ISG Provider Lens®

Future of Work Services

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

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DXC TECHNOLOGY

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Report Author: Kevin Turner

Organisations are reimagining work with GenAI, hybrid models and EX for a transformative future

Introduction

As the workplace continues to evolve at an unprecedented pace, 2025 stands out as a defining year for how U.K. organisations operate, collaborate and create value. With the rapid advancement of GenAI, the solidification of hybrid working models and a renewed emphasis on EX, U.K. enterprises are reimagining the workplace through a more connected, intelligent and purposeful lens.

This ISG Provider Lens® Future of Work Services 2025 report explores the key trends shaping this transformation across the U.K. and beyond. It highlights how GenAI is moving beyond experimentation to become a foundational element of enterprise strategy, how hybrid work is shifting from flexibility to purposeful design, and how experience management is evolving into a data-driven, outcome-oriented discipline.

At the same time, technology is no longer seen as a back-office function but as a strategic enabler of growth, fostering cross-functional collaboration and innovation, even in the face of economic headwinds such as inflationary pressures and talent shortages. U.K. organisations are also embedding sustainability and ESG commitments into their workplace strategies, aligning with national goals such as the Net Zero 2050 target and broader societal expectations around responsible business.

Together, these trends signal a new era — one in which the digital, human and physical dimensions of work converge to create smarter, more sustainable and more productive environments.

GenAI becomes a cornerstone of transformation

GenAI has undergone remarkable evolution, transitioning from a novel experimental technology to an essential element of enterprise transformation. In 2025, organisations are not merely contemplating the benefits of adopting GenAI; they are actively developing comprehensive strategies aimed at

> GenAI is not an experiment, but the engine of enterprise-scale workplace transformation.

scaling this technology rapidly and effectively across all operational facets. This shift reflects a growing recognition of GenAI's potential to drive innovation, efficiency and competitive advantage.

The ISG Provider Lens® Future of Work Services 2025 study highlights that service providers are adeptly integrating GenAI within critical workplace functions. This integration paves the way for intelligent automation, which streamlines processes and reduces manual effort, freeing employees to focus on higher-value tasks. With GenAI, businesses in the U.K. can create hyperpersonalised CX by analysing vast amounts of data to tailor interactions and offerings to individual preferences and behaviours. Furthermore, the ability to support real-time data-driven decision-making empowers organisations to remain agile and responsive in a fast-paced market landscape. Early adopters, such as those leveraging platforms such as Microsoft 365 Copilot, are progressing beyond initial pilot programs to implement expansive enterprise-level solutions that encompass various departments. This broad adoption indicates a shift from isolated initiatives to holistic transformations that impact the entire organisation. The focus of these implementations is not just on technological advancement but also on establishing robust governance frameworks, enhancing security measures and cultivating responsible AI usage practices to mitigate risks associated with data privacy and ethical considerations.

As we look ahead to the coming year, we anticipate that GenAI will become intricately woven into essential areas such as IT service management (ITSM), human resources workflows and knowledge management systems. For ITSM, GenAI will facilitate automation of ticketing processes, predictive maintenance and enhanced user support, which will reduce downtime and improve service quality. In the realm of human resources, GenAI can assist in recruitment through intelligent screening of candidates, streamline onboarding processes and even personalise employee engagement initiatives. Knowledge management systems will benefit from GenAI by enabling smarter categorisation and retrieval of information, thereby facilitating better collaboration and knowledge sharing amongst employees. This extensive integration is expected to drive substantial productivity gains, fundamentally reshaping strategies related to the digital workplace. Companies that strategically harness the capabilities of GenAI will not only improve operational efficiency but also foster a culture of innovation where continuous learning and adaptation are at the forefront of their business models. As organisations embrace this transformative technology, they are likely to emerge more competitive and better equipped to navigate the complexities of the modern business environment.

Hybrid work evolves from flexibility to intentionality

Hybrid work has evolved from a fleeting trend into a standardised operational model within organisations. As organisations adapt to changing workforce expectations, it has become evident that more than 60 percent of job postings in the U.K. now offer hybrid or fully remote options. This shift is transformative, focussing not just on where employees work but also on optimising how work is performed. Companies are recognising that to attract and retain top talent, they must provide flexibility while also fostering an environment where productivity and collaboration can thrive. With hybrid work becoming so prevalent, enterprises are investing substantial resources into the development of meticulously crafted hybrid strategies. These strategies aim to strike an effective balance between employee autonomy and organisational accountability. It is not enough to simply allow remote work; organisations must ensure that employees remain engaged and productive, regardless of their location. This requires a cultural shift that values results and outcomes over traditional measures of productivity such as hours spent in the office.

Unified communication and collaboration (UCC) platforms have become pivotal in this evolution. Tools such as Microsoft Teams and Zoom are no longer just alternatives to in-person meetings; they have transformed into advanced intelligent work hubs that facilitate seamless interaction amongst teams. These platforms are being enhanced with innovative features that support modern work styles.

For instance, AI-generated meeting summaries allow participants to focus on the discussion without the distraction of notetaking, ensuring that key takeaways are documented and easily accessible. Instant language translation capabilities enable global teams to communicate more effectively, breaking down language barriers and fostering inclusivity in diverse workforces. Comprehensive task management systems integrated into these platforms further streamline project planning and execution, ensuring all team members stay aligned on goals and deadlines. Moreover, leading providers in the U.K. are helping organisations transition from merely using basic collaboration tools to developing orchestrated and interconnected workflows. This shift emphasises the importance of creating a cohesive ecosystem that includes not just internal teams but also external partners, suppliers and customers. By fostering collaboration across these wider networks, companies can enhance their agility and innovate more rapidly, responding to market changes effectively. As hybrid work continues to mature, organisations must become intentional about their strategies. This means continually assessing the effectiveness of their hybrid models and being willing to adapt as needed. Training programs focussed on remote collaboration skills, adjustments to performance metrics and fostering a culture that values communication are critical components in this ongoing journey. In this new era, the success of a hybrid work model will depend on how well organisations can integrate the technology, culture and operational processes necessary to create an environment that empowers employees and drives collective success.

Experience management transforms into a fully outcome-driven approach

Experience management has evolved into a fully outcome-driven discipline, marking a significant advancement in how organisations perceive and EX. This evolution is rooted in the need for organisations to better understand the factors that influence employee satisfaction, engagement and overall productivity. By 2025, it is anticipated that organisations will no longer rely solely on conventional sentiment surveys, which often provide a static snapshot of employee feelings at a given time. Instead, they will embrace a more dynamic approach utilising real-time telemetry, sophisticated behavioural analytics and outcome-based metrics. Real-time telemetry involves collecting data continuously throughout the employee journey, allowing companies to monitor experiences as they happen. This provides a more accurate and timely understanding of employee needs and challenges. Nuanced behavioural analytics go a step further by interpreting this data to uncover trends and patterns in employee behaviour such as how collaboration or communication tools are used. Outcome-based metrics tie these insights directly into business results, enabling organisations to see how changes in EX correlate with key performance indicators such as productivity, retention and customer satisfaction.

In this landscape, Digital employee experience (DEX) platforms have become crucial tools. They function alongside unified endpoint management (UEM), ITSM and HR systems to deliver a holistic view of the EX. DEX platforms facilitate a seamless integration of various technological tools and support systems, ensuring that employees have access to the resources they need in a streamlined manner. This integration is vital for enabling real-time adjustments to the EX based on immediate feedback and data analysis. Moreover, providers of these platforms are increasingly harnessing advanced AI capabilities. AI can sift through vast amounts of data to proactively identify potential issues such as signs of dissatisfaction or disengagement before they escalate into larger problems. This predictive capability allows organisations to offer personalised support to employees, addressing their needs in a targeted and timely fashion. By accurately predicting attrition risks, organisations can implement retention strategies tailored to individual employees, thereby enhancing overall organisational stability.

As this transformation unfolds, organisations are shifting their focus from traditional service level agreements (SLAs), which typically outline the expected level of service provided, to more comprehensive experience level agreements (XLAs). This shift signifies a deeper understanding of the importance of EX in achieving business objectives. XLAs emphasise measurable business outcomes that are intricately linked to defined experience metrics. This ensures that there is a clear alignment between employee satisfaction and organisational goals, fostering a culture where the EX is prioritised as a strategic asset. In summary, the future of experience management is characterised by a proactive, data-driven approach that not only seeks to understand employee needs but also aligns them with the strategic objectives of the organisation. This evolution represents a crucial step towards cultivating an engaged and productive workforce that is equipped to meet the challenges of an ever-changing business environment.

Technology is now a business growth engine

Technology has evolved into a powerful engine for business growth, fundamentally reshaping the role of IT within organisations. Historically viewed as a cost centre, IT is now a pivotal force driving strategic initiatives that yield tangible business outcomes. As we approach 2025, the collaboration amongst Chief Information Officers (CIOs), Chief Human Resources Officers (CHROs) and Chief Operating Officers (COOs) will become increasingly vital. This alliance is aimed at merging technology with human capital and operational strategies to foster an environment that promotes agility and innovation. The necessity for this collaboration stems from various external and internal pressures facing organisations today. In the U.K., for instance, the aftermath of the pandemic has ushered in a pressing need for companies to adapt rapidly to changing work dynamics. Many businesses are grappling with the nuances of a hybrid work model, where flexibility is paramount, and employee engagement must be thoughtfully managed.

The blending of digital tools with human resource practices will ensure that employees remain connected and productive, regardless of their physical location. In addition to the pandemic's impact, ongoing skills shortages in key sectors have prompted organisations to rethink their strategies for talent acquisition and retention. By integrating advanced technologies with HR processes, companies can leverage data analytics to better understand workforce needs and preferences. This data-driven approach enables organisations to create personalised EX, thus increasing satisfaction and reducing turnover. Furthermore, sustainability initiatives have become a central concern in corporate strategy. With a growing emphasis on environmental responsibility, organisations are investing in technology platforms that not only unify data across IT, HR and facilities management but also support sustainable practices. For instance, these platforms can track resource consumption, optimise energy use and facilitate more effective space management. By creating a more cohesive work environment, organisations can enhance operational efficiencies while contributing positively to environmental goals. Investments in integrated platforms that streamline communication and collaboration across departments are proving essential. Such systems enable companies to optimise space usage, leading to reduced overhead costs, while also ensuring that employees have access to the resources and support they need to thrive.

This holistic approach to workplace transformation enhances not only productivity but also overall employee well-being, creating a culture that values both technology and human experience. As we continue to witness this paradigm shift, it becomes clear that the intersection of technology, HR and operations will be pivotal to driving sustainable business growth in the future. Organisations that embrace this cross-functional collaboration will be better positioned to navigate challenges and seize opportunities in an increasingly competitive landscape.

Budget scrutiny intensifies, but innovation thrives

In the current landscape, where economic uncertainty looms large, organisations are finding themselves at a crossroads. The pressures of prolonged inflation, geopolitical tensions and persistent talent shortages have forced firms to reassess their financial commitments and strategic priorities more rigorously than ever before. As a result, budget scrutiny is not just a trend; it has become a fundamental aspect of operational strategy across various sectors. This tightening of financial belts has led to a more granular analysis of expenditure. Companies are increasingly focussed on ensuring that every dollar spent contributes measurably to their bottom line. This has sparked an environment where operational efficiency is paramount, and decision-makers are expected to provide compelling justifications for their investment choices. As organisations navigate these turbulent times, they are heavily investing in thorough evaluations of potential returns, prioritising initiatives that offer measurable benefits in terms of productivity and cost-effectiveness. Yet, this climate of caution has not stifled innovation; rather, it has redirected it towards more focussed and strategic initiatives. The drive for innovation has adapted in response to these external pressures, with organisations now seeking rapid ROI and more sustainable models.

Companies that present innovative self-funding transformation strategies — where the cost of change is offset by the savings or new revenue generated — are notably gaining popularity. Such models allow businesses to pursue innovative projects without the immediate burden of upfront costs, making them more appealing in today's financial landscape. In the U.K., for example, there is a noticeable trend amongst clients that are directing their resources towards solutions that enhance productivity and operational efficiency. There is a strong emphasis on minimising operational friction, which often means streamlining processes, automating repetitive tasks and utilising technology to its fullest potential. This focus not only aims to reduce costs but also strengthens the organisation's ability to adapt to changing market conditions, forming a sturdy foundation for long-term resilience. Ultimately, while budget scrutiny may have intensified, it has inadvertently fostered an environment ripe for targeted innovation. Organisations are learning to do more with less, leveraging their resources smartly and investing in transformative solutions that ensure they thrive even amidst uncertainty. In this evolved landscape, those who can balance prudence with progressive strategies will likely emerge as leaders in their respective fields.

Sustainability and ESG are now core to workplace strategy

Sustainability has evolved from being a mere checklist item to becoming a vital competitive differentiator within the business landscape. In today's world, the expectation for organisations to integrate sustainable practices and adhere to ESG criteria is higher than ever. By 2025, companies will not only be expected to embrace these principles but also have them fully embedded within their technology decision-making processes. This means that sustainability will influence everything from product development to supplier selection, fundamentally reshaping how businesses operate.

The transparency in supply chains is one area gaining momentum, with consumers and investors alike demanding to know the origins of materials and the conditions under which they are produced. Companies are now scrutinising their supply chains to ensure ethical practices are upheld at every level. This includes ensuring fair labour practices, reducing carbon footprints and sourcing materials sustainably. More organisations are likely to utilise blockchain technology and other advanced tracking systems to provide traceability, thereby building trust with consumers and stakeholders. Moreover, leveraging technology for energy efficiency is another critical aspect of this trend. Businesses are increasingly adopting innovative solutions such as smart building technologies, energy management systems and renewable energy sources. These technologies not only reduce operational costs but also minimise environmental impacts. For example, companies may implement IoT devices to monitor energy usage in real time, which helps optimise consumption and identifies areas for improvement. Additionally, incorporating social responsibility into corporate strategies is becoming paramount. Organisations are recognising that their impact extends beyond profit, and as such, they are investing in initiatives that promote community welfare, diversity and inclusion. This might entail supporting local economies, offering fair wages or engaging in community service projects. Businesses that actively participate in social responsibility foster stronger relationships with their stakeholders, including employees, customers and local communities. As organisations prioritise sustainability, they will not only fulfil their ethical obligations but also an important strategic imperative.

By fostering deeper engagement with stakeholders and the communities they serve, organisations can drive meaningful changes that enhance their brand reputation in an increasingly conscientious marketplace. This commitment to ESG considerations can even lead to improved financial performance, as consumers are more inclined to support brands that align with their values, and investors show a preference for companies with robust sustainability practices. In summary, sustainability and ESG are no longer peripheral; they are the core of strategic decision-making for modern organisations. As they adapt to changing consumer demands and regulatory landscapes, businesses have a unique opportunity to lead in sustainability, creating long-term value for themselves and benefitting society.

Key 2025 trends by quadrant

- Workplace Strategy and Enablement Services: Integrated digital-human-physical strategies are driving long-term value.
- Collaboration & Next-gen Experience Services: AI-enhanced UCC platforms are redefining productivity.
- Managed End-user Technology Services: Circular IT and sustainable lifecycle management are priorities.
- Continuous Productivity Services (Including Next-gen Service Desk): Zero-touch support and AI copilots are transforming service desks.
- Smart and Sustainable Workplace Services: ESG-aligned workplace technology enables measurable impact.
- AI-augmented Workforce Services: Autonomous operations powered by GenAI and AIOps are becoming mainstream.

U.K. enterprises are scaling GenAI, rethinking hybrid work and embedding sustainability into every layer of the digital workplace. The 2025 workplace is intelligent, intentional and impact-driven — powered by AI, shaped by experience and measured by outcomes.

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
Atos	Product Challenger	Leader	Leader	Not In	Leader	Leader	Product Challenger
BCG	Not In	Not In	Not In	Not In	Not In	Not In	Contender
Birlasoft	Contender	Contender	Contender	Product Challenger	Contender	Contender	Product Challenger
BT	Product Challenger	Product Challenger	Leader	Not In	Contender	Not In	Contender
Capgemini	Leader	Leader	Leader	Not In	Leader	Leader	Leader
Capita	Not In	Not In	Contender	Leader	Not In	Not In	Not In
CGI	Not In	Not In	Product Challenger	Leader	Not In	Not In	Not In
Coforge	Product Challenger	Contender	Product Challenger	Rising Star ★	Rising Star ★	Not In	Leader

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
Cognizant	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
Computacenter	Leader	Leader	Leader	Not In	Leader	Leader	Contender
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In	Contender
DXC Technology	Leader	Leader	Leader	Not In	Leader	Leader	Product Challenger
EY	Market Challenger	Not In	Not In	Not In	Not In	Not In	Contender
Fujitsu	Leader	Leader	Leader	Not In	Leader	Leader	Leader
GAVS	Not In	Not In	Contender	Contender	Not In	Not In	Not In
Getronics	Contender	Product Challenger	Product Challenger	Leader	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader	Not In	Leader	Leader	Leader

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
Hexaware	Contender	Product Challenger	Product Challenger	Not In	Contender	Contender	Product Challenger
Infosys	Leader	Leader	Leader	Not In	Leader	Leader	Leader
ITC Infotech	Product Challenger	Contender	Contender	Not In	Contender	Contender	Product Challenger
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In	Contender
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
Lenovo	Market Challenger	Contender	Product Challenger	Not In	Contender	Product Challenger	Contender
LTIMindtree	Contender	Contender	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
McKinsey & Company	Not In	Not In	Not In	Not In	Not In	Not In	Contender
Microland	Product Challenger	Rising Star ★	Leader	Not In	Product Challenger	Contender	Leader

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
Movate	Not In	Not In	Contender	Leader	Not In	Not In	Leader
Mphasis	Contender	Contender	Product Challenger	Product Challenger	Contender	Contender	Product Challenger
NTT DATA	Rising Star ★	Product Challenger	Leader	Not In	Product Challenger	Rising Star ★	Leader
Orange Business	Not In	Not In	Product Challenger	Not In	Not In	Not In	Not In
PwC	Market Challenger	Not In	Not In	Not In	Not In	Not In	Contender
SCC	Contender	Contender	Rising Star ★	Leader	Contender	Not In	Contender
Sopra Steria	Not In	Not In	Contender	Product Challenger	Not In	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender	Rising Star ★
TCS	Leader	Leader	Leader	Not In	Leader	Leader	Leader

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
Tech Mahindra	Contender	Contender	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
TET	Not In	Not In	Contender	Contender	Not In	Not In	Not In
Unisys	Leader	Leader	Leader	Not In	Leader	Product Challenger	Product Challenger
UST	Not In	Not In	Contender	Leader	Not In	Not In	Not In
Vodafone	Not In	Not In	Contender	Contender	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Not In	Leader	Leader	Leader
XMA	Not In	Not In	Contender	Contender	Not In	Not In	Not In
YASH Technologies	Not In	Not In	Contender	Contender	Not In	Not In	Not In
Zensar Technologies	Product Challenger	Product Challenger	Product Challenger	Not In	Contender	Contender	Product Challenger

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

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services – 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

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-focussed 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 strategising, 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 business and IT decision-makers:

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

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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

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

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

Workplace Strategy and Enablement Services

This report is valuable for providers offering **Workplace Strategy and Enablement Services** in the **U.K.** 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 learn about leading providers that can help them better prepare workforces for changing business models and dynamics in the post-pandemic world. This report will provide insights into how these providers can support workforce readiness and adaptability, ensuring employees can handle new challenges and opportunities.

Technology professionals

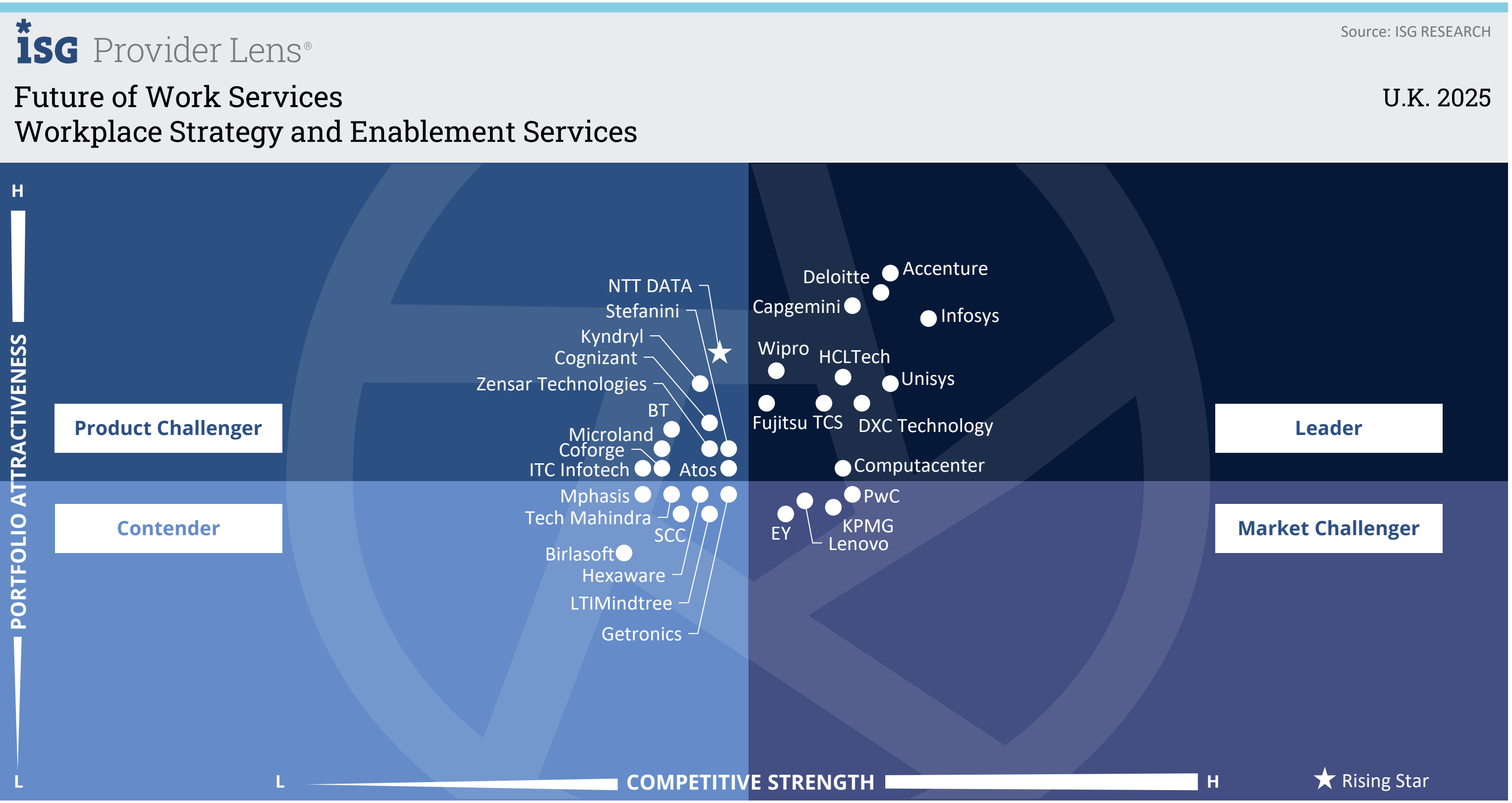
Including workplace technology leaders, should read this report to understand the positioning and capabilities of providers to enhance employee services. Gaining insights into the technological solutions offered by these providers, technology professionals can make informed decisions about implementing tools and systems that improve employee experiences and drive productivity.

Strategy professionals

Should read this report to identify the best workplace strategy and enablement service providers for their companies. Understanding these providers' capabilities and positioning, strategy professionals can develop and implement a winning workplace approach that aligns with their organisation's goals and drives long-term success.

Consultant professionals

Should read this report to advise companies on workplace strategies and performance. This report will help consultants stay up-to-date on the latest trends and developments in the industry, enabling them to provide informed recommendations and support to their clients in creating effective workplace strategies.



This quadrant evaluates **workplace strategy and enablement** service providers, offering **tailored advice** and **strategies based on region, market trends and organisational responsibilities**, while providing **integrated services** to clients.

Kevin Turner

Definition

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

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

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

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

Eligibility Criteria

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

Observations

This quadrant highlights a significant shift in the U.K.'s workplace strategy, with digital innovation becoming a basic expectation. Key areas of focus now include employee well-being, sustainability and efficient space utilisation. Organisations are using real-time analytics to enhance office layouts, minimise underutilised areas and support hybrid work. The integration of workplace technology with HR systems is improving talent acquisition and onboarding.

The next 12–24 months will see:

- *AI-driven workplace orchestration* tools becoming mainstream, enabling dynamic space booking, environmental controls and personalised work settings.
- *Sustainability metrics* embedded into workplace KPIs, with a focus on energy consumption, carbon footprint and circular IT practices.
- *Increased investments in immersive collaboration technologies*, including spatial audio, AR/VR for training and AI-powered meeting assistants.
- *Greater emphasis on neurodiverse and inclusive design*, ensuring physical and digital spaces accommodate a broader range of employee needs.

The demand for secure, cloud-native collaboration platforms supporting asynchronous work is rising, featuring AI summarisation and multilingual support. Automation and GenAI will reduce repetitive tasks and improve EX.

Overall, aligning digital workplace strategies with business outcomes is becoming a crucial board-level priority to create resilient and attractive work environments.

From the 45 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture is a leading provider of business strategy and advisory consulting services. Its clients benefit from a human-centric approach that drives broad strategic transformation, particularly in the digital workplace services area.

Capgemini

Capgemini excels in workplace strategy and enablement services, delivering efficient, productive and inspiring workspaces that assist clients in their transformation journeys. These optimised environments align with strategic objectives, driving growth and competitive advantage.

Computacenter

Computacenter leads in workplace strategy and enablement services by designing and implementing innovative work environments. The focus on creating efficient, productive and inspiring workspaces drives innovation and fuels client growth.

Deloitte.

Deloitte offers transformative workplace strategy services that help organisations create agile, inclusive and human-centric environments. The approach integrates skills development, digital ecosystems and emerging technologies, aligning workplace design with business goals.

DXC TECHNOLOGY

DXC Technology provides premium workplace strategy and enablement services through expert advisory consultants and the DXC UPtime™ platform. This platform combines analytics, automation and strategic insights to enhance workplace performance, aligning IT and business goals.

Fujitsu uvance

Fujitsu excels in creating intelligent and sustainable workspaces, focussing on workplace strategy and enablement. By leveraging industry knowledge and user-centric design, it helps organisations innovate and enhance productivity while supporting hybrid work models.

HCLTech

HCLTech provides strategic digital advisory services to create next-generation workplace solutions. Utilising AI, automation and cloud-native platforms, it enhances employee productivity and engagement, aligning workplace strategies with the digitally native workforce.

Infosys delivers workplace modernisation services backed by domain expertise and a strong partner ecosystem. Its approach is tailored to help clients transition to digital-first, agile workplaces, emphasising seamless EX and long-term sustainability.

TCS provides a forward-looking workplace strategy framework, backed by a skilled AI-trained workforce. Its consulting-led approach combines digital technologies and human-centred design, enabling clients to transform with intelligent, scalable and secure solutions.

Unisys offers workplace strategy services to drive transformation in IT and business functions. Through data-driven insights and automation, it enhances employee engagement. Unisys combines strategic consulting with technical expertise to create productive work environments.

Wipro excels in workplace strategy services with its ExperienceNXT platform, combining technology and human-centred design. Its advisory teams collaborate with clients to create scalable, secure and industry-specific digital workplace solutions for enhanced EX.

NTT DATA (Rising Star) has a strong portfolio of advisory and transformation services. It delivers agile and secure workplace experiences aligned with business goals, supporting hybrid work models and driving digital adoption.

DXC Technology

Leader

"DXC Technology delivers workplace strategy and enablement services to enterprise clients. These services are realised via the DXC UPtime™ platform — a cohesive, interoperable system underpinned by a combination of analytics and business strategy."

Kevin Turner

Overview

DXC Technology is headquartered in Virginia, US. 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 has renewed its focus on regional and industry-specific engagements to provide clients with more localised support. In the U.K., DXC is driving innovations by prioritising EX, which is enhanced in part by AI and automation, particularly through Copilot and the DXC UPtime™ platform.

Strengths

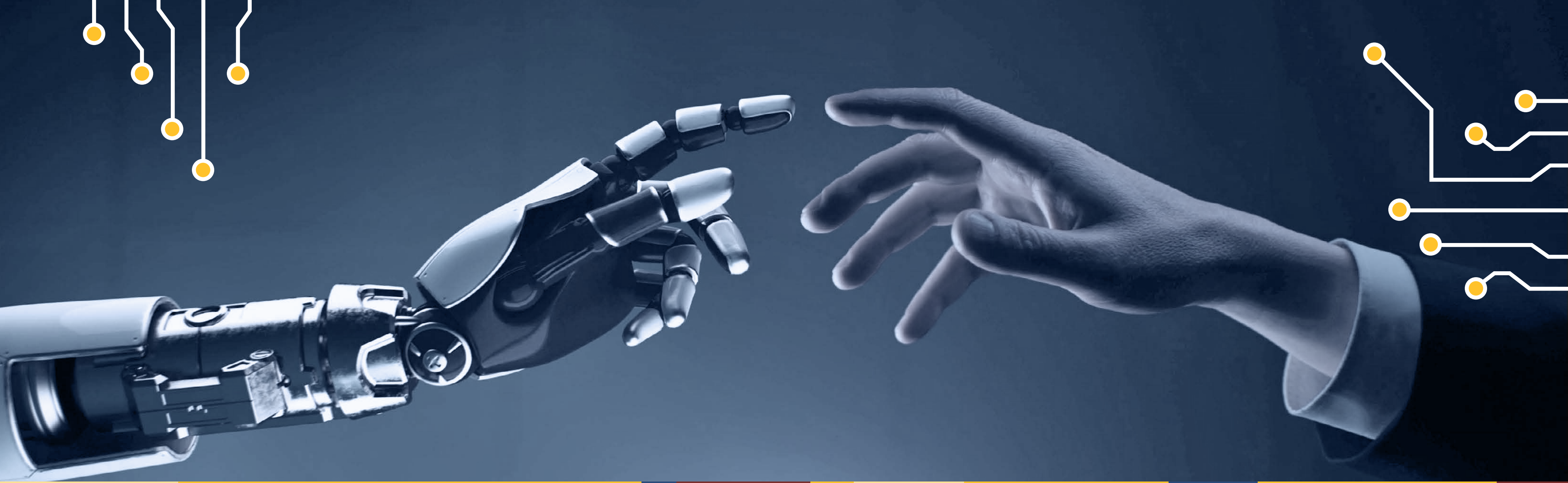
Mature modern workplace solutions: DXC continuously evolves its modern workplace offerings, focussing on innovation and responsiveness to customer feedback. By staying ahead of market trends and technological advancements, DXC meets the diverse needs of businesses. With this forward-thinking approach, the company helps clients thrive in dynamic environments and maintains a competitive edge in the market.

Customer-centric culture: Fostering a customer-centric culture, DXC prioritises understanding and addressing each client's unique needs and challenges. By actively soliciting feedback and tailoring solutions based on real-life experiences, DXC fosters client loyalty and satisfaction. This strong commitment to innovative customer service differentiates DXC from competitors that may offer more generic solutions.

Industry-specific solutions: DXC acknowledges the necessity for industry-specific solutions, recognising that tailored offerings are essential for meeting diverse client needs. Delivery of specialised services for key industries resonates well with sectors, as DXC sets new industry standards and capabilities. This strategic positioning enhances relevancy and client relationships, distinguishing DXC from its competition.

Caution

Although DXC experiences client losses, its strategy and enablement services are well positioned to assist client organisations, at different levels of maturity, develop their AI and automation strategies. Its consultative approach rapidly aligns technology initiatives with desired business outcomes, facilitating seamless adoption by the workforce.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is valuable for providers offering **Collaboration and Next-gen Experience Services** in the **U.K.** 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 experts

Should read this report to learn the relative positioning and abilities of providers that can help them effectively plan and select unified communication and collaboration as a service. This report will provide insights into the technological capabilities of different providers, enabling technology experts to make informed decisions about the best solutions to enhance communication and collaboration within their organisations.

Cybersecurity professionals

Should read this report to see how solution providers address the challenges related to compliance and security while maintaining a seamless employee experience (EX). Understanding the security measures and compliance strategies of various providers, cybersecurity professionals can ensure that their organisation's communication and collaboration tools are secure and compliant with industry standards.

Digital professionals

Should read this report to understand how unified communication and collaboration solution providers fit into their digital transformation initiatives. This report will help them identify providers that align with their organisation's digital goals and strategies, facilitating the integration of advanced communication and collaboration tools into their digital ecosystem.

Procurement professionals

Should read this report to better understand the current landscape of unified communication and collaboration solution providers. Gaining insights into different providers' market positioning and capabilities, procurement professionals can make informed decisions about sourcing and selecting the best solutions to meet their organisation's communication and collaboration needs.

This quadrant assesses providers that offer **managed UCC** and **EX enhancement services**, leveraging the latest technologies to help clients deliver a diverse range of workplace solutions and realise their **XLA** vision.

Kevin Turner

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

Observations

The 2025 ISG Provider Lens® Future of Work Services report emphasises the rising significance of collaboration and next-generation experience services, as businesses align EX with digital transformation. Providers are evaluated not just based on their collaboration tools but also on their integration of experience-level agreements (XLAs) into business outcomes. Tools such as Microsoft Copilot and Zoom AI Companion are enhancing workplaces by facilitating real-time decision-making and intelligent workflow automation, while prioritising governance and ethical AI use.

Quadrant dynamics in 2025:

- *Leaders* excel in creating holistic XM and XLA frameworks that combine telemetry and sentiment analysis for measurable outcomes.
- *Product Challengers* are gaining traction by offering Copilot services and nuanced XLA models focussing on user satisfaction.
- *Market Challengers* excel in regulated sectors, expanding their experience measurement to include accessibility and digital well-being.
- *Contenders* differentiate with predictive analytics and modular offerings that anticipate user needs.

The next 12–24 months are characterised by the following trends:

- AI Copilots will integrate into all collaboration layers, from meetings to task management.
- Experience orchestration platforms will enable real-time adjustments based on user context.
- XLAs will evolve into multidimensional contracts, focussing on sustainability and business impact.
- Voice and video intelligence will enhance compliance and customer engagement.
- Composable collaboration stacks will allow enterprises to customise UCC environments for specific roles and workflows.

This quadrant focusses on organisations aiming to future-proof their digital workplace, enhance EX and drive measurable business value.

From the 45 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture delivers industry-leading digital workplace collaboration and experience services tailored for enterprise clients in the U.K. The approach blends human ingenuity with intelligent technologies, including AI, automation and cloud platforms, to create seamless EX.

Atos Group offers digital workplace collaboration and experience services designed to help U.K. enterprises integrate people and technology in meaningful ways. Leveraging its expertise in hybrid cloud, cybersecurity and AI, the company creates connected ecosystems to support flexible work models.

Capgemini is a recognised leader in workplace collaboration and next-generation experience services, helping U.K. enterprises achieve impactful transformation outcomes. Its services are grounded in design thinking, automation and cloud-native platforms, driving EX.

Computacenter delivers advanced collaboration and digital experience services that support the evolving needs of hybrid workforces. A strong focus on flexibility, scalability, and user-centric design, it helps organisations to modernise their work environments.

DXC Technology provides collaboration and experience services through its DXC UPtime™ platform, which integrates analytics, automation and data-driven insights. These services are designed to help clients in the U.K. transform their workplace visions into reality.

Fujitsu delivers high-impact digital workplace collaboration and experience services to blend human-centric design with advanced technologies. Its solutions deliver connected, intelligent environments to empower employees, foster innovation and support hybrid work.

HCLTech leverages its XMO (Experience Management Office) framework to deliver innovative collaboration and next-generation experience services. Combining deep domain expertise with AI, automation and cloud capabilities, it helps clients enhance employee productivity.

Infosys offers a robust suite of collaboration and experience services that accelerate workplace transformation for large U.K. enterprises. Combining its global delivery model, strategic partnerships and creative innovation programs, Infosys delivers enhanced EX.

TCS partners with clients to deliver next-generation workplace experience services that empower employees and drive digital transformation. Focussing on AI, cloud and automation, it helps organisations modernise their workplace infrastructure and deliver enhanced EX.

Unisys provides agile and scalable collaboration and experience services that support rapid workplace transformation and enhance EX. Its offerings are particularly well suited for organisations prioritising employee engagement, productivity and operational excellence.

Wipro delivers human-centric digital workplace solutions through its Live Workspace™ platform. Its collaboration and experience services are designed to support hybrid work, enhance employee satisfaction and drive business agility.

Microland (Rising Star) offers collaboration and next-generation experience services built on a strong foundation of global workplace support. Through its Experience Operations Centre, Microland enhances service delivery and EX.

DXC Technology

Leader

"DXC Technology is a leading provider of collaboration and next-generation experience services that address the future vision for modern workplace requirements. The foundation for this is the interoperable DXC UPtime™ platform, which is underpinned by analytics."

Kevin Turner

Overview

DXC Technology is headquartered in Virginia, US. 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 is a long-standing global leader in workplace services, with decades of operational experience embedded into its DXC UPtime™ platform. In the U.K., DXC focusses on delivering frictionless workplace experience to clients, with the DXC UPtime™ platform at the forefront, which simplifies IT for enterprise employees.

Strengths

Experience management: The proprietary DXC UPtime™ Experience Management platform emphasises operational transparency and accountability, which are crucial for sustained client trust. Through continuous feedback and performance tracking, this platform empowers organisations to refine their processes and improve service delivery systematically. This level of commitment to client success is a defining characteristic of DXC's competitive landscape.

AI and automation integration: The integration of AI and automation into DXC's service capabilities positions the company as a front-runner in leveraging technology for transformative efficiencies. This proactive stance allows clients to harness data-driven insights and operational agility, which increases productivity and reduces costs. Competitors often lag in fully realising the potential of integrated AI solutions.

Personalised digital EX: DXC's ubiquitous Digital Employee Experience (DEX) programs aim to enhance employee engagement and productivity by providing seamless, adaptive experiences across all touchpoints. By creating personalised interactions and interfaces, DXC enables organisations to retain talent and improve satisfaction. This comprehensive approach to DEX distinguishes DXC in a market where many players still struggle to achieve effective implementation.

Caution

Despite negative media reports and slight declines in revenues, DXC's collaboration and next-gen experience services continue to be market-leading and highly credible. The company's extensive portfolio capabilities warrant a closer examination by potential clients aiming to achieve their business outcomes.

Managed End-user Technology Services – Large Accounts

Who Should Read This Section

This report is valuable for large providers offering **Managed End-user Technology Services** in the **U.K.** 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 current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities. This report will provide insights into how CIOs can navigate these challenges and leverage managed end-user technology services to enhance their organisation's technological infrastructure.

Technology professionals

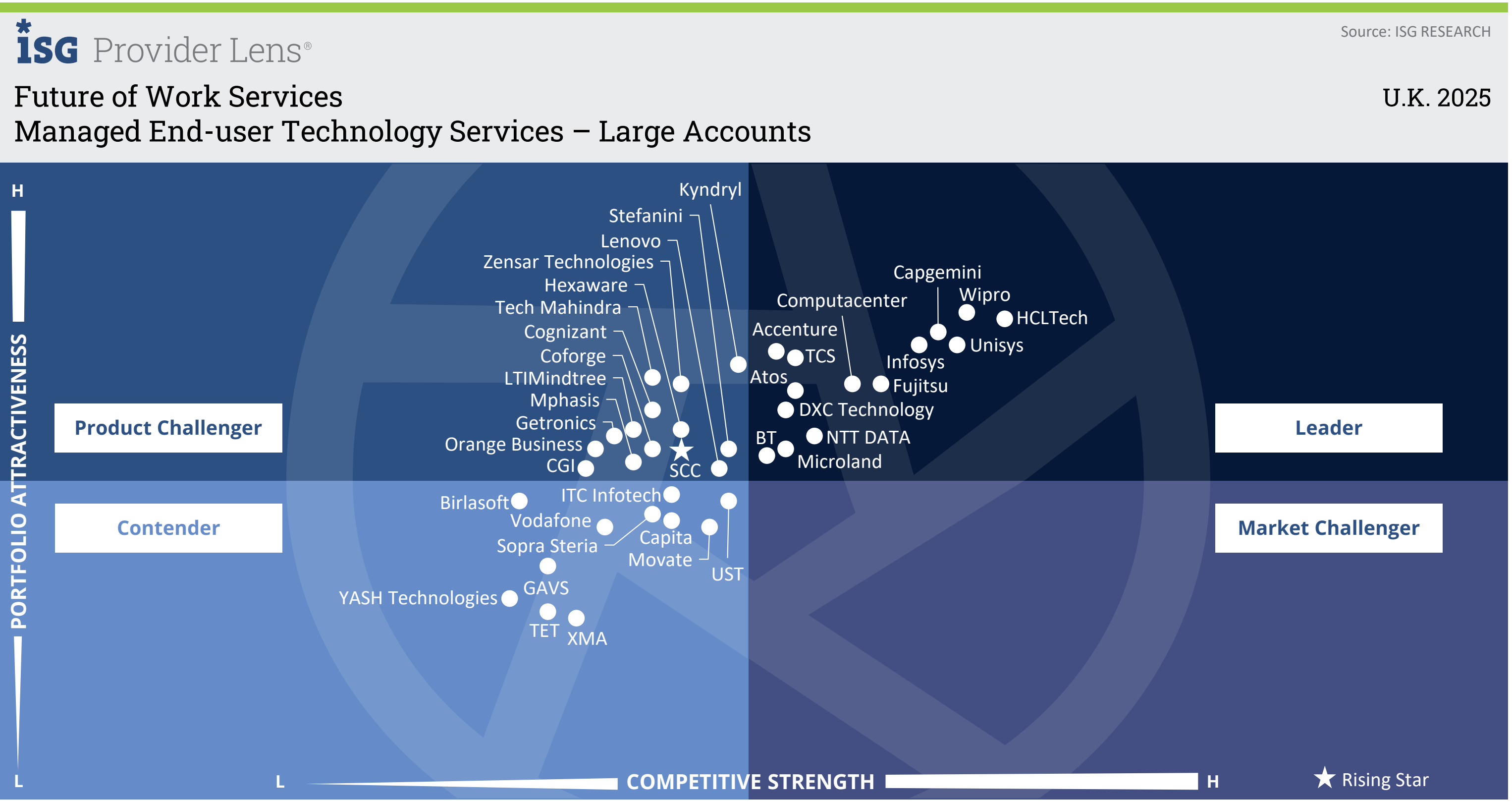
Should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed digital workplace services. Gaining insights into the capabilities of different providers, technology professionals can make informed decisions about implementing and managing end-user technology services that meet their organisation's needs.

Cybersecurity professionals

Should read this report to understand how providers address the significant challenges of compliance and security while maintaining a seamless employee experience (EX). This report will help cybersecurity professionals evaluate the security measures and compliance strategies of various providers to ensure that their organisation's end-user technology services are secure and compliant with industry standards.

Digital professionals

Including facility management leaders, should read this report to understand how managed workplace service providers fit into their digital transformation initiatives. This report will help them identify providers that align with their organisation's digital goals and strategies, facilitating the integration of advanced workplace technologies into their digital ecosystem.



This quadrant assesses service providers offering **managed services** associated with technologies that large enterprise IT departments **deploy, provision** and **secure** for end users and employees to deliver complete **end-user computing (EUC)** services.

Kevin Turner

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 (EUC) services, including device management, patch management, device and application provisioning, virtualised 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

The 2025 ISG Provider Lens® Future of Work Services report emphasises the strategic importance of managed end-user computing services in creating secure, experience-driven digital workplaces. As companies adopt hybrid work models, the role of these managed services has grown significantly. Key advancements anticipated include: AI-driven endpoint management for automating updates and issue resolution; unified platforms integrating mobile, desktop and virtual environments; context-aware tools for personalised support and user insights; and zero trust security models enhancing compliance in hybrid settings. Providers are tailoring solutions for specific industries, such as point-of-sale systems in retail, secure medical devices in healthcare and ruggedised support in field services.

Trends for the next 12-24 months:

- Copilot-style assistants will be embedded into EUC platforms, guiding users through tasks, troubleshooting and onboarding.
- Sustainability-linked device management will gain traction, with providers offering carbon tracking, e-waste reduction and circular IT services.
- Edge computing integration will become more common, especially in manufacturing and logistics, requiring new support models.
- Experience-level agreements will evolve to include device performance, user sentiment and sustainability metrics.
- BYOD and flexible device policies will expand, supported by secure containerisation and AI-driven compliance monitoring.
- Managed EUC services will be essential in shaping the future of digital workplace infrastructure, balancing cost, experience and innovation.

From the 45 companies assessed for this study, 39 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

Accenture delivers leading managed workplace services through its intelligent automation platform, myWizard®, which integrates AI, analytics and ML to provide seamless, scalable support. These services are designed to enhance agility and reduce downtime.

Atos Group is a leading provider of managed end-user technology services in the U.K. It offers a modernised and modular service portfolio that includes a service desk, device management and digital support. The company strongly focusses on automation and user-centric design.

BT is rapidly emerging as a key player in managed end-user technology services, delivering comprehensive support through an integrated, end-to-end management platform. Its secure services span the full spectrum of end-user devices, applications and data.

Capgemini is recognised as a Leader in managed end-user technology services, offering a robust suite of solutions underpinned by advanced automation, AI and cloud-native frameworks. Its services are designed to deliver consistent, high-quality support for clients.

Computacenter is a trusted provider of managed end-user technology services, known for its strong technology partnerships and deep operational expertise. It delivers modern digital workplace solutions that empower clients to streamline IT operations and enhance EX.

DXC Technology delivers leading managed end-user technology services through its UPtime™ platform, which integrates analytics, automation and service intelligence. This platform enables the company to provide EX through proactive support and optimised device performance.

Fujitsu offers comprehensive managed end-user technology services through its HX Workspace platform, emphasising human-centric design and intelligent automation. The platform supports personalised, adaptive services that improve EX and reduce IT friction.

HCLTech is a global leader in managed end-user technology services, with a strong presence in the U.K. A rich portfolio of proprietary IP, automation tools and productised solutions powers its offerings. The company leverages the global delivery model for consistency.

Infosys provides managed end-user technology services prioritising personalisation, resilience and empathy. The company helps clients build adaptive, secure and employee-centric digital workplaces by leveraging its global delivery capabilities and innovation-driven approach.

Microland is a leading provider of managed end-user technology services, offering a full-stack, end-to-end management platform. Its services cover all device, application and data management aspects in hybrid environments, supported by its Experience Operations.

NTT Data is a Leader in managed end-user technology services, delivering integrated solutions through a comprehensive management platform. Its services are designed to support hybrid work environments and streamline device and application management.

TCS delivers managed end-user technology services through its Cognix™ for Workspace platform. This platform leverages AI, ML and automation to enhance EX and drive operational efficiency. Its services are designed to help clients modernise their workplaces.

Unisys provides managed end-user technology services that combine AI, automation and analytics to deliver modern, secure and efficient device management. Its solutions are tailored to improve employee engagement, reduce IT complexity and support seamless operations.

Wipro is a Leader in managed end-user technology services, known for its innovation-led approach and strong focus on the future of work. Its platforms, like Live Workspace™, enable the company's enterprise clients to transform their workplace operations and enhance EX.

SCC (Rising Star) is emerging as a key player in the U.K.'s managed end-user technology services market, offering a comprehensive end-to-end management platform. Its services span device, application and data management, emphasising supporting hybrid work environments and EX.

DXC Technology

Leader

"DXC Technology delivers market-leading managed end-user technology services underpinned by its UPtime™ platform, providing exceptional EX and increased productivity benefits across the enterprise workforce."

Kevin Turner

Overview

DXC Technology is headquartered in Virginia, US. 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. It has been a leading provider of managed end-user technology services for many years across Europe, resulting in years of operational experience and excellence baked into its DXC UPtime™ platform. Despite a slight decline in client numbers, in the U.K., the company continues to focus on delivering modern, hybrid workplace experience, with reduced friction and increased client productivity.

Strengths

Integrated portfolio focus: DXC Technology distinguishes itself with a comprehensive integrated portfolio encompassing cloud, infrastructure, workplace and security services. This holistic approach allows for a seamless transition for clients as they adapt to changing business environments, providing robust solutions that eliminate silos. The company's integrated model enhances operational efficiency and client satisfaction.

Focus on security and compliance: DXC stands out with its robust focus on security and compliance, positioning it as a leader in a rapidly evolving landscape. By embedding security protocols and compliance measures throughout its service delivery, clients gain enhanced protection and peace of mind. As regulations proliferate, this proactive focus offers clients an invaluable advantage in risk management.

Device intelligence and experience: Through its emphasis on device intelligence, DXC utilises real-time data analytics to enhance user experiences significantly. This capability lets organisations gain insights into end-user interactions, enabling targeted improvements and streamlined processes. Rather than offering generic solutions, the company's approach helps customers receive customised experiences that meet their unique operational demands.

Caution

DXC Technology is a leading provider of managed end-user technology services and continues highlighting the power of its DXC UPtime™ platform. It should showcase the detailed benefits delivered to clients and the value realised in the U.K. to regain lost market share and attract other clients that may have never considered it.

Managed End-user Technology Services – Midmarket

This report is valuable for local providers offering **Managed End-user Technology Services** in the **U.K.** 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 current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities. This report will provide insights into how CIOs can navigate these challenges and leverage managed end-user technology services to enhance their organisation's technological infrastructure.

Technology professionals

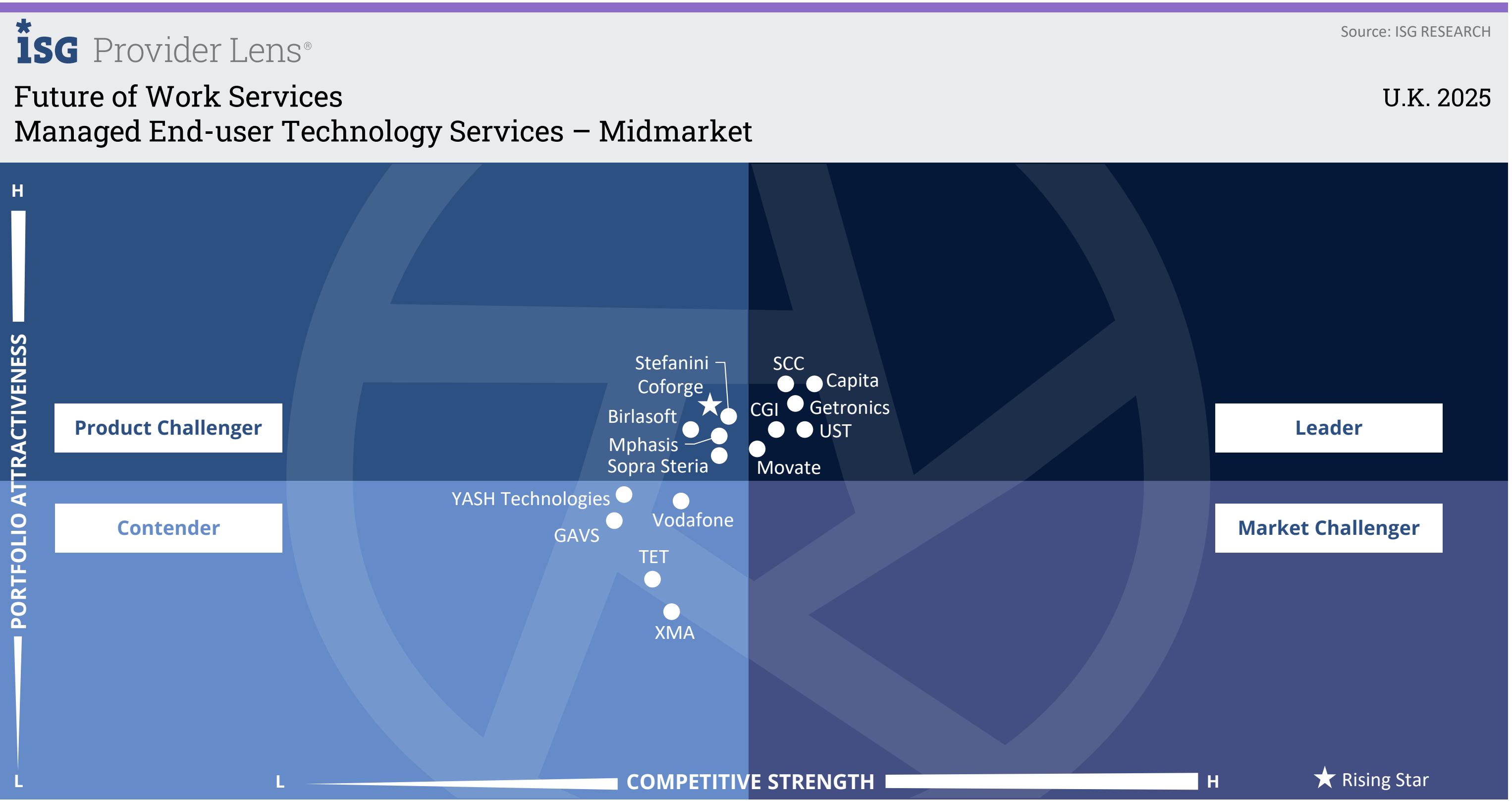
Should read this report to understand providers' relative positioning and abilities to help them effectively plan and select managed digital workplace services. Gaining insights into the capabilities of different providers, technology professionals can make informed decisions about implementing and managing end-user technology services that meet their organisation's needs.

Cybersecurity professionals

Should read this report to know how providers address significant compliance and security challenges while maintaining a seamless employee experience. This report will help cybersecurity professionals evaluate the security measures and compliance strategies of various providers to ensure that their organisation's end-user technology services are secure and compliant with industry standards.

Digital professionals

Including facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives. This report will help them identify providers that align with their organisation's digital goals and strategies, facilitating the integration of advanced workplace technologies into their digital ecosystem.



This quadrant assesses providers that specialise in managing the **end-user technology** environment for enterprise clients. They **deploy**, configure and **secure** technology for **end users** and employees, delivering localised services to clients with a regional presence.

Kevin Turner

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, virtualised 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

The 2025 ISG Provider Lens® Future of Work Services report highlights providers with a strong local presence and specialised skills in managing end-user technology services for midsize enterprises in the U.K. These providers are becoming strategic partners, offering scalable and cost-effective digital workplace solutions.

Key services include:

- Device lifecycle management with sustainability measures
- Cloud-based VDI for hybrid and remote workforces
- Unified endpoint management (UEM) for BYOD and secure access
- Proactive DEX monitoring to enhance user satisfaction
- Quadrant highlights in 2025
- *Leaders* have deep experience with U.K. midmarket clients, offering end-to-end EUC services that balance cost, performance and UX. Their offerings often include Copilot integration, sustainability reporting and industry-specific device support.
- *Product Challengers* innovate with desktop as a service (DaaS) and full device lifecycle automation, focussing on UX optimisation and operational efficiency.
- *Market Contenders* maintain strong regional coverage and focus on expanding their DEX and endpoint analytics capabilities to support more proactive and predictive service models.

Trends for the next few years include:

- AI copilots will standardise EUC support, lowering ticket volumes.
- Sustainability will be a major factor, emphasising transparency in sourcing.
- Industry-specific EUC bundles will cater to unique sector needs.
- Composable EUC platforms will allow customised service combinations.
- Security and compliance automation will become essential as regulatory pressures grow.

This quadrant reflects the maturity of the midmarket in the U.K., where digital workplace enablement is crucial for growth and talent retention.

From the 45 companies assessed for this study, 16 qualified for this quadrant, with six being Leaders and one Rising Star.

Capita

Capita is a well-established leader in providing managed end-user technology services tailored to midmarket clients across industries, including the public sector, in the U.K. It has strong expertise in consulting, digital transformation and IT service delivery.

CGI

CGI has a strong reputation in the U.K. for delivering high-quality managed end-user technology services, particularly within the public sector. Its comprehensive suite of workplace services reflects its commitment to customer satisfaction, innovation and operational excellence.

getronics

Getronics is a top-tier provider of managed end-user technology services with a global footprint and a strong focus on the midmarket. The company offers customised solutions that address the unique needs of clients across industries.

movate

Movate specialises in delivering managed end-user technology services tailored for small and midsize businesses (SMBs). Its offerings are designed to drive digital transformation while embedding sustainability and social responsibility into service delivery.

SCC

SCC is a leading provider of managed end-user technology services that focus on enhancing employee productivity and digital enablement. With a strong emphasis on end-to-end service management, SCC helps clients modernise their IT environments and drive EX.

UST is a leading provider of managed end-user technology services for midmarket clients in the U.K. It drives business outcomes for clients through seamless technology experience and AI-driven automation, elevating employee productivity and experience.

Coforge (Rising Star) provides managed end-user technology services with a strong focus on employee-first approach and client collaboration. By embedding AI and automation, it delivers global standards with a cross-industry benefit and improved employee well-being.

Continuous Productivity Services (Including Next-gen Service Desk)

This report is valuable for providers offering **Continuous Productivity Services (Including Next-gen Service Desk)** in the **U.K.** 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 modernise service desk and workplace support services. This report will provide insights into the capabilities of different providers, enabling technology professionals to select solutions that enhance productivity and streamline support services.

Field service professionals

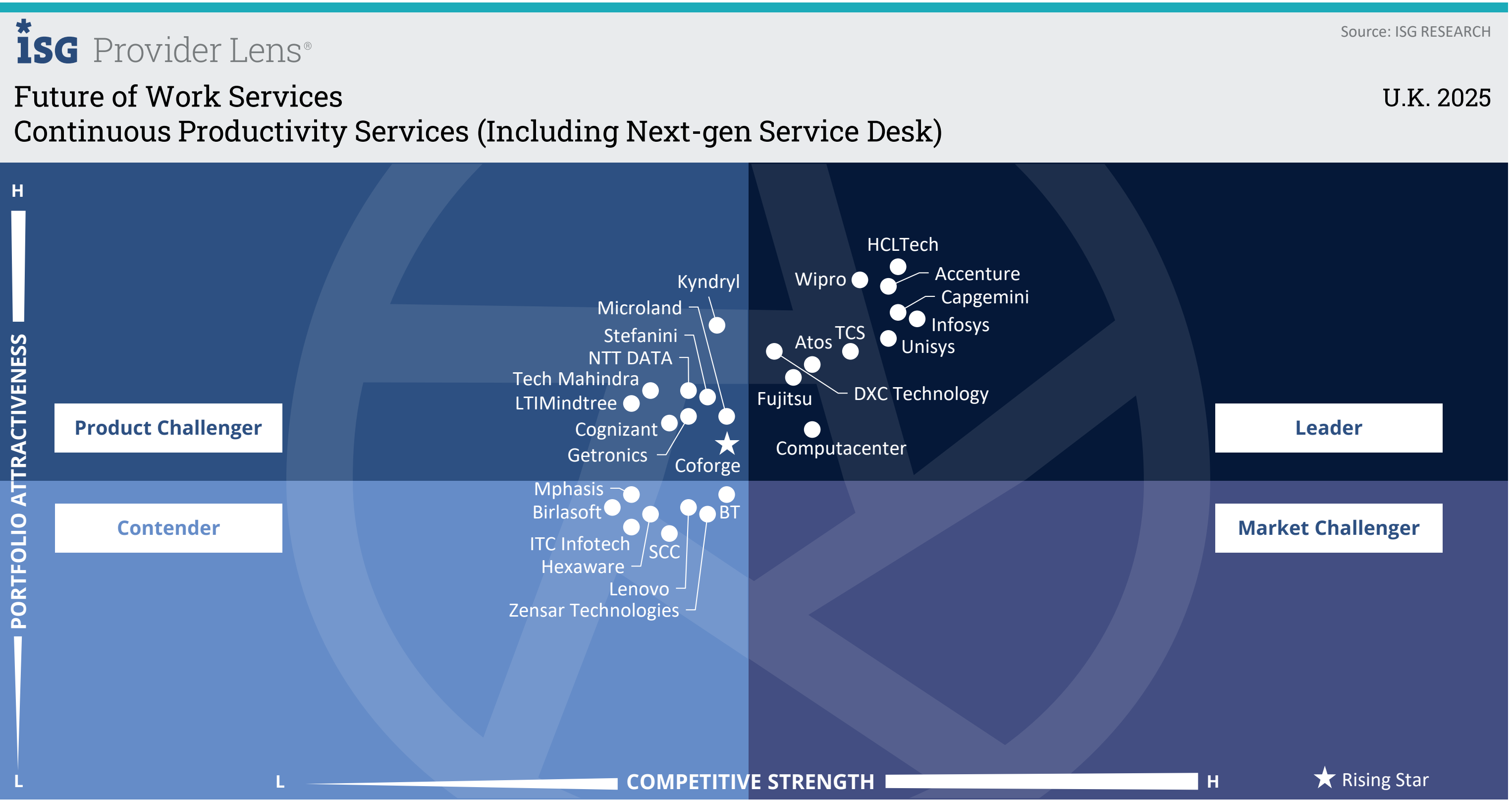
Should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations. Gaining insights into the strategies and tools providers use, field service professionals can improve the efficiency and effectiveness of their operations.

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. This report will help them identify providers that align with their organisation's digital goals and strategies, facilitating the integration of advanced support services into their digital ecosystem.

Procurement professionals

Should read this report to better understand the current landscape of digital service desk and workplace support service providers in the U.K. Gaining insights into different providers' market positioning and capabilities, procurement professionals can make informed decisions about sourcing and selecting the best solutions to meet their organisation's support service needs.



This quadrant assesses service providers' capabilities in supporting the **continuous productivity** needs of enterprise clients' **next-generation, human-centric workplaces** and fully **integrated hybrid working patterns.**

Kevin Turner

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

Observations

The 2025 ISG Provider Lens® Future of Work Services report highlights an evolved view of continuous productivity and user support services, marking a shift towards AI-driven, experience-centric support. By 2025, technological solutions such as GenAI and Microsoft Copilot are foundational, enabling:

- Automated ticket triage and resolution
- Contextual support through AI interfaces
- Real-time translation and sentiment analysis
- Continuous knowledge base improvement

Support providers are now focussed on delivering proactive experiences and measuring productivity through XLAs instead of traditional SLAs.

Quadrant dynamics in 2025:

- *Leaders* use multisource telemetry and analytics for seamless, omnichannel support.
- *Product Challengers* integrate Copilot assistants for self-healing systems.
- *Market Challengers* expand automated support, particularly in regulated sectors.
- *Contenders* concentrate on agile, cost-effective and modular support.

Future trends:

- AI-driven hyperpersonalised support tailored to user context
- Voice AI enhancing call deflection and coaching
- Experience orchestration for dynamic support adjustments based on user signals
- Sustainability metrics tracking digital impact
- Composable platforms integrating various tools into a unified ecosystem

Continuous productivity services will be essential for enhancing EX, resilience and cost efficiency in the evolving digital workplace.

From the 45 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture delivers cutting-edge continuous productivity services that focus on proactively resolving employee issues and optimising digital workflows. Leveraging intelligent automation and analytics, Accenture ensures seamless support and rapid resolution to drive EX.

Atos

Atos Group is a leading provider of continuous productivity services, with a focus on modernising service desk operations and digital support. It integrates automation, AI and user-centric design to deliver consistent, high-quality support that improves EX and eliminates IT friction.

Capgemini

Capgemini's continuous productivity services are designed to create frictionless, efficient digital workspaces. By combining automation, cloud-native platforms and real-time analytics, Capgemini helps clients streamline operations, reduce downtime and enhance EX.

Computacenter

Computacenter is a trusted provider of continuous productivity services in the U.K., specialising in tailored service desk and support solutions for hybrid workforces. Its services are built around flexibility, responsiveness and user empowerment to drive productivity.

DXC TECHNOLOGY

DXC Technology delivers enterprise-grade continuous productivity services through its DXC UPtime™ platform, which unifies service delivery across IT and business functions. The platform uses advanced analytics, automation and AI to proactively identify and resolve issues.

Fujitsu uvance

Fujitsu offers a comprehensive range of continuous productivity services that blend modern workplace technologies with human-centric design. Its solutions focus on delivering personalised support, reducing IT friction and enabling employees to work from any location.

HCLTech offers advanced AI-powered continuous productivity services, which are designed to optimise employee workflows and reduce support overhead. Its strong foundation in digital advisory and automation enables clients to deliver proactive and scalable support.

Infosys provides scalable and innovative continuous productivity services that support workplace modernisation across industries. Its offerings combine AI, automation and a strong partner ecosystem to deliver personalised, resilient support experiences to clients.

TCS delivers continuous productivity services through its GenAI-enhanced digital workplace solutions, helping enterprise clients build and sustain modern, intelligent work environments. It integrates cognitive automation and predictive analytics to drive productivity.

Unisys offers a wide range of continuous productivity services, rooted in decades of workplace support expertise. Its modernised capabilities incorporate AI, automation and analytics to deliver seamless hybrid work experiences, ensuring enhanced EX for clients.

Wipro delivers continuous productivity services through its Live Workspace™ platform, which supports human-centric, digital workplace solutions. By integrating real-time analytics, automation and contextual support, it helps clients reduce downtime and improve productivity.

Coforge (Rising Star) focusses on growing its capabilities and expanding its continuous productivity services portfolio. Its services are tailored to meet the needs of global clients, with a focus on employee-centric design, automation and proactive support.

DXC Technology

Leader

"Building on its customer-centric culture, DXC Technology delivers road maps and visions for its continuous productivity service offerings, integrating them into DXC UPtime™ — a cohesive, interoperable platform — making it a leader in the U.K. market."

Kevin Turner

Overview

DXC Technology is headquartered in Virginia, US. 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. In Europe, DXC continues to focus on clients with significant transformation objectives, positioning itself well to provide support. It has increased its regional and industry-specific engagements to provide more localised support and ensure client proximity. In the U.K., its Copilot initiatives have evolved to increase the adaptability of leading workplace technology as it moves towards achieving zero-touch support.

Strengths

AI and automation integration: The integration of AI and automation into DXC's service offerings positions it as a front-runner in leveraging technology for transformative efficiencies. This proactive stance allows clients to harness data-driven insights and operational agility, which increases productivity and reduces costs. Competitors often lag in fully realising the potential of integrated AI solutions.

Customer-centric culture: DXC fosters a customer-centric culture by prioritising clients' unique needs and challenges. By actively soliciting feedback and tailoring solutions based on real-life experiences, DXC fosters client loyalty and satisfaction. This deep-rooted commitment to customer service innovation differentiates DXC from competitors that offer more generic solutions.

Zero-touch support: DXC's vision for zero-touch support aims to streamline customer interactions and service management and minimise manual intervention by leveraging automation. This innovative strategy improves operational efficiency, reduces response times and enhances UX. By implementing sophisticated automation solutions, DXC transforms traditional service delivery paradigms, enabling clients to focus on strategic initiatives while enjoying reliable support.

Caution

DXC experienced a slight decline in clients in the U.K. However, it has a strong productivity service portfolio. By better promoting its offerings and the value delivered, it could attract more clients and maintain its market position.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is valuable for providers offering **Smart and Sustainable Workplace Services** in the **U.K.** 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 smart and sustainable workplace services trends to assist in resource allocation and strategy development. This report will provide insights into how these trends can influence strategic decisions and help executives allocate resources effectively to achieve sustainability goals.

Chief sustainability officers and ESG

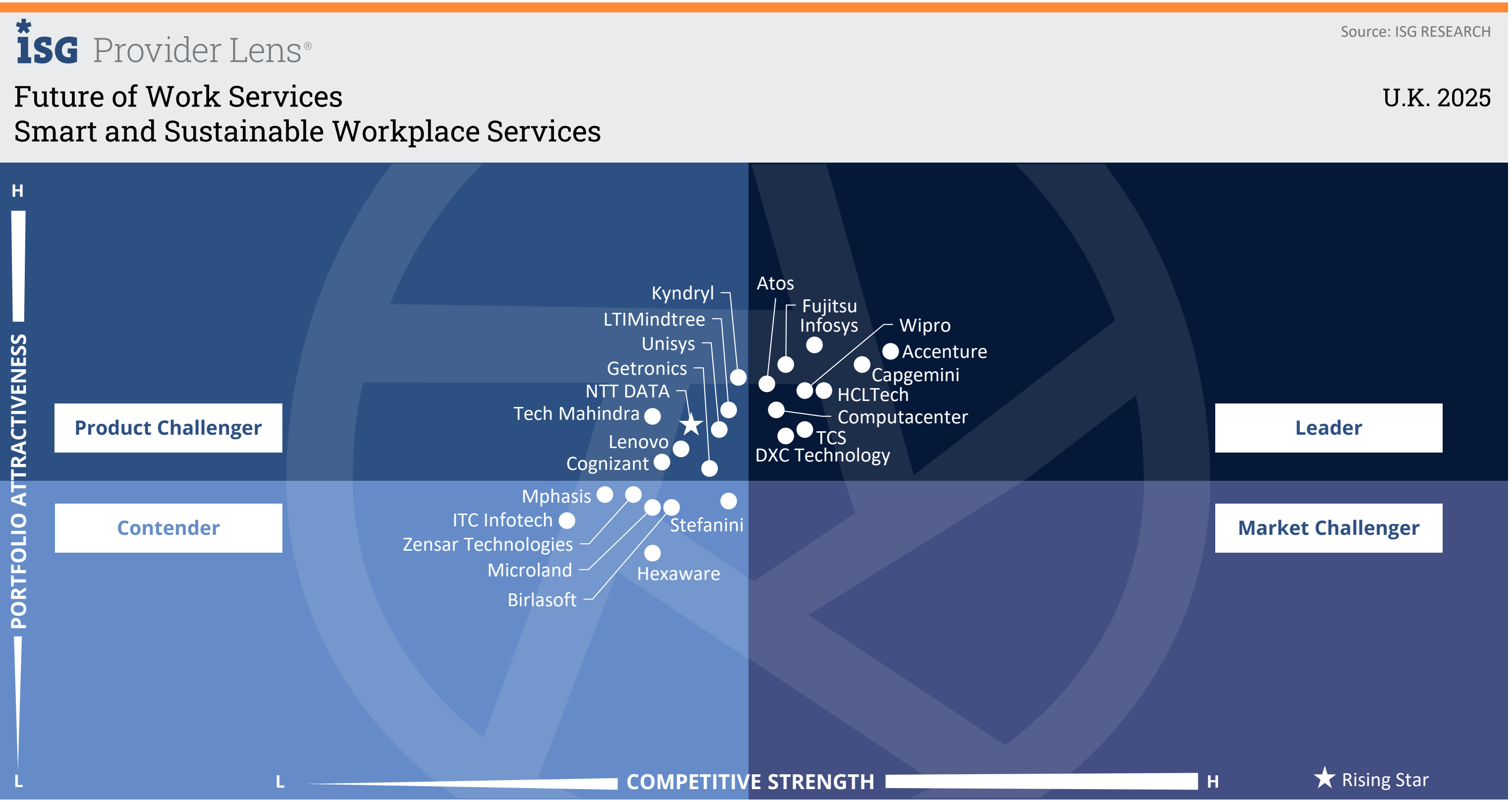
Professionals should read this report for updated insights on developing and implementing effective, sustainable strategies. Understanding the latest advancements and best practices in smart and sustainable workplace services, professionals can drive their organisations towards greater ESG performance.

Strategy professionals

Should read this report to identify the best smart and sustainable workplace service providers for companies to help develop and implement an effective ESG strategy. This report will help them evaluate the capabilities of different providers and select those that align with their organisation's sustainability objectives.

Consultant professionals

Should read this report to advise companies on sustainable strategies and performance and stay up-to-date on industry trends and developments. Leveraging the insights from this report, consultants can provide informed recommendations and support their clients in achieving their sustainability goals.



This quadrant evaluates service providers that support workplaces by incorporating human, digital and physical elements to facilitate remote, hybrid or in-person collaboration and productivity while assisting clients in achieving **sustainability goals.**

Kevin Turner

Definition

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

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

Observations

The 2025 ISG Provider Lens® Future of Work Services report highlights the increasing integration of sustainability and ESG in digital workplace strategies amongst U.K. enterprises. Sustainability is becoming a vital part of workplace transformation and a strategic differentiator. This report evaluates providers delivering smart, sustainable solutions aligned with ESG goals.

Key objectives for 2025 include:

- Measuring and reducing digital carbon footprints through optimised cloud usage and endpoint management.
- Designing hybrid work models to lower commuting emissions and optimise office space.
- Implementing circular IT practices for device reuse and responsible recycling.
- Tracking ESG metrics within workplace technologies for broader sustainability reporting.

Quadrant dynamics in 2025

- *Leaders* provide comprehensive sustainable solutions, smart building integration and sustainability-linked XLAs.
- *Product Challengers* excel in ESG alignment, emphasising DEI and investing in sustainability dashboards.
- *Contenders* focus on device lifecycle management and efficiency, especially for midmarket clients.
- *Market Challengers* offer digital workplace services but are still developing sustainability capabilities.

Sustainability trends for the next five years

- Standardisation of carbon-aware IT operations and real-time emissions tracking
- Emergence of sustainability-linked contracts connecting provider compensation to ESG outcomes
- AI-driven energy optimisation across workplace systems

As sustainability becomes central to workplace strategy, smart and sustainable workplace services will be crucial for U.K. enterprises in achieving net-zero goals.

From the 45 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture is a recognised leader in delivering intelligent and sustainable workplace solutions, seamlessly integrating business strategy, digital innovation and sustainability consulting. Its approach focusses on embedding ESG principles into workplace transformation.

Atos Group offers intelligent, environmentally conscious workplace solutions designed to support clients with future-ready, efficient and low-impact work environments. With a strong emphasis on decarbonisation and digital enablement, Atos helps organisations meet ESG goals.

Capgemini delivers intelligent and sustainable workplace services that empower clients to transition to greener, more efficient digital environments. Leveraging its deep consulting expertise and global delivery capabilities, Capgemini supports clients' ESG objectives.

Computacenter offers its clients holistic and integrated workplace solutions with an inbuilt commitment to sustainability. Environmentally friendly solutions provided to clients help businesses meet their sustainability goals while using technology effectively.

DXC Technology provides intelligent and sustainable workplace services through a consultative approach that integrates ESG strategy, digital transformation and operational excellence. The DXC UPtime™ platform supports clients with actionable sustainability insights.

Fujitsu's intelligent and sustainability-focussed workplace services are underpinned by its Uvance™ methodology. This methodology gives a human-centric and environmentally responsible approach to digital transformation, helping clients achieve their smart sustainability goals.

HCLTech is a leading provider of sustainable workplace services, leveraging its ACE (Assess, Consult, Engage) methodology to guide clients through their sustainability journeys. With a strong foundation in digital advisory and automation, HCLTech delivers ESG results.

Infosys offers smart and sustainable workplace services that combine its global delivery network, innovation hubs and strategic partnerships to meet ESG targets. Its solutions focus on energy-efficient IT operations, sustainable procurement and employee-centric design.

TCS delivers intelligent and sustainable workplace services through a global workforce and a strong commitment to innovation. By integrating GenAI, IoT and cloud-native technologies, TCS helps clients achieve their ESG goals while modernising the workplace.

Wipro is a leading provider of smart and sustainable workplace services. It leverages its Live Workspace™ platform and deep consulting expertise to deliver human-centric, low-impact digital workplace solutions. Wipro's services are designed to help clients reduce carbon emissions.

NTT DATA (Rising Star) combines expert advisory consulting with advanced technologies to support ESG-aligned transformation. With a reported growth rate exceeding 25 percent in the past year, it is expected to emerge as a leader in sustainable workplace services in the future.

DXC Technology

Leader

"DXC Technology's smart and sustainable workplace services include consulting for enterprise clients, providing road maps for ESG management and reporting that align with their business strategy and objectives."

Kevin Turner

Overview

DXC Technology is headquartered in Virginia, US. 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. For the past four years, DXC has been awarded a gold medal for its internal sustainability performance. Its sustainable device strategy encompasses a lifecycle approach, from discovery to hardware evergreen support. In the U.K., DXC focusses on delivering ESG results for clients as part of its integrated portfolio, using a comprehensive managed technology lifecycle process.

Strengths

Integrated portfolio focus: DXC Technology distinguishes itself with a comprehensive integrated portfolio that encompasses cloud, infrastructure, workplace and security services. This holistic approach allows for a seamless transition for clients as they adapt to changing business environments, providing robust solutions that eliminate silos. Its integrated model enhances operational efficiency and client satisfaction.

Zero-touch support: DXC's vision for zero-touch support leverages automation to streamline customer interactions and service management, aiming to minimise manual interventions. This innovative strategy improves operational efficiency, reduces response times and enhances UX. By implementing sophisticated automation solutions, DXC transforms traditional service delivery paradigms, enabling clients to focus on strategic initiatives while enjoying reliable support.

Ubiquitous DEX programs: DXC's ubiquitous DEX programs aim to enhance employee engagement and productivity by providing seamless, adaptive experiences across all touchpoints. By creating personalised interactions and interfaces, DXC enables organisations to retain talent and improve satisfaction. This comprehensive approach to DEX stands out in a market where many players still struggle to achieve effective implementation.

Caution

Although it continues to experience client losses, DXC remains a leader in the smart and sustainable workplace services space. It is well positioned to assist clients at different levels of maturity in achieving their ESG objectives. It could showcase more detailed case studies to attract new clients and maintain its position in this quadrant.

AI-augmented Workforce Services

Who Should Read This Section

This report is valuable for providers offering **AI-augmented Workforce Services** in the **U.K.** 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.

Consultant 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. Leveraging the insights from this report, consultants can provide informed recommendations and support their clients in implementing effective AI-augmented workforce solutions.

Technology professionals

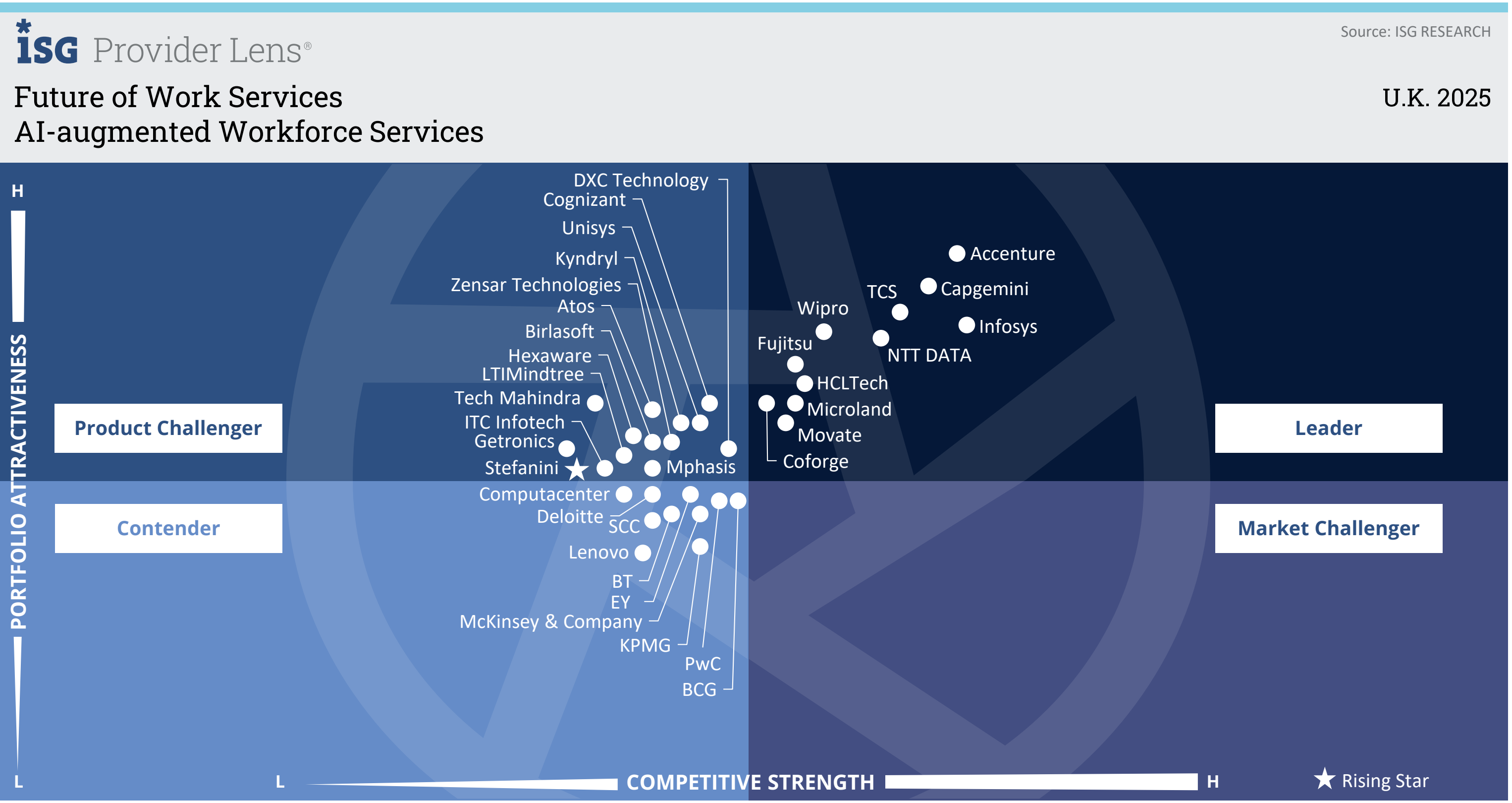
Should read this report to understand how providers' relative positioning and abilities can help them effectively plan AI-augmented workforce services. This report will provide insights into the technological capabilities of different providers, enabling technology professionals to select solutions that enhance workforce productivity and efficiency.

Chief information officers(CIOs)

Should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities. This report will help CIOs navigate these challenges and leverage AI-augmented workforce services to enhance their organisation's technological infrastructure.

Strategy professionals

Should read this report to identify the best AI-augmented workforce service providers for companies to help develop and implement effective workforce strategies. This report will help them evaluate the capabilities of different providers and select those that align with their organisation's strategic objectives.



This quadrant evaluates **agentic solutions** that use AI and ML as autonomous digital agents to boost **collaboration**, deliver measurable **outcomes** and **enhance workforce** capabilities through robust **integration** with enterprise systems.

Kevin Turner

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

The 2025 ISG Provider Lens® Future of Work Services report introduces a dedicated quadrant to evaluate providers of applied agentic AI solutions — a new class of intelligent, autonomous digital agents that are reshaping enterprise operations.

These AI-powered agents surpass automation by proactively engaging in the workplace, with contextual learning, autonomous decision-making and seamless enterprise interaction. They manage workflows, optimise processes and deliver personalised support, boosting productivity, agility and UX.

This emerging category is driving a paradigm shift in how organisations structure roles, delegate decision authority and design digital workflows. Therefore, effective deployment needs strong change management, workforce enablement and tailored adoption strategies for each region.

Providers in this quadrant are evaluated based on their ability in:

- Demonstrating measurable business outcomes from agentic AI deployments
- Integrating seamlessly with enterprise systems and data environments
- Empowering users through adaptive, self-service experiences
- Supporting change adoption with localised frameworks and governance models

Quadrant dynamics in 2025

- *Leaders* provide and deploy enterprise-grade and agentic AI solutions.
- *Product Challengers* are in advanced pilots with agentic AI use cases.
- *Contenders* provide wrappers and services around Microsoft copilot and similar platforms.

As firms increasingly seek intelligent, self-governing systems to support hybrid work, dynamic operations and real-time responsiveness, this quadrant offers a critical lens for assessing the strategic value and maturity of agentic AI solutions in the workplace.

From the 45 companies assessed for this study, 35 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture is a leading provider of AI-augmented workforce services, combining its deep roots in business and strategy consulting with advanced AI capabilities to drive workforce transformation. Its services focus on embedding AI into core business processes.

Capgemini delivers AI-augmented workforce services that empower enterprises to adopt an AI-first approach to workplace transformation. Integrating AI into service delivery, Capgemini helps clients enhance operational efficiency, automate routine tasks and improve EX.

Coforge leverages globally proven, data-driven methodologies to optimise enterprise workforce performance. Its solutions are designed to deliver actionable insights, streamline workflows and enhance decision-making.

Fujitsu offers AI-augmented workforce services built on a modular and composable architecture, enabling flexible deployment across diverse enterprise environments. Its approach supports innovation and scalability, helping clients accelerate their modernisation journey.

HCLTech delivers AI-first solutions that enhance productivity, automate support and elevate EX. With a strong foundation in digital advisory and a global delivery model, HCLTech enables clients to transform to next-gen operations.

Infosys provides comprehensive AI-augmented workforce services that combine its global delivery capabilities, innovation programs and partner ecosystem. Its solutions help enterprises embed AI across the entire workplace lifecycle to deliver enhanced experiences.

Microland's AI-augmented workforce services through its proprietary Intelligeni platform simplify IT operations and enhance UX. The platform integrates AI-driven automation, predictive analytics and self-service capabilities to streamline IT processes.

Movate's AI-augmented workforce services focus on blending digital and human intelligence. Its AI-first approach includes the development of intelligent copilots that incorporate human insights, enabling personalised support and rapid issue resolution.

NTT DATA delivers AI-augmented workforce services by integrating advanced technologies across the full IT stack. It combines AI, talent management and process optimisation to create intelligent, scalable workforce solutions for clients seeking next-gen services.

TCS' AI-augmented workforce services support enterprise-wide digital transformation. Leveraging its expertise in GenAI and cognitive automation, it accelerates the deployment of intelligent agents and AI copilots, enabling clients to adopt modern technology.

Wipro's AI-augmented workforce services provide a robust delivery framework and advisory consulting capabilities. Its solutions integrate the latest AI technologies to automate support, personalise services and drive continuous improvement across clients.

Stefanini (Rising star) is recognised for its rapid growth and innovation. Its services focus on accelerating enterprise transformation through AI-driven automation, intelligent support systems and scalability.

Appendix

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

Study Sponsor:
Iain Fisher

Lead Author:
Kevin Turner

Editor:
Sajina B

Research Analyst:
Ayushi Gupta

Data Analyst:
Pooja Rani Nayak and Aishwarya Pateriya

Consultant Advisor:
Iain Fisher

Project Manager:
Harshita Bhatt

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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 Analyst

Kevin Turner
Principal Analyst

Kevin Turner brings more than 35 years of experience spanning digital advisory, IT sourcing, technology and industry research. He is a digital expert at ISG, responsible for authoring thought leadership papers and ISG Provider Lens® reports around Future of Work. Kevin's remit includes advising senior executives on digital strategy, product planning, emerging tech, and IT procurement. Kevin has authored research reports in the realm of the Future of Work and IT outsourcing.

Research Analyst

Ayushi Gupta
Senior Research Analyst

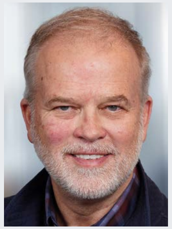
Ayushi is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on the Salesforce Ecosystem and the Future of Work. She supports the lead analysts in the research process and authors the Enterprise Context, the Global Summary report, the focal points, and the quadrants reports. Ayushi has over 4 years of experience conducting in-depth competitive research across various business verticals. She has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape and evolving needs of the potential target audience. She is good at collaborating seamlessly with stakeholders and external clients, ensuring the timely delivery of reports. Her areas of expertise lie across various industry verticals: IT services, Health, Higher Education, Infrastructure, Power & utility, and Finance.

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

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.

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REPORT: FUTURE OF WORK SERVICES