ISG Provider Lens®

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange Business

QUADRANT REPORT | DECEMBER 2025 | EU

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Sovereign cloud is now a baseline requirement for regulated workloads in Europe

The European sovereign cloud infrastructure market has entered a period of strategic urgency in 2024–2025, driven by regulatory enforcement, geopolitical tensions and the push for digital autonomy. Sovereign cloud has shifted from a niche proposition to a foundational requirement for enterprises and public sector institutions operating in regulated environments. The EU AI Act, NIS2 Directive and Data Act have elevated compliance-centric platforms to the forefront of digital strategy, particularly for workloads involving sensitive data, critical infrastructure and national security.

At the heart of this transformation is the demand for data localization, jurisdictional control and zero unauthorized access. Enterprises expect infrastructure to be hosted entirely within EU borders and governed exclusively by EU legal frameworks. This shift aligns with a broader move toward vendor-neutral, sovereign-by-design architectures, often leveraging open-source technologies such as OpenStack, Kubernetes and Terraform to enable portability, interoperability and strategic independence.

Enterprise priorities: Compliance, resilience and transparency

In 2025, enterprise priorities are defined by three key requirements: regulatory alignment, architectural resilience and commercial transparency. Certifications such as SecNumCloud 3.2, BSI C5, ISO 27001/20000 and TÜV IT Level 4 have become baseline requirements for vendor consideration in regulated industries such as healthcare, financial services and government.

Resilience is equally critical, with enterprises expecting multizone EU-based data centers, customer-managed encryption keys (HYOK) and policy-driven infrastructure services that support secure DevOps and disaster recovery. Providers are responding with sovereign reference architectures, certified value-added services and open marketplaces that

Open-source interoperability drives vendor neutrality and long-term digital autonomy.

align with national strategies. Transparent pricing—covering reserved capacity, dedicated infrastructure and usage-based billing—has also become a priority, particularly for public sector clients.

Regulatory landscape: Enforcement and expansion

The regulatory environment in Europe has evolved rapidly. The EU AI Act, finalized in 2025, mandates risk-based governance for AI systems and includes strict provisions for data residency, auditability and algorithmic transparency. The NIS2 Directive, effective from October 2024, imposes cybersecurity requirements on cloud providers, including incident reporting, supply chain risk management and continuity planning. The Data Act, adopted in mid-2024, strengthens users' control over data by mandating interoperability, portability and transparency in data-sharing agreements.

Together, these frameworks establish a comprehensive regulatory baseline that providers must meet across technical, legal and operational dimensions, thereby redefining sovereign cloud expectations in Europe.

Market trends: Fragmentation, federation and innovation

The European sovereign cloud market is characterized by fragmentation and federation. While global hyperscalers still dominate the infrastructure share, regional providers are gaining momentum by aligning closely with national strategies. For example, OVHcloud has partnered with DEEP in Luxembourg to deliver a disconnected sovereign model, while Scaleway has positioned itself in sovereign AI compute through its integration with NVIDIA DGX™ Cloud Lepton.

Federated sovereignty initiatives such as Virt8ra and Bleu are enabling cross-border interoperability under shared governance. Innovation is also accelerating in areas such as low-energy data centers, lifecycle software management and open-source orchestration, embedding sustainability and transparency into sovereign offerings.

Disruptive forces: AI, cybersecurity and strategic autonomy

Disruptive forces are reshaping market priorities. AI adoption is accelerating, with 78 percent of European organizations using AI tools in 2024 (up from 55 percent in 2023), driving demand for sovereign AI infrastructure to support training, inference and deployment under EU jurisdiction.

Cybersecurity concerns are increasing demand for air-gapped environments, external key management and confidential computing. Providers are embedding zero-trust architectures, automated compliance tooling and real-time threat detection to mitigate insider threats and foreign surveillance risks.

Strategic autonomy—the ability to operate independently of non-EU influence—has become central to procurement. Enterprises are scrutinizing vendor ownership, governance and legal exposure, prompting a marked shift toward European-owned and -operated platforms.

Competitive landscape: Hyperscalers versus regional providers

Global hyperscalers are investing heavily to maintain relevance in Europe. AWS has committed €7.8 billion to its European Sovereign Cloud and plans to launch its first independent region in Brandenburg, Germany, by the end of 2025. Microsoft is pursuing localized sovereignty through Bleu (France) and Delos Cloud (Germany), while Google Cloud is embedding sovereignty through alliances with Thales (S3NS) and T-Systems, using client-side encryption and air-gapped models. Oracle is expanding its sovereign regions in Frankfurt and Madrid, delivering Fusion Applications under EU legal insulation.

Regional providers are reinforcing their role through localized infrastructure, open-source governance and compliance leadership. IONOS has introduced GDPR-compliant AI services and codeveloped SECA for interoperable sovereign infrastructure. STACKIT, Tietoevry and T-Systems are building multicloud sovereign platforms for SAP, AI and industrial workloads, while PlusServer, Noris Network and 3DS OUTSCALE emphasize SecNumCloud-certified, KRITIS-compliant offerings for public sector clients.

Sector adoption: From compliance to transformation

In the EU, sovereign cloud infrastructure is gaining traction beyond its regulatory roots, being embraced as a transformative tool across key sectors. As privacy and data residency requirements remain paramount, enterprises are discovering that sovereign clouds offer more than just compliance—they provide a trusted platform for accelerating digital initiatives such as AI integration, collaborative workflows and customized sector-specific solutions.

- Adoption is strongest in regulated industries.
- Financial services are leveraging sovereign cloud to comply with DORA, with a focus on auditability and secure data storage.
- Healthcare services rely on HDS-certified platforms for electronic health records, telemedicine and clinical research.

Government agencies are using sovereign cloud for digital identity, citizen services and national security applications.

Use cases are shifting from basic compliance to digital transformation, with enterprises now deploying sovereign cloud for AI-driven analytics, secure DevOps and cross-border collaboration. Metrics such as uptime guarantees, data residency assurances and deployment velocity have become core measures of provider performance.

Innovation and strategic readiness

Providers are preparing for the next wave of demand through advanced encryption, compliance automation and open-source orchestration. Strategic readiness is measured by the breadth of certifications, the resilience of multizone architectures and alignment with national cloud strategies.

For example, SAP's Sovereign Cloud offers flexible deployment models across infrastructure, platform and software layers, tailored to sector-specific regulatory requirements. Marketplace ecosystems of certified sovereign applications are also accelerating, further reinforcing ecosystem growth.

Outlook and recommendations

The European sovereign cloud market is entering a scale-up phase in which compliance with the GDPR, Gaia-X, the EU AI Act and the NIS2 Directive is no longer optional but foundational. Beyond regulatory adherence, enterprises and providers are increasingly viewing sustainability, transparent pricing and open standards as the next major differentiators that will shape competitive advantage.

In the short term, through 2025, growth will be primarily driven by regulatory mandates and enterprise risk strategies, as organizations seek to ensure alignment with evolving compliance frameworks. Over the next three years, however, expectations will broaden significantly: open-source interoperability, sustainability compliance and transparent commercial models will transition from competitive advantages to baseline requirements, defining the new standard for sovereign cloud offerings in Europe.

Enterprises evaluating providers should prioritize multizone EU architectures, certification leadership and strong alignment with sovereignty goals to ensure resilience and regulatory coverage. Providers must strike a balance between technical sovereignty and commercial viability, embedding sustainability practices and open standards into their long-term roadmaps to remain competitive.

Ultimately, the market leaders will be those that successfully combine sovereignty, innovation and sustainability into scalable, compliant ecosystems tailored to Europe's unique policy environment and industry needs.

The European sovereign cloud market is entering a phase of strategic urgency. Enterprises now require infrastructure that is fully governed by EU law, operated by EU personnel and architected to prevent unauthorized access. Compliance, resilience and transparency have become the baseline for provider selection, while AI, cybersecurity and sustainability are shaping future adoption and competitive differentiation.

Provider Positioning

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	Sovereign Cloud Infrastructure Services
AWS	Leader
Clever Cloud	Contender
Cloud Temple	Contender
DATAGROUP	Contender
Deutsche Telekom/T-Systems	Leader
Google	Leader
IONOS	Product Challenger
Microsoft	Leader
noris network	Contender
Oracle	Leader

Provider Positioning

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	Sovereign Cloud Infrastructure Services
Orange Business	Leader
OUTSCALE	Product Challenger
OVHcloud	Leader
plusserver	Contender
Proximus Group	Contender
S3NS	Contender
Scaleway	Product Challenger
STACKIT	Product Challenger
Vivicta	Contender

This study focuses on what ISG perceives as most critical in 2025 for **multi public cloud services**.

Simplified Illustration Source: ISG 2025

Sovereign Cloud Infrastructure Services

Definition

This study evaluates providers within the public cloud and AI value chain, offering consulting and transformation solutions, managed services, FinOps, sovereign infrastructure, cloud-native platforms and SAP-focused solutions. These providers enable enterprises to modernize, secure, manage and scale multicloud and AI-native environments using automation, GenAI and advanced optimization frameworks.

Cloud adoption is accelerating not only for scalability or cost efficiency but also for fostering AI innovation, driving sustainability and ensuring regulatory compliance. Enterprises demand dynamic, composable cloud solutions that integrate intelligent operations, FinOps governance and AI orchestration across public and sovereign infrastructures. The widespread adoption of intelligent automation tools further streamlines data management processes and allows businesses to prioritize innovation over mundane tasks, driving demand for rearchitecting strategies and cloud-native solution expertise.

Providers that support agentic AI, hybrid FinOps-AIOps models and transformation roadmaps tailored to cloud-native development are well-positioned to lead. Sovereignty, sustainability and interoperability are no longer optional; enterprises expect secure, jurisdiction-compliant infrastructure, workload portability and customer-controlled encryption models such as Hold Your Own Key (HYOK).

Enterprises aim to leverage agentic AI and GenAI to enhance productivity, streamline operations and foster innovation. To stay relevant, providers must demonstrate technical expertise, regulatory awareness and the ability to embed AI technologies into their service architectures. This study highlights those shaping the future of the public cloud through next-generation platforms and transformation services.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following quadrant for services/solutions: Sovereign Cloud Infrastructure Services.

This ISG Provider Lens® study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the regional market

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.

Sovereign Cloud Infrastructure Services

Who Should Read This Section

This report is valuable for service providers offering **Sovereign Cloud Infrastructure Services** in **the EU region** 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.

IT leaders

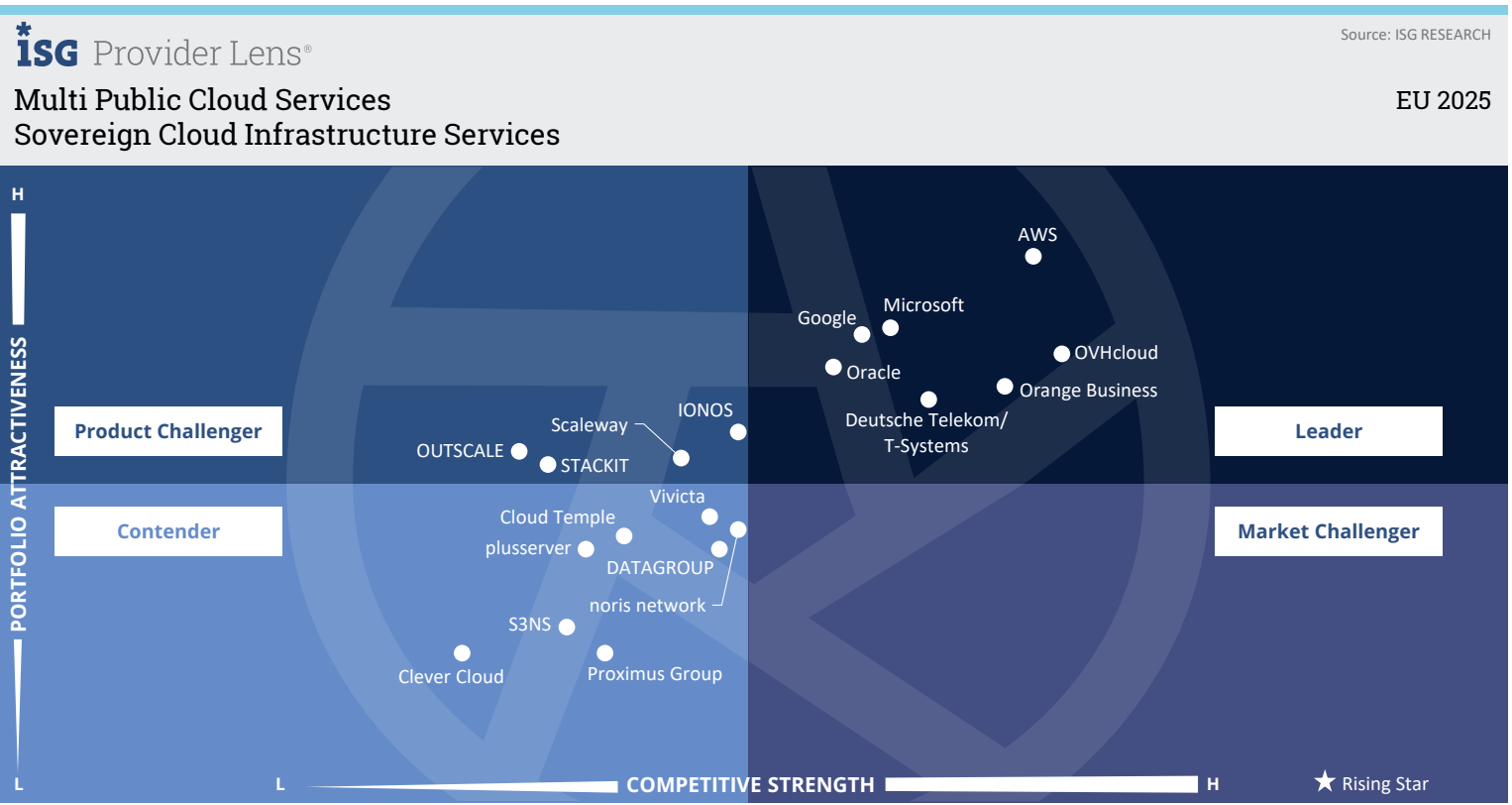
Should read this report to better understand sovereign cloud infrastructure service providers' relative strengths and weaknesses and how they can impact enterprise public cloud strategies. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to understand sovereign cloud providers' relative positioning and capabilities and how they can help migrate workloads to public cloud platforms. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape of sovereign cloud infrastructure service providers in the EU. 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.



This quadrant assesses service providers that demonstrate strong **Eurozone data center** presence, EU **compliance**, **resilient** architectures, customer-controlled **encryption**, **open standards** adoption, emerging regulatory adherence, transparent **pricing** and **sustainable** operations.

Meenakshi Srivastava

Definition

This quadrant evaluates cloud infrastructure providers offering secure, scalable and compliant platforms for enterprise and public sector workloads requiring full data sovereignty within the Eurozone. These providers empower clients to maintain exclusive control over data location, access and encryption, ensuring all infrastructure services comply with EU regulations and jurisdictional requirements. Sovereign cloud infrastructure must ensure:

- Granular data localization, allowing clients to define storage and processing zones within specific EU member states
- Strict jurisdictional control, mandating that all operations are governed exclusively by EU legal frameworks
- Zero unauthorized access, with proactive defense mechanisms against cyberthreats and fortified environments for sensitive data
- Interoperability with open standards, including support for open-source technologies, such as OpenStack, Kubernetes and Terraform, to avoid vendor lock-in and facilitate portability
- Compliance with European regulations, including Gaia-X, GDPR and the Data Act and sector-specific frameworks such as the EU AI Act, NIS2 Directive, DORA (financial services) and HDS (healthcare)

Sovereign cloud platforms should offer both enterprise-grade IaaS capabilities and compliance-aligned architectural models, which include:

- Compute, memory, storage and networking resources through on-demand, reserved or dedicated models
- Container orchestration, backup/recovery and policy-driven infrastructure services supporting secure DevOps
- Sovereign cloud reference architectures that ensure the separation of sovereign and non-sovereign data, while aligning with national strategies
- Open marketplace integration enabling access to compliant software and value-added services certified for sovereign environments

Eligibility Criteria

1. Showcase data center presence within Eurozone countries and **compliance with national and EU-wide mandates** for data residency, processing and legal oversight
2. Ensure compliance **with core EU certifications**, including: BSI-C5, SecNumCloud, ISO 27001/20000, EN 50600, TÜV IT Level 4, PCI DSS, KRITIS, HDS, HIPAA and adherence to Cloud CoC and CISPE codes of conduct
3. Provide a technical architecture built for **resilience**, including at least two interconnected EU-based data centers for disaster recovery and replication
4. Offer full support for **customer-managed encryption keys (HYOK)** and granular access policy management
5. Adopt **open-source technologies and adhere to industry standards** to foster interoperability, sustainability and independence from non-European control
6. Ensure compliance with emerging **regulatory frameworks** such as the EU AI Act and the NIS2 Directive for risk-based cybersecurity management
7. Have public documentation of **transparent pricing models**, including per-usage billing, reserved capacity and dedicated infrastructure options
8. Implement **sustainability principles**, including low-energy data center designs and long lifecycle software deployment models

Observations

The European sovereign cloud landscape has evolved substantially since last year, reflecting a broad industry commitment to digital sovereignty, regulatory compliance and operational autonomy. Leading providers have transitioned from early pilot phases to fully operational sovereign cloud infrastructure across multiple EU regions, supported by significant investments and advanced governance models.

AWS, Microsoft and Google have expanded their European footprints and enhanced security, encryption and trust services tailored to EU data protection laws and industry-specific regulations. Oracle and Orange Business have deepened their regional presence with certified platforms and specialized sovereign cloud divisions targeting regulated industries and government sectors.

OVHcloud and T-Systems have advanced their sovereign cloud offerings by launching dedicated platforms and hybrid solutions with rigorous EU-only operational controls, addressing growing customer demands for compliance and data residency.

These developments align with the EU's strategic vision to reduce dependence on non-European technologies, foster innovation and build a federated, interoperable cloud ecosystem that supports Europe's competitiveness and digital autonomy. The investments and capabilities introduced by these providers are foundational to establishing a trusted, secure and sovereign cloud infrastructure across Europe's public and private sectors.

From the 19 companies assessed for this study, 19 qualified for this quadrant, with seven being Leaders.

aws

AWS delivered a €7.8 billion investment in the EU Sovereign Cloud, delivering full EU operational control and new trust services designed to meet stringent European regulatory standards.

Deutsche Telekom/T-Systems has launched T Cloud, unifying hybrid and multicloud sovereign services with strict EU-only operations, elevating compliance and autonomy for critical EU data.

Google

Google has advanced its EU Sovereign Solutions by integrating Mandiant security, customer-managed keys and partnership options for compliant, autonomous cloud operations.

Microsoft

Microsoft is accelerating the expansion of Azure Sovereign Cloud, with enhanced customer-controlled encryption and in-region support, serving highly regulated EU sectors.

Oracle

Oracle has established multiregion, fully EU-staffed sovereign cloud environments, supporting migration of public and regulated sector workloads, backed by strong compliance certifications.

orange Business

Orange Business has achieved SecNumCloud security certification and intensified sovereign service delivery for defense, healthcare and public sector clients in France and the EU.

OVHcloud

OVHcloud is expanding its federated sovereign cloud across Luxembourg and the broader EU, enabling government-grade data autonomy and compliance for sensitive workloads.

Leader

"By effectively combining sovereign private clouds with hyperscaler public clouds, Orange Business delivers flexible hybrid architectures that address complex regulatory and performance requirements in Europe."

Meenakshi Srivastava

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business is a part of the Orange Group, which operates across 26 countries in B2C. It offers sovereign cloud infrastructure services on its Cloud Avenue platform, which is SecNumCloud qualified in its Grenoble Datacenter in France, and through its joint venture, Bleu, in partnership with Capgemini and Microsoft. Orange Business owns and operates six data centers in France and the Nordics, and four partner data centers in Sweden and Germany.

Strengths

European sovereignty and compliance: Orange Business, through its next-generation cloud platform Cloud Avenue, reinforces trust by ensuring data residency and regulatory compliance rooted in its strong European identity and telecom heritage. The platform's SecNumCloud certification for its Grenoble data center in France underscores its leadership in sovereign cloud standards.

Robust data center infrastructure: Orange Business operates multiple certified data centers that meet local regulatory requirements, offering a trusted partner with a single point of contact. It guarantees availability and business continuity through fully redundant solutions and highly scalable infrastructure, supported by its network-native digital services heritage. The company manages these centers except in Germany and adheres to a European framework, ensuring GDPR compliance and legal sovereignty. Facilities feature a power usage effectiveness (PUE) of 1.3 and are powered by renewable energy.

Integrated cloud and security: By seamlessly combining cloud services, connectivity and cybersecurity, Orange Business offers an integrated approach that is unmatched in the market. Advanced features, such as intrusion detection/prevention systems (IDS/IPS), encrypted virtual machines (VMs) and customer-controlled key management systems, are provided as standard, enhancing resilience and trust.

Superior network performance: Leveraging its Tier One operator status, Orange Business guarantees optimal network performance and low-latency connectivity. This capability is particularly critical in France, where the company maintains unmatched market leadership.

Caution

Orange Business should enhance regional partnerships across additional European markets to expand its sovereign cloud reach and reinforce compliance coverage. Simultaneously, it should invest in the ongoing upskilling and certification of cloud talent to meet the evolving requirements of enterprise customers.

Appendix

Methodology & Team

The ISG Provider Lens® 2025 – Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the EU market, 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 report includes research 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. The data collected for this report represent information that ISG believes to be current as of November 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Multi Public Cloud Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

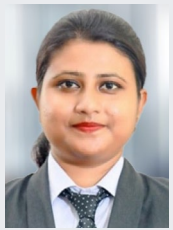
Author

Meenakshi Srivastava
Lead Analyst

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure, analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens®, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure, such as private and hybrid cloud.

She holds a Bachelor's degree in Electronics Engineering from Mumbai University and an MBA in Marketing from the Indian Institute of Management, Jammu (IIM Jammu).

Enterprise Context and Overview Analyst



Arpita Choudhury
Senior Research Analyst

Arpita is a Senior Research Analyst at ISG. She is responsible for supporting and co-authoring ISG Provider Lens® studies on Public Cloud and Private Hybrid Cloud Data Center Solutions and Services. Arpita supports the Lead Analysts in the research process across multiple regions and authors the global summary report, as well as the focal points. She also collaborates with the Lead Analysts in the process of rating the providers and in building insights around the market trends and drivers.

She has led and supported ad-hoc research requests in investment banking, healthcare, energy, and information and communication technology. During this period, she has also spent a significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence, and benchmarking. Her areas of interest are broadly technology, finance and business strategy.

Study Sponsor

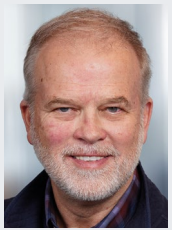
Heiko Henkes

Director and Principal Analyst

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the 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 renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

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.
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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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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ISG Provider Lens®

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