ISG Provider Lens®

Future of Work Services

A research guide to evaluate providers' strengths, challenges and differentiators in the digital workplace

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | OCTOBER 2025 | BRAZIL

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The age of artificial autonomy: redefining the global workforce and digital workplace

The future of work is shaped by an unprecedented convergence of technological, demographic and economic forces that are fundamentally altering the nature of organizations and human work. In 2025, ISG identifies significant renewals in the global workplace technology market, with a total value of $22.3 billion, especially in the Americas, APAC and EMEA. These investments reflect a transformation toward work environments that integrate human, digital, and physical elements. Simultaneously, the global digital sustainability market is expected to reach $30.3 billion by the end of 2025, driven by a compound annual growth rate of 16 percent, and could reach $41 billion by 2027. Operational technology solutions dominate this market, highlighting the growing demand for sustainable practices in daily operations. These trends and related implications point to a future where innovations in technologies such as GenAI, hybrid cloud computing and advanced networking solutions lead to operational efficiency and agility. In addition, five macro trends will impact the transformation of the global labor market by 2030: technological change, geoeconomic fragmentation, economic uncertainty, demographic shifts and the green transition. These trends, acting individually and collectively, are creating a scenario of structural transformation that will require profound strategic adaptations from global organizations.

The global projection published by the World Economic Forum in 2025 states that 170 million new jobs will be created by 2030, while 92 million will be displaced, resulting in a net increase of 78 million jobs. This statistic represents more than a simple reorganization of the labor market; it signals a paradigm shift in the relationship between technology and human labor, where technological change is expected to have the greatest impact on jobs by 2030, both creating and displacing them. With an ever-changing labor landscape, companies must adapt their technological infrastructures

The age of digital autonomy: **agentic AI redefines the future of work** and organizations.

and adopt sustainable and inclusive practices to ensure competitiveness and resilience in the global market.

The technological landscape and its organizational implications

GenAI is emerging as the main catalyst for this transformation, promoting a significant acceleration in the automation of work activities. This evolution represents a fundamental reconfiguration of organizational functions, where GenAI is improving professional work methods, a phenomenon already documented and observable in the analyses of this study.

Leading large companies in the market are at the forefront of this transformation, anticipating trends and adapting their strategies and services to current demands. Microsoft, for example, a strategic partner of the companies analyzed in this study, anticipates that 2025 will be the year of reconstruction — the moment when companies will stop experimenting with AI to rebuild themselves around it. This view is supported by empirical data demonstrating the acceleration of business adoption: the current and planned use of AI among companies jumped to 75 percent in 2024, compared to 55 percent in 2023. McKinsey reports that its organizations are using GenAI to create text outputs; they are also experimenting with other modalities. More significantly, customers report value creation within business units that use GenAI, signaling the transition from experimentation to strategic implementation.

Emergence of autonomous agents and multiagent systems

One of the most significant developments in the current landscape is the emergence of AI agents as a new class of digital workers. Agents can think or reason, remember, train and even know when to ask for help. This capability represents a fundamental evolution from traditional automation to truly autonomous systems that can manage entire business processes.

ISG's analysis of the agentic AI market reveals that this technology is emerging as a new form of business automation, enabling systems to act more independently and in a coordinated manner. Agentic AI is designed to execute business processes through autonomous actions, controlling multiple processes with essential characteristics that include autonomy, goal orientation, contextual awareness, limited decision-making, scheduling logic and evolutionary behavior.

This adoption is not merely technological but represents a fundamental reengineering of organizational processes. ISG research shows that most use cases for agentic AI are concentrated in IT, with 52 percent of applications being industry agnostic, while 70 percent of use cases are distributed across three main industries: financial services, retail and manufacturing. Agents will change how firms manage end-to-end processes, from sales to supply chains, creating constellations of agents working continuously in the background to execute or automate entire business processes.

The successful implementation of these systems requires a strategic approach to governance and trust. ISG data indicates that only 25 percent of AI agent solutions enable independent operations, while 45 percent act in an advisory role, highlighting that governance must evolve to include real-time monitoring and escalation logic. To harness the power of autonomous systems responsibly, companies must implement robust monitoring and strategic training. Additionally, the coordination among agents represents a growing area of investment, with emerging protocols for collaboration between multiple autonomous systems.

Transformation of skills and human capital

Technological transformation is fundamentally redefining the landscape of skills needed in the labor market. Employers expect that 39 percent of the key skills needed will change by 2030, down from 44 percent in 2023. This decline suggests that a growing focus on continuous learning, upskilling and reskilling programs has enabled companies to better anticipate and manage future skill requirements.

Technological skills are projected to grow in importance faster than any other skills over the next five years. At the same time, there is a growing appreciation of distinctive human skills. Human strengths such as conflict mitigation, adaptability, process automation and innovative thinking are also growing, showing that the future belongs to those who can combine deep AI capabilities with skills that machines cannot replicate. This transformation has not gone unnoticed by the companies that participated in this study. We have observed significant movement and investment in upskilling and reskilling the workforce, a strategy that is absolutely in line with the current trend.

The Brazilian scenario: opportunities and structural challenges

Brazil has unique characteristics in the future of work landscape, combining significant opportunities with specific structural challenges. Annual projections indicate that professionals with technology training will make up one-third of the country's annual demand, a significant annual talent deficit. This talent gap reflects broader structural challenges in the Brazilian education system, where there are at least 2.4 candidates for every place in IT courses, and only 24.85 percent are accepted into public institutions. In private institutions, 39 percent of students drop out of their courses, according to Brasscom.

Despite these challenges, the Brazilian technology sector shows significant dynamism. The software subsegment grew by 21.6 percent in 2023, reaching a production of R$43.8 billion, while services registered a significant increase of 25.1 percent in the same year, reaching a total production of R$104.3 billion. Particularly noteworthy is the growth of cloud computing, which increased by 25.1 percent, totaling R$46.5 billion in 2023.

Brazilian digital infrastructure and investments

Brazil is strategically positioning itself to capture opportunities in the global digital economy. Cloud computing continues to be the highlight, with a forecast growth of 24 percent per year and revenue generation of R$181.1 billion over the next three years. Big data & analytics are expected to grow 12 percent per year until 2025, generating a revenue of R$94.6 billion, while AI is expected to grow 18 percent per year until 2025, generating a revenue of R$49.7 billion.

Data center infrastructure is emerging as a critical component of this strategy. The Brazilian market had investments worth more than $2 billion in data center rentals in 2024, with expectations of reaching $3.50 billion by 2029. This expansion is crucial, as data centers host computing resources to support services such as voice recognition, predictive analytics, image processing and recommendation systems.

A distinctive competitive advantage for Brazil is its energy matrix. For Brazil, the widespread availability of clean and renewable energy is a unique competitive advantage for data centers. The country has an energy matrix based on hydroelectric sources and has seen solar and wind energy grow as supporting sources.

Strategies, governance and risk management in the AI era

Leading technology services companies are adopting differentiated strategies to navigate this transformation. We have identified various approaches in defining the future vision of corporations, ranging from those focused on collaboration between humans and AI agents, breaking down silos, promoting collaboration, and capitalizing on building platforms and capabilities to accelerate the adoption of multiagent systems to transformation through AI applications and managing tensions between technological efficiency and human values.

Regardless of the strategy, successfully implementing autonomous AI systems requires robust governance and risk management models. We have identified that organizations are intensifying their efforts to mitigate the risks related to GenAI, but this is only the beginning of the journey. The issue of trust is central to widespread adoption. While GenAI is advancing at a remarkable speed, most organizations are setting their own pace for achieving ROI with AI, which tends to be slower. The convergence of these trends points to a fundamental redefinition of work and organizations. Intelligence on demand will rewrite the rules of business and transform knowledge into actionable work. This transformation will require a new organizational mindset combining machine intelligence with human judgment, building AI-powered yet human-led systems.

Convergence of dominant capabilities, residual characteristics and implications for emerging markets

Consolidated analysis of leaders in digital workplace services reveals an architectural transformation grounded in the convergence of three dominant technology vectors: AI as a fundamental infrastructure, UX as a value metric and sustainability as a systemic competitive differentiator. This strategic tripartite division manifests itself through proprietary platforms that transcend traditional automation, implementing autonomous ecosystems capable of self-remediation, demand prediction and continuous resource optimization.

The AI-centric architecture is the prevailing paradigm, materializing through portfolios with domain-specific prebuilt agents, request deflection, efficiency gains and customer satisfaction. Proprietary ecosystems integrate multimodal virtual assistants, cognitive automation and predictive analytics, eliminating operational silos through code-free orchestration. The transition from traditional service level agreements (SLAs) to experience level agreements (XLAs) represents a fundamental paradigm shift, prioritizing business outcomes over traditional operational metrics through experience management offices (XMO) that consolidate full journey scores.

Sustainability evolves from regulatory compliance to a driver of competitive innovation through proprietary ESG methodologies, integration of IoT and AI, and circular life cycle management models. Smart solutions implement integrated sensors, energy resource automation and predictive analytics for space optimization, creating responsive environments that reduce environmental impact while increasing organizational productivity.

The emerging layered delivery model integrates user profiles, technology platforms, multichannel service centers, predictive services and reliability automation. Extreme personalization through micro-profiles and real-time sentiment analysis sets a new standard for engagement, while always-on self-healing solutions, anomaly detection and silent interventions dramatically reduce IT interactions. Disruptive technologies such as augmented and virtual reality (AR and VR) for field support minimize travel, maximizing operational efficiency.

Less prominent features reveal the accelerated commoditization of traditionally differentiated capabilities. Traditional field services (IMAC), telecommunications management, BYOD, desktop virtualization, patch management and application provisioning appear as basic integrated features, important in the context of the service provided, but without significant strategic differentiation. Traditional service desks, physical tech bars, digital lockers, traditional hot desking and basic facility management suggest an accelerated transition to completely autonomous models, indicating the obsolescence of legacy operating paradigms.

Strategic partnerships with cloud providers and manufacturers are a critical differentiator, achieved through coinnovation and joint development of proprietary solutions. The ability to orchestrate complex technology ecosystems, integrating legacy, cloud and internal solutions with operational agility, creates sustainable competitive advantages that are impossible to replicate in isolation. Technological convergence through integrated portfolios establishes significant barriers to entry through human-free capabilities.

Compliance and ethics in AI are core pillars supported by international standard frameworks, role-based access controls, secure programming interfaces and algorithmic fairness through continuous bias reviews. An AI-ready workforce represents a strategic investment, ensuring organizational relevance and sustainable models of collaboration between humans and AI.

For emerging markets, particularly in the Brazilian context, the analysis reveals strategic opportunities through local regulatory expertise, specialized on-site support and regionalized cultural adaptation. Compliance with the LGPD (General Data Protection Law) integrated with ESG creates a sustainable competitive advantage, while the continental size and infrastructure complexity favor suppliers with on-site delivery capabilities and distributed multilingual support.

Strategic implications and directions for the future of work

The future of work is being shaped by a confluence of technological, economic and social forces that require coordinated strategic responses from businesses, governments and educational institutions. The emergence of autonomous AI and multiagent systems, evidenced in the accelerated transformation of digital workplace models, represents a technological evolution and fundamental transformation in human organizational work and its operational nature. This evolution redefines the relationships between productivity, sustainability and EX, establishing new paradigms of organizational value.

For technology services companies, the central challenge transcends the development of advanced technical capabilities, focusing on creating governance structures and operating models that balance technological efficiency with human values. The ability to navigate this fundamental tension, evidenced in the transition from traditional operational metrics to user-centered experience outcomes, will determine which organizations thrive in the age of AI autonomy. Successfully implementing agent-based ecosystems requires technological excellence, cultural sensitivity, regulatory adaptability and a genuine commitment to social and environmental sustainability.

With its distinctive competitive advantages in clean energy and a dynamic domestic market, Brazil has the strategic potential to emerge as a significant regional technology hub in the global context of digital transformation. Brazil's energy matrix, based on renewable sources, positions the country as a preferred destination for sustainable digital infrastructure, while its sectoral and cultural diversity offers a unique environment for the development of adaptive and inclusive AI solutions. However, realizing this potential critically depends on sustained investments in education, digital infrastructure and innovation policies that address current structural deficits in technological talent formation, particularly in the areas of GenAI and UX.

In conclusion, the digital workplace market is undergoing a structural transformation. The convergence of agent-based AI, operational sustainability and personalized experience defines new competitive paradigms that transcend sectoral and geographical boundaries. The accelerated commoditization of traditional services, combined with the emergence of advanced autonomous capabilities, establishes a scenario where strategic differentiation depends fundamentally on the ability to orchestrate complex technological ecosystems, while maintaining cultural adaptability, local regulatory compliance and a genuine commitment to the sustainable transformation of human work in the age of AI.

The digital workplace converges on three pillars: AI as core infrastructure, UX as a value metric and operational sustainability as a competitive differentiator. AI-centric architectures implement autonomous ecosystems, providing demand deflection and efficiency gains. Strategic partnerships are a differentiator, achieved through coinnovation and the orchestration of technological ecosystems.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Accenture	Leader	Leader	Product Challenger	Product Challenger	Product Challenger	Leader
Atos	Leader	Leader	Leader	Leader	Leader	Product Challenger
Capgemini	Rising Star ★	Product Challenger	Leader	Product Challenger	Product Challenger	Product Challenger
Cognizant	Not In	Not In	Not In	Contender	Not In	Not In
ConnectCom	Not In	Not In	Not In	Contender	Not In	Not In
Dedalus	Market Challenger	Leader	Market Challenger	Not In	Not In	Not In
Deloitte	Leader	Product Challenger	Not In	Not In	Product Challenger	Leader
DXC Technology	Leader	Leader	Leader	Leader	Leader	Leader
Getronics	Product Challenger	Product Challenger	Leader	Rising Star ★	Leader	Product Challenger

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
HCLTech	Product Challenger	Rising Star ★	Rising Star ★	Leader	Product Challenger	Rising Star ★
homeagent	Not In	Not In	Not In	Not In	Contender	Not In
ilegra	Not In	Not In	Product Challenger	Not In	Not In	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
IPNet	Contender	Contender	Contender	Not In	Not In	Not In
Kyndryl	Leader	Market Challenger	Leader	Leader	Leader	Not In
Lenovo	Contender	Product Challenger	Contender	Contender	Product Challenger	Not In
Logicalis	Not In	Not In	Not In	Product Challenger	Not In	Not In
LTIMindtree	Contender	Contender	Contender	Contender	Contender	Contender

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Multiedro	Contender	Contender	Contender	Contender	Not In	Not In
NAVA	Not In	Not In	Contender	Product Challenger	Not In	Product Challenger
NTT DATA	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Leader
Positivo S+	Product Challenger	Rising Star ★	Product Challenger	Leader	Not In	Not In
Processor	Not In	Not In	Not In	Contender	Not In	Not In
SONDA	Product Challenger	Product Challenger	Product Challenger	Market Challenger	Market Challenger	Not In
Stefanini	Leader	Leader	Leader	Leader	Leader	Leader
TCS	Product Challenger	Leader	Product Challenger	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender	Contender

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
TIVIT	Leader	Leader	Leader	Leader	Product Challenger	Leader
Unisys	Leader	Leader	Leader	Leader	Leader	Product Challenger
Venha Pra Nuvem	Contender	Contender	Contender	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Product Challenger	Product Challenger

This study evaluates providers' capabilities in delivering key **future of work services** across different regions.

- **Workplace Strategy and Enablement Services**
- **Collaboration and Next-gen Experience Services**
- **Managed End-user Technology Services**
- **Continuous Productivity Services (Including Next-gen Service Desk)**
- **Smart and Sustainable Workplace Services**
- **AI-augmented Workforce Services**

Simplified Illustration Source: ISG 2025

Definition

The future of work is constantly evolving, with employees returning to offices or hybrid models. Advances in GenAI and the need to assimilate new business models to meet dynamic consumer demands are helping to drive this evolution.

Companies no longer partner with suppliers of just laptops, cell phones, Wi-Fi and call centers. Instead, they adopt flexible work styles and workplaces open to new technological possibilities.

Continuum ranges from traditional low-tech approaches to sustainability-focused agendas, with AI, XR and immersive experiences in EX. Experience parity is a differentiator in the market. Thus, workplaces must offer continuous EX, regardless of location or interaction with consumers. Employees seek freedom to select workspaces and technology. They need ubiquitous access to devices, applications, data, workflows, documents and processes, regardless of location. Such requirements demand security through established platforms, protocols, and access rights.

However, there are challenges in integrating pre-pandemic infrastructure with post-pandemic capabilities. Companies face challenges in integrating pre-pandemic infrastructure with post-pandemic capabilities.

With autonomous improvements, GenAI paves the way for greater employee productivity and efficiency. It allows enterprise IT to manage back-end workplace technologies without major manual intervention. Still, companies need expert help to strategize, implement and adopt the technology.

The report focuses on approaches in which next-generation thinking is changing the future landscape of the workplace.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following six quadrants for services: Workplace Strategy and Enablement Services, Collaboration and Next-gen Experience Services, Managed End-user Technology Services, Continuous Productivity Services (Including Next-gen Service Desk), Smart and Sustainable Workplace Services, and AI-augmented Workforce Services.

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

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

Workplace Strategy and Enablement Services

This report is valuable for providers offering **workplace strategy and enablement services** in **Brazil** to understand their market position and for companies seeking 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.

Digital transformation professionals

Should read this report to compare different providers and gain a comprehensive understanding of how these providers fit into their digital transformation initiatives, including technology integration, adoption of strategies to create more efficient workplaces, new forms of collaboration to meet demands and digital training that impacts workplaces, among others.

Technology professionals

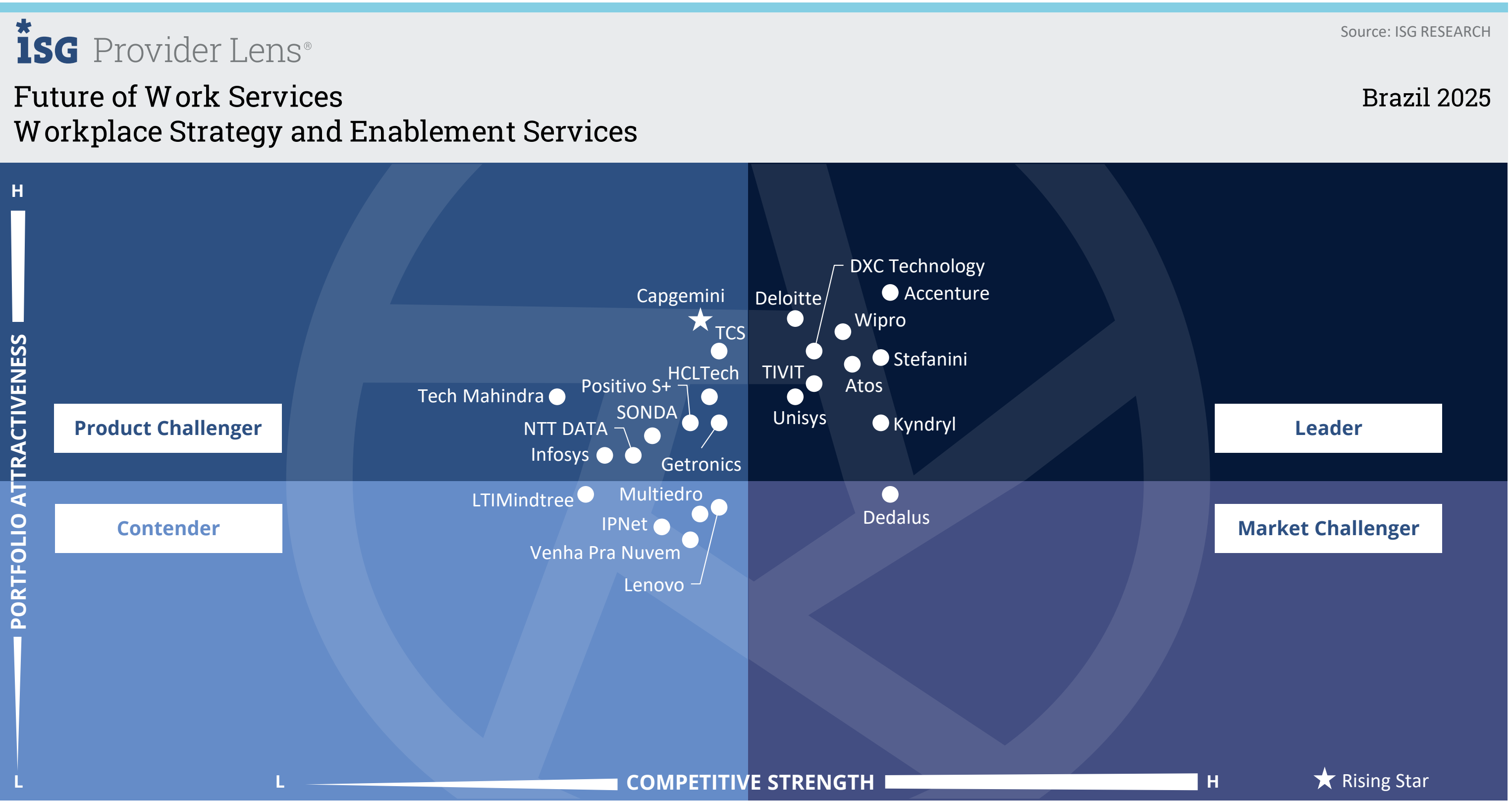
Should read this report to gain an in-depth understanding of their relative positioning in relation to the capabilities and competitive strengths of various providers that can support their commitment to building more efficient and, above all, innovative workplaces. Through this report, technology professionals can learn more about the providers that are most aligned with their strategic objectives.

Human resources executives

Should read this report to understand how service providers are addressing the EX in human, digital and physical work collectively, ensuring the parity of experiences, adopting workplace sustainability strategies and implementing newer, more modern talent models that integrate diversity, equity and inclusion and eliminate the risk of modern slavery.

Chief experience officers (CXOs)

Should read this report to understand how service providers can help their teams in the digital age and adapt to evolving business dynamics, including market changes and new business models. The report offers guidance, compliance, workplace strategies and strategic digital resources that impact workplaces across all companies.



This quadrant evaluates providers of **strategy** and enablement **services** for work environments, **tailoring advice by region and industry**. It includes **business models, digital capabilities**, physical environment integration and sustainability.

Cristiane Tarricone

Definition

This quadrant evaluates providers offering workplace strategy and enablement services across industries. Organizations tailor their advice and strategy by region, market direction and organizational responsibility, offering strategic capabilities for enterprise-wide workplaces.

Providers consider modern business models and talent approaches while offering guidance, compliance and strategies suited to human, digital and physical workplaces collectively. Their services include:

- Market changes and new business models
- Digital capabilities impacting workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategies

While some providers develop strategies, minimizing potential issues needs work on procurement and CX, project and change management, and effective workplace strategy delivery. Tailoring these capabilities by industries is crucial, as regulations vary by industry.

Eligibility Criteria

1. Provide **advisory services** and **new business model designs**
2. Have a vendor-neutral approach for **workplace transformation-led business delivery models**
3. Offer **advisory services for human, digital or physical workplace strategy**
4. **Adopt new talent models** that should integrate diversity, equity and inclusion and eliminate modern slavery risks
5. **Integrate local and remote physical workplaces** to ensure **experience parity**
6. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom line performance
7. Have **experience and references in delivering workplace-driven sustainability strategy**
8. Have **industrywide case studies for workplace strategy** leading to human, digital and physical workplace benefits

Observations

This quadrant covers providers that demonstrate consultative excellence in workforce strategy and digital skills development. The analysis prioritized consulting practices, focusing on optimizing the EX and structured training programs. Organizations with consolidated capabilities in managing the transformations necessary for the evolution of the digital work model stand out, incorporating strategic elements into EX management, with an emphasis on empathy and personalization.

The characteristics of Leaders in this quadrant reflect a long-term strategic vision, significant investments in AI, promoting an ecosystem of skills and continuous evolution. Integrating human and technological strategies is essential as companies design and implement these strategies, aligning operations with measurable results. A strong focus on CX, manifested in experience centers and customized solutions, ensures that offerings are tailored to regional particularities, such as in Brazil. A concern for sustainability and inclusion is evident in integrating ESG practices and accessibility solutions. Maturity models enable detailed assessments of customers' digital capabilities, promoting greater adoption.

However, challenges remain, including the need to minimize the risks associated with change and acquisitions and to improve transparency in results and KPIs. Thus, we identified Accenture, Atos, Deloitte, DXC Technology, Kyndryl, Stefanini, TIVIT, Unisys and Wipro as Leaders and Capgemini as a Rising Star.

From the 50 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Accenture is a leading consulting and strategy services company focused on digital business transformation. It creates digital workplaces that combine human and digital elements through connected strategies, technological innovation and EX.

Atos is a global leader in technology services and a digital transformation solutions partner. Its digital workplace consulting connects technological innovation to human performance through partnerships with educational institutions and enhances EX.

Deloitte is a global leader in consulting and strategy, focusing on digital business transformation. Its approach integrates transformation, innovation, the evolution of roles, and human and digital integration, enabling a highly collaborative workplace.

DXC Technology operates in mission-critical business applications, providing its Modern Workplace solution, which connects human and digital agents for transparent and secure collaboration and performance, enabling teams to perform their work on any device, anywhere.

Kyndryl is a leader in digital workplace services, bringing continuous innovation to its intelligent solutions, AI-driven automation and GenAI support. It enhances the EX and business results for clients.

Stefanini specializes in digital workplaces and applies intelligent solutions to collaborative environments, security and high levels of customization. Its flexibility and expertise in remote solutions ensure customized and productive contracts.

TIVIT is a leader in digital workplace and transformation consulting. With over 1 million tickets handled annually, support centers in Brazil and other Latin American countries and many certified analysts, it guarantees productivity and security for the workplace.

Unisys offers digital workplace consulting, empowering employees with customized and secure tools. It focuses on the UX, with managed services for Microsoft 365® and comprehensive support.

Wipro offers cognitive intelligence, touchless automation and a comprehensive data framework that enable enhanced EX, boost productivity and enhance employee well-being.

Capgemini (Rising Star) is a global leader in consulting, technology and outsourcing, offering innovative solutions in digital transformation, cloud, AI and engineering. It designs and executes connected digital workplaces.

DXC Technology

Leader

"DXC Technology innovates with OASIS and UPtime platforms, offering real-time insights and user-centric experiences. With a focus on emerging technologies and sustainability, it creates resilient environments that improve efficiency and Net Promoter Score."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees in over 130 offices in 65 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC was positioned in the Workplace Strategy and Enablement Services quadrant in 2024 as a Leader and remains a Leader in 2025. In Brazil, DXC has delivery centers in the states of São Paulo, São Bernardo do Campo, Rio de Janeiro, Belo Horizonte and Vitória.

Strengths

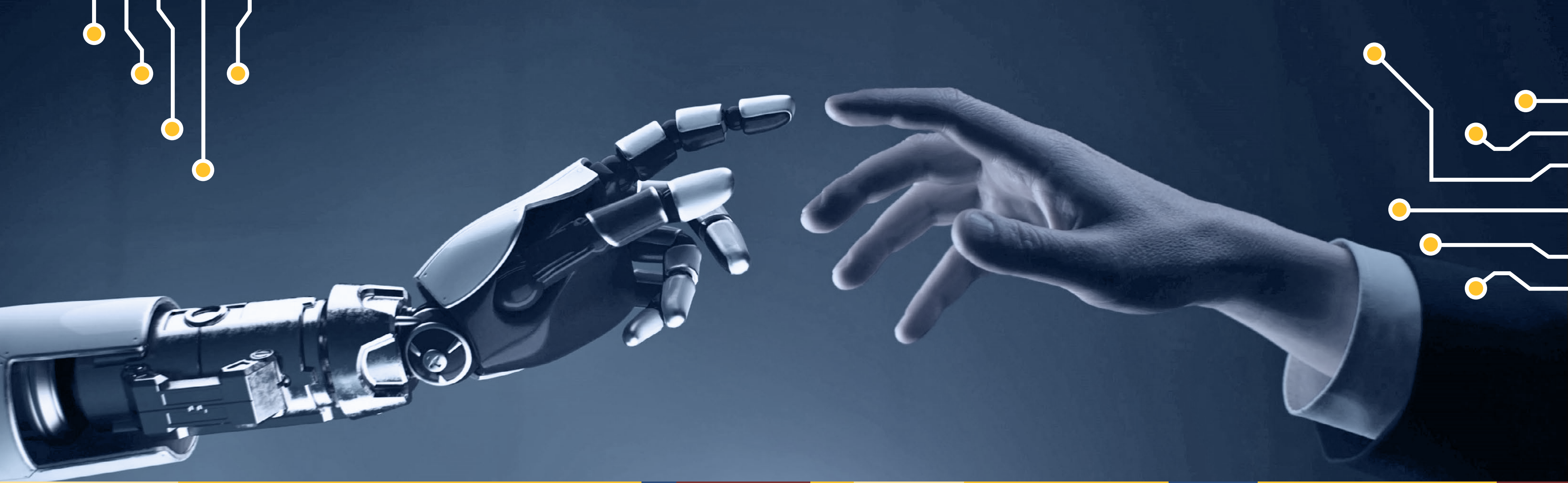
Integrated approach: DXC applies an innovative approach guided by UX and powered by AI. Its OASIS and UPtime platforms offer real-time insights into service performance and device health, enabling more agile and informed decisions. This integration is complemented by solid global operational stability, strategic partnerships with suppliers, and a combination of services that promote effective modernization of the work ecosystem.

Change management: DXC uses the Vortical Change model to drive effective transformation, which provides cognitive education and practical experiences that empower users to become autonomous advocates of new practices.

Sustainable adoption and focus on results: DXC facilitates the adoption of emerging technologies such as GenAI and virtual assistants while optimizing Microsoft 365 governance and device life cycle management strategies. With a global commitment to sustainability, it delivers ESG value through sustainable device management practices. Its DEX AI framework ensures continuous improvements in UX and ROI, with a goal to create resilient, human-centric work environments.

Caution

Although business growth rates have slowed, DXC can enhance its go-to-market approach by investing more in strategic consulting focused on GenAI to drive new growth and strengthen its market position.



Collaboration and Next-gen Experience Services

This report is valuable for providers offering **collaboration and next-gen experience services** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market presence.

Human resources executives

Should read this report to understand how providers are addressing collaboration, empathy and employee well-being in the era of hybrid work. The report highlights how solutions such as Teams, Cisco and Zoom support unified communications, collaboration and productivity stacks, as well as how they manage and monitor deployed hardware analytics.

Technology professionals

Should read this report to understand the relative positioning of the capabilities and competitive strengths of various providers that can meet their needs for next-gen collaboration and experience services. Through this report, technology professionals can learn more about the providers that are most aligned with their strategic goals.

Experience directors

Should read this report to gain an in-depth understanding of how service providers can help their teams with collaboration and experience in the digital age and adapt to evolving business dynamics. The report covers proper change management and technology adoption, improving end-to-end CX and EX and offering managed services for workplace technology ecosystems.

Digital transformation professionals

Should read this report to compare different providers and gain a comprehensive understanding of how providers fit into their digital transformation initiatives. The report highlights improvements in collaboration and experience, as well as the importance of aligning digital workplace transformation with human needs and measurable business outcomes.

This quadrant evaluates providers **that improve CX and EX with managed services** for technology at work. They **promote collaboration,** adopt results-focused technology, **utilize AI and offer change management consulting.**

Cristiane Tarricone

Definition

This quadrant assesses service providers that enhance end-to-end CX and EX and offer managed services for workplace technology ecosystems. Providers enable business leaders, line-of-business representatives and CXOs to enhance collaboration and improve experience. They align digital workplace transformation with human needs and measurable business results.

Next-generation experience services promote technology adoption. Providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data, sentiment analysis, ML and change management.

Providers enhance and support communication, collaboration and productivity stacks using AI and GenAI for enterprises. They offer consulting and advisory services for HR and operations, guiding change management and technology adoption. They also promote digital dexterity, fostering an environment conducive to learning and skill development for the evolving workplace.

Eligibility Criteria

1. Adopt an **XLA-focused delivery approach** to enhance collaborative experiences
2. **Leverage AI and GenAI** to provide value-added experience transformation services
3. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage them by monitoring analytics from deployed hardware
4. **Support unified communication, collaboration and productivity stacks**
5. **Provide services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
6. Provide **services that enable proper change management and technology adoption**, leveraging the latest technologies such as Copilot
7. **Support XMO and associated services**
8. Provide **services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**

Observations

The evaluated quadrant highlights providers that demonstrate excellence in enhanced experiences for employees and customers through managed services. Best practices revealed include the adoption of XLA (Experience Level Agreement)-centric approaches that emphasize continuous improvement and engagement in measurable results. AI and GenAI tools play a key role in transforming experiences, enabling personalization and optimization of collaboration. Leaders align their strategies with human needs and business outcomes, offering collaboration and human resources consulting solutions.

Notable characteristics of leaders include implementing services such as Microsoft 365 Copilot, which guide technology adoption and transforming EX into a collaborative effort. Predictive analytics models and CoEs enable proactive interventions and continuous improvement. The adoption of strategic partnerships, cocreation, and robust cybersecurity with AI are priority among Leaders.

In the Brazilian context, it is crucial for companies to focus on customizing solutions and cultural adaptation, considering local diversity. Coinnovation with customers will ensure that solutions effectively meet market needs. Integrating emerging technologies and a focus on UX will be key to building sustainable work environments, promoting a dynamic and effective digital future. Thus, we identified Accenture, Atos, Dedalus, DXC Technology, Stefanini, TCS, TIVIT, Unisys and Wipro as Leaders, and HCLTech and Positivo S+ as Rising Stars.

Of the 50 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and two Rising Stars.

Accenture is a leading consulting and strategy services company focused on digital business transformation. It creates digital workplaces that combine the human and digital, through connected strategies, technological innovation and EX.

Atos is a global leader in technology services and a partner in digital transformation solutions. Its *digital workplace* consulting connects technological innovation to human performance through partnerships with educational institutions and enhances EX.

Dedalus is a Brazilian Microsoft partner that offers Microsoft services in consulting, collaboration, communication, and cloud. The company specializes in standardization of scale and service to offer cost optimization and employee productivity.

DXC Technology operates in mission-critical business applications, providing its Modern Workplace solution, which connects human and digital agents for transparent and secure collaboration and performance, enabling them to perform their work on any device and in any location.

Stefanini specializes in *the digital workplace* and applies intelligent solutions to collaborative, secure and highly customized environments. Its flexibility and expertise in remote solutions ensure customized and productive contracts.

TCS is a global leader in IT services and consulting, offering solutions in digital transformation, automation and AI. With a focus on sustainability and excellence, it enables companies to optimize their operations and drive growth.

TIVIT

TIVIT is a leader in *digital workplace* and transformation consulting. With over 1 million tickets handled annually, support centers in Brazil and Latin America, and a high number of certified analysts, it ensures productivity and security for the workplace.

unisys

Unisys offers digital workplace consulting, empowering employees with personalized and secure tools. Its focus is on the UX, with managed services for Microsoft 365® and comprehensive support.

wipro

Wipro offers cognitive intelligence, touchless automation and a comprehensive data framework that enables exceptional experiences for employees, boosting productivity and employee well-being.

HCLTech

HCLTech is a global IT services company offering solutions in innovation, digital transformation and software engineering. Focused on CX and agility, it combines technology and expertise to drive business efficiency and growth.

Positivo S+

Positivo S+ is a Brazilian technology company focused on hardware, software and digital services solutions. Offering notebooks, tablets, and devices, it seeks to promote digital inclusion, digital transformation, automation and personalized support.

DXC Technology

Leader

"With an analytical, data-driven approach and intelligent models, DXC continuously optimizes the UX, provides *feedback* and comprehensive, proactive support, and it ensures a resilient hybrid operation aligned with business objectives."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees in over 130 offices in 65 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC was positioned in the Collaboration and Next-gen Experience Services quadrant in 2024 as a Leader and remains a Leader in 2025. In Brazil, DXC has delivery centers in the states of São Paulo, São Bernardo do Campo, Rio de Janeiro, Belo Horizonte and Vitória.

Strengths

Collaborative ecosystem: DXC's robust network of partners, such as Microsoft, Cisco and HP, provides access to innovative solutions in intelligent collaboration and cloud. This synergy enables comarketing and codevelopment of cutting-edge technologies, ensuring customers stay ahead in the competitive hybrid work landscape. Its expertise in intelligent collaboration and data analytics ensures the delivery of results and risk mitigation.

Analytical and data-driven approach: The XM Delivery Framework and Unified Experience Data Model ensure an optimized UX. The model is based on a comprehensive methodology that identifies critical areas for customers. With stages that include consulting, rapid prototyping and end-to-end managed services, it promotes a modern work experience that is continuously improved and adapted to the business.

Intelligent collaboration: This implementation involves a continuous *feedback* cycle and proactive support, with consulting sessions to tailor solutions to the customer's infrastructure and policies, followed by level 4 support. Analysis and *feedback* from user experiences ensure that solutions are aligned with business objectives, resulting in IT spending maturity that supports an effective and resilient hybrid operation.

Caution

The ongoing evolution of hybrid workplace demands requires a constant focus on innovation, adaptation and security. DXC can monitor emerging trends and explore the resilience and security aspects of its infrastructure as differentiators in its service offering.

Managed End-user Technology Services

Who Should Read This Section

This report is valuable for providers offering **managed end-user technology services** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market presence.

Technology professionals

Should read this report to gain an in-depth understanding of the relative positioning of various providers regarding their capabilities and competitive strengths. The report highlights how these providers can support their demands for managed infrastructure services in the digital workplace, including end-user enablement across devices, applications, cloud workspaces and endpoint security.

Procurement professionals

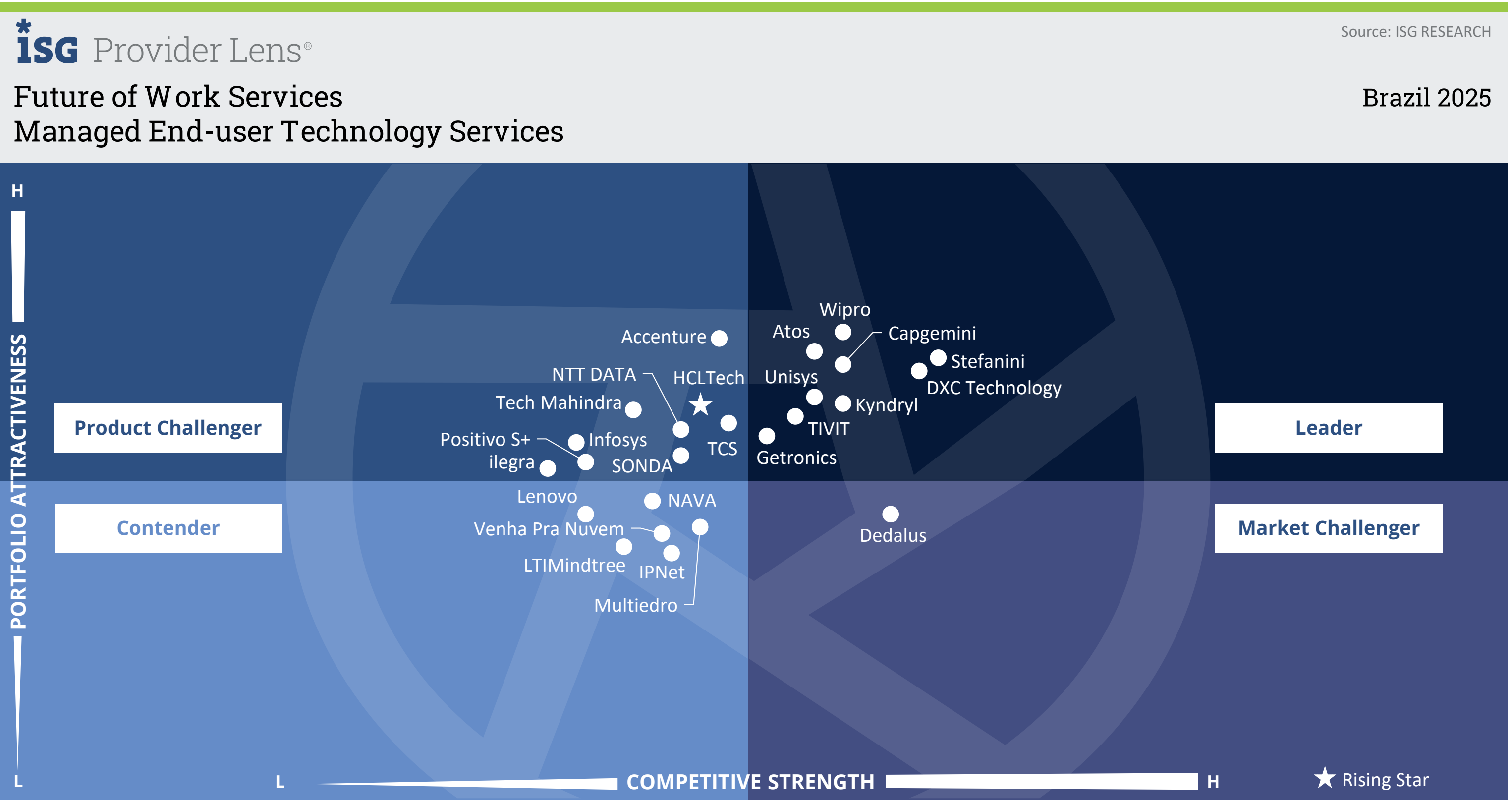
Should read this report to gain a better understanding of the current landscape of managed workplace service providers in the Brazilian market that offer comprehensive end-user computing (EUC) services, including device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management, among others.

Cybersecurity professionals

Should read this report to gain a deeper understanding of how providers in the Brazilian market address compliance and security challenges without compromising EX, considering that management and security are the first steps in enabling a digital workplace by providing devices with built-in collaboration and productivity features.

Digital professionals

Should read this report to compare different providers and gain a comprehensive understanding of how these providers fit the demands of their digital workplace transformation initiatives, including the adoption of efficient managed infrastructure technologies in the digital workplace for IT departments to support end users.



This quadrant evaluates service providers that **manage technology for enterprise IT,** offering computing services for end users, device management, and security. It includes support for BYOD initiatives and **personalized digital experiences** for various industries.

Cristiane Tarricone

Definition

This quadrant evaluates service providers that manage technology for enterprise IT departments to support end users. These managed infrastructure services in the digital workplace include end-user enablement through devices, applications, cloud workspaces and endpoint security. Providers offer complete end-user computing (EUC) services, including device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. They support BYOD initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX). Provisioning, managing and securing devices are the primary steps to enabling a digital workplace, providing devices with integrated collaboration and productivity capabilities. These services can also be tailored for specific industries, such as retail, hospitality and healthcare.

Eligibility Criteria

1. **Provide connected, always-on and updated end-user devices** for secure collaboration and productivity
2. Support **unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**
3. Offer **complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Provide **DEX solutions for automated issue resolution**
5. Demonstrate **experience in providing virtual desktop services on-premises and on the cloud** (desktop as a service)
6. **Offer related field services**, IMAC (Install, Move, Add and Change/Configure) and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **Include end-user technology services management in at least 75 percent of regional contracts**

Observations

Leaders in managed *digital workplace* services converge on three strategic pillars: AI as an engine for operational transformation, end-user experience as a metric for success, and sustainability as a competitive differentiator. AI represents the main lever, manifesting itself through unified platforms with intelligent automation, predictive *analytics* and *self-healing.* Providers position AI as a foundational architecture, from provisioning to proactive incident resolution via hyper automation and GenAI.

The digital experience emerges through proprietary methodologies that transform traditional metrics into tangible results. Proactive Experience Centers, DEX and behavioral *analytics* customize deliveries according to specific operational profiles.

Sustainability is a competitive advantage through circular device management models. Practices include refurbishment, eco-friendly recycling and ESG scores that align behavior with corporate goals.

The layered delivery model integrates personas, technology platforms, omnichannel *service desks* and reliability automation. Strategic partnerships with *hyperscalers* are a differentiator through co-innovation and joint development.

For the Brazilian market, local regulatory expertise, specialized on-site support and cultural adaptation represent opportunities for differentiation. Compliance with LGPD and local legislation are emerging as competitive barriers. The continental size favors suppliers with on-site capacity and distributed multilingual support. Atos, Capgemini, DXC Technology, Getronics, Kyndryl, Stefanini, TIVIT, Unisys and Wipro were identified as Leaders, and HCLTech as a Rising Star.

Of the 50 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one Rising Star.

Atos is a global leader in technology services and a digital transformation solutions partner. Its *digital workplace* consulting connects technological innovation with human performance through partnerships with educational institutions and enhances EX.

Capgemini is a global leader in consulting, technology, and outsourcing, offering innovative solutions in digital transformation, cloud, AI, and engineering. It designs and implements connected digital work environments.

DXC Technology operates in mission-critical business applications, providing its Modern Workplace solution, which connects human and digital agents for transparent and secure collaboration and performance, enabling them to perform their work on any device, anywhere.

Getronics is a global leader in IT solutions, with 4,000 employees in 22 countries. It specializes in digital transformation, smart *workplaces*, and managed services. It leads the Global Workspace Alliance, serving more than 180 territories.

Kyndryl is a leader in *digital workplace* services, bringing continuous innovation to its intelligent solutions, AI-driven automation, and GenAI support. It enhances the EX and business results.

Stefanini specializes in *digital workplaces* and applies intelligence solutions to collaborative environments, security, and high levels of customization. Its flexibility and expertise in remote solutions ensure customized and productive contracts.

TIVIT is a leader in *digital workplace* and transformation consulting. With over 1 million tickets handled annually, support centers in Brazil and Latin America, and a high number of certified analysts, it guarantees productivity and security for the workplace.

Unisys offers digital workplace consulting, empowering employees with personalized and secure tools. Its focus is on the UX, with managed services for Microsoft 365® and comprehensive support.

Wipro offers cognitive intelligence, touchless automation, and a comprehensive data framework that enable exceptional EX, boost productivity and enhance employee well-being.

HCLTech (Rising Star) is an Indian multinational IT company with 224,000 employees in 60 countries. It offers collaboration and experience services based on unique intellectual property to elevate the end-user experience.

DXC Technology

Leader

"DXC offers Modern Device Management with 360° experience and multi-OS integration. Using cloud and AI ensures efficiency, security and rapid adaptation to modern work demands, promoting resource savings."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees in over 130 offices in 65 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC was positioned in the Managed End-user Technology Services quadrant in 2024 as a Leader and remains a Leader in 2025. In Brazil, DXC has delivery centers in São Paulo, São Bernardo do Campo, Rio de Janeiro, Belo Horizonte, and Vitória.

Strengths

Modern device management: DXC's solution provides a 360° integrated UX across multiple operating systems, such as Windows and iOS. With a focus on process automation, simplified *onboarding*, and life cycle management, DXC ensures that employees can access data and applications securely and efficiently, increasing flexibility and mobility in the workplace.

Digital approach and intelligence: DXC uses the cloud to deliver efficiency, consistency and cost savings in device management. With intelligence and automation at the core of its strategy, the company implements real-time monitoring, proactive support and strict security policies. This ensures that organizations can quickly adapt to the dynamic demands of the modern workplace using scalable service models.

Innovation and sustainability: Owing to its expertise in device intelligence, DXC drives innovation in its offering. The DXC Device Intelligence Framework leverages performance data to guide a journey of maturity in device investment, promoting efficient use of the IT budget. In addition, the company emphasizes sustainability by extending device life cycles and aligning itself with corporate ESG initiatives.

Caution

DXC could enhance its communication about the impact of modern device management on technology budgets. Integrating FinOps initiatives more effectively into devices in its strategy could further strengthen its value proposition.

Continuous Productivity Services (Including Next-gen Service Desk)

This report is valuable for providers offering **continuous productivity services (including next-gen service desk)** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market presence.

Technology professionals

Should read this report to gain an in-depth understanding of the relative positioning of various providers regarding their capabilities and competitive strengths. The report highlights how these providers can support their demands for service desk modernization and desktop support services, as well as meet the productivity needs of next-gen human and hybrid workplaces.

Digital professionals

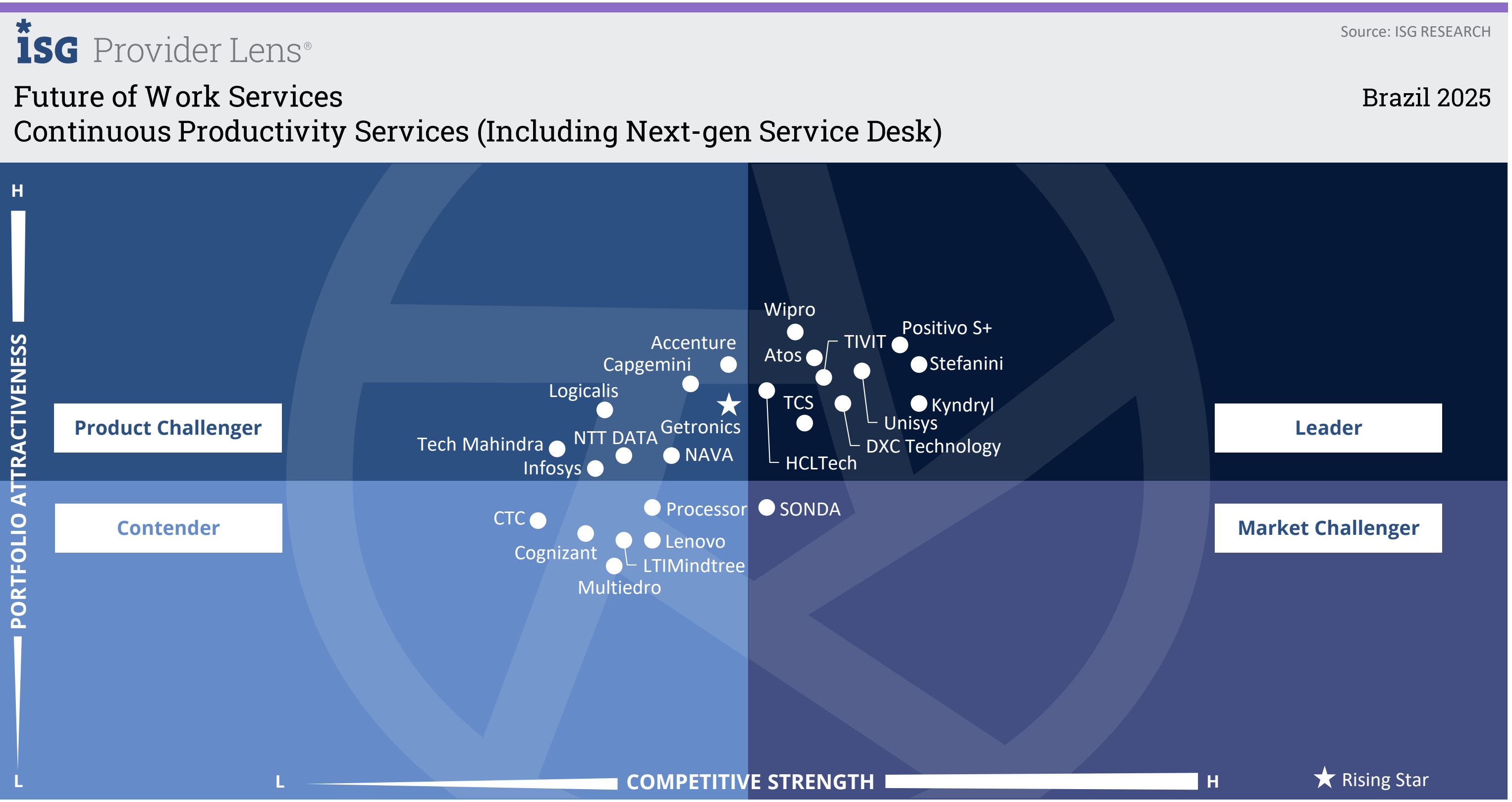
Should read this report to compare different providers and gain a comprehensive understanding of how providers fit into their continuous productivity initiatives and needs, especially as the majority of the workforce now prefers the ability to work from anywhere at any time, driving the need for a different IT operating model.

Digital professionals

Should read this report to compare different providers and gain a comprehensive understanding of how providers fit into their continuous productivity initiatives and needs, especially as the majority of the workforce now prefers the ability to work from anywhere at any time, driving the need for a different IT operating model.

Field service professionals

Should read this report to understand the relative positioning of providers in the Brazilian market and how they can help expand and modernize the use of services in the workplace to better manage field service operations, including fully integrated analytics and automation for problem resolution.



This quadrant evaluates providers that meet productivity needs in hybrid work environments. They offer **advanced support with sentiment analysis, automated DEX** and emerging technologies, **prioritizing XLAs** and automation.

Cristiane Tarricone

Definition

This quadrant assesses service providers supporting the productivity needs of next-generation, human and hybrid workplaces.

Today's workforce prefers the ability to work from anywhere and anytime, leading to the need for a different IT operating model driven by changes in business models and market channels. Providers must offer enhanced support capabilities, making typical service desk offerings less appealing yet available. Next-generation services include sentiment analysis, automated DEX triage, AI-powered health monitoring and emerging technologies such as AR and VR. Providers must also leverage AI and cognitive technologies for user-facing tasks to achieve cost savings.

Providers measure success through XLAs linked to business outcomes rather than SLAs. They enhance business outcomes by leveraging automation and offering remote and self-service options like AR self-fix, workplace support, service desk, tech bars, DigiLockers and omnichannel chat and voice support.

Eligibility Criteria

1. Provide ***deliver-anywhere*** **autonomous workplace support**
2. Offer **fully integrated analytics and automation** for issue resolution
3. Deliver **contextualized AI support** for workplaces
4. Provide **service desk augmentation**
5. Offer **XLA-driven support** instead of SLA-driven decisions
6. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
7. Provide **automated and contextualized support for end users** based on their roles and work
8. **Quantify workplace support function performance** beyond traditional service metrics
9. Have a **robust local presence** with most workplace engagements around service desk services

Observations

Leaders in Continuous Productivity Services converge on GenAI, UX, and cognitive automation. The transition from SLAs to XLAs prioritizes business outcomes over traditional operational metrics. GenAI permeates solutions via virtual assistants, cognitive automation, and predictive *analytics*. Intelligent platforms demonstrate autonomous resolution and self-remediation. Multiagent ecosystems with explainable AI eliminate silos through code-free orchestration.

Experience Management emerges as a differentiator through methodologies that transform observability into actionable insights. Experience Management Offices consolidate end-to-end journeys, governing experiences from meeting rooms to industrial plants. Personalization via micro-personas and sentiment analysis set a new standard for engagement.

Intelligent automation transcends ticket deflection, eliminating problems before they impact. Active *self-healing*, anomaly detection, and silent interventions reduce IT interactions. AR/VR for field support minimizes travel while maximizing efficiency. Partnerships with hyperscalers underpin *zero-touch* capabilities via AutoPilot, *smart lockers*, and *vending machines*. Integrated portfolios create sustainable competitive advantages. Less prominent features include traditional *service desks*, physical *tech bars*, and DigiLockers, suggesting a transition to autonomous models. Kiosks appear as basic features. Atos, DXC Technology, HCLTech, Kyndryl, Positivo S+, Stefanini, TCS, TIVIT, Unisys and Wipro were identified as Leaders, and Getronics was identified as a Rising Star.

Of the 50 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Atos

Atos is a global leader in technology services and a digital transformation solutions partner. Its *digital workplace* consulting connects technological innovation with human performance through partnerships with educational institutions and enhances EX.

DXC TECHNOLOGY

DXC Technology operates in mission-critical applications for companies, providing its Modern Workplace solution, which connects human and digital agents for transparent and secure collaboration and performance, enabling them to perform their work on any device and in any location.

HCLTech

HCLTech is a global IT services company offering solutions in innovation, digital transformation, and software engineering. Focused on CX and agility, it combines technology and expertise to drive business efficiency and growth.

kyndryl

Kyndryl is a leader in *digital workplace* services, bringing continuous innovation to its intelligent solutions, AI-driven automation, and GenAI support. It enhances the EX and business results.

Positivo S+

Positivo S+ is a Brazilian technology company focused on hardware, software and digital services solutions. Offering notebooks, tablets and devices, it seeks to promote digital inclusion, digital transformation, automation and personalized support.

stefanini GROUP

Stefanini specializes in *the digital workplace* and applies intelligence solutions to collaborative environments, security and high levels of customization. Its flexibility and expertise in remote solutions ensure customized and productive contracts.

tcs TATA CONSULTANCY SERVICES

TCS invests in Near Zero Contact Service Desk, which is an end-to-end hyperautomated approach to resolving end-user issues without active *call center* involvement.

TIVIT is a leader in *digital workplace* and transformation consulting. With over 1 million tickets handled annually, support centers in Brazil and Latin America, and a high number of certified analysts, it ensures productivity and security for the workplace.

Unisys offers digital workplace consulting, empowering employees with personalized and secure tools. Its focus is on the UX, with managed services for Microsoft 365® and comprehensive support.

Wipro offers cognitive intelligence, touchless automation and a comprehensive data framework that enable exceptional EXs, boost productivity and enhance employee well-being.

Getronics (Rising Star) is a global leader in IT solutions, with 4,000 employees in 22 countries. Specialists in digital transformation, smart *workplaces* and managed services. It leads the Global Workspace Alliance, serving over 180 territories.

DXC Technology

Leader

"DXC revolutionizes digital support with proactive AI that eliminates problems before they impact users. Combining intelligent automation, strict ISO 27001/GDPR compliance and a *touchless* experience, it delivers high-performance autonomous environments."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees in over 130 offices in 65 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC was positioned in the Continuous Productivity Services (Including Next-Gen Service Desk) quadrant as a Leader and remains a Leader in 2025. In Brazil, DXC has delivery centers in São Paulo, São Bernardo do Campo, Rio de Janeiro, Belo Horizonte and Vitória.

Strengths

Proactive and autonomous ecosystem: DXC Digital Support Services aim to create an autonomous work environment using solutions such as digital assistants, device intelligence and an Agile Service Desk. This automation and AI-based approach proactively predicts and resolves issues, reducing IT interactions and improving user satisfaction while facilitating a touchless support experience.

Innovation with AI: DXC invests in continuous innovation through AI to detect anomalies and optimize support interactions. With a focus on automation, the company aims to eliminate tickets rather than just deflect them, ensuring that issues are resolved before they impact the UX, resulting in significant improvements in response times and overall experience.

Strict security and compliance: DXC is committed to robust security and compliance practices, aligning itself with strict standards such as ISO/IEC 27001 and GDPR. These practices encompass risk management, incident response and regular audits, ensuring that the company's continuous productivity services are secure, reliable and compliant with industry standards, providing peace of mind to customers.

Caution

Although DXC offers advanced AI and automation solutions, implementing fully autonomous ecosystems can present a significant learning curve for end users. The transition to *touchless* environments requires organizational cultural change and adequate training to maximize ROI.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is valuable for providers offering **smart and sustainable workplace services** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market presence.

Technology professionals

Should read this report to understand the relative positioning and capabilities of providers that can help them build a smart and sustainable workplace. The report highlights the importance of incorporating smart facilities, adaptable and efficient spaces and supporting smart office spaces that combine human, digital and physical elements for better engagement and productivity.

Digital transformation professionals

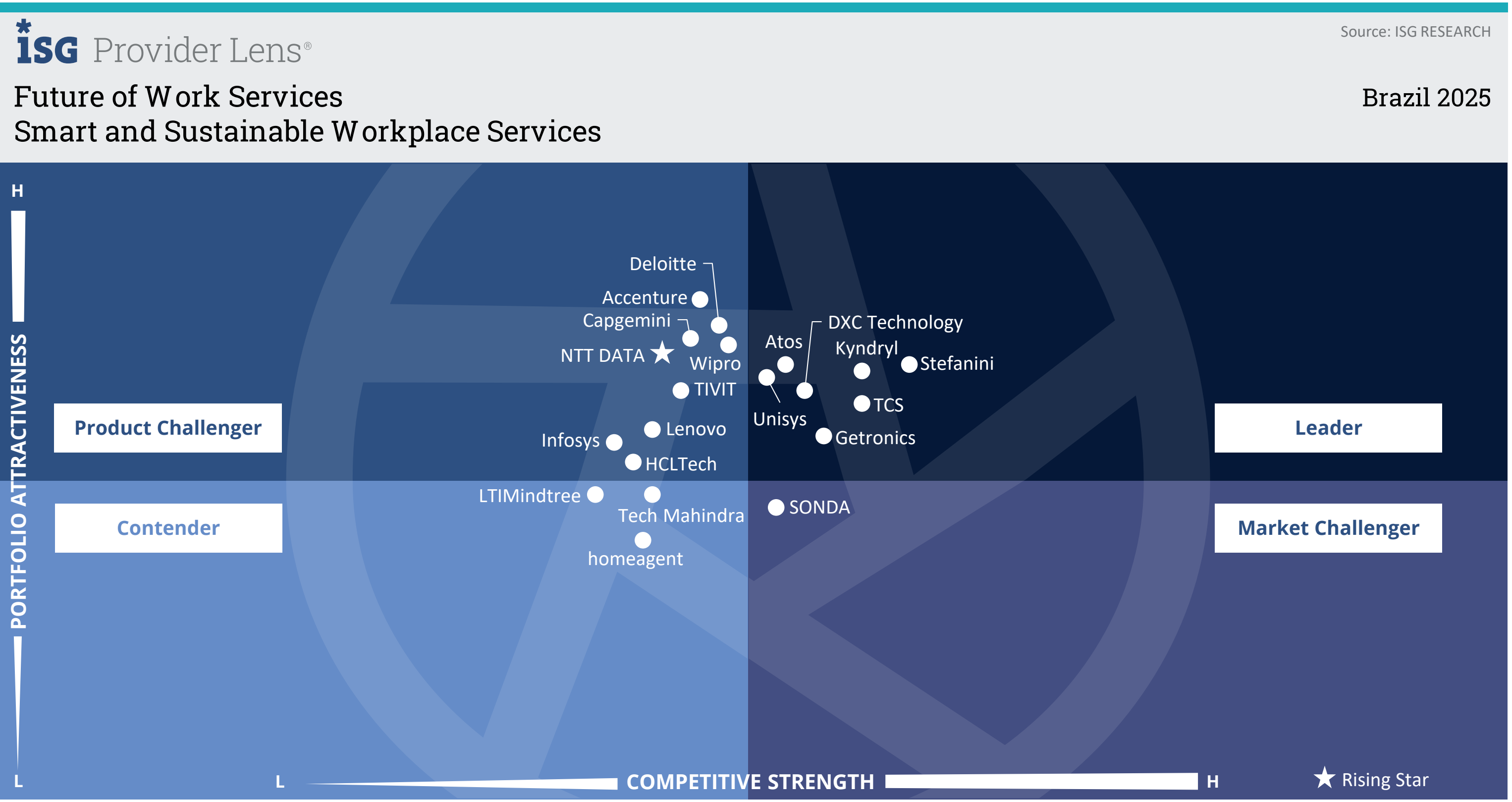
Should read this report to compare different providers and gain a comprehensive understanding of how providers fit into their smart and sustainable workplace transformation. The report will also help them understand the integration of innovations and market demands for holistic office strategies in remote, hybrid or face-to-face activities.

Procurement professionals

Should read this report to gain an in-depth understanding of the current landscape of providers of smart and sustainable workplace services in the Brazilian market. This understanding will enable these professionals to compare providers, make more informed decisions, improve their operational efficiency and strengthen their business partnerships.

Sustainability leaders

Should read this report to understand the relative positioning and capabilities of providers that can assist them in implementing sustainable projects. The report covers how to manage environments that improve operational efficiency and employee well-being, fulfill environmental responsibilities and establish offices that are integrated, inclusive and sustainable.



This quadrant evaluates providers that support **smart and sustainable work environments**. They create holistic strategies with technologies that promote efficiency, well-being and environmental responsibility, **integrating IoT into collaborative spaces.**

Cristiane Tarricone

Definition

This quadrant assesses service providers supporting smart, IoT-enabled workplaces and helping clients achieve sustainability goals. Modern workplaces combine human, digital and physical elements for remote, hybrid or in-person collaboration and productivity. Office buildings must also be integrated, inclusive and sustainable.

With commercial retail facing occupancy issues, providers must collaborate with enterprise leaders to create holistic office strategies. They must leverage technology and sustainability to design, implement and manage environments that enhance operational efficiency, employee well-being and environmental responsibility. Providers must build environments with smart meeting and facility management solutions, creating adaptive, efficient, inclusive and responsible spaces. They must also integrate experience parity capabilities, unified communications and smart collaborative workspaces. Their services must include IoT-enabled functionality for smart campuses, focusing on ESG initiatives.

Eligibility Criteria

1. Support **smart office spaces** and provide workplace analytics, hot desking, smart buildings, and facilities management **by leveraging IoT and the latest technologies.**
2. **Support asset efficiency and meet energy management requirements**.
3. Provide **inclusive, adaptable, and integrated hybrid workspace solutions**.
4. Provide **services to reduce carbon emissions** in the workplace.
5. Assist in aligning customer **strategies and metrics for ESG reporting**, with a particular focus on the use of workspace in the social and governance dimensions.

Observations

Leaders in Smart and Sustainable Workplace Services are converging on integrated ESG strategies, IoT and AI technologies, and impact measurement methodologies. Sustainability is emerging as a driver of innovation through circular and net-zero approaches. IoT and AI integration permeates solutions via integrated sensors, energy automation, and predictive *analytics* for space optimization.

Intelligent platforms demonstrate maturity in carbon footprint management by location and persona. Convergence creates responsive environments, reducing environmental impact. Proprietary ESG methodologies represent a differentiator through real-time data mining, industrial benchmarking, and automated reporting. End-to-end programs focus on transparency and resource reduction via the circular economy. Diversity and inclusion emerge as pillars through engagement and organizational well-being *frameworks*. Initiatives such as women's representation in the company and volunteer programs demonstrate a commitment to social responsibility.

Integrated partnership ecosystems underpin holistic solutions including Virtual Tech Cafés and Kiosks. The evolution toward smart models is noteworthy, superseding traditional *hot desking* and basic *facility management*.

For Brazil, the culture of co-creation represents an ideal approach that considers sectoral diversity and local regulations. LGPD compliance integrated with ESG practices creates a sustainable competitive advantage. Atos, DXC Technology, Getronics, Kyndryl, Stefanini, TCS and Unisys were identified as Leaders, and NTT DATA as a Rising Star.

From the 50 companies assessed for this study, 20 qualified for this quadrant, with seven being Leaders and one Rising Star.

Atos is a global leader in technology services and a digital transformation solutions partner. Its *digital workplace* consulting connects technological innovation with human performance through partnerships with educational institutions and enhances EX.

DXC Technology operates in mission-critical applications for companies, providing its Modern Workplace solution, which connects human and digital agents for transparent and secure collaboration and performance, enabling them to perform their work on any device and in any location.

Getronics is a global leader in IT solutions, with 4,000 employees in 22 countries. It specializes in digital transformation, smart *workplaces* and managed services. It leads the Global Workspace Alliance, serving more than 180 territories.

Kyndryl is a leader in *digital workplace* services, bringing continuous innovation to its intelligent solutions, AI-driven automation and GenAI support. It enhances the EX and business results.

Stefanini specializes in *the digital workplace* and applies intelligence solutions to collaborative, secure and highly customized environments. Its flexibility and expertise in remote solutions ensure customized and productive engagements.

TCS invests in Near Zero Contact Service Desk, which is an end-to-end hyper-automated approach to resolving end-user issues without active *call center* involvement.

Unisys offers digital workplace consulting, empowering employees with personalized and secure tools. Its focus is on the UX, with managed services for Microsoft 365® and comprehensive support.

NTT DATA has introduced a new generation of SDI (Software-Defined Infrastructure) services with AI, focusing on intelligent automation and real-time insights, with a focus on cost optimization, increased efficiency and improved business results.

DXC Technology

Leader

"DXC Technology transforms *workplaces* with over 20 years of expertise, integrating AI, ESG and advanced *analytics*. From Smart Working Spaces to Industrial IoT, it delivers sustainable solutions that optimize resources and experiences in complex global organizations."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees in more than 130 offices in 65 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC was positioned in the Smart and Sustainable Workplace Services quadrant as a leader and remains a Leader in 2025. In Brazil, the company has delivery centers in São Paulo, São Bernardo do Campo, Rio de Janeiro, Belo Horizonte and Vitória.

Strengths

Diversified portfolio and consolidated industry experience: DXC Technology offers comprehensive solutions ranging from Smart Working Spaces to Industrial IoT, including Smart Factory, Defense Systems and Intelligent Transportation. With more than 20 years of experience in complex global organizations, it delivers integrated *workplace* transformation with strategic partnerships with Microsoft, HP and AudioCodes for measurable results.

Leadership in ESG and corporate sustainability: DXC's ESG offering combines energy consumption analytics with automated compliance reporting and device life cycle tracking services. It reduces carbon footprint through intelligent space optimization and resource management, meeting corporate environmental goals while maximizing operational efficiency and real estate ROI.

Advanced *analytics* capabilities and continuous innovation: Using a data-driven approach to sentiment, perception and UX analytics, DXC delivers actionable insights for *workspace* optimization. The 12–24-month *road map* includes AI, integrated sensors and AV automation, ensuring technological evolution aligned with hybrid work demands and organizational efficiency.

Caution

Although DXC has robust data analytics capabilities in the office environment, there is significant opportunity to develop data-as-a-service (DaaS) products and marketable predictive insights. Transforming collected data into additional revenue would strengthen its competitive positioning and ROI.

AI-augmented Workforce Services

This report is valuable for providers offering **AI-augmented workforce services** in **Brazil** to understand their market position and for companies seeking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market share.

Technology professionals

Should read this report to gain an in-depth understanding of the current landscape of AI-augmented workforce service providers in the Brazilian market. This understanding will enable these professionals to evaluate providers based on the measurable business value delivered by their AI workforce solutions, such as autonomous and intelligent agents.

Digital transformation professionals

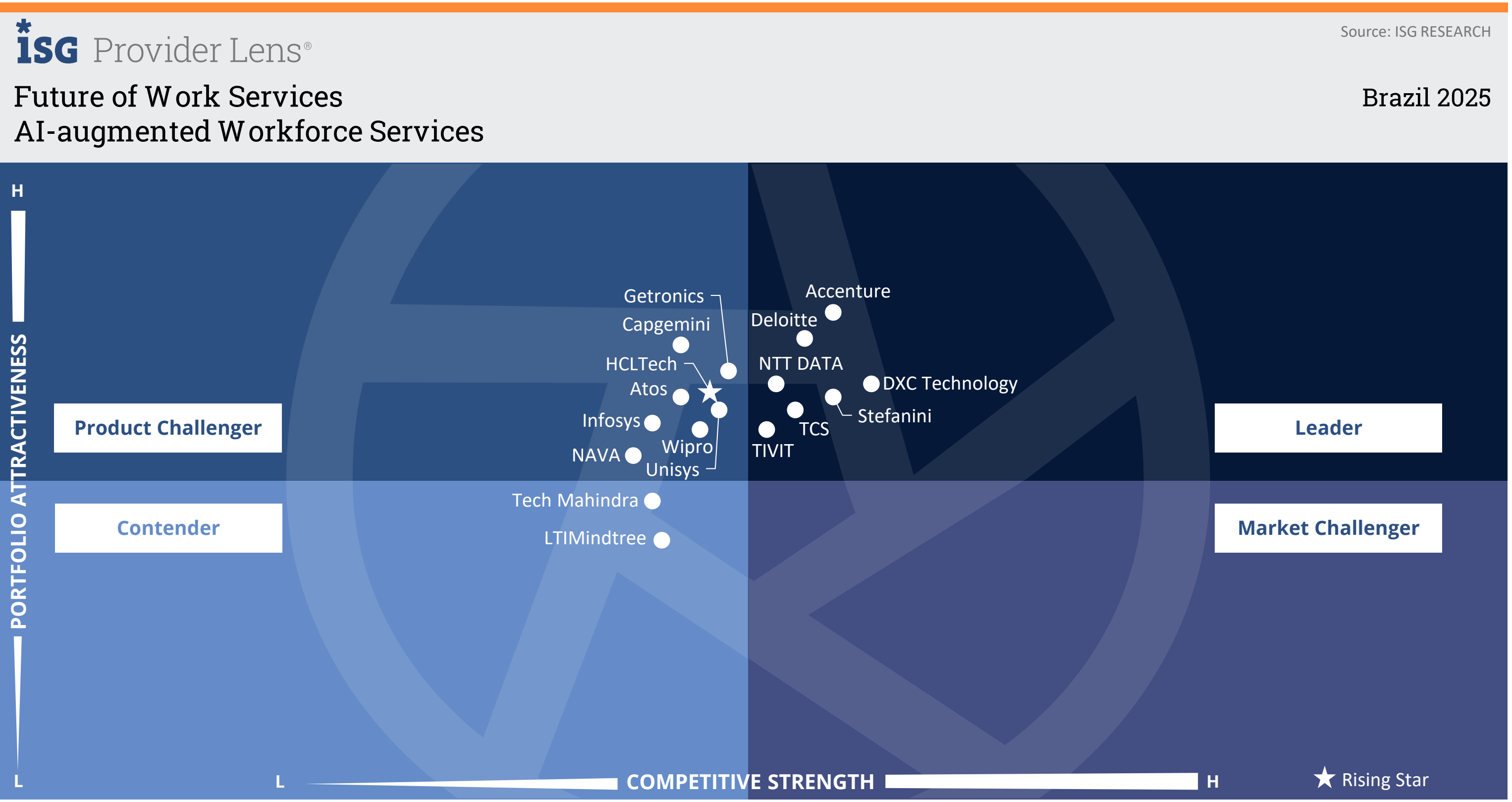
Should read this report to compare different providers and gain a comprehensive understanding of how providers fit into their transformation of AI-augmented workforce. This understanding will enable proactive decision-making, contextual learning and seamless enterprise interaction in a market that demands modernization and faster, more efficient solutions.

Procurement professionals

Should read this report to gain an in-depth understanding of the current landscape of AI-augmented workforce service providers in the Brazilian market. The report will enable these professionals to compare providers, make more informed decisions, improve their operational efficiency and strengthen their business partnerships.

Experience managers

Should read this report to compare different providers and gain a comprehensive understanding of how they adapt to their needs to optimize processes and provide personalized support to increase productivity and efficiency, incorporating advanced solutions with AI and ML agents to achieve this goal.



This quadrant evaluates **solution providers** with **autonomous digital agents that use AI and ML**. They optimize processes, offer personalized support and impact organizational culture, with change management and evidence of measurable results.

Cristiane Tarricone

Definition

This quadrant evaluates providers of advanced agentic solutions using AI and ML as autonomous digital agents. These agents enable proactive decision-making, contextual learning and seamless enterprise interaction. They act as active participants in the workplace ecosystem and autonomously manage workflows, optimize processes and provide personalized support to boost productivity and efficiency. AI-driven agents reshape job roles, decision-making and organizational culture, requiring robust change management and adoption frameworks.

Providers must present region-specific evidence of their solution's impact, including successful deployment, measurable business outcomes, robust integration with enterprise systems and workforce empowerment through change management and adoption.

The study places agentic solution providers in a dedicated quadrant, enabling enterprises to evaluate them based on the measurable business value delivered by their intelligent, self-governing agents.

Eligibility Criteria

1. Offer services with **autonomous capabilities** that include proactive, context-aware, and continuously improving actions **beyond planned routines** and **traditional automation**, differentiating them from traditional managed services or broader workplace strategies.
2. Ensure deep integration with **existing digital workplace ecosystems** for seamless operations.
3. Have achieved outcome-driven impact with verifiable gains (e.g., productivity gains, cost reductions and enhanced user experience for targeted job roles or personas)
4. Support **workforce transition** by offering extensive **training and development** to drive adoption and enable effective collaboration with digital agents.
5. Follow **ethical governance** standards, ensuring fairness, accountability, and transparency in AI deployment.
6. Provide services that incorporate robust **feedback mechanisms** for **continuous evaluation** and **adjustment**.
7. Offer **region-specific case studies** that demonstrate **scalability, relevance**, and adaptability to local market demands.

Observations

Leaders in Agentic AI Workplace Solutions converge on autonomous AI ecosystems, scalable proprietary platforms, and XLA methodologies. Automation transcends traditional *scripts* via intelligent agents with predictive, proactive and continuous self-improvement capabilities.

Proprietary AI agent ecosystems differentiate through portfolios of domain-specific, pre-built agents. Intelligent platforms demonstrate ticket deflection of 40 percent, efficiency gains of 30 percent and CSAT of over 12 percent. Omnichannel integration with Voice AI, Device AI and Workflow IQ creates fully autonomous support eliminating human intervention.

An end-to-end consultative approach emerges through organizational readiness assessment, enterprise environment mapping, and technology road maps. Solution architects and COEs ensure nondisruptive integration via workshops and POC models with measurable ROI.

Compliance and ethical AI are pillars through ISO 27001 frameworks, RBAC controls, secure APIs and algorithmic fairness via continuous anti-bias reviews. Native LGPD integration with specialized curation ensures auditable transparency.

A skilled workforce represents an investment through a significant number of employees trained in AI/ML/GenAI. AI Experience Zones and platforms ensure sustainable human-AI collaboration models. For Brazil, specialized laboratories with vertical solutions represent a successful approach. Accenture, Deloitte, DXC Technology, NTT DATA, Stefanini, TCS and TIVIT were positioned as Leaders, with HCLTech identified as a Rising Star.

Of the 50 companies assessed for this study, 17 qualified for this quadrant, with 7 being Leaders and 1 Rising Star.

Accenture combines more than 100,000 human experts with over 3,600 automation solutions via the *myWizard* platform, creating virtual agents that self-resolve tickets and prevent annual incidents.

Deloitte uses its *Smart Automation* cloud platform that integrates RPA, BPM, Intelligent Capture, and AI into a single solution, including *chatbots* for employee requests (payroll, vacation, benefits) with an *on*-demand model paid per minute of use.

DXC Technology is a pioneer in Brazil in implementing truly intelligent *digital workplace* services, combining automation, *analytics*, and AI on a unified platform with AI capabilities, offering a personalized and frictionless experience for the workforce.

NTT DATA has introduced a new generation of SDI (Software-Defined Infrastructure) services with AI, focusing on intelligent automation and real-time insights, with a focus on cost optimization, increased efficiency, and improved business results.

Stefanini offers *Sophie SaaS*, a virtual assistant with its own AI, fluent in over 60 languages, which reduces *service desk* calls, increases productivity, and acts as *an IT assistant* for password *resets*, account unlocking, and multilingual problem solving.

TCS implements the self-healing cognitive AI platform ignio AI.Digital Workspace, which autonomously manages resources, proactively performs root cause analysis, screening and correction on end devices, with more than 75 patents in AI and automation.

TIVIT implements Athena for Support, its Azure OpenAI-based GenAI that allows you to define specific data sources (CRM, ERP, public databases) to generate personalized responses in *the service desk*, integrating systems with sector-specific human curation.

HCLTech implements the *DRYiCE Lucy* conversational AI cognitive assistant, which offers IT/help desk query automation, self-resolution of problems directly from user systems, and multilingual omnichannel support with automatic *self-healing*.

DXC Technology

Leader

"DXC revolutionizes business support with autonomous AI to proactively eliminate 98 percent of tickets. Combining rigorous global compliance and continuous innovation via CoEs, it delivers *zero-touch* experiences that redefine corporate productivity."

Cristiane Tarricone

Overview

DXC Technology is headquartered in Virginia, USA. It has more than 127,200 employees in over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC offers the DXC UPtime™ Experience Platform, an AI-powered *digital workplace* solution that centralizes intelligent services in the workplace, capable of resolving more than 36 million support interactions annually in 109 digital languages, with integration with Microsoft Teams for omnichannel support. DXC Technology was positioned as a Leader in the AI-augmented Workforce Services quadrant in 2025 in Brazil.

Strengths

Autonomous AI ecosystem: DXC *UPtime Digital Assistant* integrates omnichannel GenAI, Voice AI, Device AI, and Workflow IQ for fully autonomous support without human intervention. With a goal of 98 percent predictive/proactive and 50 percent automated, it eliminates tickets rather than deflecting them, keeping devices in *guaranteed state* through global CoEs and thousands of shared automations.

Scalable enterprise platform with strict global compliance: Serving over 200 customers with multilingual support (over 100 languages), DXC ensures compliance through ISO 27001, SOC2, FedRAMP, GDPR and NIST 800-53. The Agile Service Desk platform offers advanced XO (experience and operational) *analytics*, real-time *sentiment analysis*, and *seamless* integration, positioning itself as a leader in *enterprise-grade solutions*.

Continuous innovation and differentiated technology *road map*: The Prototyping team develops proprietary IP in autonomous knowledge, Voice AI ServiceDesk and fraud detection. The 12–24-month *road map* includes codevelopment of Microsoft Copilots, Amazon Q integration, expanded voice translation and OASIS platform for business performance tracking, sustaining competitive advantage through constant innovation.

Caution

Although DXC offers advanced autonomous AI capabilities, the transition to 98 percent predictive support requires significant cultural change and complex integration with legacy systems. Organizations may face initial resistance and require substantial investments in training and process adaptation.

Appendix

The ISG Provider Lens 2025 – Future of Work Services 2025 study analyzes the relevant software vendors/service providers in the Brazil market, based on a multiphased 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 August 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 Future of Work 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

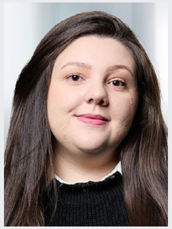
Lead Author

Cristiane Tarricone
Lead Analyst

At ISG, Cristiane Tarricone is lead analyst for ISG Provider Lens Future of Work and Oracle Cloud Ecosystem. She brings more than 30 years of extensive experience in driving business results and realizing measurable value from IT-enabled transformation. She has held senior IT and business leadership positions in Fortune 100 IT service provider and end-user companies.

She is a hybrid business and IT leader focused on the disciplines of leadership, digital strategy, and the generation of business value investments in technology. She is committed to IT innovation and emerging technologies to reshape the future. She is an independent advisor to the Board of Directors on strategies digital entrepreneur, mentor, speaker, and MBA guest lecturer. She is also the founder and CEO of a nonprofit organization that supports women in IT leadership. She has extensive experience in applying new trends and technologies to guide clients in reshaping their digital strategy and business plans to achieve their goals.

Cristiane was Regional Vice President and Team Manager in the Executive Programs of Gartner, where he led a team of Senior Executive Partners to guide and advise clients in Brazil and Latin America.



Research Analyst

Kellem Azevedo
Research Analyst

Kellem Azevedo is a research analyst at ISG based in São Paulo and is responsible for supporting the lead author in the IT provider research process for several studies in the LATAM region.

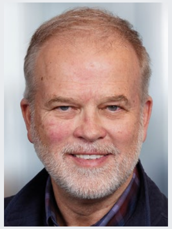
Kellem holds a bachelor's degree in Mining Engineering and specializes in data analysis. In her previous positions, she has accumulated considerable experience in qualitative and quantitative data collection, analysis and generation of data-driven insights for decision-making, complex problem-solving, and innovative solutions.

Study Sponsor

Iain Fisher
Director and Principal Analyst

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.



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.

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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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