ISG Provider Lens®

Future of Work Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | OCTOBER 2025 | U.S.

Report Author: Bruce Guptill

Workplace services drive transformation through GenAI, hybrid work and sustainability

GenAI maturity shifts from experimentation to integration

In 2024, GenAI was a promising disruptor. In 2025, it is a foundational capability. U.S. enterprises are no longer piloting GenAI. They are embedding it across workplace services, from AI copilots and agentic automation to predictive analytics and immersive collaboration. According to ISG's analysis of public research, over 75 percent of large enterprises use GenAI in at least one business function, with workplace services among the most active domains.

Providers have responded by launching proprietary GenAI platforms, copilots and orchestration layers. TCS' Cognix, Infosys' Topaz and Wipro's GenAI Foundry are examples of how service providers are productizing GenAI to deliver measurable business outcomes. The focus has shifted from cost savings to experience augmentation, workflow intelligence and adaptive learning.

However, challenges remain. Many enterprises lack a cohesive GenAI governance model, and fewer than half are tracking ROI on GenAI investments. Providers that offer strategic advisory, ethical AI frameworks and industry-specific copilots are gaining traction.

Hybrid work recalibrated: From policy to purpose

The hybrid work debate has evolved. In 2025, it is no longer about where employees work; it is about why and how. While some Fortune 500 firms have mandated full-time office returns, most U.S. enterprises have settled into structured hybrid models. According to BuildRemote, 84 percent of companies with public workplace policies operate on a hybrid schedule.

Yet, the return-to-office (RTO) push has triggered backlash. A 2025 GAO report found that rigid RTO mandates often reduce productivity and increase attrition. Enterprises are now focusing on environment-

Workplace services are strategic enablers of talent, productivity and ESG outcomes based working (EBW), designing spaces and policies around employee needs, not executive preferences.

This shift has elevated the role of workplace services. Providers are helping clients reimagine offices as collaboration hubs, using AI to optimize space utilization, personalize environments and support inclusive, flexible work. Experience parity that ensures a consistent employee experience across remote and physical settings is now a core KPI.

Experience management becomes a strategic imperative

Experience level agreements (XLAs) have moved from hype to maturity. The XLA Institute's 2025 report shows that nearly 70 percent of organizations plan to adopt XLAs by 2026. Experience is no longer a soft metric. It is a strategic driver of productivity, retention and innovation.

Providers are embedding XLAs into service delivery, using sentiment analytics, behavioral nudging and real-time telemetry. Platforms such as Infosys' DWX Command Center and Kyndryl's Experience Conductor are enabling proactive, personalized support. Unisys's XLA 4.0 and Wipro's AI Live Workspace exemplify how GenAI is being used to orchestrate experience across IT, HR and facilities management.

Importantly, XLAs are expanding beyond IT. Healthcare, education and finance sectors are adopting experience frameworks to improve frontline engagement, compliance and service quality.

Sustainability: From compliance to competitive advantage

Sustainability has become a board-level priority. In 2025, U.S. enterprises are embedding ESG metrics into workplace services, driven by regulatory pressure, investor expectations and employee values. According to FM:Systems, 45 percent of occupiers plan to adopt energy and emissions management technology in the next 12 months.

Providers are responding with GreenOps dashboards, circular device programs and smart building solutions. TCS' CleverEnergy, Wipro's GreenOps Studio and HCLTech's partnership with Circular Computing are examples of how sustainability is being operationalized.

Smart workplace technologies (IoT sensors, digital twins, and AI-powered space analytics) are enabling real-time tracking of energy use, occupancy and carbon emissions. These tools reduce costs and also enhance employee well-being and brand equity.

Workplace outsourcing: From cost center to transformation engine

The outsourcing model is evolving. Traditional workplace-only contracts are declining, while bundled transformation deals are rising. Enterprises now expect providers to deliver IT support and business outcomes, from talent enablement to ESG compliance.

According to KPMG, 81 percent of enterprises want providers to act as strategic collaborators, not vendors. This has led to a rise in hybrid outsourcing models, combining onshore leadership with offshore delivery, and integrating AI, automation and experience design into every engagement.

Providers that offer verticalized solutions, HITL (human-in-the-loop) AI services and outcome-based pricing are gaining market share. The shift from SLAs to XLAs is accelerating this transformation, aligning service delivery with employee satisfaction and business agility.

AI-augmented workforce: Redefining roles and skills

AI is not replacing workers; it is redefining work. By 2025, AI is expected to displace 85 million jobs but create 97 million new ones. The focus is shifting from automation to augmentation by using AI to enhance creativity, decision-making and collaboration.

Enterprises are investing in AI-first talent models, adaptive learning platforms and digital dexterity programs. Providers such as Accenture, Infosys and Capgemini are launching AI academies and immersive learning environments to support workforce transformation.

Lifelong learning is now a business imperative. According to Cengage, 60 percent of U.S. workers are actively reskilling to stay competitive. Providers that offer upskilling as a service, diversity, equity and inclusion (DEI)-integrated design and AI ethics consulting are becoming essential partners in talent strategy.

Conclusion: Workplace services as a strategic lever

In 2025, workplace services have evolved from operational necessities to **strategic enablers of enterprise transformation**. They now sit at the intersection of **technology, talent, sustainability and experience**, shaping how organizations attract, retain and empower their workforce.

The convergence of GenAI, hybrid work and ESG imperatives has redefined the expectations from service providers. Enterprises are no longer satisfied with reactive support or siloed IT functions. They demand **integrated, intelligent and outcome-driven solutions** that align with business goals and employee needs.

Providers that succeed in this environment are those that:

- **Embed GenAI** across the service stack to drive automation, personalization and continuous learning
- **Design hybrid work** with experience parity, smart infrastructure and flexible support models
- **Operationalize sustainability** through circular IT practices, carbon tracking and ESG-aligned service delivery
- **Elevate experience** through XLAs, sentiment analytics and immersive collaboration
- **Enable workforce transformation** with AI-augmented tools, adaptive learning and inclusive design

The U.S. market, in particular, is leading this shift. Enterprises are investing in workplace services to reduce costs and **unlock agility, resilience and innovation**. As the boundaries between IT, HR and facilities management blur, workplace services are becoming the connective tissue of enterprise strategy.

Looking ahead, the most successful providers will be those that act not as vendors, but as **strategic partners**, cocreating the future of work with their clients. They will offer not just technology, but **vision, governance and measurable impact**.

In this new era, workplace services are no longer about keeping the lights on. They are about **lighting the way forward**.

U.S. enterprises are demanding workplace services that integrate GenAI, support hybrid work with measurable experience outcomes and embed sustainability into every layer of the digital and physical workplace.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Midmarket	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Accenture	Leader	Leader	Leader	Not In	Leader	Leader	Leader
Allied Digital	Not In	Not In	Not In	Not In	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Contender
Avaso Technology	Not In	Not In	Not In	Contender	Not In	Not In	Not In
BCG	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Bell Techlogix	Contender	Not In	Contender	Leader	Product Challenger	Not In	Not In
Birlasoft	Not In	Contender	Contender	Contender	Contender	Not In	Not In
Capgemini	Rising Star ★	Rising Star ★	Rising Star ★	Not In	Rising Star ★	Rising Star ★	Leader
CDW	Not In	Not In	Not In	Contender	Not In	Not In	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Midmarket	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Coforge	Not In	Contender	Contender	Product Challenger	Contender	Not In	Not In
Cognizant	Leader	Leader	Leader	Product Challenger	Leader	Leader	Leader
CompuCom	Not In	Market Challenger	Product Challenger	Leader	Market Challenger	Not In	Contender
Computacenter	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Contender
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In	Product Challenger
Dexian	Not In	Not In	Not In	Contender	Not In	Not In	Not In
DWG	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
DXC Technology	Leader	Leader	Leader	Not In	Leader	Leader	Leader
EY	Market Challenger	Not In	Not In	Not In	Not In	Not In	Contender

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HCLTech	Leader	Leader	Leader	Not In	Leader	Leader	Market Challenger
Hexaware	Product Challenger	Product Challenger	Product Challenger	Leader	Not In	Not In	Product Challenger
Infosys	Leader	Leader	Leader	Not In	Leader	Leader	Leader
Insight	Not In	Not In	Contender	Contender	Contender	Not In	Not In
ITC Infotech	Not In	Contender	Contender	Product Challenger	Contender	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In	Contender
Kyndryl	Leader	Leader	Leader	Not In	Leader	Leader	Leader
Lenovo	Contender	Product Challenger	Product Challenger	Leader	Contender	Product Challenger	Product Challenger
Long View Systems	Not In	Not In	Not In	Contender	Not In	Not In	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Midmarket	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
LTIMindtree	Contender	Contender	Product Challenger	Leader	Product Challenger	Contender	Contender
Microland	Not In	Contender	Contender	Contender	Contender	Not In	Not In
Milestone Technologies	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Movate	Contender	Contender	Contender	Rising Star ★	Contender	Not In	Contender
Mphasis	Contender	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Contender
NTT DATA	Leader	Leader	Leader	Not In	Leader	Product Challenger	Leader
Pomeroy	Not In	Market Challenger	Product Challenger	Leader	Product Challenger	Market Challenger	Not In
PwC	Market Challenger	Not In	Not In	Not In	Not In	Not In	Product Challenger
Red River	Contender	Contender	Contender	Rising Star ★	Contender	Not In	Market Challenger

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Midmarket	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Ricoh	Not In	Not In	Not In	Contender	Not In	Not In	Not In
SHI	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Softchoice	Not In	Not In	Not In	Product Challenger	Not In	Not In	Not In
SoftwareOne	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Leader	Leader	Contender	Contender
TCS	Leader	Leader	Leader	Not In	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Leader	Product Challenger	Rising Star ★	Product Challenger
TEKsystems	Not In	Not In	Contender	Contender	Not In	Not In	Not In
Unisys	Rising Star ★	Leader	Leader	Product Challenger	Leader	Market Challenger	Rising Star ★

Provider Positioning

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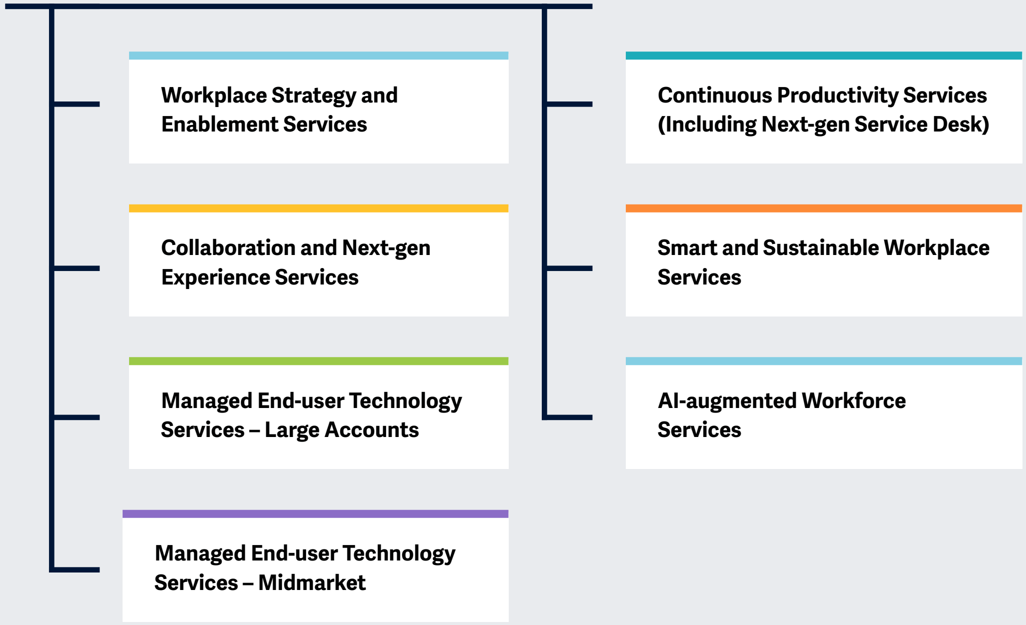
	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Midmarket	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
UST	Not In	Not In	Not In	Product Challenger	Contender	Not In	Not In
Wipro	Leader	Leader	Leader	Not In	Leader	Leader	Leader
WWT	Not In	Not In	Not In	Contender	Not In	Not In	Not In
YASH Technologies	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Zensar Technologies	Contender	Market Challenger	Product Challenger	Leader	Market Challenger	Contender	Product Challenger
Zones	Contender	Contender	Product Challenger	Product Challenger	Market Challenger	Not In	Not In

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



Simplified Illustration Source: ISG 2025

Definition

The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. Advancements in GenAI and the need to assimilate new business models to meet dynamic customer demands contribute to this evolution.

Enterprises no longer partner with service providers to just provide laptops, mobiles, Wi-Fi and service desks. Instead, they embrace flexible working styles and workplaces open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction. Employees seek the freedom to select their workspace and technology. They need ubiquitous access to devices, applications, data, workflow, documents and processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

With autonomous enhancements, GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to manage back-end workplace technologies without requiring extensive manual interventions. Still, enterprises need expert help strategizing, implementing and adopting this technology.

This report examines approaches where next-generation thinking changes the future workplace landscape.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following seven (spell out the number of quadrants; do not use a digit) quadrants for services: Workplace Strategy and Enablement Services, Collaboration and Next-gen Experience Services, Managed End-user Technology Services – Large Accounts, Managed End-user Technology Services – Midmarket, 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 on their competitive strengths and portfolio attractiveness
- Focus on the U.S. 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

Who Should Read This Section

This report is valuable for providers offering **workplace strategy and enablement services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief experience officers (CXOs)

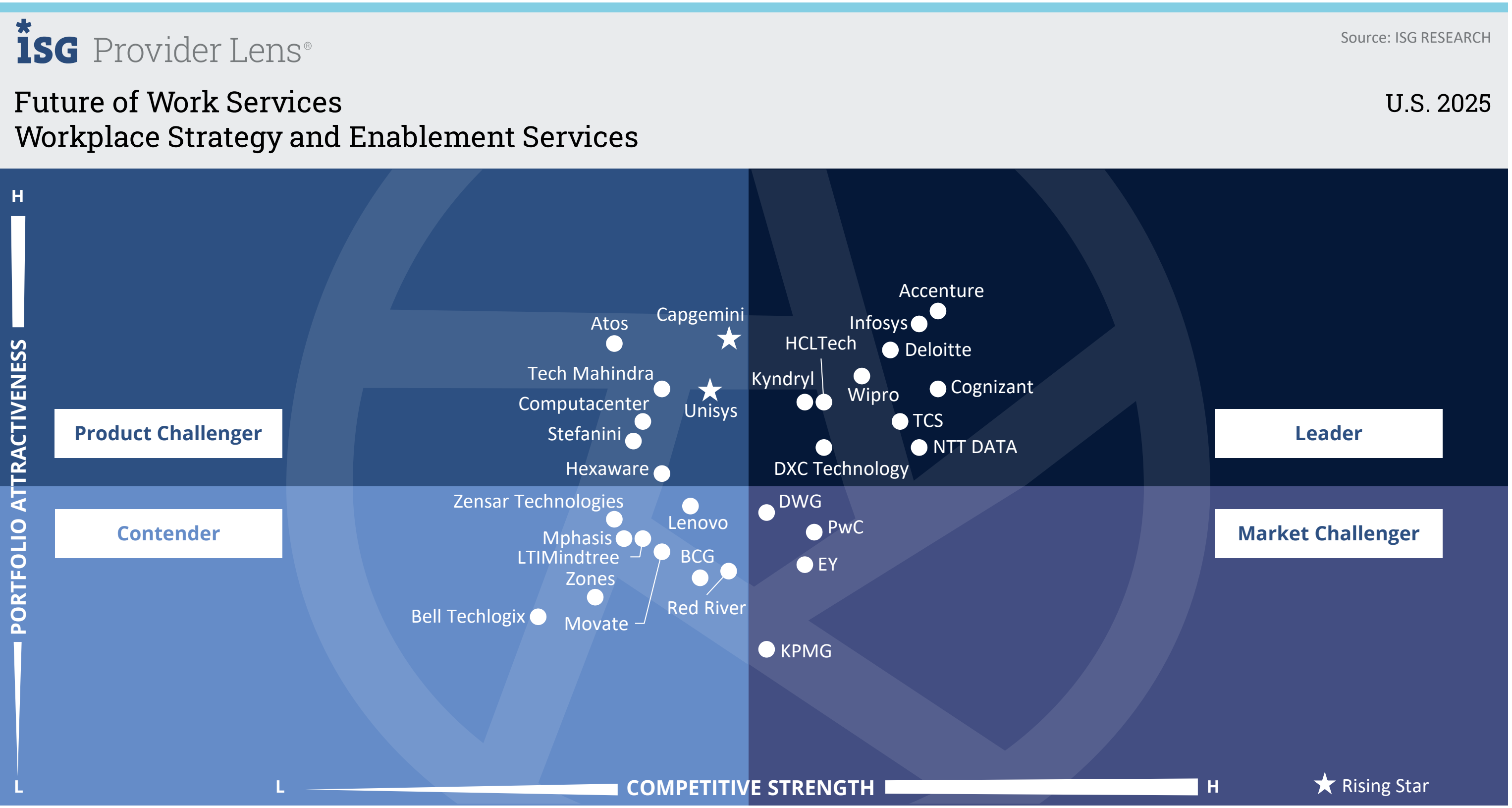
Should read this report to understand how leading providers can help them better prepare their workforces for the changing business models and dynamics in the post-pandemic world. They can recognize the link between workforce readiness and improved CX, which drives business growth. CXOs will be better equipped to align their organizational goals with customer-centric initiatives, ensuring that CX remains at the forefront of their business strategy.

Strategy professionals

Should read this report to identify the most suitable workplace strategy and enablement service providers. These providers can help companies develop and implement a successful workplace strategy. Professionals can compare their organization's strategies with those of industry leaders to identify gaps and opportunities.

Consulting professionals

Should read this report to advise companies on workplace strategies and performance, enabling them to stay up-to-date on trends and developments. By doing so, they can offer companies customized recommendations through the transition to ensure minimal disruption and maximum engagement. By leveraging the insights provided, they can ensure that their clients are well-prepared to meet the challenges of today's evolving work landscape.



This quadrant assesses workplace strategy services providers that align human, digital and physical environments with evolving business models, talent needs and industry-specific requirements.

Bruce Guptill

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 enterprisewide 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

In 2025, this quadrant evolved into a hub for AI-first, sustainability-aligned and hybrid-ready workplace strategies. Compared to 2024, providers expanded their advisory capabilities to include GenAI integration, immersive collaboration and XLAs.

We are noticing a notable shift from traditional consulting to vendor-neutral, outcome-based transformation services. Providers are increasingly embedding ESG goals, DEI principles and circular IT practices into workplace design and delivery. Several firms have launched proprietary platforms and AI copilots to support adaptive workforce models and hybrid work enablement. New entrants have brought innovation in agentic AI, smart asset management and sustainability tracking.

The quadrant has also seen increased alignment between workplace strategy and broader business transformation goals, with stronger integration across IT, HR and facilities management. DXC Technology, a new Leader, offers vendor-neutral, AI-powered workplace strategy with platforms such as OASIS and UPtime. Rising Stars Capgemini and Unisys have introduced GenAI and XLA approaches that challenge incumbents.

Overall, the quadrant reflects a maturing market where workplace strategy is no longer siloed but central to enterprise agility, EX and long-term value creation.

From the 51 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and 2 Rising Stars.

Accenture emphasizes AI-ready environments and public sector focus, expanding LearnVantage and Smart Work Anywhere. Accenture's offerings have deeper GenAI integration and stronger alignment with adaptive workforce transformation.

Cognizant expanded its WorkNEXT platform with ESG automation and Agent Foundry in 2025, shifting from implementation-heavy services to business-focused strategic advisory, emphasizing industry-specific platforms and autonomous AI agents.

Deloitte highlights its DREAM platform and ESG suite integration. It has strengthened its workplace strategy offerings with immersive digital-physical experiences and expanded partnerships for scalable transformation.

DXC Technology offers vendor-neutral, AI-powered workplace strategy with platforms such as OASIS and UPtime. The firm builds client-tailored solutions based on ethical talent practices and sustainability.

HCLTech has added FlexSpace 5G, WorkBlaze and Smart Support Hubs to expand its GenAI use and sustainability offerings. This has helped the firm evolve from being perceived as a systems integrator to a strategic workplace innovator.

Infosys has introduced the NAVI, Orbit and Cortex platforms and has the ISO/IEC 42001 certification. The company has deepened AI integration and sustainability, with stronger industry-specific transformation and global delivery hubs.

Kyndryl has expanded both Kyndryl Consult and Kyndryl Bridge platforms for predictive support and sustainability. ISG sees stronger integration of hybrid work models and DEI, with enhanced AI-driven workplace orchestration.

NTT DATA has added several capabilities, including its Smart AI Agent suite, StampChain and SAP MSP partnership. It has also expanded AI and sustainability capabilities, with broader certifications and industry-specific advisory.

TCS has strengthened its emphasis on Consult2Operate, Cognix and CleverEnergy. The company has significantly scaled GenAI training and sustainability tools, enhancing hybrid workplace integration and industry-aligned advisory.

Wipro has expanded its Live Workspace with NeuraDesk, GreenOps and AI copilot innovation hub. To boost client time-to-value, Wipro also deepened AI and sustainability integration, with stronger industry alignment and immersive collaboration tools.

Capgemini (Rising Star) leverages its CHIP AI, Living Labs and circular device management to emphasize value of GenAI, sustainability and agentic AI for personalized workplace transformation.

Unisys (Rising Star) offers XLA 4.0, omnichannel support and AI-driven workplace solutions. The company emphasizes a unified digital-physical-human experience across sectors.

DXC Technology

Leader

"DXC Technology is a leader in digital workplace services, with its vendor-neutral and AI-powered platforms, scalable hybrid solutions and ethical talent practices to deliver tailored, compliant and experience-driven transformation across industries and regions."

Bruce Guptill

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. The company continually invests in digital workplace advancement, emphasizing AI-powered, experience-centric workplace solutions. AI, automation and experience-centric platforms drive digital workplace strategy and enablement services. The company supports over 700 customers in 68 countries, managing 6.9 million devices, 1.1 million virtual desktops and 5 million Microsoft 365 seats.

Strengths

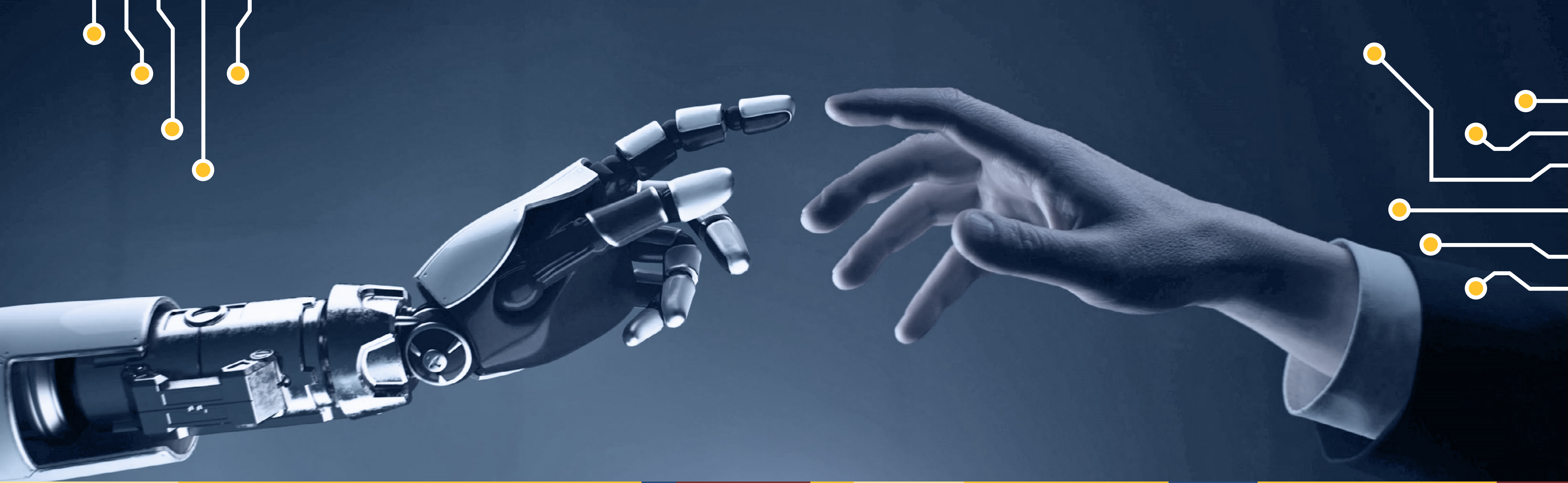
Vendor-neutral approach to transforming hybrid workspaces: DXC delivers vendor-neutral, data-driven workplace strategy services that support hybrid environments. Using tools such as its Modernization Decision Accelerator, DXC tailors strategies by region and industry, enhances infrastructure through cognitive IT and ensures compliance.

AI-powered transformation tools: Its Modern Workplace solution supports over 7.1 million devices and 5.6 million Microsoft 365 seats, offering AI-driven service desks, predictive analytics and self-service tools that ensure consistent EX across remote and onsite settings. Its AI-powered platforms such as OASIS, UPtime™ and Experience Cube unify automation, observability and sentiment analytics and support vendor-neutral advisory, new business model design and experience-led analysis. DXC's AI road map includes hybrid copilots, GenAI assistants and predictive analytics to enhance service delivery.

Modern business practice enablement: DXC emphasizes ethical workplace practices, promoting diversity, equity and inclusion while addressing modern slavery risks. It is a UN Global Compact signatory, conducts supplier due diligence and supports inclusive hiring through programs such as the DXC Dandelion Program. These efforts align with evolving talent models and regulatory expectations across industries.

Caution

DXC had a 5.3 percent YoY revenue decline in FY24, reflecting weakness in its Modern Workplace and cloud/ITO segments and raising concerns about long-term investment capacity and service continuity. To reassure clients, DXC should continue demonstrating operational discipline and transparent progress on its turnaround strategy.



Collaboration and Next-gen Experience Services

Who Should Read This Section

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

Cybersecurity professionals

Should read this report to learn how service providers address compliance and security challenges while maintaining a seamless EX. The report highlights innovative technologies and tools that enhance security while supporting user engagement. The findings will help IT security managers assess the effectiveness of existing security measures and identify areas for improvement. By learning about innovative technologies, they can strengthen their security frameworks.

Digital professionals

Should read this report to understand how unified communication and collaboration service providers fit their digital transformation initiatives. They can understand how these services can streamline workflows and reduce operational silos while discovering metrics and KPIs to evaluate the effectiveness of communication and collaboration initiatives.

Procurement professionals

Should read this report to understand the current landscape of unified communication and collaboration service providers. They can discover tools that enhance team collaboration and communication across departments while ensuring the chosen services align with the organization’s broader objectives.

Providers **elevate workplace experience through AI, GenAI and XLA**, driving collaboration, productivity and transformation **with data-driven insights, human-centric design and measurable business impact**.

Bruce Guptill

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

This quadrant experienced a significant transformation in 2025, driven by the widespread adoption of GenAI, agentic AI and immersive collaboration platforms.

Compared to 2024, providers moved beyond deploying communication tools to delivering holistic, experience-centric ecosystems. XLAs replaced SLAs as the standard for measuring success, with sentiment analytics and behavioral insights guiding service delivery. Providers introduced AI copilots, multiagent orchestration and real-time analytics to enhance productivity and engagement. Strategic partnerships with Microsoft, Cisco, Zoom and ServiceNow have strengthened, enabling seamless integration across collaboration and productivity stacks.

Experience management offices (XMOs) have become more common, aligning IT services with business outcomes and employee well-being. Several firms have launched proprietary platforms to unify communication, automate workflows and personalize support.

New entrants, including Capgemini, a Rising Star in the quadrant, have driven interest in the use of sector-specific solutions and immersive learning environments, expanding the quadrant's scope. The quadrant reflects a growing demand for secure, scalable and human-centered collaboration services that support hybrid work, digital dexterity and measurable business impact across industries.

From the 51 companies assessed for this study, 29 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture expanded its Trusted Agent Huddle and AI Refinery™ in 2025. Throughout the past year, Accenture has strengthened AI agent collaboration across platforms and enhanced digital employee experience (DEX) measurement with Microsoft Fabric and Semantic Kernel integration.

Cognizant launched a $1 billion Microsoft-ServiceNow initiative in 2024, expanding WorkNEXT with DigiHub and Workplace Intelligence. The company has significantly shifted toward total experience and outcome-based delivery.

DXC Technology has introduced Smart Working Spaces and its XM framework, adding dozens of AI copilots, real-time voice translation and hybrid meeting support, enhancing collaboration and experience analytics.

HCLTech has added TeamsWork, LibreSpace, Rendezvous and UWX platforms to its portfolio, and expanded copilot deployments, GenAI tools and meeting room modernization, strengthening its partnerships with Microsoft, Zoom and Cisco.

Infosys launched NAVI and Orbit in 2025, expanding its Wongdoody and Zoho partnerships. The company strongly focuses on AI-first collaboration, hyperpersonalized EX and regional delivery hubs for scalable, localized support.

Kyndryl introduced its Microsoft Acceleration Hub and Experience Management as a Service, and continued to shift from SLAs to XLAs, emphasizing AI-driven collaboration and immersive learning environments.

NTT DATA has launched its ExPaaS and Smart AI Agent suite. It has also expanded GenAI integration, unified communication analytics and AR/VR learning tools, enhancing collaboration and total experience management.

TCS is heavily leveraging its WisdomNext, Copilot and XMO frameworks. It also advanced AI-augmented collaboration, immersive tools and behavioral nudging, with stronger XLA-driven delivery and industry-specific copilots.

Unisys introduced XLA 4.0, PowerSuite and Service Experience Accelerator in 2025. Compared to 2024, the firm has significantly enhanced GenAI integration, collaboration optimization and sentiment-driven insights across the Microsoft and Zoom ecosystems.

Wipro has expanded its VisionEDGE+, NeuraDesk and AI Live Workspace in 2025. It has strengthened its GenAI integration, immersive tech and XLA frameworks, with stronger partnerships and outcome-based delivery.

Capgemini (Rising Star) has introduced CHIP AI, Copilot Studio integrations and sector-specific tools to boost clients' time-to-value. Strategic partnerships and Living Labs have helped it establish a strong focus on GenAI, immersive collaboration and measurable outcomes.

Leader

"DXC Technology offers collaboration and next-generation experience services through strategic AI investments, strong partner ecosystems and smart workplace innovations that enhance productivity, inclusivity and measurable business outcomes."

Bruce Guptill

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC manages over 5 million Microsoft 365 seats and 4 million monthly active Teams users, supporting global collaboration at scale. Recognized as a leader in multiple industry digital workplace and experience studies, DXC continues to invest in AI-powered and experience-centric digital workplace transformation.

Strengths

Significant investments in AI and DEX: Since January 2024, DXC has expanded its offerings through investments in agentic AI copilots, low-code and pro-code automation and ubiquitous DEX. These enhance collaboration, automate tasks and support seamless technology adoption via organizational change management (OCM) and DXC's Modern Workplace Advisory services. DXC is also investing in AI-driven collaboration analytics, real-time voice translation and experience scorecards to enhance productivity and user satisfaction.

Strengthening collaborative relationships: DXC has strengthened its partnerships with Microsoft, Qualtrics, Espressive and ServiceNow to deliver integrated collaboration platforms, AI-powered service desks and smart workplace solutions. In 2024, DXC accelerated its retirement of legacy IP voice systems, transitioning clients to Microsoft Teams-based telephony, improving communication and reducing operational complexity.

Smart working spaces and XM: The company's Smart Working Spaces initiative, launched in 2024, helps clients optimize hybrid work environments by enabling space scheduling, hybrid meeting support and part-time workforce accommodation. These are supported by DXC's Experience Management (XM) framework that uses sentiment analytics and continuous feedback to improve stakeholder experiences.

Caution

Some clients note that DXC's collaboration tools can require steep learning curves and extended change management. Enhancing user onboarding and simplifying interface design could improve adoption and overall experience.

Managed End-user Technology Services – Large Accounts

Who Should Read This Section

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

Chief information officers (CIOs)

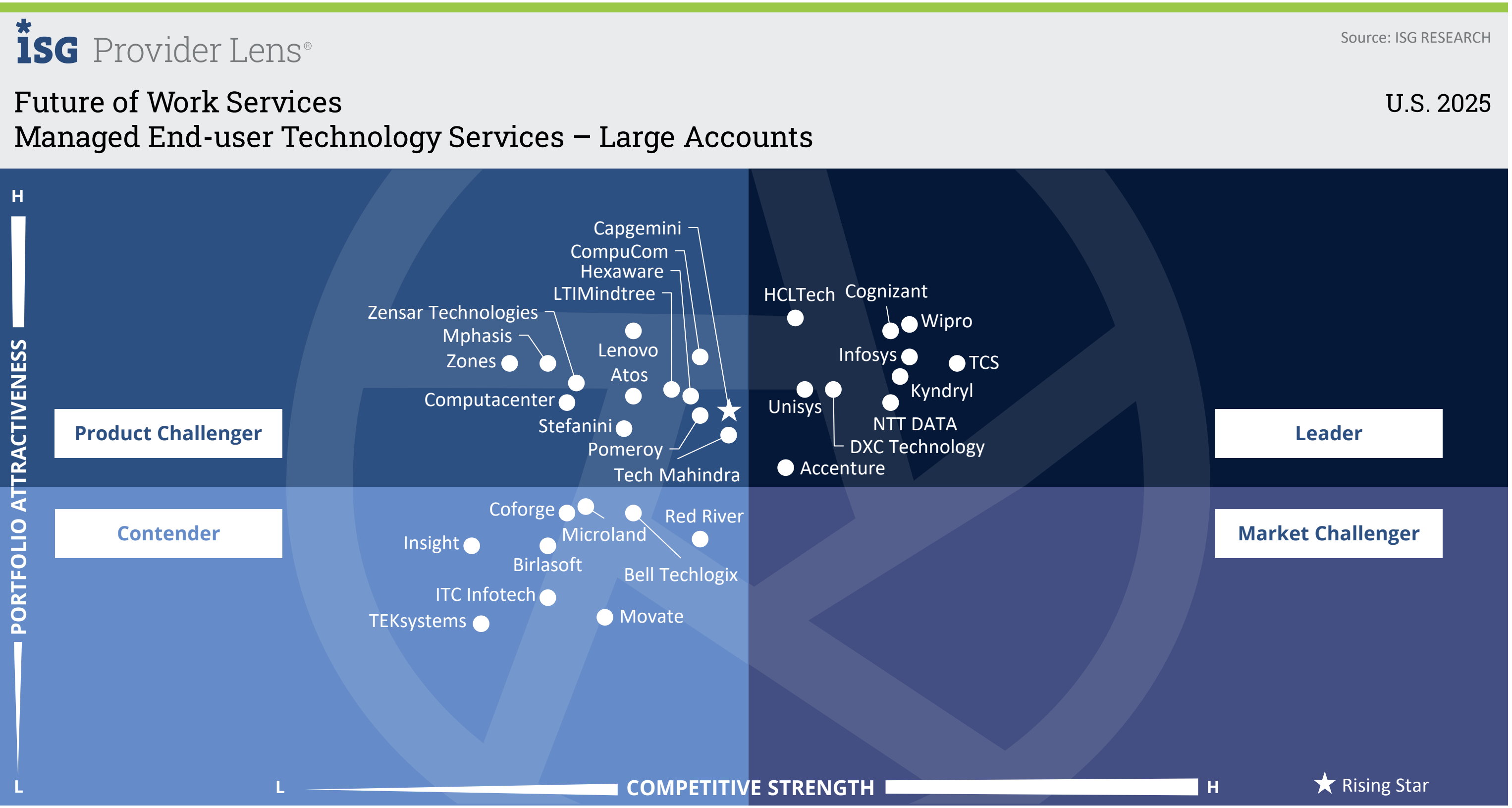
Should read this report to understand how existing processes and protocols influence an enterprise's use of workplace technologies. The report highlights the potential limitations of adopting new capabilities and technologies and outlines strategies to mitigate these challenges. CIOs will find guidance on fostering a culture of innovation and adaptability within their teams.

Technology professionals

Should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed end-user technology services. The report discusses building effective partnerships with service providers for ongoing support and innovation. It highlights the best practices for deploying managed digital workplace services within their organizations.

Cybersecurity professionals

Should read this report to understand how providers address the significant challenges of compliance and security while maintaining a seamless EX. They can learn about innovative technologies and tools that enhance security while supporting user engagement. The findings will help IT security managers assess the effectiveness of current security measures and identify areas for improvement. By learning about innovative technologies, they can enhance their security frameworks.



Providers in this quadrant **deliver secure, end-to-end device and workplace tech services**, enhancing digital EX, mobility and productivity through **proactive management, cloud workspaces and industry-specific support**.

Bruce Guptill

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 u**nified 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

In 2025, this quadrant advanced significantly with the integration of AI-driven automation, predictive analytics and sustainability-focused device lifecycle management.

Compared to 2024, providers have expanded zero-touch provisioning, virtual desktop infrastructure (VDI) and unified endpoint management (UEM) capabilities. Many have shifted from SLA-based models to XLA frameworks, embedding sentiment analysis and proactive remediation into service delivery. Strategic partnerships with Microsoft, Dell, ServiceNow and other OEMs have enabled the stronger integration of endpoint security, compliance and collaboration tools. Providers have also introduced modular platforms for device as a service (DaaS), experience monitoring and intelligent support.

New competitors have entered the quadrant with strong sustainability credentials, circular IT practices and GenAI-powered support. The quadrant reflects a shift toward scalable, secure and intelligent workplace support tailored to large enterprise environments.

Providers are increasingly expected to deliver operational efficiency, measurable improvements in EX, sustainability and business agility. The competitive landscape has tightened, with innovations and adaptability becoming key differentiators.

From the 51 companies assessed for this study, 32 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture has extended its AI-driven automation and public sector expansion via its L3Harris partnership. It offers mobile device security assessment and stronger integration of cloud and infrastructure modernization.

Cognizant has expanded its WorkNEXT portfolio with DigiHub and AI Solution Stack. The company continues to shift toward XLA-based pricing, and has added industry-specific device support and sentiment-driven experience management.

DXC Technology has added AI-powered device intelligence and expanded its smart locker logistics capabilities. It has also strengthened its partnerships and enhanced predictive analytics for device provisioning and sustainability optimization.

HCLTech introduced AI PC as a service, Smart Support Hubs and BigFix Workspace+., while scaling zero-touch provisioning and predictive endpoint healing, with expanded global delivery centers.

Infosys has added key capabilities, including DWX Command Center, AR support and the KEI framework. It has also expanded its DaaS offerings, GenAI agents and regional hubs, with stronger industry-specific device lifecycle services.

Kyndryl has focuses on its Kyndryl Bridge capabilities in 2025, while expanding DaaS with Nerdio and Horizon. It has also added ESG metric tracking and codeveloped cyber resilience services with Microsoft.

NTT DATA has launched its Workplace Smart AI Agent suite and ExPaaS platform. It has also expanded global field services, added multilingual support and improved provisioning speed with AI automation.

TCS is aggressively leveraging its Cognix, ignio and ESM stack. It has enhanced AI-powered automation, sustainability dashboards and industry-specific integration across IT, HR and facilities management.

Unisys has introduced a device subscription service and service experience accelerator. Compared to 2024, Unisys has expanded proactive support, sentiment analytics and secure VDI services with flexible financing options.

Wipro has expanded its offerings substantially, adding WaaS360, virtuadesk and CPQ pricing via PROS. It has strengthened its AI-driven lifecycle management and compliance-focused EUC remediation with low-code automation.

Capgemini (Rising Star) has introduced CHIP AI, SDLM and Buddybot. Focusing on sustainable device lifecycle management, the firm has expanded predictive support and sector-specific enablement with strong AI and automation integration.

DXC Technology

Leader

"DXC Technology is a leader in managed end-user technology services, with its full EUC suite, AI-driven optimization and strong partnerships. It delivers secure, scalable and cost-effective digital workplace solutions across industries."

Bruce Guptill

Overview

DXC Technology (DXC) is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. Since 2024, DXC has reported steady performance and innovation in its managed end-user technology and EUC services, despite broader revenue pressures. The company has focused on AI-driven automation, proactive support and experience-centric delivery to enhance value and engagement.

Strengths

Full services suite: DXC offers a full suite of EUC services, including device management, patching, virtual desktop access, application provisioning and lifecycle management. It supports BYOD, mobility and telecom expense management, while also delivering DEX solutions for automated issue resolution and proactive experience management.

Strengthening capabilities via partnerships: Since 2024, DXC has deepened alliances with Microsoft, Apple, Dell, 1E, Nexthink and Qualtrics to enhance endpoint security, DEX and collaboration. It also expanded global provisioning through smart locker and vending solutions with Signifi, IVM and Smartbox, improving device logistics and lifecycle support.

Recent portfolio expansion via AI: Since early 2024, DXC has expanded its portfolio with AI-powered device and application intelligence, enabling predictive analytics, anomaly detection and TCO-based optimization. These tools align device and software provisioning with actual user needs, improving performance, reducing costs and supporting sustainability goals across industries such as healthcare, retail and hospitality.

Caution

While DXC is rightly recognized for innovation, some clients express concern over the time to value of its AI-driven workplace solutions, especially when benefits are not immediately tangible. DXC could align offerings more closely with client-specific business outcomes and accelerate its onboarding and adoption processes.

Managed End-user Technology Services – Midmarket

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

Chief information officers (CIOs)

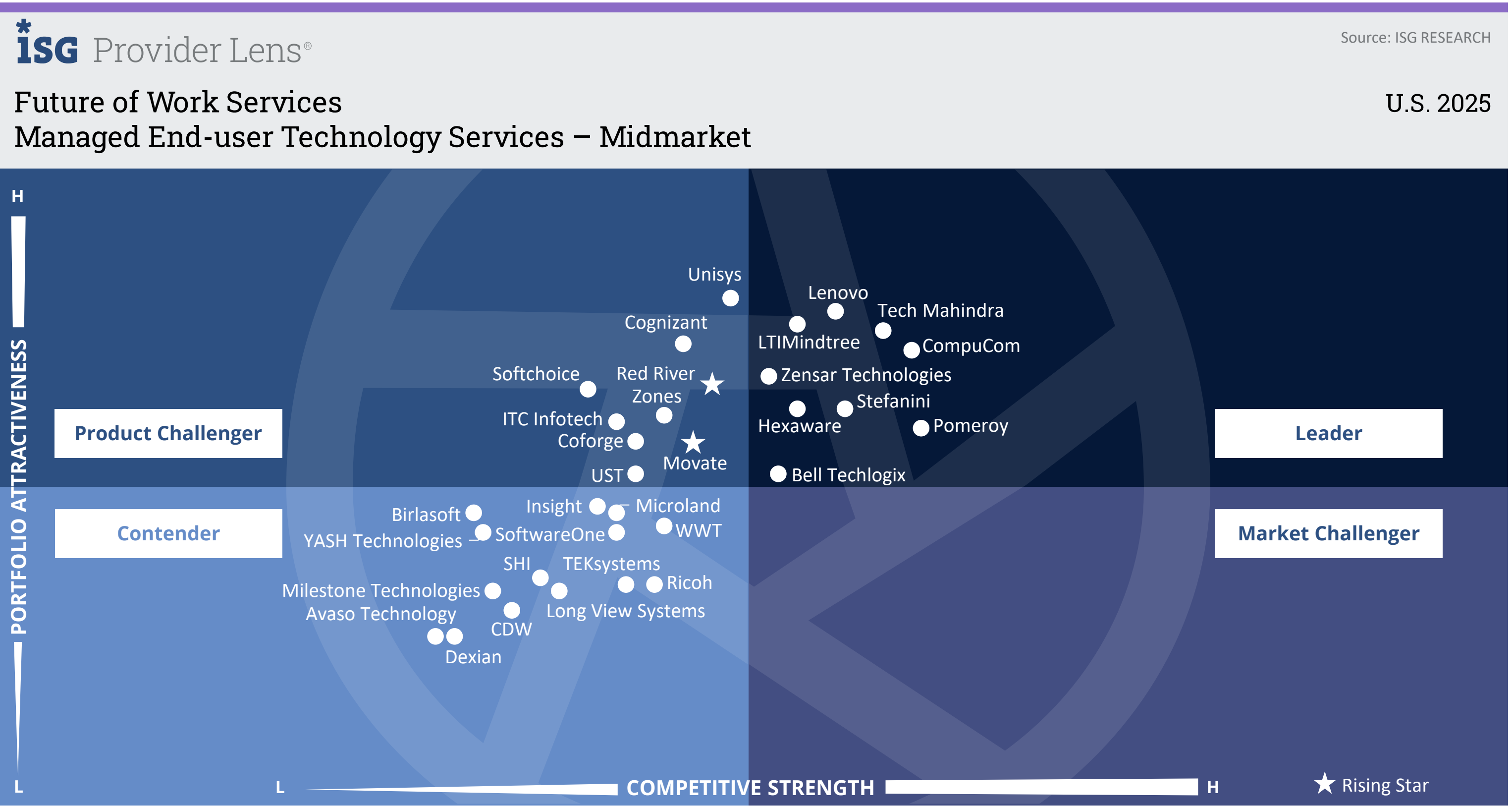
Should read this report to understand how existing processes and protocols influence an enterprise's use of workplace technologies. The report highlights the potential limitations of adopting new capabilities and technologies and outlines strategies to mitigate these challenges. CIOs will find guidance on fostering a culture of innovation and adaptability within their teams.

Technology professionals

Should read this report to understand providers' relative positioning and abilities, which will help them effectively plan and select managed end-user technology services. The report discusses building effective partnerships with service providers for ongoing support and innovation and outlines best practices for deploying managed digital workplace services within their organizations.

Cybersecurity professionals

Should read this report to understand how providers address significant compliance and security challenges while maintaining a seamless EX. They can learn about innovative technologies and tools that enhance security while supporting user engagement. The findings will help IT security managers assess the effectiveness of existing security measures and identify areas for improvement. By learning about innovative technologies, they can strengthen their security frameworks.



This quadrant assesses providers **specializing in managing the end-user technology** environment and servicing **local clients** with a regional presence.

Bruce Guptill

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

This quadrant matured in 2025 with a strong focus on modularity, automation and midmarket-specific service delivery. Compared to 2024, providers expanded AI-first platforms, multilingual support and flexible pricing models tailored to SMB and midmarket clients.

The quadrant reflects a growing demand for agile, cost-efficient and personalized end-user technology services that can scale with evolving business needs. Providers that offer localized support, intuitive automation and measurable outcomes are increasingly favored by midmarket enterprises seeking transformation without enterprise-level complexity.

Device lifecycle automation, zero-touch provisioning and smart locker-based field services have become standard offerings. Several new entrants have introduced gig-enabled delivery, GenAI copilots and outcome-based contracts.

Providers emphasize sentiment-driven experience management, proactive remediation and industry-specific solutions for retail, healthcare and manufacturing. Strategic investments in AR/VR, predictive analytics and hybrid workforce support have enhanced service personalization and scalability. While many Leaders have retained their positions, Rising Stars have brought innovation in elastic workforce models and circular IT practices.

From the 51 companies assessed for this study, 32 qualified for this quadrant, with nine being Leaders and two Rising Stars.

Bell Techlogix

Bell Techlogix has added AI-enhanced endpoint services, Tech Cafés and predictive analytics. It has also expanded modular midmarket offerings and strengthened automation and asset management capabilities.

compucom

CompuCom heavily emphasizes full lifecycle observability (FLO) and GenAI-driven DEX. It has strengthened AI automation, expanded midmarket focus and improved proactive remediation and hybrid workforce support.

HEXAWARE

Hexaware introduced its TANOSHI and Tensai® platforms with predictive automation in 2025. It has also added flexible pricing, multilingual assistants and stronger midmarket alignment with AI-powered lifecycle and experience services.

Lenovo

Lenovo, promoted to Leader in 2025 from a Rising Star in 2024, has expanded its TruScale DaaS and Care of One platform. It has also expanded hyperpersonalized support, AR/VR lifecycle management and stronger midmarket pricing flexibility.

LTIMindtree

LTIMindtree highlights AI-first workplace services and modular pricing. The company has greatly expanded its autopilot provisioning, GenAI copilots and vertical-specific support, enhancing midmarket scalability and experience personalization.

POMEROY

Pomeroy has introduced the BanzAI platform and DDaaS model, expanding AI-driven zero-touch support and industry-specific field services and improving device lifecycle efficiency and localized expertise.

stefanini GROUP

Stefanini has introduced SteflеX and AI-first architecture. It has also scaled predictive remediation and modular ITSM offerings, enhancing midmarket flexibility and proactive experience optimization.

TECH mahindra

Tech Mahindra has broadened its FLEX DWP with multilingual GenAI and Intel vPro support. It also has added AR/VR field services and healthcare IoT, strengthening industry-specific innovation and global device lifecycle coverage.

ZenSar TECHNOLOGIES

Zensar Technologies emphasizes AI-led service desks and localized delivery. Since 2024, it has expanded vertical-specific solutions and acquired Bridge View Life Sciences, strengthening its healthcare and life sciences expertise.

Movate

Movate (Rising Star) has introduced Gen5.AI, uXLA metrics and gig-enabled delivery. Focused on modular device lifecycle and proactive support, Movate's elastic workforce models are tailored to midmarket transformation.

Red River

Red River (Rising Star) offers full lifecycle DaaS, AI chatbots and virtual desktop services. It focuses on automation-led support and vertical-specific solutions for healthcare and public sector clients.

Continuous Productivity Services (Including Next-gen Service Desk)

Who Should Read This Section

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

Technology professionals

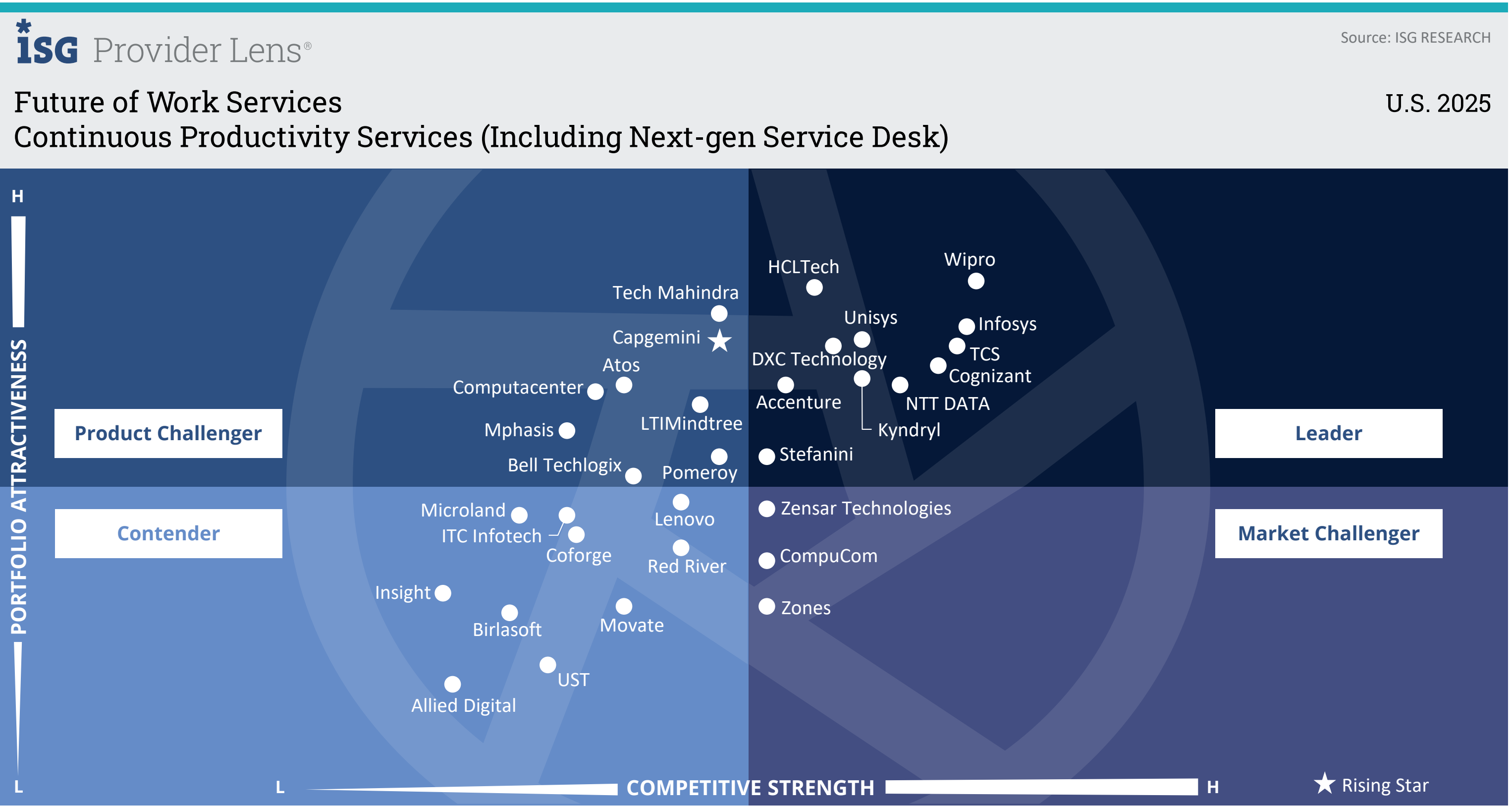
Including workplace technology leaders, should read this report to learn about providers that can help them modernize service desk and workplace support services. The report discusses building effective partnerships with service providers for ongoing support and innovation and outlines best practices for deploying continuous productivity services within their organizations.

Field service professionals

Should read this report to understand how providers implement and expand the uses of workplace services to better manage field service operations. They can gain insights into key performance indicators (KPIs) that can help measure the effectiveness of field service operations. Field service professionals will be equipped with the knowledge and tools necessary to drive improvements in their operations.

Digital professionals

Including facility managers, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives. They can gain insights into how these services can streamline workflows and reduce operational silos while discovering metrics and KPIs to evaluate the effectiveness of communication and collaboration initiatives.



Providers in this quadrant deliver autonomous, AI-powered workplace support, **enhancing hybrid productivity, experience and outcomes** through XLAs, automation and immersive technologies such as AR, VR and cognitive analytics.

Bruce Guptill

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 a**utomated 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

Between 2024 and 2025, the Continuous Productivity Services quadrant evolved from cautious GenAI exploration to full-scale integration. GenAI is now foundational, with providers embedding it across service desks, collaboration platforms and support ecosystems. XLAs have matured into strategic metrics, replacing SLAs and becoming central to experience-driven service delivery. Platforms such as Infosys' DWX and Kyndryl's Experience Conductor exemplify this shift.

Hybrid work has transitioned from policy debates to purpose-driven design. Enterprises now prioritize environment-based working (EBW), using AI to personalize spaces and ensure experience parity across remote and physical settings. This emphasis has elevated workplace services as enablers of collaboration and productivity.

Sustainability has progressed from compliance to strategic priority. Providers now offer ESG-aligned services such as carbon tracking, circular device programs and smart infrastructure. TCS, Wipro and HCLTech lead this initiative with operationalized sustainability platforms.

Overall, workplace services are no longer tactical IT functions, they are strategic levers for transformation, talent enablement and ESG outcomes. Providers that deliver AI-powered, experience-centric and sustainable solutions are gaining market share and reshaping enterprise expectations.

From the 51 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture leads with its AI-powered DEX platform and immersive AR/VR support, integrating GenAI and strategic investments, such as Workhelix to deliver proactive, experience-led and scalable workplace productivity solutions.

cognizant

Cognizant WorkNEXT™ platform, GenAI investments and AR/VR innovations, enable predictive, self-healing support and hybrid workplace transformation, positioning it as a leader in proactive, personalized digital support services.

DXC TECHNOLOGY

DXC Technology combines AI-first autonomous support, predictive analytics and global provisioning with platforms, such as OASIS and UPtime™, delivering scalable, secure and user-centric productivity services across industries.

HCLTech

HCLTech GenAI-first transformation, immersive automation and unified global support model, featuring AI Force, WorkBlaze and multilingual voice AI, drive proactive resolution and measurable productivity gains.

Infosys

Infosys leads with AI-first platforms such as Cortex and DWX, launching GenAI assistants and AR support to reduce MTTR, enhance self-service and scale omnichannel support globally.

kyndryl

Kyndryl integrates AI-driven service desks, omnichannel self-service and XLA-based experience management, delivering proactive, contextualized and autonomous workplace support at enterprise scale.

NTT DATA

NTT DATA Workplace Smart AI Agent™ suite, immersive self-service tools and XLA-led delivery, backed by partnerships with Microsoft and OpenAI, enable scalable, contextual and autonomous workplace support.

Stefanini's AI-first workplace model, SAI platform and $350 million investment in automation and acquisitions enable contextualized, scalable support and measurable outcomes across U.S. enterprise environments.

TCS delivers AI-powered, autonomous support via Cognix™ and ignio™, with omnichannel Zero Service Desk models and industry-specific XLAs driving proactive, contextual and scalable workplace support.

Unisys Service Experience Accelerator integrates GenAI, telemetry and omnichannel tools to deliver proactive, XLA-driven support, reducing downtime and aligning IT with business outcomes.

Wipro NeuraDesk, immersive self-service tools and XLA frameworks deliver autonomous, hyperpersonalized support, enabling proactive, cost-efficient productivity services across global enterprise environments.

Rising Star **Capgemini's** CHIP AI, omnichannel tools and XMO-driven insights deliver proactive, personalized and sustainable support, positioning it as a trusted provider of next-gen workplace productivity services.

DXC Technology

Leader

"DXC Technology leads in managed end-user services by combining AI-first autonomous support, predictive analytics and global provisioning with strategic partnerships, enabling scalable, secure and user-centric continuous support and enhancing productivity across industries."

Bruce Guptill

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC's AI-powered IT service desk offerings integrate GenAI, automation and predictive analytics to streamline support, reduce manual effort and personalize EX. Its solutions seamlessly integrate with Microsoft Teams and provide omnichannel support through kiosks, smart lockers and walk-in centers.

Strengths

Blending end-user technology management and productivity support: DXC aligns its support and EUC managed service offerings by incorporating AI-powered device and application intelligence. These tools synchronize device and software investments with actual user workloads using anomaly detection, trend analytics and TCO-based optimization. This approach helps clients reduce costs, improve and manage productivity, and achieve sustainability goals through extended device lifecycles and smarter resource utilization.

Comprehensive services and capabilities: DXC's core capabilities span device and patch management, virtual desktops, BYOD support and telecom expense management. These services are frequently tailored for industries such as healthcare, finance and retail, delivered through a globally distributed support model that emphasizes automation, sustainability and user-centric outcomes.

Transitioning to autonomous support: DXC's services road map emphasizes a shift to AI-first autonomous support, integrating voice assistants, fraud detection and real-time sentiment analytics. Its platforms, such as OASIS and UPtime™, are being enhanced with GenAI and agentic automation. DXC also partners with Amazon Q, Sanas/Krisp.AI and ServiceNow to deliver predictive, scalable support and proactive service optimization. Strategic collaboration with Signifi, IVM and Smartbox enables the company to deliver smart locker and vending solutions for global device provisioning and support.

Caution

While DXC's AI-driven support tools, such as chatbots and kiosks, are effective, some users have reported frustrations related to keyword recognition and delays in issue resolution, particularly during peak usage. These usability gaps may impede the overall effectiveness of DXC's next-generation support services, especially in high-demand environments.

Smart and Sustainable Workplace Services

Who Should Read This Section

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

C-suite executives

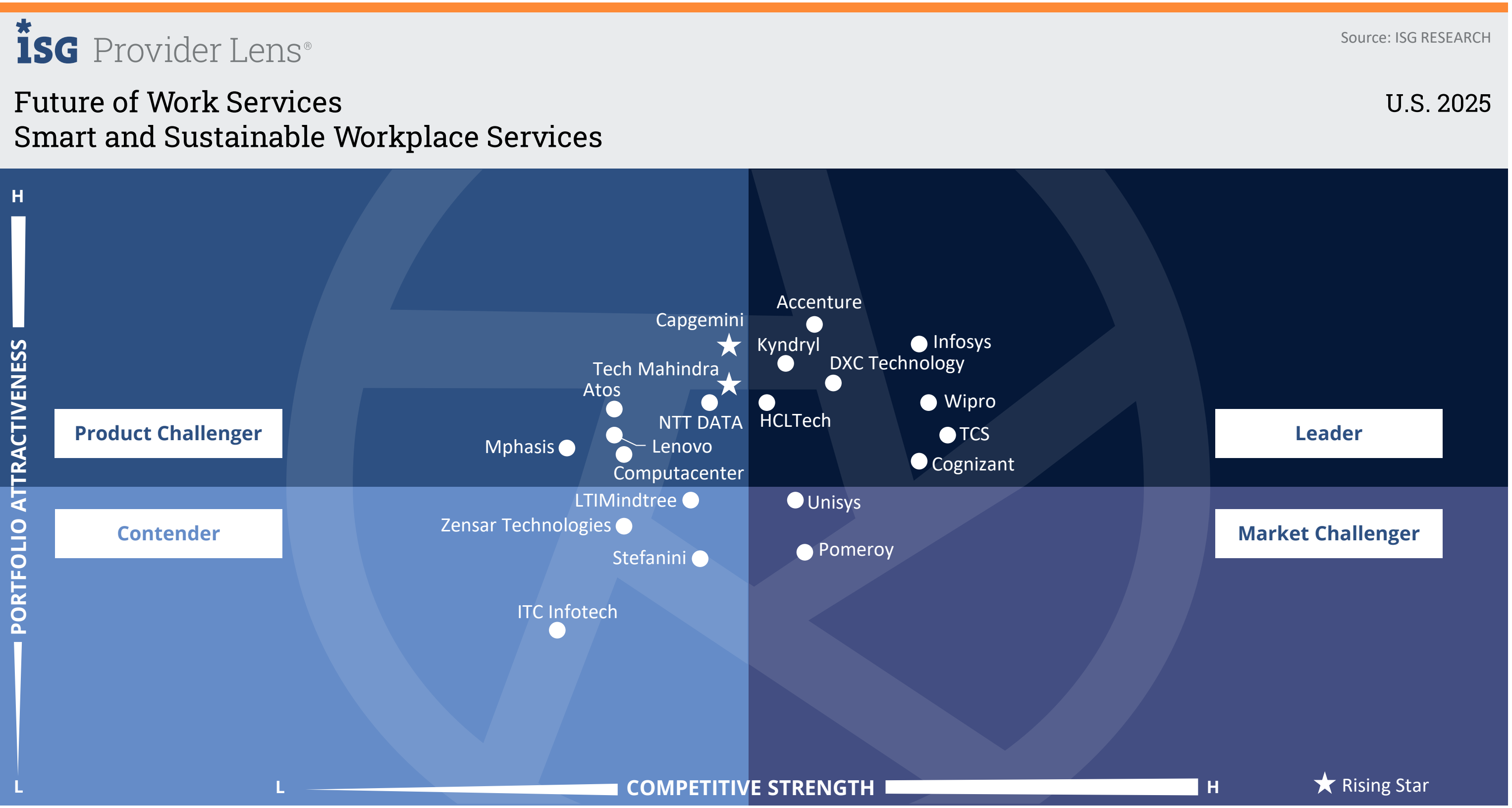
Should read this report to understand the latest trends in smart and sustainable workplace services, aiding in resource allocation and strategy development. The report outlines best practices that streamline processes and reduce operational costs while maintaining quality. It also highlights implementing eco-friendly practices that align with corporate social responsibility objectives.

Chief sustainability officers and ESG professionals

Should read this report for insights on developing and implementing effective, sustainable strategies. The report includes guidance on developing a long-term vision for sustainability that integrates with overall business strategy. It identifies opportunities for sustainable investments that align with corporate goals.

Strategy professionals

Should read this report to identify the most suitable smart and sustainable workplace service providers that can help companies develop and implement an effective ESG strategy. They can compare their organization's strategies with those of industry leaders to identify gaps and opportunities. By leveraging the insights provided, they can ensure that their clients are well-prepared to meet the challenges of today's evolving work landscape.



The quadrant assesses providers' offerings that integrate AI, IoT and ESG strategies to deliver smart, sustainable workplace services that enhance efficiency, inclusivity and measurable environmental impact.

Bruce Guptill

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.

Facing commercial 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 building and facility management **by leveraging IoT and the latest technologies**
2. **Support asset efficiency and address energy management requirements**
3. Provide **inclusive, adaptable and integrated hybrid working solutions** and spaces
4. Provide **services to reduce carbon emissions** from workplaces
5. Assist in aligning client **strategies and metrics for ESG reporting**, particularly focusing on workspace utilization within the social and governance dimensions

Observations

As regulatory requirements grow and mature, and stakeholder expectations rise, smart and sustainable workplace services are becoming essential for long-term enterprise resilience and brand value.

This quadrant has expanded for 2025, with more emphasis on ESG integration, smart infrastructure and AI-powered sustainability tracking. It now reflects a growing convergence of digital workplace innovation and environmental responsibility.

Sustainability for clients has evolved from a compliance checkbox to a core differentiator, with providers embedding ESG goals into workplace strategy, asset management and service delivery. Providers are increasingly expected to deliver measurable reductions in carbon footprint, energy use and waste, while enhancing employee experience and operational efficiency. As a resut, more providers have introduced or expanded carbon assessment tools, circular device programs and IoT-enabled workplace optimization.

Strategic partnerships with Microsoft, SAP, Dell and others enable and support a widening array of energy-efficient transformation and real-time sustainability reporting for providers. Several providers have even launched their own platforms for emissions tracking, smart building management and climate risk analytics. New entrants bring immersive collaboration tools and industry-specific sustainability solutions.

From the 51 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and two Rising Stars.

Accenture has advanced its smart workplace services with IoT-enabled buildings, AI partnerships, and ESG-aligned strategies. Strategic acquisitions and OpenBlue Innovation Centers enhance its ability to deliver scalable, sustainable and immersive workplace solutions.

Cognizant has improved its smart workplace portfolio with GenAI investments, WorkNEXT™ and strategic partnerships. It strengthened ESG alignment through decarbonization initiatives, AR/VR tools and AI-powered reporting, enhancing hybrid work and sustainability outcomes.

DXC Technology introduced Smart Working Spaces and AI-driven ESG analytics, helping clients achieve strong emissions reductions. Recognized for ESG leadership, it integrates IoT, AI and sustainability to optimize hybrid workspaces and real estate efficiency.

HCLTech continues to enhance smart workplace offerings, including WorkBlaze, LibreSpace and NIO, solidifying its leadership. It supports energy optimization, device lifecycle sustainability and predictive analytics, helping clients reduce emissions and align with ESG goals.

Infosys has enhanced its smart workplace services with platforms such as NAVI and Orbit, integrating circular device management, AI-driven analytics and carbon tracking to support inclusive, energy-efficient and ESG-aligned hybrid environments.

Kyndryl is expanding IoT-enabled workplace services and predictive ESG analytics via Kyndryl Bridge. It supports net-zero goals with energy optimization, Scope 3 tracking and smart facility management across hybrid environments.

TCS solidified its leadership with Clever Energy™, Grow+ and DEI-focused hybrid workspaces. It delivers measurable carbon reduction, ESG reporting and circular IT practices through IoT-driven platforms and consulting.

Wipro strengthened its smart workplace services with SpaceIQ, GreenOps and immersive hybrid tools. It supports ESG compliance, energy optimization and inclusive collaboration through AI, IoT and sustainability dashboards.

Rising Star **Capgemini** advanced with its CHIP AI, SDLM and immersive collaboration tools. It integrates IoT, AI and ESG metrics to deliver adaptive, energy-efficient and inclusive hybrid workplace ecosystems.

Rising Star **Tech Mahindra's** FLEX DWP platform, i.Sustain framework, and AR/VR tools support smart, sustainable workplaces. It emphasizes IoT integration, ESG reporting and inclusive hybrid collaboration to drive responsible digital transformation.

DXC Technology

Leader

"DXC Technology is a leader in smart and sustainable workplace services, integrating AI, IoT and ESG analytics to deliver adaptive, inclusive and energy-efficient environments that optimize operations and support enterprise sustainability goals."

Bruce Guptill

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC has earned a top ESG rating from Morningstar Sustainalytics and was named a 2025 Climate Leader by USA Today and Statista. The company has achieved external assurance for Scope 1-3 emissions, aligning with GRI, ISO 14064-3 and SBTi standards. DXC has helped clients reduce CO_2 emissions by up to 37 percent through cloud and data center optimization.

Strengths

Smart sustainable spaces: DXC's Smart Working Spaces offering, introduced in 2025, includes AI-enabled meeting rooms, real-time space utilization analytics and integrated booking systems. Strategic investments in AI, IoT and analytics support ESG goals and adaptive workspaces, tailored for hybrid, inclusive and sustainable environments, focusing on experience parity and operational efficiency.

AI-driven ESG reporting and optimization: DXC's ESG-aligned workplace analytics track energy usage, occupancy and environmental impact. Its AI-powered systems support compliance, automate ESG disclosures and optimize real estate usage, helping enterprises meet sustainability goals while enhancing workspace effectiveness.

Sustainability in DXC's strategy: In FY24, DXC reported a 68 percent reduction in Scope 1 and 2 emissions and sourced 57 percent of electricity from renewables. It was named Dell Technologies' 2025 Sustainability & ESG Partner of the Year and recognized by Newsweek and Sustainalytics for ESG leadership. In 2024, DXC was named a Leader in ISG's Future of Work Services study and was recognized by Microsoft and Dell for innovation and sustainability.

Caution

Some clients report challenges with AI integration in DXC's smart workplace services, including data silos, skill gaps and unclear ROI. DXC can improve its offerings by enhancing governance, training and outcome transparency.

AI-augmented Workforce Services

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

Consulting professionals

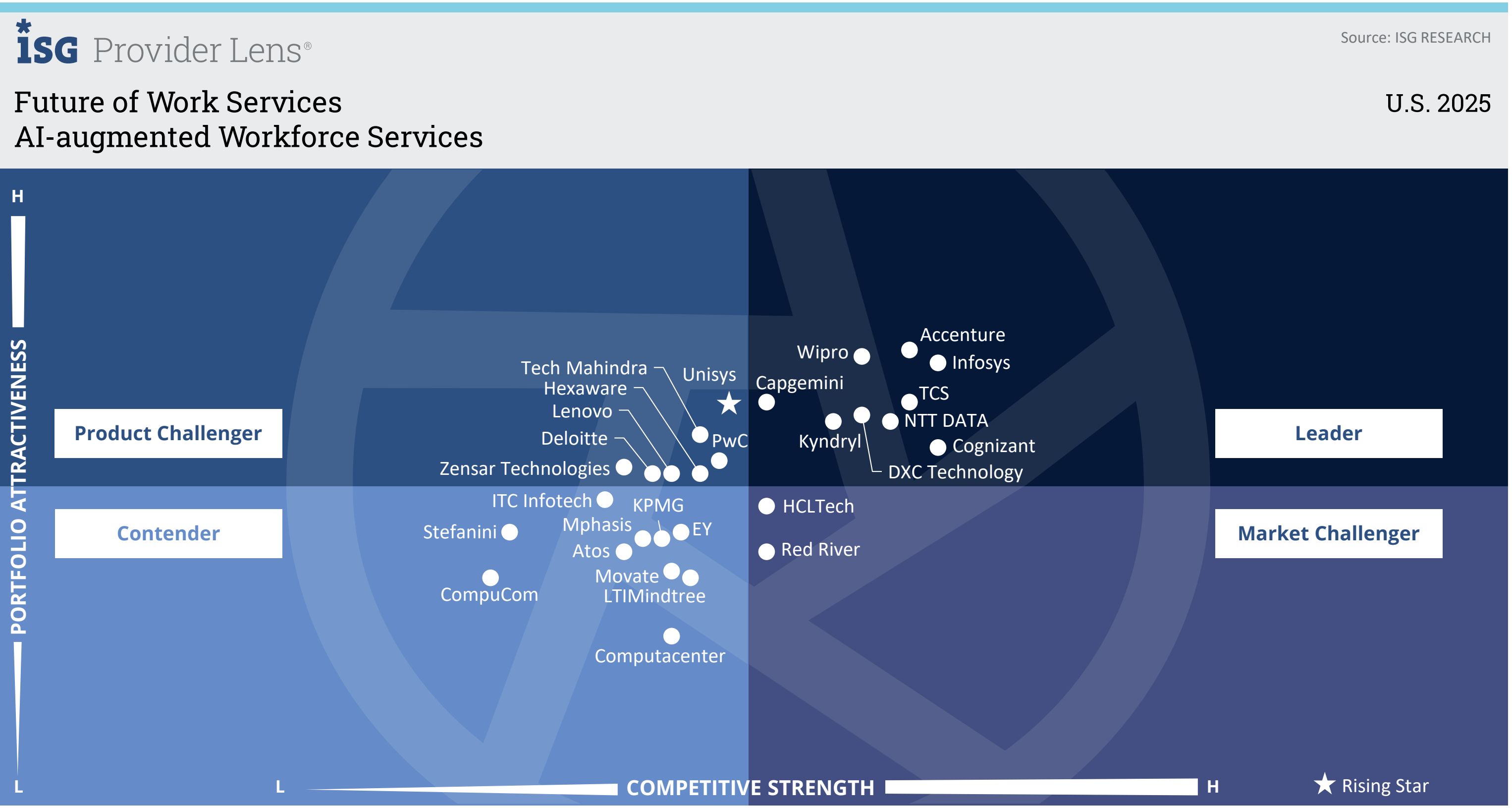
Should read this report to advise companies on AI-augmented workforce strategies and performance, ensuring they stay up-to-date on industry trends and developments. By doing so, they can offer companies customized recommendations through the transition to ensure minimal disruption and maximum engagement. By leveraging the insights provided, they can ensure that their clients are well-prepared to meet the challenges of today's evolving work landscape.

Technology professionals

Should read this report to understand how providers' relative positioning and abilities can help them effectively plan AI-augmented workforce services. The report discusses building effective partnerships with service providers for ongoing support and innovation and outlines best practices for deploying AI-augmented workforce services within their organizations.

Chief information officers (CIOs)

Should read this report to understand how existing processes and protocols influence an enterprise's use of workplace technologies. The report highlights the potential limitations of adopting new capabilities and technologies and outlines strategies to mitigate these challenges. CIOs will find guidance on fostering a culture of innovation and adaptability within their teams.



The quadrant assesses providers deploying and improving autonomous AI agents to transform workforce productivity, integrating ethical governance, platform ecosystems and scalable, human-centric digital augmentation strategies.

Bruce Guptill

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 functionalities** that comprise proactive, context-aware and continuously self-improving actions **beyond scripted 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 comprehensive **training and upskilling** to drive adoption and enable effective collaboration with digital agents
5. Adhere to **ethical governance** standards, ensuring fairness, accountability and transparency in AI deployment
6. Provide services incorporating 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

Introduced in 2025, this new quadrant captures the rapid evolution of workforce enablement through GenAI, agentic AI and autonomous workflow orchestration. Providers have launched AI copilots, multiagent platforms and immersive learning environments to support hybrid and digital-first workforces.

The quadrant reflects a foundational shift in how enterprises approach workforce transformation, moving from task automation to the augmentation of human potential. Providers emphasize AI-first talent models, adaptive learning and experience parity across physical and remote environments. Several have introduced platforms for real-time sentiment analysis, predictive support and personalized upskilling.

As organizations seek to future-proof their talent strategies, AI-augmented workforce services are becoming central to productivity, innovation and employee engagement across industries.

Strategic investments in AI ethics, DEI and digital dexterity have become standard, with many firms embedding responsible AI practices and ISO certifications into their offerings. Strategic partnerships with core technology and tool leaders such as Microsoft, NVIDIA and ServiceNow enable an increasing range of providers to offer scalable, secure AI integration across enterprise functions.

From the 51 companies assessed for this study, 28 qualified for this quadrant, with nine being Leaders and one Rising Star.

Accenture leads in AI-augmented workforce services with its AI Refinery™ and NVIDIA-powered multiagent systems, emphasizing industry-specific deployment, human-centric adoption and scalable autonomous decision-making across enterprise functions.

Capgemini strengthened its AI workforce services via its Resonance AI Framework, CHIP AI platform and WNS acquisition, enabling ethical, scalable agentic AI integration and measurable outcomes across diverse enterprise environments.

Cognizant launched Agent Foundry and Neuro® accelerators, invested heavily in GenAI and integrated Microsoft Copilot to deliver autonomous agents, measurable productivity gains and robust workforce transformation support.

DXC Technology has expanded its AI-first workforce portfolio with UPtime™, OASIS and partner-integrated agents, emphasizing proactive support, ethical governance and measurable productivity improvements across global enterprise operations.

Infosys has deployed over 200 autonomous AI agents via Topaz and NAVI, integrating ethical AI, self-healing systems and multimodal analytics to drive scalable, context-aware enterprise automation and workforce enablement.

Kyndryl is embedding agentic AI into workflows via Microsoft Acceleration Hub and GenAI orchestration, emphasizing ethical governance, workforce readiness and measurable business process automation across enterprise environments.

NTT DATA launched its Smart AI Agent™ Suite and Agentic AI CoE, integrating GenAI tools, talent development and ethical governance to empower secure, autonomous workforce transformation globally.

TCS scaled agentic AI through Cognix™, ignio™ and WisdomNext™, integrating autonomous agents, deep enterprise systems and large-scale upskilling to deliver measurable productivity and ethical, human-centric transformation.

Wipro advanced AI workforce services with NeuraDesk, WaaS360 and Live Workspace™, delivering autonomous support, measurable outcomes and robust talent transformation through ethical, scalable and hyper-personalized enterprise experiences.

Rising Star **Unisys** leverages its Service Experience Accelerator, delivering autonomous GenAI agents, ethical AI governance and measurable productivity gains through secure enterprise integration and workforce enablement.

DXC Technology

Leader

"DXC Technology is a leader in AI-augmented workforce services, delivering autonomous, context-aware digital agents through its own and partners' platforms to drive measurable productivity, cost savings and UX across global enterprises."

Bruce Guptill

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated $13.7 billion in revenue, with Global Infrastructure Services as its largest segment. Since 2024, DXC has significantly expanded its AI-augmented workforce services, focusing on scalable, secure and productivity-enhancing solutions across industries. In 2025, DXC was recognized by AWS for its Generative AI Services Competency, validating its production-grade deployments and industry-aligned solutions.

Strengths

Importance of change management: DXC offers robust change management to support adoption, and it trained over 6,100 FTEs in AI, IoT and analytics in 2024. Ethical AI governance, embedded feedback loops and outcome-based metrics ensure transparency and continuous improvement. These capabilities position DXC as a global leader in delivering intelligent, autonomous workplace solutions.

Strength through partner agencies: DXC's AI agents integrate deeply with partners' ecosystems, offering real-time sentiment analysis, predictive device optimization and fraud detection. Partnerships with Amazon Q, Microsoft Azure and Sanas/Krisp.AI strengthen conversational AI and multilingual support. The AI agents autonomously manage workflows, optimize IT operations and provide personalized assistance, improving resolution times and user satisfaction.

Agentic acceleration in workforce services: DXC has accelerated its AI-augmented workforce services with a clear vision to shift from human-led to AI-first support. Investments in platforms such as DXC UPtime™, OASIS and Agentic AI Support enable autonomous digital agents to deliver proactive, context-aware and self-improving services. This transition reduces costs and enhances productivity across global enterprises.

Caution

Potential clients should be aware that DXC's AI-augmented workforce services face challenges with data silos, skill gaps and ROI measurement. To improve, DXC could strengthen cross-functional governance, enhance client-side training and clarify value metrics to support strategic alignment and adoption.

Appendix

The ISG Provider Lens® 2025 – Future of Work Services U.S. study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of 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

Bruce Guptill
Analyst and Advisor

Bruce Guptill brings more than 30 years of technology business and market experience and expertise to ISG clients.

Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. public sector research for ISG's Provider Lens global research studies and IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Master's degree in Marketing and Finance and a bachelor's degree combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware and networking technologies, as well as mechanical and electrical engineering disciplines.

Research Analyst

Khyati Tomar
Senior Research Analyst

Khyati Tomar is a Senior Research Analyst at ISG. She is responsible for supporting and co-authoring Provider Lens® studies on the Microsoft Partner Ecosystem, the Future of Work — Services and Solutions, and OCM. Khyati supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports. Prior to this, she had over 2.5 years of experience in the technology research industry.

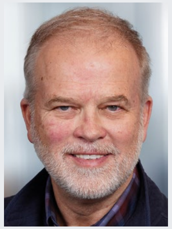
She carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.

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.

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

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ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens®

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REPORT: FUTURE OF WORK SERVICES