Mainframe as a Service
- Application Modernization Services
- Mainframe Application Modernization Software (Global)

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.

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 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.

Mainframe as a Service

Who Should Read This Section

This report is valuable for providers offering **mainframe as a service** 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 as a service 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 as a service 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 as a 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 both immediate value and sustainable long-term benefits.

The Mainframe as a Service quadrant evaluates service providers **delivering mainframe managed services** to U.S. public sector agencies. These services are delivered either through staff support or **subscription-based** outsourced infrastructure.

Peter Crocker

Definition

This quadrant assesses providers delivering mainframe services through subscription-based models, including MFaaS, as well as traditional outsourcing approaches.
In the MFaaS model, providers take complete responsibility for processing capacity, storage, infrastructure operations, security and ongoing maintenance, often embedding them in hybrid cloud environments. Other outsourcing models range from facility management to comprehensive services, covering system operations, middleware, monitoring, capacity planning, technical support, disaster recovery and staff augmentation. The capability to bundle these services determines the breadth and attractiveness of a provider's portfolio, with MFaaS offerings representing the pinnacle of integration, automation and scalability.

By outsourcing mainframe operations, enterprises transfer the responsibility and risk to the provider, reducing CapEx and predictable operating costs and allowing agile responses to business and market demands.

Eligibility Criteria

1. Deliver **full mainframe environments**, including facilities, hardware, connectivity, OS, subsystems, licensing and tools
2. Provide **professional services** and expertise to ensure availability and meet performance metrics
3. Operate secure, **high-availability data centers** with proven disaster recovery capabilities
4. Offer **automation** for job scheduling, batch processing, performance optimization and routine system operations
5. Ensure **regular patching, upgrades and security** updates for operating systems, middleware and applications
6. Provide **low-latency and carrier-neutral connections** in public cloud environments
7. Demonstrate **financial capacity to expand** and maintain mainframe operations at scale
8. Maintain structured **hiring and training programs** to secure the availability of future mainframe skills
9. Enable **client access to dashboards** with utilization data, performance indicators, chargeback and reporting

Observations

Mainframe-as-a-service (MFaaS) offerings enable clients to offload the risks and costs of managing mainframe infrastructure in-house to a provider. To succeed in this business, providers must have the scale to operate infrastructure and manage software licenses profitably. Alternatively, they must offer value-added services that can support the investment in offering MFaaS to their clients.

This trend creates a distinct divide between MFaaS specialists and value-added providers in the MFaaS quadrant. Specialists are pulling away from more diversified providers. In many cases, diversified providers are outsourcing their MFaaS offerings to specialists that can deliver them efficiently.

From the 49 companies assessed for this study, 17 qualified for this quadrant, with 6 being Leaders and one Rising Star.

DXC Technology is a global U.S.-based IT service provider that focuses on optimizing mainframe environments and mitigating the challenges of maintaining mainframe infrastructure and applications.

Ensono is a mainframe services specialist and leads the MFaaS market with a strong presence in the public sector. This focus enhances the company's offerings and services, helping it grow faster than more diversified competitors.

FNTS is a subsidiary of First National of Nebraska. The company's experience in highly regulated industries, such as financial services, gives it an advantage when collaborating with U.S. public sector agencies on managing mainframe infrastructure.

Kyndryl is the spin-off of IBM's service business, providing it with deep knowledge of IBM operating systems and access to new technology. The company also operates one of the largest MFaaS businesses in the market.

TCS relies on its mainframe optimization services and the mainframe business as key sources of revenue. The company offers flexible business models and can deliver a range of complementary services to support a diversified mainframe management and modernization strategy.

Wipro is a large global service provider based in India. The company is increasing investments in value-added services and innovation. This investment is building on its role as a traditional systems integrator to deliver superior MFaaS to public sector agencies.

Cognizant (Rising Star) is gaining traction in the public sector through its acquisition of Belcan, an engineering firm serving the aerospace and defense industries.

Leader

"DXC Technology's commitment to the mainframe and to helping its clients stay on the platform through risk reduction and optimization differentiates the company from its competitors."

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 more than 5,500 certified staff worldwide supporting mainframe services. The MFaaS offering is the largest source of revenue for the company's mainframe services group. The U.S. public sector is a significant revenue source for this group, accounting for an estimated 12 percent of its total revenue. The company's primary objective in mainframe services in the public sector is to increase market share by minimizing TCO.

Strengths

Embracing the mainframe as a strategic asset: DXC pursues a deliberate strategy that treats the mainframe as a strategic asset and optimizes it to operate in a hybrid ecosystem. The strategy focuses on reducing the costs and risks of running applications on the mainframe, eliminating the need to contend with the uncertainty associated with migrating applications to the cloud or other platforms. The company's MFaaS offering is a key component of this approach.

Cost savings: Unique IBM hardware contract that allows it to shift MIPS across mainframe environments to recover unutilized MIPS. This capability has driven multiple early renewals in the public sector owing to its measurable cost savings.

Economies of scale: As one of the largest MFaaS providers, DXC has significant negotiating leverage in the market to lower costs and pass savings to customers. This strategy also enables a global delivery model to address sovereignty and compliance issues while leveraging low-cost countries.

Software factory: DXC operates a software factory that automates deployments, upgrades and patches. It can also adjust automation based on the unique configuration of a logical partition (LPAR). This capability reduces operating costs and improves MFaaS reliability and performance.

Caution

DXC's strategy focuses on maintaining applications on the mainframe. Customers seeking MFaaS as an interim solution before migrating off the mainframe may be better served by providers that specialize in mainframe migration.

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.

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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

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.

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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

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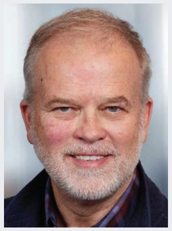
Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

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.

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ISG

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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.

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