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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unisys

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Germany's workplace services market moves from hybrid support to work orchestration

This ISG Provider Lens® study assesses the future of work services market in Germany across workplace strategy and enablement, digital workplace operations and support, AI-augmented collaboration and experience, and smart and sustainable workplace services. The evaluation reflects a market in which hybrid work goes beyond location. Work now spans digital tools, physical environments and human-AI readiness. The study examines how providers help organizations design, run and improve work experiences that are secure, measurable, sustainable and aligned with Germany's regulatory and labor market context. It also recognizes distinct service needs by treating digital workplace operations separately for the enterprise and SMB segments.

Market Context

1. Germany's digital workplace services market is being reshaped by five structura forces:
2. AI is moving into daily work
3. Strong regulation of workplace technology
4. Persistent talent scarcity
5. Shift from service availability to experience outcomes
6. Ongoing importance of sustainability in workplace design and operations

These forces affect all five quadrants, but not evenly. Strategy services focus on AI governance, work design and human readiness. Operations services are affected by automation, digital employee experience (DEX) telemetry and sovereign delivery. Collaboration services are changing through AI-supported meetings, messaging and knowledge work. Smart workplace services are moving toward the convergence of physical space, ESG reporting and digital workplace data.

Hybrid work is **shifting** from location choice to **human-AI work design**.

The most important macro shift is the move from hybrid work as a location model to hybrid work as a human-AI operating model. With modern work now including human-AI dimensions, trust, skills and psychological safety influence whether employees accept and use AI-enabled capabilities. Devices, connectivity and support remain necessary, but they no longer define the category. Differentiation increasingly depends on how well organizations connect workplace strategy, collaboration behavior, service operations, governance and physical workplace design.

GenAI and agentic AI are accelerating this shift as they move from experimentation to production-oriented use and change how work is designed. ISG has observed that AI voice bots have reached production across the board.

Regulation gives the German market a sharper edge than many other European markets. The EU AI Act, GDPR, co-determination and data residency expectations make workplace AI a governance issue rather than a simple feature rollout. Recent court decisions underscore that the AI chatbot is not a third party and that the organizations running it remain responsible.

AI, DEX and workplace integration are further exacerbating the skills shortage, and companies cannot rely solely on internal resources to address it. This pressure is amplified in the Mittelstand, where many firms face enterprise-grade workplace complexity with fewer specialist resources.

DEX, XLA and sustainability complete the context. Availability, uptime and ticket resolution remain relevant, but work quality now also depends on task success, collaboration effectiveness, sentiment, device health, space utilization, energy consumption and environmental impact.

Enterprise Priorities

German organizations are evolving work and the workplace with a more disciplined set of priorities. They have shifted their early focus on hybrid work enablement toward governed AI adoption, measurable EX, operational resilience, talent-gap mitigation and sustainability. CIOs, CHROs, workplace leaders, legal teams, procurement functions and works councils increasingly assess workplace services through the same lens: technology must improve how people work while remaining secure, explainable and compliant.

The first priority is AI governance before expanding AI use. GenAI and agentic AI are moving into collaboration, support, knowledge access and work orchestration, but German enterprises need clear guardrails before scaling. The EU AI Act raises expectations on transparency, risk classification, prohibited practices and human oversight. In workplace settings, this is especially sensitive because AI can touch employee data, meeting content, productivity signals, service interactions and sentiment indicators. Organizations, therefore, need AI inventories, governance models and work council-ready adoption plans before AI-supported work becomes a standard operating model.

The second priority is workforce readiness. Germany's shortage of IT and digital talent increases demand for automation, managed services and AI-supported work, but it also raises the burden of adoption. Employees need the skills and confidence to use new tools safely and effectively. Digital dexterity, AI literacy, change management and human-AI role design are therefore moving from optional program elements to core workplace requirements.

The third priority is experience-based value measurement. Large enterprises increasingly expect workplace services to demonstrate their impact on work quality, rather than merely on system availability. SLAs remain relevant, but DEX telemetry, XLA governance and Experience Management Office models are gaining importance because they measure device health, friction reduction, self-service adoption, collaboration effectiveness and sentiment. The enterprise question is shifting from whether the service is running to whether it improves the work experience.

The fourth priority is fit-for-segment service design. Large enterprises usually prioritize scale, integration, sovereign delivery and mature outcome measurement. Mittelstand organizations often need modular, locally responsive and commercially accessible services that reduce complexity without imposing enterprise-scale contract structures. This distinction matters most in digital workplace operations, where large enterprise models cannot simply be downsized and sold into SMB environments.

Sustainability remains part of workplace decision-making. Device lifecycle management, space utilization, smart workplace data, meeting room technology and workplace-related emissions increasingly influence sourcing and governance. German organizations are therefore asking for workplace models that connect productivity, compliance, EX and environmental accountability.

Provider Dynamics

Providers in Germany's future of work services market are aligning around four supply-side priorities: AI-enabled delivery, experience-led operating models, regional governance credibility and sustainability-linked workplace services. The competitive field is shifting from broad workplace transformation messaging to specific evidence of execution. Providers must demonstrate how their portfolios connect strategy, operations, collaboration and physical workplace services into measurable work outcomes.

The most visible shift is the integration of GenAI and agentic AI into service portfolios. Strategy firms are building AI governance, human-AI role design and adoption readiness into advisory methods. Operations providers are adding AI-assisted service desks, automated remediation, self-healing endpoints and predictive support. Collaboration providers are extending Microsoft Teams, Webex, Zoom and knowledge platforms with Copilots, meeting intelligence, contextual assistants and in-flow support. Smart workplace providers are applying AI to occupancy insight, space optimization, energy management and building intelligence. The differentiator is no longer whether AI appears in the portfolio; it is about deployment being responsible, adopted by users and delivering operational impact.

A second shift is the ongoing evolution from SLA-only delivery approaches to DEX- and XLA-led operating models. Providers are investing in DEX telemetry, Experience Management Office structures and outcome governance to show how workplace services affect device health, digital friction, collaboration quality and employee sentiment. In mature offerings, telemetry is not only a dashboard layer and does more than report; it triggers prioritization, remediation and service redesign. This separates firms that use experience data to improve work from those that use it mainly for reporting.

Third, providers are strengthening their Germany-specific governance posture as Germany's regulatory and labor context raises the bar for local credibility. The EU AI Act, GDPR, data residency expectations and works council realities make generic European or global claims less persuasive. Providers with credible German delivery structures, local references, auditable AI governance models and sector-aware compliance approaches are better positioned than those relying on broad global capability statements. This is especially important where services involve employee data, AI-enabled collaboration, sentiment analysis, endpoint telemetry or workplace intelligence.

Fourth, sustainability is moving into mainstream offerings, becoming part of provider differentiation. Device lifecycle management, circular workplace technology models, smart office analytics, energy optimization and ESG-aligned reporting now inform service design. In the Smart and Sustainable Workplace Services, this is central; in the Digital Workplace Operations and Support Services quadrant, it appears through device lifecycle and end-of-life management; in the Workplace Strategy and Enablement Services Quadrant, it shapes workplace strategy. Providers that connect sustainability to operating data, not just advisory language, are likely to gain stronger credibility.

The provider market is also becoming more segmented. Large global providers compete on scale, integrated portfolios, platform partnerships and multinational delivery. German and regional providers often compete on local proximity, Mittelstand relevance, works council familiarity and trusted execution. Product specialists differentiate through focused AI, DEX, collaboration or smart workplace capabilities. The strongest positions will belong to providers that combine credible regional evidence, repeatable methods, measurable outcomes and clear governance around AI-supported work.

Field and proximity services are becoming a sharper competitive boundary. Some providers increasingly rely on partner-led local execution, while others turn AI-empowered remote triage, smart lockers, AR guidance, intelligent dispatch and managed on-site support into a last-mile differentiator. Generic transformation messaging will lose force as enterprises expect tangible proof that workplace services can improve work quality without increasing regulatory, operational or employee-trust risk.

Outlook

Over the next 12-24 months, Germany's future of work services market will likely favor providers and buyers that treat AI, EX, governance and sustainability as a single, connected operating challenge. The market will not be defined by AI adoption alone, but by whether AI-supported work can be trusted, measured, governed and improved in live operating environments.

Three indicators will show which providers are gaining durable relevance:

1. Auditable AI governance: Providers must demonstrate auditable governance for workplace use cases, including collaboration AI, service desk automation, employee-facing assistants and smart workplace intelligence.
2. Measurable experience impact: DEX telemetry, XLAs and adoption analytics must drive concrete service improvements and demonstrable gains in EX.
3. Regional proof: Providers need local references and delivery evidence across large enterprises and the Mittelstand.

Leaders will combine AI-enabled delivery with local governance credibility, measurable EX outcomes and integrated human-digital-physical workplace thinking. Providers focused mainly on platform administration, tool deployment or traditional SLA-centric operations will face price pressure and weaker differentiation.

Agentic IT configuration will increase pressure on the traditional digital workplace and IT service providers. Advisory that translates into agentic workloads and change management that builds employees' trust, adoption and human-AI role design will be critical to success. Field and proximity services will also become a sharper boundary, as remote triage, smart lockers, AR guidance, intelligent dispatch and on-site support define last-mile quality.

AI economics will be a constraint, adding another dividing line. Token consumption, reasoning steps and model choice will challenge AI business cases. Reaching a consumption limit can become a financial, operational or delivery risk. Providers that apply lean AI approaches, use small or domain-specific models where appropriate and reserve frontier models for high-value use cases will stand out.

The bottom line is that the strongest future of work providers in Germany will be those that help organizations make work more adaptive without compromising accountability.

> Germany's workplace services are moving beyond hybrid enablement toward measurable, governed work. AI adoption, DEX telemetry, XLA models, sustainability data and support must reinforce one another. Poor AI adoption erodes trust and widens the gap between corporate AI strategy and daily use. Token economics will further separate organizations that match models to work from those that treat AI as a single uniform capability.

Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Accenture	Leader	Product Challenger	Not In	Leader	Leader
ACP Group	Contender	Not In	Leader	Product Challenger	Not In
adesso SE	Not In	Contender	Not In	Contender	Not In
All for One Group	Contender	Not In	Product Challenger	Contender	Not In
Arvato Systems	Contender	Not In	Leader	Product Challenger	Not In
Atos	Product Challenger	Product Challenger	Not In	Leader	Product Challenger
Axians	Contender	Not In	Product Challenger	Contender	Not In
BCG	Product Challenger	Not In	Not In	Not In	Not In
Bechtle	Leader	Leader	Not In	Leader	Leader

Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Birlasoft	Not In	Contender	Not In	Not In	Not In
Campana Schott	Contender	Not In	Not In	Contender	Contender
CANCOM	Market Challenger	Market Challenger	Not In	Product Challenger	Contender
Capgemini	Leader	Leader	Not In	Leader	Leader
CGI	Not In	Contender	Not In	Not In	Not In
Cognizant	Product Challenger	Rising Star ★	Not In	Rising Star ★	Product Challenger
Computacenter	Leader	Leader	Not In	Leader	Leader
Controlware	Not In	Not In	Market Challenger	Not In	Not In
DATAGROUP	Market Challenger	Not In	Leader	Product Challenger	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Deloitte	Leader	Not In	Not In	Not In	Leader
Deutsche Telekom/T-Systems	Leader	Leader	Not In	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
enthus	Not In	Not In	Product Challenger	Not In	Not In
EY	Product Challenger	Not In	Not In	Not In	Not In
Fujitsu	Not In	Contender	Not In	Not In	Contender
Getronics	Contender	Contender	Not In	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Not In	Leader	Leader
Hexaware	Not In	Contender	Not In	Product Challenger	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Infosys	Leader	Leader	Not In	Leader	Leader
IT-HAUS GmbH	Not In	Not In	Contender	Contender	Not In
KPMG	Product Challenger	Not In	Not In	Not In	Not In
Kyndryl	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Lenovo	Product Challenger	Leader	Not In	Product Challenger	Product Challenger
Logicalis	Contender	Not In	Leader	Not In	Not In
LTM	Not In	Product Challenger	Not In	Not In	Not In
Materna	Not In	Not In	Contender	Not In	Not In
McKinsey & Company	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
Medialine	Not In	Not In	Market Challenger	Not In	Not In
MSG Systems AG	Not In	Not In	Market Challenger	Not In	Contender
netgo	Contender	Not In	Leader	Product Challenger	Not In
NTT DATA	Product Challenger	Leader	Not In	Leader	Rising Star ★
PwC	Leader	Not In	Not In	Not In	Not In
q.beyond	Not In	Not In	Product Challenger	Not In	Not In
Ratiodata	Not In	Not In	Market Challenger	Not In	Not In
SoftwareOne	Contender	Not In	Contender	Contender	Not In
Stefanini	Product Challenger	Not In	Leader	Product Challenger	Contender

Provider Positioning

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	Workplace Strategy and Enablement Services	Digital Workplace Operations and Support Services — Large Account	Digital Workplace Operations and Support Services — Midmarket	AI-augmented Collaboration and Experience Services	Smart and Sustainable Workplace Services
SVA	Contender	Not In	Leader	Contender	Not In
TCS	Leader	Product Challenger	Not In	Product Challenger	Leader
teccle group	Not In	Not In	Product Challenger	Not In	Not In
Tech Mahindra	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
think about IT	Not In	Not In	Contender	Not In	Not In
TIMETOACT GROUP	Not In	Not In	Product Challenger	Not In	Not In
Trans4mation	Not In	Not In	Contender	Not In	Not In
Unisys	Leader	Leader	Not In	Leader	Product Challenger
Wipro	Leader	Leader	Not In	Leader	Leader

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

- **Workplace Strategy and Enablement Services**
- **Digital Workplace Operations and Support Services — Large Account**
- **Digital Workplace Operations and Support Services — Midmarket**
- **AI-augmented Collaboration and Experience Services**
- **Smart and Sustainable Workplace Services**

Simplified Illustration Source: ISG 2026

Definition

Hybrid work continues to evolve. What started as a location-based concept is increasingly becoming a model of human-AI collaboration, where AI assistants augment everyday work. Modern work now spans interconnected physical and digital environments, as well as the human workplace, where trust, skills and psychological safety are essential for employees to accept, adopt and effectively use AI-enabled capabilities. As a result, productivity, collaboration and EX are shaped as much by human readiness as by technology, requiring an orchestrated approach rather than isolated tools or point solutions. Devices, connectivity and basic support services remain foundational, but they no longer define differentiation or long-term value. Competitive advantage now stems from the orchestration that delivers consistent, secure and sustainable work experiences.

Collaboration and communication platforms have become the primary interface for work, shaping how employees meet, share, decide and interact. With AI embedded into meetings, messaging, content and workflows, enterprises evaluate initiatives by adoption, effectiveness and experience — not just by deployment of technology. While traditional digital workplace services are highly mature, differentiation increasingly arises from experience management, AI augmentation, sustainability integration, and the ability to align human, digital and physical workplace dimensions.

This study examines how service providers address these challenges across four distinct yet interconnected service domains, reflecting the evolving nature of digital work and enterprise expectations in the age of AI.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following five quadrants for services: Workplace Strategy and Enablement Services, Digital Workplace Operations and Support Services — Large Accounts, Digital Workplace Operations and Support Services — Midmarket, AI-augmented Collaboration and Experience Services and Smart and Sustainable Workplace Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets, including the U.S., the U.K., Germany, Switzerland, Brazil and Australia

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 service providers offering **workplace strategy and enablement services** in **Germany** 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

Chief experience officers should read this report to understand leading providers that can help them better prepare their workforces for changing business dynamics and the required models. This report provides insights into how these providers support workforce readiness and adaptability, enabling enterprise clients to address new challenges and growth opportunities.

Technology professionals

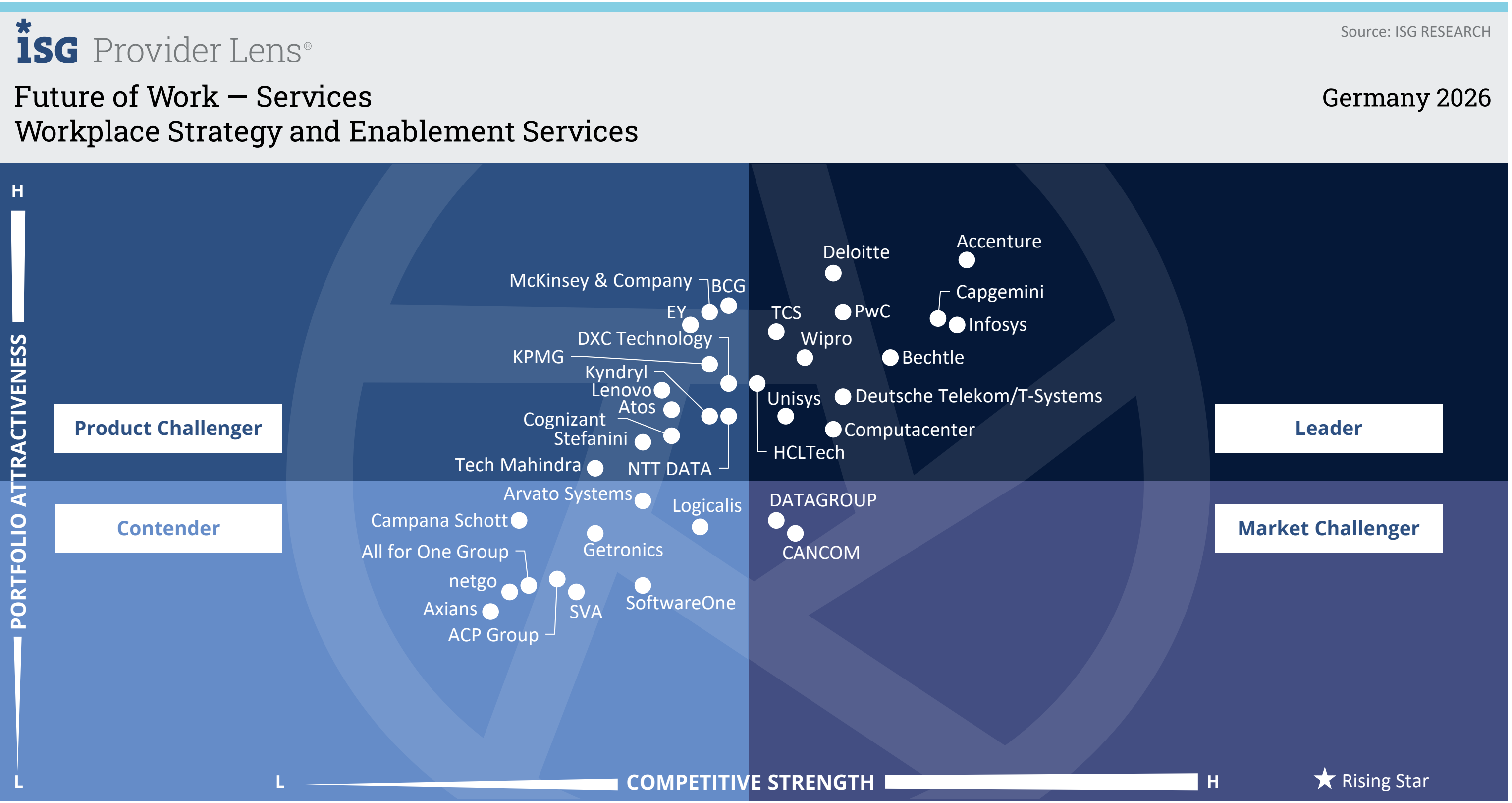
Technology professionals, including workplace technology leaders, should read this report to understand providers' positioning and capabilities to enable them to enhance employee services. By gaining insights into the solutions these providers offer, technology professionals can make informed decisions about adopting and implementing tools and systems that improve EX and drive productivity.

Strategy professionals

Strategy professionals should read this report to identify the most suitable workplace strategy and enablement service providers for their companies. By understanding these providers' capabilities and positioning, strategy professionals can develop and implement a winning workplace strategy aligned with their organizational goals and long-term success.

Consultant professionals

Consultant professionals should read this report to offer the right advice to companies on workplace strategies to enhance performance. This report will help consultants stay abreast of current trends and latest industry developments, enabling them to make informed recommendations and support clients in establishing effective workplace strategies.



This quadrant evaluates providers that help clients define **workplace and enablement strategies** for the era of **AI-empowered work**, as **human-AI role design, hybrid maturity** and **EU AI Act** readiness are board-level operating model decisions today.

Roman Pelzel

Definition

This quadrant evaluates providers' capabilities to help clients define a future workplace vision, operating model and roadmap by integrating human, digital and physical workplace dimensions. The strategy and enablement services offered by these providers align with evolving business models, workforce expectations and regulatory requirements and are tailored by region, industry and organizational context.

Strategic focus areas include:

- Responsible integration of AI into the workplace
- Market changes and emerging business models
- Digital capabilities shaping work and collaboration
- New talent and skills models
- Integration of local and remote physical workplaces
- Physical asset strategy and workplace assessments
- Workplace-driven sustainability strategies

The evaluation emphasizes providers' ability to go beyond vision and design totranslate strategy into execution, addressing procurement, adoption readiness andexperience impact while meeting industry-specific requirements.

Eligibility Criteria

1. Provide **enterprise-level workplace advisory services**, including the design of future workplace visions, operating models and roadmaps
2. Maintain a **vendor-neutral approach** to workplace transformation and business delivery models
3. Offer **integrated workplace strategy advisory** across **human, digital and physical workplace dimensions**
4. Advise on the **strategic use of AI in the workplace**, including governance, human-AI role design, adoption readiness and risk management
5. Address **talent models and workforce readiness**, including skills evolution, inclusion and ethical considerations relevant to modern workplaces
6. Design **hybrid workplace models** that integrate physical and remote environments to ensure experience parity
7. Deliver **workplace-driven sustainability strategies,** including physical asset optimization, digital efficiency and ESG-aligned workplace design
8. Demonstrate **industry-specific experience and case studies** showing measurable benefits across human, digital and physical workplace outcomes

Observations

Workplace strategy in Germany is moving from hybrid work design toward governed human-AI work models in 2026. The concept of hybrid work is evolving to focus on the touchpoints between humans and AI. The priority is how organizations redesign work, roles, governance and the workplace experience for AI-enabled operating models.

The EU AI Act is turning AI governance, transparency, human oversight and role-boundary design into procurement requirements. At the same time, Germany's talent shortage is elevating workforce readiness to a board-level concern.

The strongest providers combine workforce advisory, AI governance, operating model design, digital sovereignty, experience management and physical workplace planning and translate these into adoption roadmaps that reflect co-determination, data protection and implementation realities. They help organizations govern AI responsibly while designing work that employees can trust, adopt and sustain.

Leaders differentiate themselves through depth across human, digital and physical dimensions, and through local credibility in responsible AI, EX-led change, maturity assessment and roadmap-to-run governance.

A common pattern is the shift from tool selection to decision frameworks for AI use cases, role redesign, skills evolution, workplace telemetry and sustainability-linked asset choices. Providers that present workplace strategy primarily as a technology roadmap will face increasing pressure from advisory-led competitors.

From the 54 companies assessed for this study, 36 qualified for this quadrant, with 12 being Leaders

Accenture combines AI ecosystem orchestration, digital core modernization and workforce readiness into a governed workplace strategy. Clients gain EU AI Act controls, human-AI role guidance and adoption discipline suited to regulated German works council settings.

Bechtle links DEX, XMO, XLA governance and digital sovereignty with an AI operating model advisory for workplace strategy. The model helps German clients turn ambition into prioritized roadmaps, adoption readinessand more controllable, resilient workplace architectures.

Capgemini frames sovereign workplace design and responsible AI governance as a single execution discipline for German workplace strategy. By combining discovery, multi-partner orchestration and adoption planning, clients move from concept to roadmaps with clear control.

Computacenter uses its North Stars strategy, AI readiness work and experience-led design to structure workplace transformation. Its approach helps German clients connect future-state design, maturity steps and service priorities across people, tools and workplaces.

Deloitte brings workforce research, human-AI work design and local Deloitte Digital studios into an integrated workplace advisory. In German client settings, this turns AI-enabled work, hybrid models and EX into governed operating-model change with adoption planning.

Deutsche Telekom/T-Systems, through T-Systems, links sovereign workplace design, T Cloud options and AI adoption with workforce enablement. The model helps German clients align cloud choice, compliance and adoption so workplace strategy becomes an executable operating model.

HCLTech anchors workplace strategy in FLUID assessments, XMO measurement and sustainability-linked hybrid planning across human, digital and physical work. Clients benefit from assessment-led roadmaps that connect AI guardrails, adoption readiness and ESG outcomes.

Infosys positions its AI workplace blueprint around responsible AI, EX governance and workplace observability for the German market. By linking business cases, proof of value and applied innovation, clients move from AI ambition to measurable operating change.

PwC applies its Evolution of Work model to combine EX strategy, workforce transformation, employment law and physical workplace design. The firm helps German clients align HR, IT, legal and real estate choices before AI-enabled work models move into execution.

TCS uses its AI autonomy model and WisdomNext™ GenAI orchestration to shape human-AI work, governance and adoption readiness. Clients gain a structured basis for role impact assessment, oversight, skills evolution and experience-led work improvement.

Unisys brings frontline workplace insight, responsible AI readiness and roadmap-to-run governance into the German workplace strategy. By linking data classification, OCM and leadership structures, clients turn office, deskless and hybrid work plans into executable change.

Wipro applies human-centric design methods to connect employee journeys, hybrid work scenarios and AI governance in workplace strategy. Clients gain evidence-led concepts that test human-AI roles, adoption assumptions and delivery feasibility before rollout.

Unisys

Leader

"Unisys helps enterprises move from fragmented workplace tooling to an orchestrated workplace operating model, where support, devices, collaboration spaces, frontline experience, AI enablement and physical workplace services are managed as one business value system."

Roman Pelzel

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. For German enterprises, it provides workplace advisory that links frontline realities, AI readiness and execution governance, helping redesign work across office, deskless and hybrid settings. Its approach combines data classification, access preparation, prompt library design, OCM and tailored roadmaps with leadership structures that connect business, technology and security. The firm provides clients with a practical strategy that reflects operational complexity and carries through into implementation rather than remaining a conceptual vision.

Strengths

Frontline workforce design: Unisys brings a deep understanding of frontline workplaces to workplace strategy, shaped by cross-sector experience, which gives the company practical insight into specialized devices, kiosks, signage, meeting technologies and task-specific support needs. This helps clients design workplace models and enablement approaches around real operating conditions rather than office-centric assumptions.

Responsible AI readiness: Unisys treats workplace AI as a readiness challenge rather than a rollout exercise. Its advisory work combines data classification, access rights preparation, prompt library design and OCM to help clients adopt AI with clear governance, low data risk and strong workforce adoption. This helps enterprises translate AI ambition into role-based behaviors, governance practices and adoption pathways that scale rather than remaining isolated experiments.

Roadmap-to-run governance: Unisys helps clients carry workplace strategy into execution through a structured governance model that links business, delivery, technology and security leadership. With tailored innovation roadmaps and strategic support and advisory, the company helps enterprises move from transformation design to implementation with clear accountability, cross-functional alignment and strong continuity through change.

Caution

Unisys would benefit from clearly showing how its workplace advisory supports executive workforce decisions in Germany, particularly where frontline transformation, AI readiness and change governance must translate into sustainable operating models, investment choices and measurable business outcomes.

Digital Workplace Operations and Support Services – Large Account

Who Should Read This Section

This report is valuable for service providers offering **digital workplace operations and support services – large accounts** in **Germany** 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.

Workplace technology leaders

Workplace technology leaders, including CIOs, heads of workplace services and EUC leaders, should read this report to understand how service providers deliver scalable, resilient and experience-centric workplace operations. The report helps them evaluate partners that can modernize end-user support, optimize service delivery models and integrate automation and intelligence to improve productivity, operational stability and EX across distributed and hybrid work environments.

IT operations and service management professionals

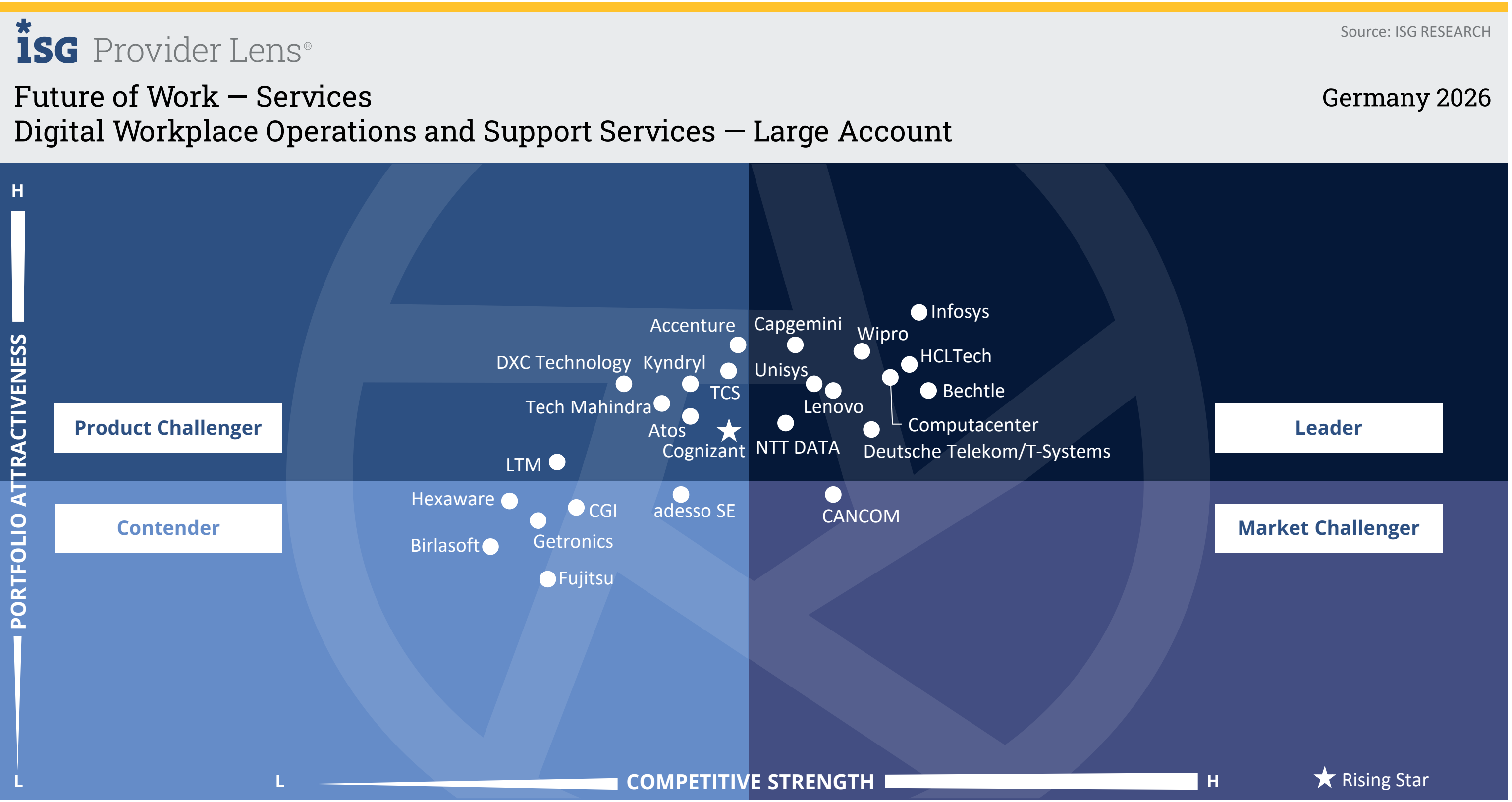
IT operations and service management professionals should read this report to assess providers' capabilities in managing day-to-day digital workplace operations, including service desk, endpoint support and operational governance. The report highlights approaches to proactive monitoring, incident resolution, automation and continuous improvement, enabling IT operations leaders to benchmark service maturity, reduce downtime and align workplace support services with evolving business and workforce demands.

Digital workplace and EX professionals

Digital workplace and EX professionals should read this report to understand how workplace operations and support services contribute to consistent, high-quality EX across devices, locations and work models. The report provides insights into service design, experience measurement and operational practices that help enterprises improve satisfaction, reduce friction and ensure employees have reliable access to the tools and support required for effective, productive work.

Security and risk management professionals

Security and risk management professionals should read this report to evaluate how workplace operations service providers embed security, compliance and risk controls into end-user support and device management services. The report outlines operational practices that help balance secure access with usability, highlighting how providers support secure workplace operations while maintaining service continuity, regulatory compliance and a positive EX in hybrid and remote environments.



This quadrant evaluates **AI-supported workplace operations** and **DEX-led service governance** as German enterprises shift from reactive support to **measurable, experience-aware run services** driven by GenAI, hybrid work and regulation.

Roman Pelzel

Definition

This quadrant evaluates service providers that assume end-to-end responsibility forbuilding, transitioning and operating the digital workplace at scale. It spans the full lifecycle of end-user technology services, from design and transition to run, day-to-day operations, support and continuous optimization. The scope of services includes unified endpoint and application management, device as a service, virtual desktops, service desk, and field/proximity services, all leveraging digital employee experience (DEX) telemetry.

Providers in this quadrant increasingly deliver AI-powered, EX-led operations, incorporating experience management offices and XLAs to prioritize business outcomes. Key differentiators include automation, self-healing and AI-driven support, enabling proactive issue resolution and cost-efficient service delivery. The quadrant reflects the market shift toward integrated, outcome-oriented digital workplace operations, moving beyond fragmented, tool-centric services.

Eligibility Criteria

1. Provide **end-to-end digital workplace build and run services**, including transition-to-run and steady-state operations
2. Deliver **service desk services,** including omnichannel, remote and contextualized end-user support
3. Provide **unified endpoint and application management,** including staging, configuration, patching, security and application provisioning
4. Offer **device lifecycle management**, covering procurement, logistics, deployment, support, refresh, disposal and recycling, with **device-as-a-service options**
5. Demonstrate experience in delivering **virtual desktop services** across on-premises, cloud and hybrid environments, including **desktop as a service**
6. Provide **field services and IMAC/R/D support,** including remote and on-site break/fix services and in-person technical assistance
7. Operate **EX-led support models,** leveraging **DEX telemetry** to prioritize and improve workplace performance
8. Offer **XLA-driven service delivery** that measures outcomes, such as productivity, task success and user sentiment, beyond traditional SLA metrics
9. Leverage **automation, analytics and AI-enabled support,** including automated issue resolution, self-service and proactive remediation
10. Maintain a robust **regional delivery presence**

Observations

Germany's digital workplace operations market in 2026 is no longer defined by who can run workplace services at scale, but by who can deliver a governed, AI-supported, experience-centric operating model. Broad service coverage remains necessary in the market. The sharper test is whether providers turn DEX telemetry into action through self-healing, AI-assisted service desks, intelligent dispatch, lifecycle decisions and XLA governance. Demand is shaped by hybrid work saturation, scarce IT talent, GDPR, EU AI Act readiness and expectations for sovereign delivery. Organizations seek information on where endpoint, service desk, DEX and AI support data are processed, how human escalation is governed and how automation improves task success.

Field and proximity services are becoming a sharp competitive boundary. Some providers increasingly rely on partner-led local execution, while others convert AI-empowered remote triage, smart lockers, AR guidance, intelligent dispatch and on-site support into a managed last-mile differentiator. Sustainability also moves deeper into the quadrant, as device as a service (DaaS), secure disposal, reuse, recycling and Scope 3 evidence become part of workplace operations contracts.

Leaders run models that integrate endpoint management, service desk, field support, device lifecycle and experience management into a single controlled operating layer. The strongest providers show telemetry-to-remediation maturity, XLA structures, agentic support flows, governed field escalation and credible German delivery depth. Cognizant secures Rising Star status by integrating AI-led support and DEX-driven prevention into its human-centric WorkNEXT™ platform, specifically tailored to the needs of the German market.

From the 54 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

BECHTLE

Bechtle combines DEX-led client management, Bechtle CARE and strategic device lifecycle services with deep German delivery reach. Clients gain tight control of endpoint estates, clear friction signals and a practical path from standardization to improvement.

Capgemini

Capgemini links PRiSM, agentic workflows and XMO-led experience management with sovereign secure workplace operations in Germany. By using self-healing capabilities, structured knowledge and XLAs, clients connect support efficiency to employee outcomes and regulated delivery.

Computacenter

Computacenter applies AI service orchestration, lifecycle intelligence and XMO maturity to connect support, endpoint and application signals. The model helps German clients convert analytics and sentiment into faster remediation, risk-aware refresh decisions and improved service choices.

T Systems

Deutsche Telekom/T-Systems and T-Systems unify desktop, mobile and lifecycle operations into a consistent managed endpoint model. Clients benefit from local execution, service continuity and AI-assisted support that reduces friction during refresh and AI-driven transitions.

HCLTech brings service desk, endpoint, application, VDI, field and lifecycle operations into one DEX-led run fabric for Germany. By linking AEX automation with FlexSpace 3.0, clients can prioritize incidents by user impact, reduce handoffs and accelerate AI PC readiness.

Infosys uses Topaz Fabric, multi-modal channels and AI-ready endpoint services to govern agentic workplace operations. With voice agents, translation, human approvals and smart lockers, clients gain traceable support, faster escalation and stronger lifecycle control.

Lenovo builds on xIQ automation, TruScale DaaS and Smart Store Services to connect device support with telemetry-led prevention. Its approach helps German enterprises manage endpoints, retail sites and distributed workplaces with fewer avoidable on-site visits.

NTT DATA brings together Agentic Service Desk, DEXOps, EXPaaS and Workplace Lifecycle Hub into a single EX-led run model. By linking service desk, endpoint, field and refresh activities, clients connect AI-enabled support with workplace performance.

Unisys turns smart field service orchestration, XMO insights and EX-led lifecycle decisions into connected workplace operations. The firm helps German clients reduce handoffs, guide field teams and align refresh choices data related to persona, usage and reliability.

Wipro frames AI Live Workspace and experience-led XLA delivery as a proactive operations model for German workplace services. By combining AIOps, DEX telemetry and sentiment insight, clients identify friction earlier and steer support through outcome controls.

Cognizant (Rising Star) uses WorkNEXT to connect AI-led service desk, DaaS, UEM, field support and lifecycle control. In German client settings, the model links workplace intelligence with governed self-healing to reduce avoidable demand and sharpen DEX-led prevention.

Unisys

Leader

"Unisys combines AI-enabled support flows, EX-centric device lifecycle decisions and smart field service orchestration to help enterprises move beyond isolated service towers toward responsive, connected and experience-aware workplace operations at scale."

Roman Pelzel

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. The firm's workplace operations portfolio combines AI-enabled support, EX-led device lifecycle management and orchestrated field services.
Using XMO insights, Unisys helps German enterprises improve refresh and deployment decisions through persona, usage and reliability data, while linking service desk, curated knowledge, touchless channels and onsite resolution. Its field model adds route optimization and in-field guidance, helping clients modernize support journeys instead of running isolated service towers.

Strengths

Smart field service orchestration: Unisys has modernized field services beyond traditional break-or-fix by connecting service desk, dispatch, smart lockers, AR and in-person support into a single operating model. Using Salesforce Field Service for route optimization and Agentforce for pre-work briefs, post-work summaries and in-field knowledge, the approach enables intelligent scheduling and in-field support across complex environments.

EX-centric device lifecycle: Unisys uses its Experience Management Office to turn device lifecycle management into an experience-led discipline. By linking persona-based selection, usage and reliability data with AI-readiness signals and sustainability goals to refresh planning, the company helps clients move from calendar-based replacement to more deliberate decisions on deployment, refresh timing and asset use.

AI-enabled support flow: Unisys integrates proactive detection and self-healing, knowledge-grounded AI support, AI-assisted agents, intelligent dispatch and touchless or on-site fulfillment into a single operating model. By linking service desk workflows with field services, smart lockers, kiosks, virtual tech cafés and curated knowledge, the company helps clients reduce fragmented handoffs, improve resolution continuity and deliver faster, more context-aware support.

Caution

Unisys could strengthen its position in Germany by translating its global field, support and connected-endpoint capabilities into a regionally articulated frontline operations model, with local references that show how AI-enabled support and lifecycle governance reduce friction in day-to-day operations.

Digital Workplace Operations and Support Services — Midmarket

Who Should Read This Section

This report is valuable for service providers offering **digital workplace operations and support services - midmarket** in **Germany** 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.

Workplace technology leaders

Workplace technology leaders, including CIOs, heads of workplace services and EUC leaders, should read this report to understand how service providers deliver scalable, resilient and experience-centric workplace operations. The report helps them evaluate partners that can modernize end-user support, optimize service delivery models and integrate automation and intelligence to improve productivity, operational stability and EX across distributed and hybrid work environments.

IT operations and service management professionals

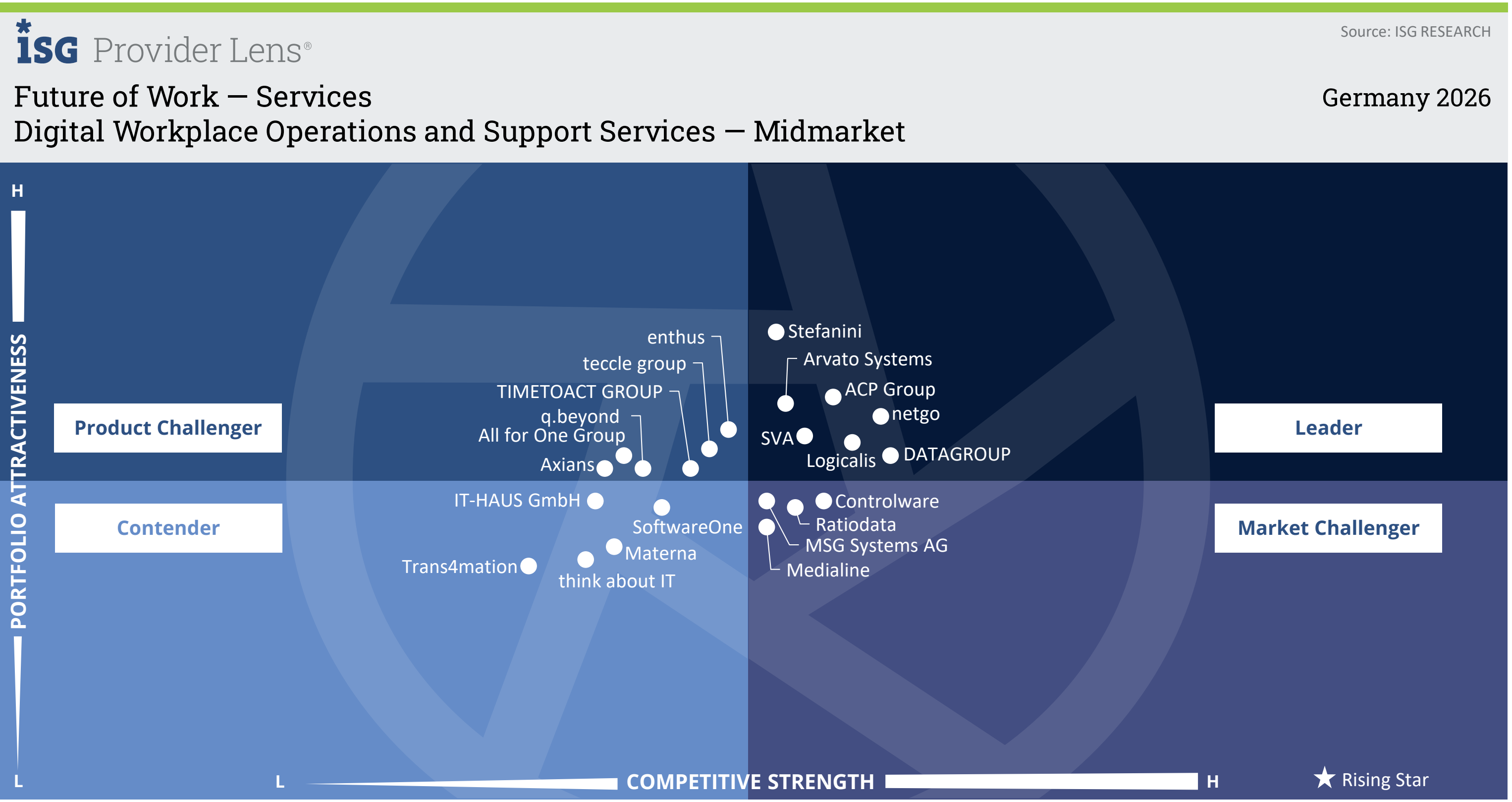
IT operations and service management professionals should read this report to assess providers' capabilities in managing day-to-day digital workplace operations, including service desk, endpoint support and operational governance. The report highlights approaches to proactive monitoring, incident resolution, automation and continuous improvement, enabling IT operations leaders to benchmark service maturity, reduce downtime and align workplace support services with evolving business and workforce demands.

Digital workplace and EX professionals

Digital workplace and EX professionals should read this report to understand how workplace operations and support services contribute to consistent, high-quality EX across devices, locations and work models. The report provides insights into service design, experience measurement and operational practices that help enterprises improve satisfaction, reduce friction and ensure employees have reliable access to the tools and support required for effective, productive work.

Security and risk management professionals

Security and risk management professionals should read this report to evaluate how workplace operations service providers embed security, compliance and risk controls into end-user support and device management services. The report outlines operational practices that help balance secure access with usability, highlighting how providers support secure workplace operations while maintaining service continuity, regulatory compliance and a positive EX in hybrid and remote environments.



This quadrant assesses providers that are experts in running **digital workplace operations for German SMBs**, combining local support, endpoint services, device as a service and **AI-assisted remediation** as talent scarcity raises outsourcing demand while proximity remains key.

Roman Pelzel

Definition

This quadrant evaluates service providers that assume end-to-end responsibility for building, transitioning and operating the digital workplace at scale. It spans the full lifecycle of end-user technology services, from design and transition to run, day-to-day operations, support and continuous optimization. The scope of services includes unified endpoint and application management, device as a service, virtual desktops, service desk, and field/proximity services, all leveraging digital employee experience (DEX) telemetry.

Providers in this quadrant increasingly deliver AI-powered, EX-led operations, incorporating experience management offices and XLAs to prioritize business outcomes. Key differentiators include automation, self-healing and AI-driven support, enabling proactive issue resolution and cost-efficient service delivery. The quadrant reflects the market shift toward integrated, outcome-oriented digital workplace operations, moving beyond fragmented, tool-centric services.

Eligibility Criteria

1. Provide **end-to-end digital workplace build and run services**, including transition-to-run and steady-state operations
2. Deliver **service desk services,** including omnichannel, remote and contextualized end-user support
3. Provide **unified endpoint and application management,** including staging, configuration, patching, security and application provisioning
4. Offer **device lifecycle management,** covering procurement, logistics, deployment, support, refresh, disposal and recycling, with **device-as-a-service options**
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6. Provide **field services and IMAC/R/D support,** including remote and on-site break/fix services and in-person technical assistance
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8. Offer **XLA-driven service delivery** that measures outcomes, such as productivity, task success and user sentiment, beyond traditional SLA metrics
9. Leverage **automation, analytics and AI-enabled support,** including automated issue resolution, self-service and proactive remediation
10. Maintain a robust **regional delivery presence**

Observations

Germany's midmarket workplace operations are characterized by proximity to locally accountable, AI-assisted run services rather than scale alone. Mittelstand firms face the same hybrid-work, endpoint security, GDPR, AI adoption and device lifecycle complexity as large enterprises, but with fewer internal IT specialists and less tolerance for heavy governance.

The Leaders all cover core workplace operations and differ less by service desk or endpoint coverage. Differentiation comes from how they combine German-language support, endpoint control, security, virtual desktops, field services, DEX telemetry and AI-enabled support.

The strongest portfolios show movement from reactive ticket handling toward self-service, anomaly detection, automated remediation and experience-led operations. Local proximity remains important because midmarket and Mittelstand organizations often need trust, language fit, device assistance and governance clarity rather than a purely offshore model.

Microsoft 365, Copilot readiness, Virtual Desktops, Intune, endpoint security and device as a service are recurring platform anchors. The next frontier is translating AI support, self-service and DEX telemetry into auditable outcomes such as issue prevention, task success, sentiment and digital dexterity, not just faster ticket handling.

Product Challengers show strong technology depth, especially in DEX, automation or device lifecycle services, but still need broad market proof. Market Challengers would bring reach, references or local reputation, but with weaker evidence of integrated portfolio maturity. For Contenders, gaps usually sit in breadth, scale, proof points or differentiated automation.

From the 54 companies assessed for this study, 22 qualified for this quadrant, with seven being Leaders.

ACP Gruppe

ACP Gruppe combines managed workplace operations, secure application access and endpoint protection with 24 German locations for local service proximity. Clients gain a practical outsourcing model for Microsoft 365, device as a service and run support that addresses Mittelstand challenges.

AS ARVATO SYSTEMS

Arvato Systems links digital sovereignty with Microsoft workplace operations through data-protection configuration, Microsoft 365 fallback planning, NAVOO and Copilot readiness. In German client settings, this supports controlled cloud work, tenant operations and AI adoption.

DATAGROUP

DATAGROUP draws on CORBOX, CORIntelligence and Germany-based delivery to standardize workplace operations for Mittelstand clients. The model provides clients with local accountability, ISO 20000-aligned discipline and lifecycle control across service desk, devices and desktops.

LOGICALIS Architects of Change

Logicalis brings security-led workplace operations to endpoint and remote-access services through zero-touch device management and Azure Virtual Desktop. By pairing endpoint security with network strengths, clients reduce handoffs across support and access control.

netgo

netgo turns workplace lifecycle services, omnichannel support and AI enablement into a modular managed model for German midmarket clients. Clients benefit from one accountable partner across transition, workplace as a service (WaaS), virtual desktops, field support and user adoption.

stefanini GROUP

Stefanini applies an AI-first service desk model with SophieX, SAI Analytics, DEX telemetry and OCM across German workplace operations. By combining triage, translation, anomaly detection and adoption support, clients move from reactive support to proactive remediation.

SVA

SVA strengthens midmarket workplace operations across 29 German locations, with device as a service, DEX tooling and Copilot adoption support. With local presence and managed endpoints, clients gain direct support, ready devices and experience-led remediation.

AI-augmented Collaboration and Experience Services

This report is valuable for service providers offering **AI-augmented collaboration and experience services** in **Germany** 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.

Workplace technology leaders

Workplace technology leaders, including CIOs and heads of digital workplace and collaboration platforms, should read this report to understand how service providers apply AI to enhance collaboration ecosystems and EX. The report helps leaders evaluate partners that combine collaboration platforms, experience insights and intelligent automation to improve adoption, productivity and consistency across hybrid, remote and in-office work environments.

Digital and EX transformation professionals

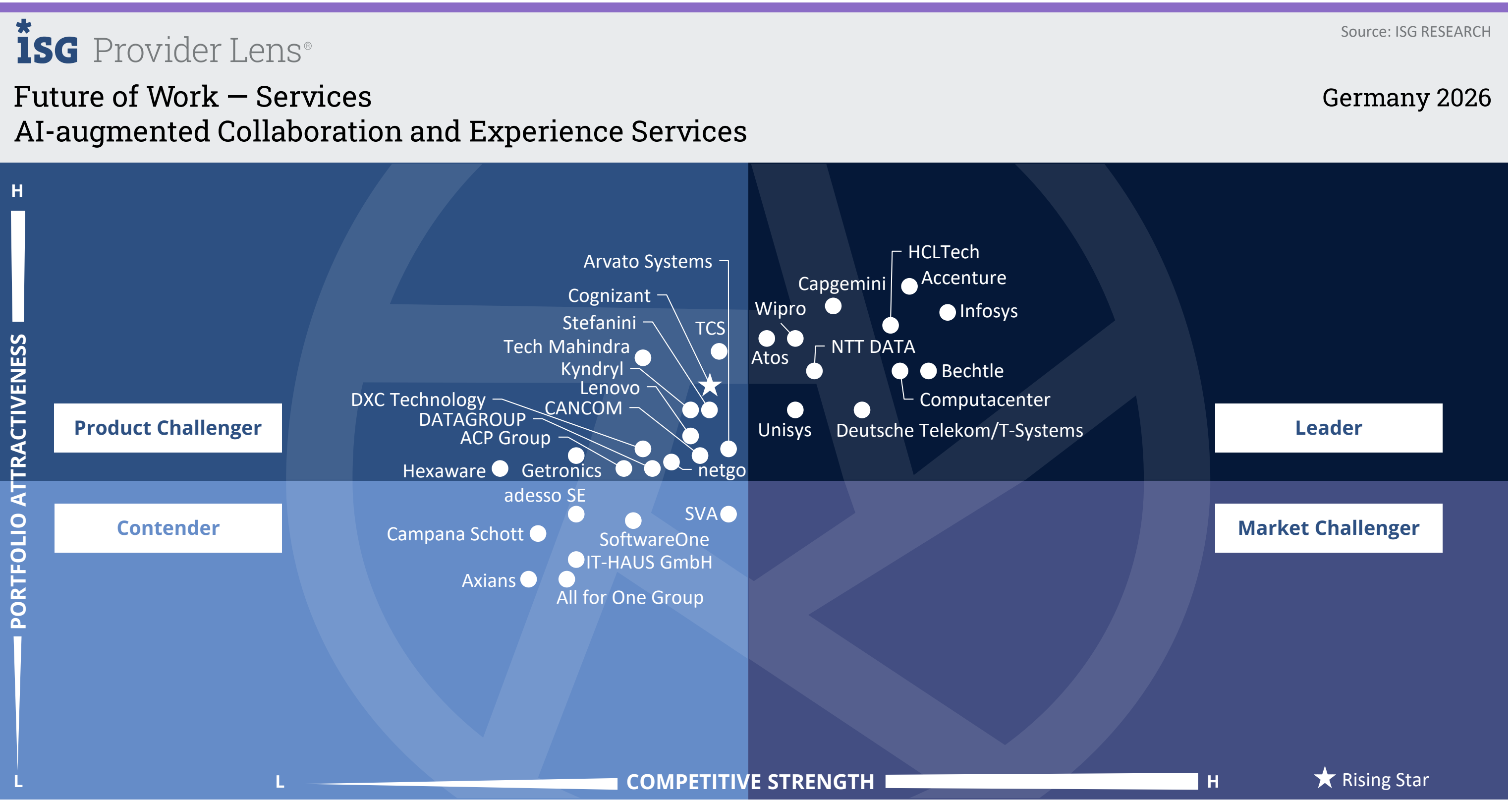
Digital and EX transformation professionals should read this report to assess how AI-augmented collaboration and experience services support enterprise-wide digital and EX transformation initiatives. The report offers insights into how providers use AI to optimize workflows, personalize interactions and reduce friction across collaboration tools, enabling organizations to improve engagement while aligning experience investments with measurable business outcomes.

IT operations and support professionals

IT operations and support professionals should read this report to understand how AI is embedded into collaboration and experience services to improve operational efficiency and service quality. The report offers clarity on service models that leverage automation, analytics and proactive issue resolution to reduce support effort, enhance platform stability and deliver consistent collaboration experiences across users, devices and global locations.

Procurement and vendor management professionals

Procurement and vendor management professionals should read this report to gain a structured view of the global provider landscape for AI-augmented collaboration and experience services. The report supports informed sourcing decisions by outlining service scope, differentiation and delivery approaches, helping procurement teams assess provider fit, manage risk and align collaboration investments with enterprise cost, performance and value objectives.



This quadrant assesses providers that advance **AI-augmented collaboration** by combining AI-enabled **collaboration platforms, DEX**, experience-led **adoption** and **OCM** with **agentic support** models, measurable **EX outcomes**, responsible AI and trusted change execution.

Roman Pelzel

Definition

This quadrant evaluates providers that design, deploy and continuously optimize collaboration and communication services in the digital workplace, enhanced by AI and agentic assistants. It covers enterprise collaboration platforms and communication technologies, including meetings, messaging, calling and conferencing, alongside content and knowledge management and flow-of-work experiences.

As AI-augmented collaboration becomes the primary interface for modern work, providers help organizations evolve their collaboration ecosystems by embedding AI capabilities such as copilots, contextual assistants and meeting intelligence into everyday workflows. Success in this quadrant is measured by experience and adoption outcomes, including engagement and sentiment. Providers employ an experience-led delivery model, combining analytics, EX and DEX insights, OCM and enablement to drive sustainable adoption.

Eligibility Criteria

1. **Design, deploy and optimize collaboration and experience services** across meetings, messaging, content, knowledge and flow-of-work environments
2. **Deploy and manage collaboration platforms,** such as Microsoft Teams, Zoom, Cisco Webex and comparable ecosystems, alongside experience optimization and adoption services
3. **Leverage AI and GenAI to augment collaboration and EX,** including copilots, assistants, meeting intelligence and contextual knowledge support
4. **Provide AI-augmented and contextualized user support within collaboration and work environments**, aligned to user roles and tasks
5. Adopt an **experience- and XLA-focused delivery approach**, measuring outcomes such as adoption, task success, engagement and user sentiment
6. Deliver services that enable **effective change management and technology adoption**, including training, enablement and digital dexterity programs
7. **Support experience management functions**, such as XMO or equivalent models, using analytics, sentiment analysis and behavioral insights
8. Demonstrate **outcome-driven impact,** with verifiable improvements in productivity, collaboration effectiveness or EX
9. Ensure **responsible and ethical use of AI,** including governance, transparency and human oversight in AI-augmented workplace services

Observations

Collaboration is becoming the primary layer of digital experience, where employees meet, communicate, access knowledge, coordinate work and assess whether digital tools support or hinder productivity. AI is rapidly transforming this layer. Copilots, contextual assistants, meeting intelligence and agentic workflows are shifting collaboration platforms from communication tools to active work environments that summarize, guide, recommend and automate. Provider differentiation depends on how effectively these capabilities are embedded into daily work.

In Germany, this shift makes the quality of adoption more important than the availability of AI. Enterprises are learning that collaboration AI without DEX telemetry, XLA governance, OCM and digital dexterity can lead to fragmented usage, employee skepticism and limited evidence of productivity gains.

Regulation introduces an additional layer of complexity. The EU AI Act transparency requirements, workplace restrictions on sensitive AI use and works council expectations make responsible AI governance, human oversight and explainable adoption models essential elements of service design.

Providers differentiate themselves by combining multi-platform operations, DEX insight, XMO models, change enablement and measurable outcomes across adoption, sentiment, task success, knowledge access and collaboration quality.

The strongest Leaders show local relevance through German client references and demonstrate how AI assistants and agents connect with governed enterprise systems, rather than remaining limited to generic meeting or chat features.

Cognizant is recognized as a Rising Star because its WorkNEXT™ AI and TRUE EX strategy demonstrate progress toward experience-led, OCM-supported and agentic collaboration services aligned with the German market.

From the 54 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture combines Microsoft depth, agentic orchestration and EX analytics to position collaboration platforms as governed AI work environments. Clients gain stronger adoption, greater access to contextual knowledge and measurable task improvements through XMO-led optimization.

Atos

Atos turns Sovereign Agentic Studios into a governed collaboration model for regulated German work environments. By linking agent lifecycle control, DEX telemetry and human oversight, the firm supports trusted AI adoption and measurable outcomes in collaboration quality.

BECHTLE

Bechtle links agentic workflow design, contextual knowledge support and community-led Copilot adoption with German governance requirements. Its approach helps clients transition from AI experimentation to scaled usage, stronger digital dexterity and sustained work practices.

Capgemini

Capgemini brings Copilot readiness, agentic workflow control and sovereign delivery options into a single governed collaboration model. In Germany, clients benefit from structured rollout discipline, digital dexterity programs and practical value beyond pilots at scale.

Computacenter frames collaboration as an experience-led service, using XMO insight, adoption support and AI-assisted improvement. Clients benefit from clearer links between meeting quality, platform usage, user sentiment and targeted service actions in Germany.

Deutsche Telekom/T-Systems with T-Systems and Telekom MMS, connects sovereign collaboration design, in-flow AI assistance and adoption services. With UC-Play, Zoom X and Business GPT, clients modernize communication while maintaining hosting control and aligned workforce adoption.

HCLTech positions collaboration as an experience operating model across Collab360, AEX Agentic AI Studio and WorkBlaze 2.0. The model helps German clients unify UCC events, meeting rooms, employee communications, multilingual support and XMO-led experience optimization.

Infosys advances governed AI work environments with Topaz Fabric Studio, Copilot readiness and contextual knowledge support. By using guardrails, repositories and observability, clients reduce agent sprawl while improving adoption and daily knowledge workflows in Germany.

NTT DATA links carrier-grade cloud voice, managed EX services and meeting room governance within a single collaboration operating layer. As a result, German clients gain stronger control over voice, meeting rooms, support and AI-assisted hybrid work across complex estates.

Unisys combines curated knowledge and hybrid meeting assurance to deliver practical AI-enabled collaboration support for daily work. The firm helps German clients pair persona-based adoption, XMO measurement and in-tenant guidance with smoother meeting continuity and reduced user friction.

Wipro combines Live Workspace™ Modern Work Hub, Copilot readiness, XLA-governed support and responsible AI advisory. This approach enables German clients to connect Microsoft-centered design, OCM, contextual support and employee acceptance with stronger AI governance and user control.

Cognizant (Rising Star) uses WorkNEXT and the TRUE EX strategy to connect multi-agent AI, UCC services, OCM and sentiment insight. German clients benefit from a more measurable adoption model for contextual support, platform management and flow-of-work assistance.

Unisys

Leader

"Unisys turns curated knowledge into a practical layer for AI-augmented collaboration, helping enterprises move from generic copilots to more relevant guidance, stronger adoption and better support in the flow of work."

Roman Pelzel

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. The company's collaboration and experience services in Germany focus on turning copilots, digital assistants and hybrid meetings into adopted ways of working rather than isolated tools. Unisys combines persona-based enablement, cross-functional governance, XMO-led measurement, in-tenant knowledge curation and meeting room experience management. Buyers choose Unisys for its ability to connect AI adoption, collaboration, continuity and contextual guidance across daily work, with less friction for users.

Strengths

Experience-led AI adoption: Unisys treats collaboration AI adoption as a managed experience, not a feature launch. Through persona-based enablement, role-specific learning, champions networks and cross-functional governance, the company helps clients embed copilots, contextual assistants and meeting intelligence into daily work. Continuous measurement through the XMO helps target interventions where engagement, sentiment or task success are lagging.

Hybrid meeting assurance: Unisys helps clients manage meeting rooms as part of the collaboration experience, not as isolated audio-visual assets. With real-time room dashboards, proactive organizer alerts, automated firmware and operating system updates, room-specific support and outage notification integration, the company supports more reliable hybrid meetings and better continuity for all participants.

Contextual knowledge assistance: Unisys treats knowledge as strategic infrastructure for AI-augmented collaboration rather than a static support repository. Using in-tenant knowledge curation, quality assessment and audience-specific publishing, the company helps clients deliver immediate, role-aware guidance through digital assistants and workflow experiences. This capability gives employees and agents more relevant support throughout the workflow and helps enterprises extend AI assistance beyond IT.

Caution

Unisys's experience-centric capabilities are well-recognized. To sustain its position in Germany, the company should reinforce its local story with more local proof that experience-led AI adoption, contextual knowledge assistance and hybrid meeting services consistently translate into measurable collaboration outcomes.

Smart and Sustainable Workplace Services

This report is valuable for service providers offering **smart and sustainable workplace services** in **Germany** 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

C-suite executives should read this report to understand the latest trends in smart and sustainable workplace service to assist with resource allocation and strategy development. This report will provide insights to these executives, equipping them to make strategic decisions on allocating resources effectively in line with these trends and consequently achieve their organization’s sustainability goals.

Chief sustainability officers and ESG professionals

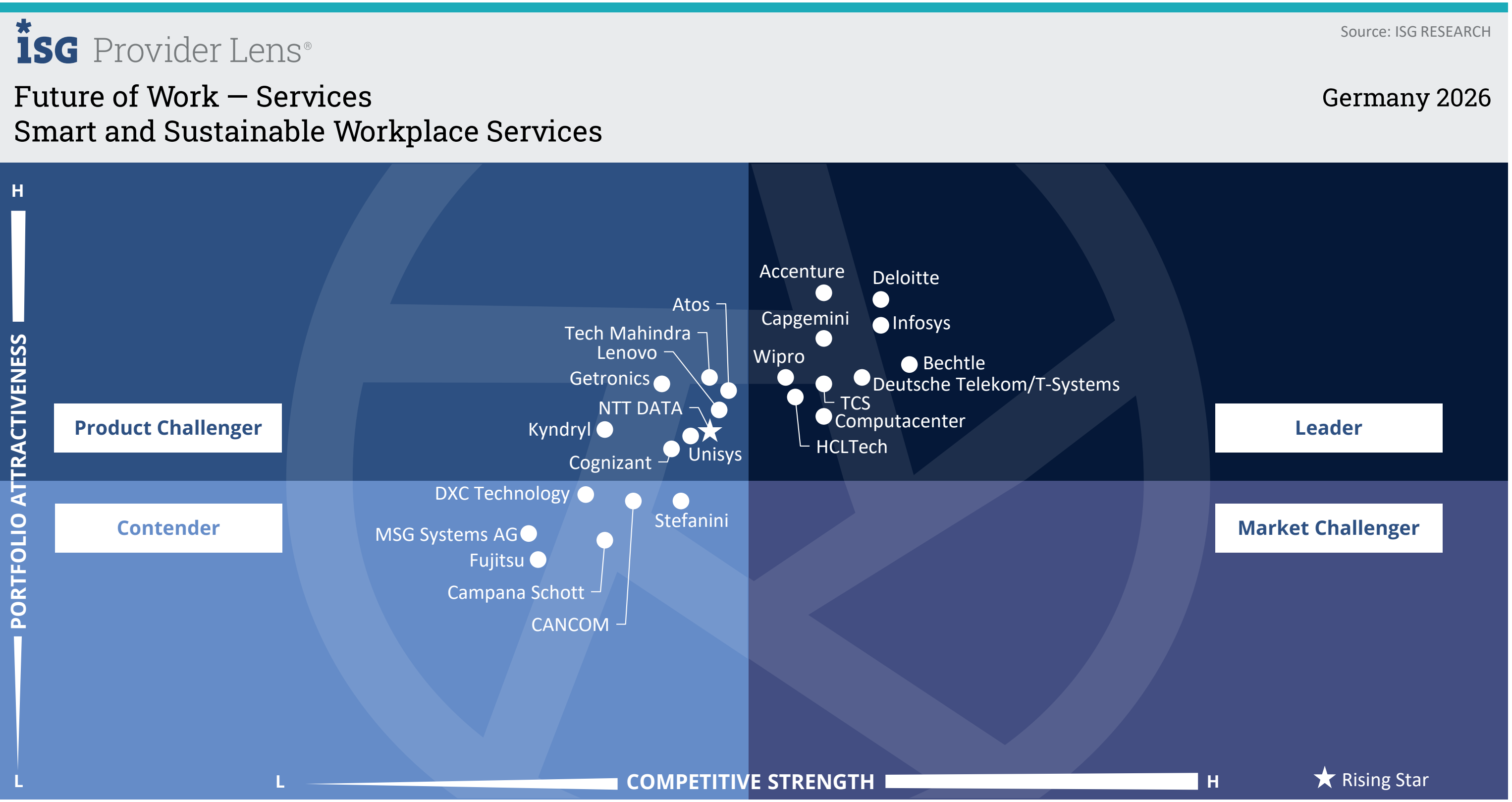
Chief sustainability officers and ESG professionals should read this report for insights on developing and implementing effective sustainability strategies. By understanding the latest advancements and best practices in smart and sustainable workplace services, they can drive their organizations toward improved ESG performance.

Strategy professionals

Strategy professionals should read this report to identify the most suitable smart and sustainable workplace service providers to develop and implement effective ESG strategies for their companies. This report will enable them to evaluate the capabilities of various providers and select those aligned with their sustainability objectives.

Consulting professionals

Consulting professionals should read this report to advise companies on sustainability strategies and performance and stay updated on the latest industry trends and developments. By leveraging the insights from this report, consultants can make recommendations and support clients in achieving their sustainability goals.



This quadrant evaluates service providers that **design, implement and manage smart physical work environments** by connecting IoT infrastructure, workplace analytics, smart meeting rooms, energy optimization and ESG-aligned reporting to **improve EX**.

Roman Pelzel

Definition

This quadrant evaluates service providers that design, implement and manage smart, technology-enabled physical workplaces that support hybrid collaboration, operational efficiency and workplace-driven sustainability. Providers help organizations integrate buildings, workplaces and collaboration spaces into intelligent environments by combining IoT-enabled infrastructure, analytics and digital platforms. They deliver experience parity for in-office and remote participants through smart meeting rooms and integrated collaboration technologies. Services optimize the physical workplace as a strategic asset, addressing space utilization, energy efficiency, environmental impact and employee well-being.

The emphasis is on creating adaptive, inclusive and responsible workplaces that align human, digital and physical needs. Sustainability is embedded as a core design and operating principle, supported by ESG-aligned workplace strategies, measurable outcomes and transparent reporting.

Eligibility Criteria

1. Design, implement and manage **smart physical workplace environments,** leveraging IoT-enabled infrastructure, sensors and analytics across spaces
2. Enable **smart workplace analytics**, including space utilization, occupancy, environmental conditions and workplace performance insights
3. Deliver **smart meeting rooms and collaborative workspaces** that **support experience parity** between in-office and remote participants through integrated collaboration and audio-visual technologies
4. Support **energy efficiency and resource optimization**, including energy management, monitoring and optimization of physical workplace assets
5. Provide **workplace-driven sustainability** services, including initiatives and solutions to reduce carbon emissions and the environmental impact of workplaces
6. Deliver **inclusive and adaptable work environments**, supporting diverse workstyles, accessibility requirements and hybrid working models
7. Integrate **physical workplace data with digital workplace platforms**, enabling unified management, visibility and optimization of human, digital and physical workplace dimensions
8. Support **ESG-aligned workplace strategies and reporting**, including metrics and data relevant to ESG requirements, with a focus on workplace utilization and impact

Observations

While many organizations still rely on conventional layouts and static utilization models, leading high-performance work environments increasingly treat the office as a network of smart places that create the right working conditions when physical presence matters.

Providers are responding by extending digital workplace services into building management systems, occupancy analytics, hot-desking, wayfinding, people-flow technologies, environmental monitoring and smart meeting rooms.

The strongest providers align IT, facilities management, corporate real estate, sustainability and workplace experience teams, because smart spaces create value only when technology, space design and human needs are designed together.

This also explains why leading providers are broadening their partner models to include workplace architecture, smart building and facilities specialists.

Leaders differentiate by integrating physical workplace data with digital workplace platforms, building systems and sustainability reporting, turning occupancy, energy, comfort, collaboration and utilization signals into operating decisions.

Leading providers combine circular lifecycle models, smart workplace intelligence, AI-assisted building optimization and human-centered design into adaptive work environments.

Progress depends on moving beyond point solutions, strengthening Germany-specific proof points and demonstrating how smart space, meeting room, energy and sustainability capabilities improve EX and operate within a single operating model.

NTT DATA is recognized as a Rising Star for connecting sustainable device lifecycle services, smart workplace intelligence and intelligent building modernization.

From the 54 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Accenture connects sensor-driven workplace intelligence, AI-enabled optimization and ESG governance to make physical workplaces measurable and sustainable. The firm helps German firms turn building data into decisions on comfort, space use, operations and reporting.

Bechtle brings together workplace, IoT and OT depth with a sovereignty-aware architecture for smart buildings, campuses and office environments. Clients benefit from stronger local control, energy insight and resilient operations across physical workplace infrastructure.

Capgemini combines sustainable IT, IoT energy optimization and ESG reporting to make workplace impact measurable across complex environments. By combining energy command centers, carbon data and ESG visibility, it helps firms turn sustainability goals into action.

Computacenter links smart space advisory, IoT-enabled space intelligence and Sentient Workspaces with circular services for the physical workplace. As a result, German enterprises can improve utilization, room experience, reuse, redeployment and responsible recovery.

Deloitte brings Corporate Sustainability Reporting Directive (CSRD) readiness, sustainability advisory, real estate strategy and smart building planning into early workplace decisions. With this advisory lens, clients gain a governed basis for footprint, energy, carbon data, partner roles and smart building priorities.

Deutsche Telekom/T-Systems turns IoT occupancy insight, adaptive building operations and energy intelligence into a basis for right-sized workplaces. Clients gain clearer decisions on hybrid readiness, predictive maintenance, energy control and physical workplace performance.

HCLTech brings GreenSight, WorkBlaze and FlexSpace 3.0 together for telemetry-led smart and sustainable workplace operations. Using energy, carbon, e-waste and device data helps German enterprises improve reporting, refresh cycles and workplace behavior.

Infosys uses IoT sensors, digital twins, edge computing and resource controls to build managed, data-rich workplace environments. In German client settings, this supports space use, environmental monitoring, hybrid planning, comfort and ESG evidence.

TCS combines managed collaboration spaces, sustainability intelligence and workplace observability to make modernization measurable. With smart rooms, energy and lifecycle practices, clients improve hybrid quality, resource efficiency and reporting discipline.

Wipro uses Smart i-Building, advanced analytics and workplace data to make physical environments more measurable. Clients gain stronger evidence for occupancy, utilization, environmental quality, resource demand and sustainability-linked decisions.

NTT DATA (Rising Star) combines circular lifecycle services, smart workplace intelligence and AI-informed building modernization. By linking devices, space data and building roadmaps, it helps German clients improve efficiency, sustainability and workplace readiness.

Appendix

The ISG Provider Lens® 2026 – Future of Work — Services study analyzes the relevant software vendors/service providers in the Gemran market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2026 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

Roman Pelzel
Assistant Director & Principal Analyst

Roman Pelzel is a recognized thought leader and trusted advisor with more than 30 years of experience shaping outcome-driven digital work and workplaces. His work centers on the principle that digital transformation succeeds when technological change aligns with how people work.

He has led and facilitated experience-centric digital workplace initiatives across industries, including cloud adoption and ITIL-based service management transformations.

As a Principal Analyst and Advisor at ISG, he focuses on human-centric digital work across the DACH region. His research covers EX, digital experience management and the evolution of digital labor and workplace ecosystems.

Roman currently serves as Lead Analyst for the ISG Provider Lens® studies covering the Salesforce Ecosystem Partners, the Oracle Cloud and Technology Ecosystem, and the Future of Work Services.

Research Analyst

Varsha Sengar
Research Specialist

Varsha Sengar is a Research Specialist at ISG and is responsible for supporting ISG Provider Lens® studies on Chemicals and Manufacturing Services and Solutions. She has also co-authored the Public Sector and Retail & CPG Services Studies. She has over 9 years of experience in technology research and consulting. At ISG, she is responsible for delivering enterprise' perspective for IPL and collaborates with analysts, advisors and enterprise clients on various research requests including primary and secondary research. She supports the lead analysts across multiple regions in the research process and authors the global summary and focal points.

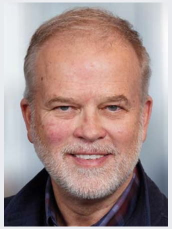
Prior to this role, she has carried out multiple ad-hoc projects and competitive benchmarking reports delivering industry level actionable insights and recommendations.

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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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