ISG Provider Lens®

Workday Ecosystem

Innovation on Workday

A report analyzing the strengths and competitive positioning of Workday service provider partners

Customized report courtesy of:
cognizant

QUADRANT REPORT | OCTOBER 2025 | EUROPE

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Capitalizing on Workday's AI and innovation wave in Europe

The market for Workday-enabled HR, finance and planning solutions across Europe is moving into a stage of advanced maturity. The initial push for cloud-based transformation has been replaced by an emphasis on maximizing ROI, embedding AI at scale and linking technology adoption directly to business outcomes. Enterprises are no longer merely going live with Workday; they are optimizing, extending and integrating it into the strategic core of their operations.

Workday continues to be a leading choice for European organizations seeking a unified, secure and scalable platform. Its road map, anchored in its AI platform (Illuminate), analytics, Workday Extend and ESG reporting, aligns with the region's complex regulatory requirements, multilingual needs and diverse cultural contexts. Simultaneously, the ecosystem of partners, including global system integrators, consulting firms and niche specialists has become indispensable in tailoring deployments, ensuring compliance and sustaining adoption. Together, Workday and its partners are driving operational agility, regulatory readiness and differentiated EX across Europe.

From adoption to value realization

Cloud adoption has become the baseline, with the new priority being the delivery of measurable business outcomes from Workday investments. Enterprises expect reductions in time to hire, swift financial close cycles and tangible productivity gains. Workday's native analytics, continuous updates and embedded best practices enable the refinement of processes without the need for disruptive overhauls.

Partners are embedding value measurement into every stage of the Workday lifecycle. Common practices include diagnostic-led optimization, peer benchmarking and targeted automation. Furthermore, industry-specific accelerators such as prebuilt compliance templates or sector-focused reporting packs enable quick time to value.

AI-driven innovations help European enterprises boost **efficiency, compliance** and **agility.**

AI and intelligent automation at the core

Workday's AI strategy has moved beyond experimentation into operational reality. At the center is *Illuminate*, its framework for AI agents designed to perform specific HR and finance roles such as hiring assistants, payroll verifiers, financial auditors and policy compliance agents, delivering measurable efficiency gains. These agents are managed within the Agent System of Record (ASR), a governance layer ensuring consistency, security and accountability across Workday-built and partner-created agents.

Workday's focus on agentic AI, capable of completing multistep tasks without human intervention, is unlocking new possibilities, including conversational hiring journeys for frontline roles, compliance-ready onboarding experiences and automated close processes that integrate data from across enterprises. For partners, the release of AI developer toolsets, including Workday's Expanded AI Gateway and Developer Copilot that accelerates app creation, unlocks opportunities to build region-specific solutions such as GDPR-aware compliance agents, multilingual onboarding bots and localized payroll assistants. This innovation is backed by Workday's two decades of unified HR and finance data, ensuring model accuracy and context-aware outputs, critical in Europe's tightly regulated environment.

Regulatory and compliance excellence

Europe's multijurisdictional regulatory environment, anchored by GDPR and expanded by ESG mandates, tax rules and employment laws, demands robust compliance capabilities. Workday's embedded audit trails, consent management tools and regulatory updates ensure readiness for evolving legal requirements.

Partners provide the localization layer by tailoring Workday's compliance features to each market. They develop multicountry frameworks within a single tenant, conduct audit-readiness simulations and maintain continuous regulatory monitoring. In sectors such as banking and healthcare, where compliance breaches incur high penalties, these combined capabilities serve as a key differentiator.

Sustainability and ESG as strategic priorities

The Corporate Sustainability Reporting Directive (CSRD) and other European frameworks are transforming ESG from a corporate responsibility measure to a board-level compliance requirement. Workday's ESG tools integrate sustainability metrics such as carbon footprint, diversity data and governance indicators into the same environment as HR and financial data, enabling consolidated reporting and insight generation. Partners are extending these capabilities with industry-specific ESG accelerators, including carbon impact trackers for manufacturing, diversity dashboards for healthcare and supply chain risk monitors for retail. This integration allows organizations to link ESG performance directly to operational KPIs, improving transparency and fostering stakeholder trust.

Localized EX and talent retention

In a competitive labor market across Europe, EX is a strategic priority. Workday's self-service, mobile-first design and personalized dashboards empower employees to access HR and finance tasks from anywhere. Partners enhance these capabilities with localized workflows, cultural customizations and integration into regional collaboration tools. For industries such as hospitality and retail, mobile-first onboarding in local languages has reduced attrition within the first 90 days. Meanwhile, in professional services, personalized career development dashboards have boosted internal mobility.

Optimizing Workday Extend for market-specific needs

Workday Extend enables organizations to tailor core platform functionality to local and industry-specific requirements without custom code outside the system. In Europe, this flexibility supports regulatory compliance, specialized workflows and multilingual service delivery.

Partners are developing Extend apps such as tax calculators for specific countries across Europe, localized expense approval flows and GDPR consent trackers. These apps integrate seamlessly with core Workday, improving adoption and reducing operational friction.

Overcoming cross-border complexity

Operating across multiple European countries creates challenges in payroll, benefits, taxation and compliance. Workday's multicountry capabilities, supported by partner-led localization, enable organizations to centralize governance while facilitating local execution.

Global system integrators often deploy regional hubs for payroll and compliance, supported by shared governance frameworks. This hybrid approach delivers standardization for efficiency while retaining the flexibility to meet country-specific requirements.

Embedding optimization beyond go-live

After deployment, organizations in Europe are turning to application management services (AMS) to sustain adoption and drive continuous improvement. Workday's biannual updates introduce new features, but adoption requires testing, change management and configuration tuning. Partners differentiate by integrating AI into AMS for automated release testing, predictive issue detection and ongoing skills enablement. This approach ensures that configurations evolve with business needs and that clients continue to maximize ROI following the initial go-live.

Partner ecosystem evolution

The partner ecosystem in Europe is diversifying. Global system integrators bring scale, cross-industry expertise and proprietary automation frameworks, while niche players excel in localized delivery, industry-specific compliance and cultural adoption. Cosourcing models are becoming increasingly popular, blending internal expertise with partner specializations for ongoing operations.

An emerging class of intellectual property (IP)-led innovators is delivering proprietary software, often in the form of Extend apps that enhance Workday functionality, from automated compliance checks to advanced analytics. This approach accelerates time to value and creates new revenue streams for partners, while increasing the platform's stickiness for clients.

Outlook for 2025 and beyond

The Workday market in Europe is transitioning from being cloud-enabled to autonomous-ready. The next phase of transformation will be driven by integrated AI agents, continuous optimization and embedding compliance and ESG into core workflows. Workday's innovation road map, anchored in Illuminate, agentic AI and an open developer ecosystem, positions it to address Europe's dual demands for agility and governance.

With a partner ecosystem that blends global scale with local nuance, the opportunity is evident that enterprises in Europe can achieve operational efficiency, regulatory certainty and employee engagement, all within a future-ready digital core.

> Enterprises in Europe will accelerate Workday adoption in 2025, leveraging AI and cloud innovation to drive strategic goals, boost efficiency, strengthen compliance and deliver enhanced EX across diverse markets.

Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Accenture	Leader	Leader	Leader	Leader
BNB	Contender	Contender	Contender	Product Challenger
Capgemini	Product Challenger	Product Challenger	Product Challenger	Contender
CloudRock	Contender	Contender	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
E1 Consulting	Contender	Contender	Contender	Not In
Genpact	Contender	Not In	Not In	Not In
Hexaware	Product Challenger	Product Challenger	Product Challenger	Contender
HR Path	Leader	Leader	Leader	Product Challenger

Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
IBM	Market Challenger	Market Challenger	Leader	Market Challenger
Invisors	Product Challenger	Rising Star ★	Product Challenger	Leader
Kainos	Leader	Leader	Leader	Leader
KPMG	Leader	Leader	Product Challenger	Leader
Mercer	Leader	Product Challenger	Product Challenger	Product Challenger
Preos	Contender	Product Challenger	Not In	Not In
PwC	Leader	Leader	Leader	Leader
Strada	Leader	Leader	Leader	Leader
UST	Not In	Contender	Contender	Contender
Vivicta	Product Challenger	Product Challenger	Product Challenger	Product Challenger

The **Workday study focuses** on the road map of **Workday and its service partners** to provide intelligent HCM and financial management.

- **Transformation Services**
- **Deployment and Integration Services**
- **Performance and Optimization Services**
- **Innovation on Workday**

Simplified Illustration Source: ISG 2025

Definition

Workday's commitment to innovation, its adaptability and its ongoing focus on product enhancement have enabled it to stay ahead of competition, attract new clients and expand its market presence. Currently, Workday has a share of more than 40 percent in the cloud HCM market, primarily driven by its ability to ensure superior UX. Despite the complexity of customization, Workday's modern user interface and focus on customer satisfaction set it apart from its competitors.

The recent Spring 2025 release, with over 350 new features along with innovations such as Workday Illuminate, Workday Orchestrate and AI agents for HR and finance, is going to revolutionize the way digital HCM services are delivered by its partners and consumed by enterprise clients. These new solutions leverage AI to streamline tasks, enhance decision-making and transform business processes, reinforcing Workday's commitment to innovation and enhanced UX.

Workday's partnerships with industry leaders such as Salesforce and Equifax have strengthened its market position. These partnerships have expanded Workday's HCM capabilities on these platforms, ensuring seamless integration with Workday modules.

In mid-2024, Workday introduced the Built on Workday program to leverage generative AI (GenAI) and agentic AI, enhancing its HCM and finance solutions. This initiative empowers partners to develop specialized applications, enabling Workday to offer increasingly comprehensive and tailored solutions and also opening new revenue streams for partners. Additionally, in September 2024, Workday, in collaboration with key service partners such as Accenture, CrossVue, Deloitte, Invisors, Kainos, KPMG, Mercer and PwC, launched the Industry Accelerator program, featuring 12 preconfigured solution accelerators.

Scope of the Report

In this ISG Provider Lens® quadrant study, ISG includes the following four quadrants: Transformation Services, Deployment and Integration Services, Performance and Optimization Services and Innovation on Workday

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
- Focus on Europe market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

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

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Innovation on Workday

Who Should Read This Section

This report is valuable for service providers offering **innovation on Workday** in Europe 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.

Strategy and innovation leaders

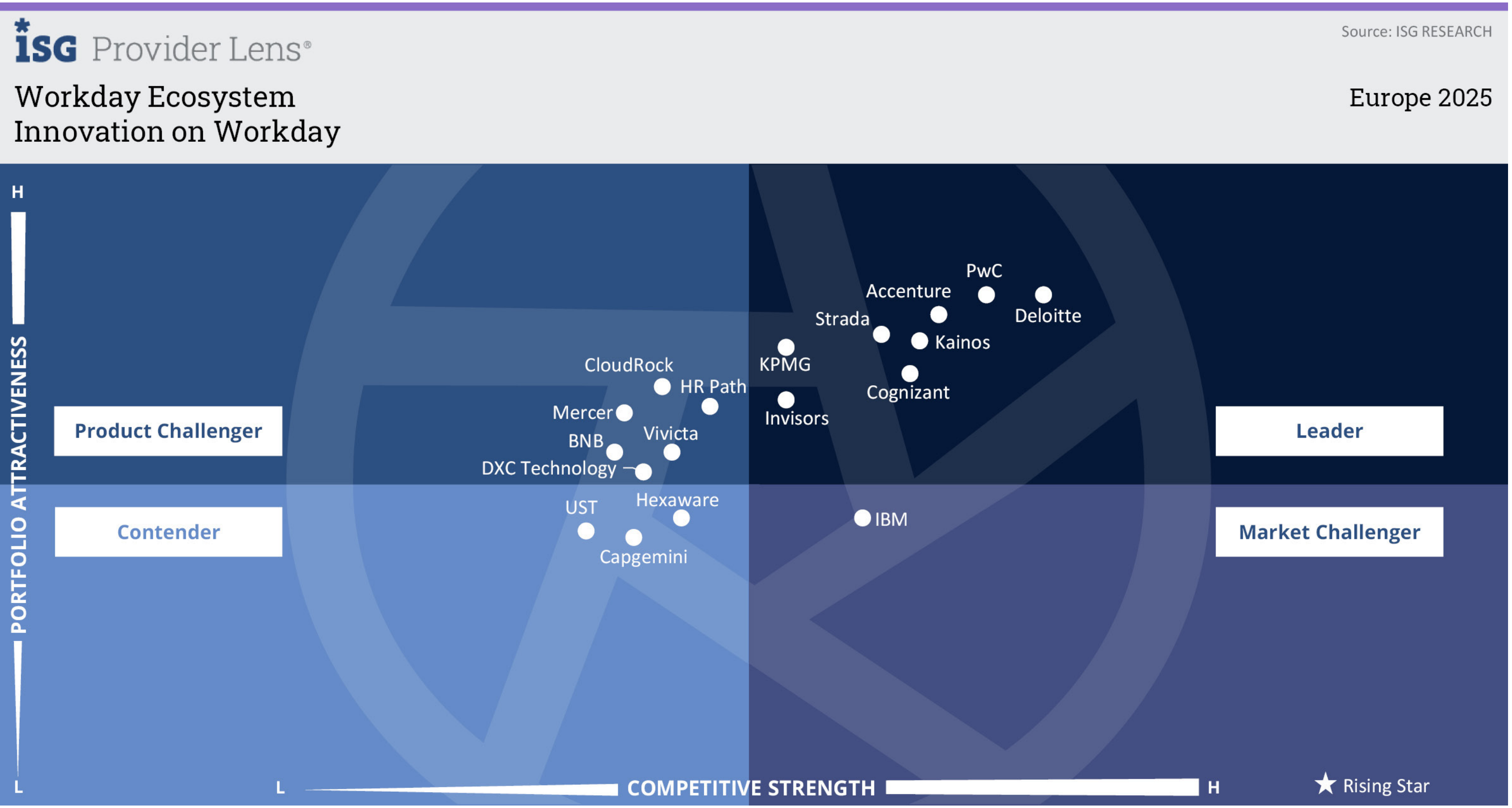
Should review this report to gain insights into how Workday facilitates digital transformation and enhances competitiveness, aiding strategic planning and long-term growth through innovation. This report explores the latest offerings and portfolio of service providers on the Workday platform, which will enable C-suite professionals to obtain a thorough understanding of the latest developments in the Workday ecosystem and determine their impact.

Technology and application development professionals

Should review this report to understand the latest features, functionalities and components of the Workday platform, along with their configuration and integration. The Workday platform has transformed from a basic HCM system into a comprehensive, AI-driven workforce management solution, offering a diverse array of functionalities, and this report highlights providers' capabilities in developing innovative solutions leveraging functionalities from Workday Extend.

Engineering teams

Including solution architects, should read this report to gain insights into software development and thus build IPs/accelerators for cloud platforms/industries by analyzing the best fit ServiceNow solution. The report focuses on the engineering capabilities of providers with insights into their technology partner ecosystem.



This quadrant evaluates providers' ability to deliver innovation by designing and **implementing new capabilities,** applications and **AI-driven solutions** that address evolving **business needs** while creating measurable **operational** and **strategic** value.

Gaurang Pagdi

Definition

The Innovation on Workday quadrant evaluates providers based on their ability to develop custom applications on the Workday Extend platform, while leveraging AI components from Workday Illuminate. The assessment criteria include proficiency in building business modernization solutions for HCM, capabilities in integrating Workday Orchestrate for workflow automation , expertise in AI Gateway and skills in applying Workday Illuminate's *Accelerate, Assist, Transform* capabilities. Providers are measured on their competency in creating both client-specific and industry-focused applications and hosting them in the Workday Marketplace that covers published offerings, adoption rates, customer ratings, solution categories and depth of vertical functionality. This quadrant assesses providers based on their technical expertise, industry knowledge, innovation capabilities and overall contribution to expanding Workday Extend's core functionality, experience and modularity.

Eligibility Criteria

1. Possess **certifications** and proven technical resources skilled in **custom application development on Workday Extend**
2. Have experience in **integrating Workday Illuminate's AI capabilities,** particularly Orchestrate and AI Gateway components
3. Have **custom-developed, industry-relevant and validated applications** hosted and available in the Workday Marketplace.
4. Can highlight client references showcasing **successful deployments of Workday Extend** solutions with measurable outcomes
5. Claim a **proven track record of delivering tailored solutions** to finance and HR verticals
6. Demonstrate capability in rapidly **innovating and adapting Workday solutions** to evolving business requirements, including automation, cloud, and **Workday Extend and Workday illuminate**
7. Demonstrate compliance with Workday's standards and data privacy policies and have established application security best practices
8. Have proven expertise in **integrating** custom **Workday Extend solutions** seamlessly **with existing client systems and third-party platforms**
9. Show **expertise in creating intuitive and user-centric designs,** improving user engagement and satisfaction

Observations

Workday innovation in Europe has evolved from incremental feature extensions to transformative, AI-enabled solutions that expand the platform's core capabilities. Providers are leveraging Workday Extend, the Workday Marketplace and the new AI developer toolset to design role-specific agents, localized applications and industry accelerators that address functional gaps and deliver measurable business outcomes.

Recent advancements such as Illuminate AI agents and the ASR allow providers to embed autonomous, multistep workflows directly into HR and finance processes. Examples include GDPR-compliant onboarding assistants, region-specific payroll calculators and ESG reporting dashboards aligned to European mandates.

Innovation efforts increasingly focus on cocreation with clients and Workday, using agile development to deliver quick, high-impact solutions while ensuring scalability and compliance. Providers are also integrating Workday data with broad enterprise analytics and AI ecosystems, creating new insights that inform strategic decisions.

In this region, Workday innovation is defined by providers' ability to bridge platform capabilities with business ambitions. Providers that can deliver secure, compliant and context-aware innovations are enabling clients to achieve enhanced agility, operational efficiency and competitive differentiation.

From the 21 companies assessed for this study, 18 qualified for this quadrant, with eight being Leaders.

Accenture drives innovation via Workday Extend, developing custom apps, automated workflows and AI integrations through Workday's AI Marketplace to help clients experiment, improve and gain new value.

Cognizant's innovation strategy aligns Workday-native development with client-specific maturity needs. Clients benefit from Built on Workday apps, agentic AI pilots and an expanding focus on upskilling and AI orchestration.

Deloitte leads in AI and industry-led innovation for Workday by combining real-world accelerators with road map influence to deliver tangible outcomes across clients' HR and finance functions in Europe.

With over 20 demo-ready Extend frameworks and a growing suite of modular applications, **Invisors** brings a practical, client-driven innovation agenda that strengthens Workday's competitive edge in high-growth verticals.

Kainos stands out for its AI-driven product suite and as an early adopter of the Built on Workday program. Its incubator-led innovation model and ecosystem partnerships position it as a frontrunner in codeveloping future-ready Workday extensions across Europe.

KPMG delivers custom-built apps through the early adoption of Extend and analytics. These apps help meet specific finance, ESG and HR needs while aligning with Workday's native architecture.

PwC's early investment in Workday Extend and Workplace Marketplace solutions helps it lead and drive domain-specific, client-validated innovations within the Workday ecosystem.

STRADA

Strada's innovation strategy combines customer-driven design with Workday codevelopment, focusing on addressing platform gaps, including cash-based accounting and DEI tracking, through intelligent apps and proprietary tools.

Leader

"Cognizant accelerates Workday innovation across Europe with built-on apps, GenAI frameworks and cross-platform agentic AI, helping clients bridge functionality gaps and scale enterprise AI adoption."

Gaurang Pagdi

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 343,800 employees across over 50 countries. In FY24, the company generated $19.7 billion in revenue, with Health Sciences as its largest segment. Cognizant provides a range of innovative Workday solutions, leveraging its deep expertise and long-standing partnership with Workday. These solutions include custom applications built on the Workday platform, advanced GenAI capabilities and proprietary tools that enhance implementation and support services.

Strengths

Built on Workday leadership with app commercialization: Cognizant stands as a leading developer within the Built on Workday ecosystem, with a number of published apps and additional solutions requested by Workday to address native functionality gaps. These apps have played a key role in closing major deals in Europe and remain pivotal in Workday's subscription sales.

Advisory-led AI maturity framework: Cognizant's innovation services are anchored by an AI readiness framework that assesses clients across five dimensions, including culture and people operations, to drive strategic AI adoption. This consultative approach prepares clients to activate Workday's embedded AI, extending value beyond automation.

Agentic AI use cases with cross-platform reach: Cognizant is developing Workday-native agents, such as recruiting and reporting bots, while also exploring enterprisewide AI orchestration through Neuro, its proprietary platform. These agentic solutions are in PoC stages across multiple European clients.

Academic innovation through workforce enablement: Cognizant's collaboration with Brigham Young University resulted in a Workday-focused curriculum codesigned with faculty and based on Cognizant's proprietary insights. This initiative is now being expanded to other institutions, reflecting long-term investment in the Workday talent pipeline.

Caution

While Cognizant's innovation pipeline is robust, the widespread adoption of agentic AI and Neuro-led orchestration among its European clients is still in its early phases. Demonstrating scalable impact and cross-tenant integration will be key going forward.

Appendix

The ISG Provider Lens 2025 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the europe 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 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 Workday Ecosystem 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

Gaurang Pagdi
Lead Analyst

Gaurang has over 22 years of experience in the Finance & Accounting (F&A) domain with expertise in the Order to Cash vertical; he has worked as a delivery leader with industry leaders in Banking, Telecom & E-Commerce; and as a Digital Transformation Consultant with a prominent F&A SaaS provider, working with clients from across industries. Gaurang's core expertise lies in delivery and business transformation, where the focus is beyond digital transformation, like operations and talent transformation, giving him a holistic view of driving a healthy and future-ready business.

As a lead analyst at ISG, Gaurang is responsible for authoring the F&A studies, taking into consideration the latest market trends and perceived future of the industry in relation to the competitive strength and offerings of the service providers.

Research Analyst

Megha Dodke
Research Specialist

Megha Dodke joined ISG as a Research Specialist in October 2024. Based in Bangalore, India, she holds a Master's degree in Marketing and a certification in Product Strategy from the Indian Institute of Management, Kozhikode (IIM-K). Megha brings over 12 years of diverse experience in Business Research, Market and Competitive Intelligence, Sales Enablement, and Strategic Advisory across multiple industry verticals.

At ISG, Megha focuses on enterprise platform research, with a specialization in areas such as Enterprise Service Management (ESM), ServiceNow, and Workday. She has a strong track record of conducting in-depth research and analysis on emerging technologies, market dynamics, and the capabilities of IT service providers—including consulting, managed services, implementation, and innovation.

Her work supports clients through strategic advisory, briefings, workshops, and consulting engagements. Prior to this, she has worked with organizations including HP Inc., Accenture, Talent Neuron and Transparency Market Research.

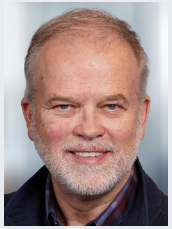
Study Sponsor

Aman Munglani

Director: Hyperscalers, Digital Innovator Series and Custom Research

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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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.

OCTOBER, 2025

REPORT: WORKDAY ECOSYSTEM