

Sourcing Industry Conference

November 18 - 19, 2025
Windsor, UK




Last year, only 15% of enterprises had Generative AI pilots in production, and scaling was proving difficult for those at that point. Overcoming these challenges is still top of mind, but Agentic AI's entrance into the AI arena has introduced new priorities. With so many priorities, enterprise clients are demanding simpler, ready-built AI solutions - and less experimentation. And in this time of high economic pressure, they need to see AI driven results: efficiencies, savings, innovation and scale. Cost optimisation and self-funding initiatives are more important than ever.

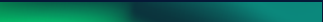
Returning for its 19th year, the **ISG Sourcing Industry Conference** brings together ISG advisors and the software, technology and service provider communities to lead through and beyond AI hype. Every year hundreds of provider attendees get actionable insight into buying behaviors, market trends and how to position products and services in an evolving technology landscape.

Join us this **November** in **Windsor** for this must-attend, intimate gathering of leaders, influencers and market shapers.

Reasons to Attend



Get an inside-peek into the **key trends** that will shape the landscape in 2026 and beyond




Meet one-on-one with ISG's top advisors and thought leaders



Unlock **data-driven market intelligence** to shape your customer success strategy



Understand and **proactively address** top concerns and investment priorities for your executives



Discover best-practice tips to navigate a turbulent economic environment

Meet the Speakers



Michael Dornan

Principal Analyst,
ISG



David Locke

Director,
ISG



Stella Harris

Senior IT Service Manager,
Santander UK



Paul Coby

CIO,
Persimmon Homes



Shweta Taneja

Director,
ISG



Matt Aslett

Director of research.
ISG



Nils Bachmann

Partner,
ISG



Anas Barmo

Consulting Manager,
ISG



Sam Barringer

Director,
ISG

Meet the Speakers



Carolyn Alexandra Becker

Director,
ISG



Howard Davies

Partner,
ISG



Richard de Beijer

Director,
ISG



Anthony Drake

Partner,
ISG



Julien Escribe

Partner and Managing
Director, SEMEA,
ISG



Andreas Fahr

Partner,
ISG



Hervé Ferrouillat

Partner & Sales
Management Lead EMEA,
ISG



Iain Fisher

Director,
ISG



Sven Geissler

Partner,
ISG



Daniel Gerster

Partner
ISG



Steven Hall

Regional President EMEA,
ISG



Mathew Hannon

Director,
ISG



Jon Harrod

Partner,
ISG



Frank Heuer

Principal Analyst,
ISG



Matthaeus Kaeppler

Director,
ISG



Rachel Key

Principal Consultant,
ISG



Robert Kugel

Executive Director,
ISG



Gary Leaderman

Principal Consultant,
ISG

Meet the Speakers



Lucy Mair

Principal Consultant,
ISG



Eleanor Matthews

Director,
ISG



Jaydeep Mody

Principal Consultant,
ISG



Naveen Mohanan

Principal Consultant,
ISG



Pierre Moulin

Director,
ISG



Rakesh Parameshwara

Director,
ISG



Suresh Payapulli

Director,
ISG



Lyonel Rouast

Senior Advisor,
ISG



Venkatesh Sangam

Principal Consultant,
ISG



Mark Smith

Chief Software Analyst
and Partner,
ISG



Cengiz Uludag

Director,
ISG



Stephan Weisser

Director,
ISG

Summit Agenda

Day 01 - Tuesday, 18 November 2025

09:00 **Registration Opens and Morning Coffee**

09:30 - **1:1 Meetings with ISG Advisors**
12:30

09:30 - **W1. The Evolving State of the Advisor Relations**
10:00 **Function**

Get a firsthand look into the results of the annual 2025 ISG Advisor Relations benchmark, which provides insights into the evolving trends on how service providers fund and allocate their Advisor Relations budgets and how teams are changing to engage with third party advisors. Attain the information you need to support your annual Advisor Relations strategic plan for next year.



Howard Davies
ISG

10:15 - **W2A. ISG Market Lens: Markets are Flat but**
10:45 **EVERYTHING is Changing**

IT budgets are flat and overall managed services deal activity is flat, and yet it seems EVERYTHING is changing.

In this session we will unlock the “devil in the detail”, examining ISG Market Lens data through different lenses and highlighting enterprise behaviour shifts around the “data tower”, AI, and GCCs.



Michael Dornan
ISG

W2B. The Future of Software Research at ISG for 2026 to 2028

The future of software research at ISG is set to evolve dramatically between 2026 and 2028, driven by AI technologies. This session outlines the changing landscape of software research and establishes a forward-looking agenda that emphasises the critical areas of focus in the coming years. It highlights the utilisation of the ISG Buyers Guide for enterprise assessment and selection processes, along with an overview of ISG Provider Intelligence and the Software Index.

- Gain insight into the Software Research Agenda for 2026 to 2028.
- Understand how the ISG Buyers Guide is the gold standard.
- Get a sneak peek into ISG Provider Intelligence with Software Index.



Matt Aslett
ISG



Mark Smith
ISG

11:00 - 11:30 W3. ProBenchmark & Inform

Learn how to leverage our benchmarking data to enhance bid success and secure contract renewals with confidence. This session will explore how Value Assurance, known today as “Fairness Assessments,” provides the insights needed to demonstrate competitive and sustainable value.



Sam Barringer
ISG

11:45 - 12:15 W4. IPL 2.0: Leveraging AI to Streamline, Standardise and Make IPL More Efficient

ISG has introduced new strategic insights capabilities aimed at

helping enterprises select best in class providers plus aiding providers to boost capability where others are ranked higher. Our new ability to take ISG Tango and deep dive every industry and cross industry IPL now enables us to help providers and Enterprises to make more strategic decisions. Learn how ISG can new better advise the entire buying cycle of the enterprise market. Attendees of this session will be given a sneak preview of strategic insights and an overview of our new tools and processes that will improve your understanding to data gathering and analyst interaction and how it impacts sourcing plus how to more effectively communicate capabilities and differentiators with ISG Research.



Iain Fisher
ISG

12:30 - Lunch
13:30

13:30 - CONFERENCE CHAIRMAN'S WELCOME
13:45



Anthony Drake
ISG

13:45 - ISG KEYNOTE: ISG Software and Services Market in
14:15 2026 and Beyond

Global business uncertainty is at a decades-high, driven by trade upheavals, geopolitical shocks, and slowing growth—putting intense pressure on enterprises. In response, companies are racing to deploy agentic and generative AI to boost productivity and reduce costs, yet meaningful ROI remains elusive. At the same time, AI is rapidly blurring the lines between software and services, fueling nonstop disruption as companies struggle to scale the rising “AI Wall.” These converging forces are set to redefine the Software & Services Market

in 2026 and beyond, demanding bold strategies and agile new operating models to stay competitive. Using the intelligence from ISG Index, this session will help navigate the intertwined services and software economy.

- Understand how cost efficiency demands, and AI ambitions are shaping enterprise buying behavior—reflected in the latest software and services bookings from ISG Index.
- Learn why many enterprises are hitting the “AI Wall,” and what providers must do to help clients achieve meaningful productivity and ROI.
- Gain insight into the bold strategies, operating models, and differentiators that will separate winners from laggards in the next wave of AI disruption.



Anthony Drake
ISG



Mark Smith
ISG

14:20 -
14:50

ISG PREDICTS: The Next Five Years in Services: Rebuilding the Enterprise Stack for the Intelligence Economy

As AI, cloud, and data converge, enterprises aren't just modernising - they're rewiring. Explore how the next five years will reshape everything from infrastructure and applications to ERP, sourcing, and value delivery. What happens to our services when software becomes autonomous, data becomes decision-making, and services shift from people to outcomes? ISG's Steve Hall will provoke the ambition and urgency to rethink how we build, sell, and operate technology. If you're a tech leader, platform builder, or service provider - this is your map to the future.



Steven Hall
ISG

14:50 - **Networking Break**
15:20

15:00 - **1:1 Meetings with ISG Advisors**
17:30

15:30 - **A1. How to Prevent Divorce and Set Yourself up**
16:00 **for a Long and Prosperous Marriage! (in Professional Relationships)**

You have successfully pitched your visions to your customers, secured a long-term IT service contract with all the bells and whistles after a long, tedious and exhausting contract negotiation and finally tied the knot. Excellent! Are you ready for the secrets to a successful, long, sustainable and prosperous customer-provider marriage? Learn about ISG's Managed Service Provider trainings that enable customer organisations to work better with you and ISG's Partner Assessments that help you improve the understanding of the customer's sentiment and value drivers.



Stephan Weisser
ISG

A2. Vertical Industry Insights: Consumer Services

ISG's vertical leaders provide insight into the market, their observations of the challenges, and our vision of the future in this market.



Eleanor Matthews
ISG

**A3. Agentic AI and Future of Business Applications:
Everything Changes**

The integration of Agentic AI is set to redefine the future of business

applications, transforming front to back-office operations. This radical shift is reshaping enterprise evaluations of business software. As organisations adapt to these changes, a new paradigm for business and industry software research emerges.

- How does AI-infused software boost productivity and upskill the workforce while enhancing the user experience?
- Where does AI change the way business software works?
- What do enterprises need in business applications for the future with AI?



Robert Kugel

ISG

16:15 -
16:45

B1. Vertical Industry Insights: Engineering & Manufacturing

ISG's vertical leaders provide insight into the market, their observations of the challenges, and our vision of the future in this market.



Andreas Fahr

ISG

B2. Vertical Industry Insights: Insurance

ISG's vertical leaders provide insight into the market, their observations of the challenges, and our vision of the future in this market.



Rakesh Parameshwara

ISG

B3. AI Market with Agentic and Gen AI: New Software Universe

The emergence of Agentic and Generative AI is ushering in a new era

for the AI software market, fundamentally reshaping the software universe. Investigate the evolving data foundations that support enterprise AI applications, alongside significant transformations in cloud computing and platforms for business software. As enterprises adapt, they are redefining criteria for evaluating AI and IT software solutions. We will address future directions in AI and IT software research, emphasising key insights.



Matt Aslett

ISG

17:00 -
17:30

C1. The Impact of AI on Sourcing

Get the latest insights on how AI is transforming IT sourcing and service delivery. Discover practical strategies to embed continuous innovation into your IT contracts, and learn how to structure AI-driven offerings using ISG's AI capability reference model. Walk away with clear, actionable guidance to help you craft contract terms that ensure compliance while driving ethical and responsible AI adoption.



Daniel Gerster

ISG

C2. Vertical Industry Insights: Banking and Financial Services

ISG's vertical leaders provide insight into the market, their observations of the challenges, and our vision of the future in this market.



Richard de Beijer

ISG

C3. From Dependency to Destiny: Europe's Sovereign IT Future

Europe's IT landscape is shifting from dependency on global platforms to a destiny defined by sovereignty, resilience, and innovation. This workshop unpacks where the market is heading and how new rules of trust will reshape IT in continental Europe. Attendees will learn why partnering with ISG is key to anticipating, adapting, and leading.



Mark Smith
ISG

17:30 - **WELCOME RECEPTION**
18:30

18:30 - **DINNER**
20:00

Day 02 - Wednesday, 19 November 2025

08:00 **Morning Coffee**

08:30 - **CONFERENCE CHAIRMAN'S WELCOME**
08:40



Rakesh Parameshwara
ISG

08:45 - **CIO Keynote**
09:15



Paul Coby
Persimmon Homes



Eleanor Matthews
ISG

09:20 - **ISG INSIGHTS: Women at the Forefront of AI - How AI**
09:40 **Equalises, Accelerates & Enables Leadership**

As AI transforms every industry, it's critical that women are not only

included—but leading the way. Explores the power of representation in shaping the future of AI, spotlighting women who are driving innovation across their fields. We'll examine how AI is redefining leadership itself, moving away from traditional hierarchies toward more empathetic, collaborative, and inclusive models—where women's natural leadership strengths align with the moment. AI is enabling women to lead with greater impact. Join us for an inspiring conversation about how women are building a more equitable, creative, and powerful AI future—for everyone.



Eleanor Matthews
ISG



Stella Harris
Santander UK

09:45 - 09:55 **ISG INSIGHTS: Avoiding ROI Leakage in Outsourcing Engagements**

Outsourcing offers many business benefits, but the value realised often falls short of expectations—even when milestones are met. This gap, or value leakage, is common across most contracts and carries real costs. Its significance will increase further as GenAI/AgenticAI is incorporated into contracts.

- How do you minimise value leakage through a holistic plan?
- How do you minimise value leakage through Independent Assurance and oversight?
- What are the areas that the client can control and how do you establish that control?
- How do you calculate the potential leakages and create a plan to ensure ROI is protected?



Rakesh Parameshwara
ISG

10:00 - 13:00 **1:1 Meetings with ISG Advisors**

10:15 -
10:45

D1. Decrypting Decisions: How Security Teams Identify the Best Security Solution

As the security solution market continues to expand and evolve, organisations are confronted with the increasingly difficult task of assessing the most suitable solutions. At the same time providers face challenges in effectively communicating their value propositions. Explore the evaluation process to discern the ideal cybersecurity solution from a myriad of options and gain valuable insights into the criteria and methodologies employed to identify and select solutions

- Identify the factors clients prioritise when choosing security solutions.
- Discover ways providers can facilitate the evaluation process.
- Understand how clients' security strategies drive their choice of providers.



Anas Barmo
ISG



Lucy Mair
ISG

D2. United Kingdom & Nordics Interactive Roundtable

Join an interactive exchange on shared challenges, local market dynamics, and emerging trends shaping enterprise strategies. Gain region-specific insights and actionable ideas through candid dialogue with fellow leaders and experts.



Anthony Drake
ISG

D3. ADM 2030: Rethinking Applications Delivery Management for the Age of Agentic and AI

By the year 2030, agents and AI will have significantly shaped Application Delivery Management. Major shifts will include outcome-led engagements, AI-augmented operations, and multi-modal

pods. Given that contracts extending up to 2030 are being closed now, providers must evolve to stay relevant. Those able to actively influence the future of ADM will have a unique opportunity to position themselves as trusted partners, guiding the long-term transformational journey involving AI and agents.



Daniel Gerster
ISG

11:00 - 11:30 E1. Position Yourself to Win: Succeeding in ISG-Led Sourcing Deals

In today's competitive sourcing landscape, understanding what drives client decisions is critical to winning and retaining business. Drawing from ISG-led deal experiences, we'll present the characteristics of providers who consistently win. Examine the common pitfalls and missteps that prevent you from succeeding. Sharpen your approach. Strengthen your positioning. Improve your win rate in ISG-led sourcing deals.



Lucy Mair
ISG

E2. DACH Interactive Roundtable

Join an interactive exchange on shared challenges, local market dynamics, and emerging trends shaping enterprise strategies. Gain region-specific insights and actionable ideas through candid dialogue with fellow leaders and experts.



Andreas Fahr
ISG

E3. The Future of Data: A Tower of Software Value for IT and Business

As enterprises strive to gain differentiation through data and AI, the architecture required to support data and AI systems is undergoing a radical transformation. What are the software architecture, platforms and capabilities required to fulfill emerging data and AI requirements? Examine the role of real-time data with event-driven architecture as well as streaming data processing and analytics, identifying when it is the “right-time” for investment and impact. Discover how data platforms are evolving to meet the demands of next-generation agentic applications, and why data management is essential for enabling governance, integration and intelligence across public and private cloud-centric environments to meet efficiency and data sovereignty requirements. How can data operations software can simplify collaboration between IT and business teams, empowering more agile and intelligent decision-making across the enterprise?



Matt Aslett
ISG

11:45 -
12:15

F1. Win-Win GenerativeAI in IT Operations Deals

Discover how to structure win-win contracts that reward providers for delivering measurable AI-driven operational efficiencies—while ensuring your enterprise gains transparent, risk-controlled benefits. Explore practical approaches to risk-reward (gain share) models, SLA observability, and robust data sharing, governance, and audit practices. Learn how to co-innovate with clients through joint R&D funding, agile value sprints, and clear IP and commercialisation rights. Prepare your scale-up playbook with real-world examples to help you drive mutual value through AI-powered partnerships.



Naveen Mohanan
ISG

09:30 -
10:00

F2. France Interactive Roundtable

Join an interactive exchange on shared challenges, local market dynamics, and emerging trends shaping enterprise strategies. Gain region-specific insights and actionable ideas through candid dialogue with fellow leaders and experts.



Hervé Ferrouillat
ISG

F3. Collaborative and Agentic AI Software: Future of Work is Now

The rapid rise of AI is transforming how people connect, communicate, and collaborate—reshaping both the workforce and the customer experience. How are collaboration and communications software intersecting with the growth of AI, and what does it mean for the future of work? Examine the emergence of collaborative AI platforms and their impact on productivity, creativity, and decision-making across teams. As AI agents and digital assistants become more intelligent and proactive, they are poised to redefine roles, workflows, and interactions in both business and IT environments. The evolution of legacy collaboration and productivity tools is changing, and Agentic AI is being embedded into modern collaborative platforms. Even the future of CPaaS platforms will enable smarter, more dynamic engagement across workforces and to customers and consumers.



Mark Smith
ISG

12:30 - 13:00 G1. From Commodity to Game Changer: How Service Providers Create Real Value with AI, Data, and Automation

Discover how to future-proof your offerings and lead in a rapidly

evolving market. This dynamic session will reveal how AI-driven services, data-centric models, and secure, scalable platforms can power sustainable growth—while striking the right balance between data sovereignty and regulatory compliance. Gain practical strategies to stand out through cybersecurity innovation, network-as-a-service, and application expertise—and leave with actionable insights to sharpen your competitive edge.



Suresh Payapulli

ISG

G2. From Traditional Outsourcing to Intelligent Contracts: Embracing the Age of AI

Learn how to evolve your contracting frameworks to meet the unique demands of Generative and Agentic AI—ensuring agility, flexibility, and compliance. How do you move beyond transactional relationships and build strategic partnerships that drive innovation and maximise the value of AI? Gain practical guidance on managing risk and accountability, with clear approaches for defining responsibilities, upholding ethical standards, and setting performance metrics to support the safe and effective use of AI technologies.



Rakesh Parameshwara

ISG

G3. The Future of CRM: Revenue Software Designed with AI and Outcomes

As traditional CRM systems show their age, forward-looking enterprises are reimagining front-office and revenue software to meet the demands of modern, dynamic customer lifecycles. The next generation of revenue platforms—augmented by automation, generative AI, and agentic AI—will go far beyond pipeline tracking to actively drive selling, streamline renewals, and power expansion

opportunities. Examine how AI is shifting from passive insight to proactive execution, helping revenue teams focus on outcomes rather than administration and gain insight into how revenue performance planning is being transformed through adaptive, data-driven approaches that align go-to-market resources to business impact. Unpack the fast-evolving role of dedicated monetisation platforms built for subscription, usage-based, and hybrid models, and their emergence as central to both commercial strategy and operational scalability.



Robert Kugel
ISG

13:00 - 14:00 **CLOSING LUNCH**



Robert Kugel
ISG

18:30 - 23:00 **Sourcing Industry Awards Dinner by Invitation**

- * Paragon Awards
- * IPL Awards
- * Star of Excellence
- * Software Industry Awards

Conference Venue



Fairmont Windsor Park

Bishopsgate Rd, Englefield Green,
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Fairmont Windsor Park is situated adjacent to Windsor Great Park and the Savill Garden, and is surrounded by famous landmarks of Windsor Castle, LEGOLAND Windsor and Thorpe Park Resort. The hotel is also conveniently located within an hour of Central London.