ISG Provider Lens®

Future of Work — Services

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

Customized report courtesy of:

unisys

QUADRANT REPORT | JULY 2026 | U.S.

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Report Author: Bruce Guptill

Workplaces are evolving into orchestrated, AI-driven ecosystems focused on business outcomes

The emergence of an orchestrated, AI-driven workplace

This Provider Lens® study examines how digital workplace services are shifting from hybrid workplace enablement toward orchestrated, AI-driven ecosystems. It evaluates how providers integrate technology, operations, governance and experience to deliver measurable productivity and business outcomes. It also assesses how effectively providers align strategy and execution across increasingly complex enterprise IT environments.

Market context

From hybrid enablement to integrated workplace ecosystems

The digital workplace services market is shaped by a convergence of structural forces that are redefining both enterprise priorities and provider strategies. A key driver among these is the rapid evolution of AI, which has moved beyond isolated automation use cases into a pervasive, embedded capability. AI is being increasingly integrated into workflows, collaboration environments and decision processes to augment human judgment while automating routine and repetitive tasks.

This shift is significantly changing the nature of work. Rather than functioning as discrete tools, AI capabilities are becoming part of the *flow of work*, influencing how tasks are initiated, executed and completed. In doing so, it is driving a transition from *process-centric work models to intelligence-driven work models,* where decision speed, contextual awareness and continuous optimization play a central role.

Hybrid work has also evolved from a logistical concern into a multi-dimensional operating model. Once framed primarily as a question of location (e.g., office versus remote), it now encompasses a broader interplay between digital collaboration platforms, physical environments and human behaviors. Organizations must ensure experience

From **hybrid tools** to **AI-driven orchestration of work, people and experience.**

consistency across these overlapping domains while accommodating diverse workstyles and organizational contexts. This has elevated orchestration as the defining challenge, and success depends less on the presence of individual capabilities and more on their ability to function cohesively.

Economic pressures further add to the momentum of this shift. Enterprises are operating in an environment characterized by cost constraints, ongoing talent shortages and increasing expectations for productivity gains. These conditions are accelerating the demand for *automation, simplification and scalability*, prompting them to invest in capabilities that reduce operational friction and improve predictability. Rather than incremental improvements, enterprises are seeking step changes in efficiency, often enabled through AI-driven optimization and platform consolidation.

Additionally, experience and sustainability have emerged as critical factors in workplace strategy. Digital employee experience (DEX) is now closely linked to productivity, retention and overall organizational performance. At the same time, sustainability considerations, ranging from energy consumption to environmental impact, are being integrated into workplace design and operations. Together, these trends reflect a broader shift in which the workplace is viewed not merely as an infrastructure but a strategic asset that directly influences business outcomes.

Enterprise priorities

From capability deployment to measurable outcomes

As the market shifts, enterprise expectations are becoming increasingly outcome-oriented, with a growing emphasis on measurable improvements in workforce effectiveness rather than the successful implementation of technology alone. This shift is redefining how organizations measure success in workplace transformation.

A central priority is aligning strategy and execution. Many organizations have struggled to translate workplace vision into operational realities, creating gaps between strategic objectives and outcomes. As a result, there is an increasing demand for providers that can bridge this gap by delivering sustained improvements in productivity and experience. This requires not only technical capabilities but also robust governance frameworks, change management expertise and the ability to coordinate stakeholders across organizational silos.

AI readiness has emerged as another critical focus area. Enterprises recognize that deploying AI technologies does not automatically translate into value but also depends on other factors, including workforce skills, organizational trust, ethical governance and clear alignment between AI capabilities and business roles. This realization has elevated the importance of services that address not only technical deployment but also *workforce enablement, adoption and responsible AI practices*.

Performance measurement is also undergoing a significant transformation. Traditional metrics, such as SLAs based on uptime or response times, are increasingly supplemented (or replaced) by outcome-based frameworks. These models emphasize indicators such as productivity, employee sentiment and task success. By drawing on the lived experience of employees, rather than the performance of systems, organizations are creating stronger links between workplace investments and business outcomes.

Additionally, enterprises are seeking greater integration across organizational domains. Workplace transformation touches IT systems, HR policies, physical spaces and business processes, making cross-functional alignment essential. However, this integration introduces complexity, particularly in large organizations with fragmented governance structures. To address this challenge, many enterprises are pursuing simplification strategies, including vendor consolidation, platform standardization and tool rationalization. These efforts aim to create more coherent environments that can be managed and optimized more effectively.

Provider dynamics

Shift toward orchestrated, outcome-led services

Service providers are adapting to these evolving enterprise demands by reconfiguring their offerings and delivery models. The most significant change is the move toward integrated, end-to-end service provision, in which consulting, implementation and operations are combined into a continuous delivery model.

This *consult-to-run* approach reflects a growing expectation for accountability across the workplace transformation lifecycle. Enterprises increasingly expect providers not only to define strategies but also to deliver and sustain measurable outcomes over time. As a result, traditional boundaries between advisory and operational roles have blurred, creating a more unified market in which differentiation depends on the ability to execute as well as to design.

AI is central to this transformation. Providers are embedding AI across service portfolios, using it to enhance automation, improve decision-making and optimize operations. In workplace operations, it is driving the development of predictive and self-healing systems that can identify and resolve issues before they impact users. In collaboration environments, AI augments meetings, streamlines communication and surfaces relevant information in real time. Together, capabilities are reshaping service delivery, enabling providers to move from reactive support models to proactive and adaptive systems.

Experience has also become a central organizing principle in provider delivery models. The integration of DEX platforms, analytics and sentiment data allows providers to gain continuous insight into how employees interact with workplace technologies. This data is used to inform ongoing improvements, with governance frameworks such as XLAs linking service delivery directly to user outcomes. In effect, providers are shifting from managing systems to managing experiences, aligning their services more closely with business priorities.

Another important development is the rise of platformization and ecosystem orchestration. Providers are investing in proprietary platforms that support automation, analytics and integration across workplace environments. They are also expanding partnerships with hyperscalers, software vendors and hardware providers to build comprehensive ecosystems. These ecosystems allow organizations to combine diverse technologies into cohesive solutions, reducing integration complexity for clients while accelerating innovation.

Operational capabilities are becoming increasingly industrialized, particularly in areas such as endpoint management, service desk operations and device lifecycle management. Automation, analytics and AI are being used to standardize processes, improve efficiency and enable continuous optimization. This industrialization is transforming workplace services into scalable, data-driven systems that operate with greater consistency and predictability.

Providers are also extending their scope into adjacent domains, including AI-augmented collaboration and smart workplace services. These areas expand the definition of the workplace beyond digital platforms to include physical environments and their integration with digital systems. This broader scope reinforces the importance of holistic orchestration, requiring providers to coordinate multiple workplace dimensions to deliver cohesive experiences.

Outlook

The evolution toward AI-native, experience-driven workplaces

Over the next several years, the digital workplace services market is expected to continue evolving toward more integrated AI-native workplace models. AI will become an increasingly pervasive element of everyday work, with copilots, assistants and autonomous agents embedded in workflows across the enterprise. The focus will shift from introducing AI capabilities to managing and scaling them effectively, ensuring that they deliver consistent value while maintaining trust and compliance.

Outcome-based accountability will become increasingly embedded in provider engagements. Enterprises will expect measurable improvements in productivity, experience and resilience, reinforcing the transition from technology implementation to business impact. This will place greater pressure on providers to demonstrate service value through data and analytics that quantify outcomes and continuously optimize performance.

Experience and adoption will remain critical differentiators. As workplace environments become more complex, the ability to drive sustained behavioral change will be essential. Providers that can align technology with such human factors as skills, culture and trust will be better positioned to deliver long-term value. This will require a continued emphasis on change management, enablement and workforce engagement.

The convergence of workplace domains is likely to intensify. Boundaries between IT services, HR functions and facilities management will continue to blur, leading to more integrated approaches that address the full spectrum of workplace needs. This convergence will create opportunities for providers that can deliver cross-domain solutions, but it will also increase the complexity of both demand and supply.

Sustainability and responsible innovation will play an increasingly important role in workplace strategies. Enterprises will expect workplace initiatives to support broader ESG objectives, including energy efficiency, reduced environmental impact and ethical use of AI. These considerations will become embedded in both workplace design and operations, influencing technology choices, service delivery models and governance frameworks.

The digital workplace services market is entering a phase defined less by technological experimentation and more by operational maturity and strategic alignment. The primary challenge is no longer enabling hybrid work but orchestrating a complex and evolving ecosystem that integrates people, technologies and workplace environments to deliver measurable business value.

Within this context, the role of service providers is evolving. Organizations are no longer seeking partners that can deliver individual capabilities but those that can *continuously manage and optimize the workplace as a dynamic system.* This requires a combination of strategic insight, technological capabilities and operational excellence, supported by a deep understanding of how work is performed and experienced.

As enterprises navigate ongoing economic, technological and workforce changes, the ability to create and sustain intelligent, adaptive workplaces will become an important source of competitive advantage. Providers that can translate this vision into practical, scalable solutions, *while maintaining a focus on outcomes and experience,* will define the next phase of the market.

Enterprises are shifting from deploying technology to delivering measurable outcomes, where AI-enabled orchestration, workforce readiness and experience-led performance determine productivity, adoption and long-term business value.

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	Leader	Not In	Leader	Leader
Altimetrik	Contender	Contender	Not In	Not In	Not In
Atos	Product Challenger	Contender	Not In	Not In	Product Challenger
Avaso Technology	Not In	Not In	Contender	Not In	Not In
BCG	Product Challenger	Not In	Not In	Not In	Not In
Bell Techlogix	Contender	Contender	Leader	Market Challenger	Not In
Birlasoft	Not In	Contender	Product Challenger	Not In	Not In
Capgemini	Leader	Leader	Not In	Product Challenger	Leader
CDW	Not In	Not In	Contender	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
CGI	Not In	Product Challenger	Not In	Contender	Market Challenger
Coforge	Not In	Contender	Product Challenger	Not In	Not In
Cognizant	Leader	Leader	Product Challenger	Leader	Leader
CompuCom	Not In	Product Challenger	Leader	Contender	Not In
Computacenter	Rising Star ★	Rising Star ★	Not In	Contender	Product Challenger
Deloitte	Leader	Not In	Not In	Leader	Market Challenger
Dexian	Not In	Not In	Contender	Not In	Not In
Digital Workplace Group(DWG)	Product Challenger	Not In	Not In	Not In	Not In
DXC Technology	Market Challenger	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
EY	Market Challenger	Not In	Not In	Not In	Not In
Fujitsu	Market Challenger	Not In	Not In	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Not In	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Contender	Contender
Infosys	Leader	Leader	Not In	Leader	Leader
Insight	Not In	Not In	Product Challenger	Not In	Not In
ITC Infotech	Not In	Contender	Product Challenger	Not In	Contender
KPMG	Market Challenger	Not In	Not In	Product Challenger	Not In
Kyndryl	Leader	Leader	Rising Star ★	Market Challenger	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
Lenovo	Contender	Product Challenger	Leader	Contender	Product Challenger
Long View Systems	Not In	Not In	Contender	Not In	Not In
LTM	Contender	Product Challenger	Leader	Contender	Product Challenger
Microland	Not In	Contender	Contender	Not In	Not In
Milestone Technologies	Not In	Not In	Contender	Not In	Not In
Movate	Contender	Contender	Product Challenger	Contender	Not In
Mphasis	Contender	Product Challenger	Not In	Contender	Product Challenger
NTT DATA	Leader	Leader	Not In	Leader	Rising Star ★
Pomeroy	Product Challenger	Contender	Leader	Contender	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
PwC	Leader	Not In	Not In	Market Challenger	Not In
Red River	Contender	Contender	Leader	Contender	Contender
Ricoh	Not In	Not In	Market Challenger	Not In	Contender
SHI	Not In	Not In	Product Challenger	Not In	Not In
Softchoice	Not In	Not In	Product Challenger	Not In	Not In
SoftwareOne	Not In	Not In	Contender	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Leader	Contender	Not In
TCS	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Rising Star ★	Product Challenger	Leader	Product Challenger	Product Challenger

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
TEKsystems	Not In	Contender	Contender	Not In	Not In
Unisys	Leader	Leader	Product Challenger	Product Challenger	Leader
UST	Not In	Not In	Product Challenger	Product Challenger	Not In
Wipro	Leader	Leader	Not In	Leader	Leader
WWT	Not In	Not In	Market Challenger	Not In	Not In
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar Technologies	Contender	Product Challenger	Leader	Contender	Contender
Zones	Contender	Product Challenger	Product Challenger	Not In	Not In

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

- **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/ solutions: 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 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 (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.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief experience officers

Should read this report to identify leading providers that can help them better prepare workforces for changing business dynamics and consequent required models. This report will provide insights into how providers can support workforce readiness and adaptability, ensuring they can handle new challenges and growth opportunities.

Technology professionals

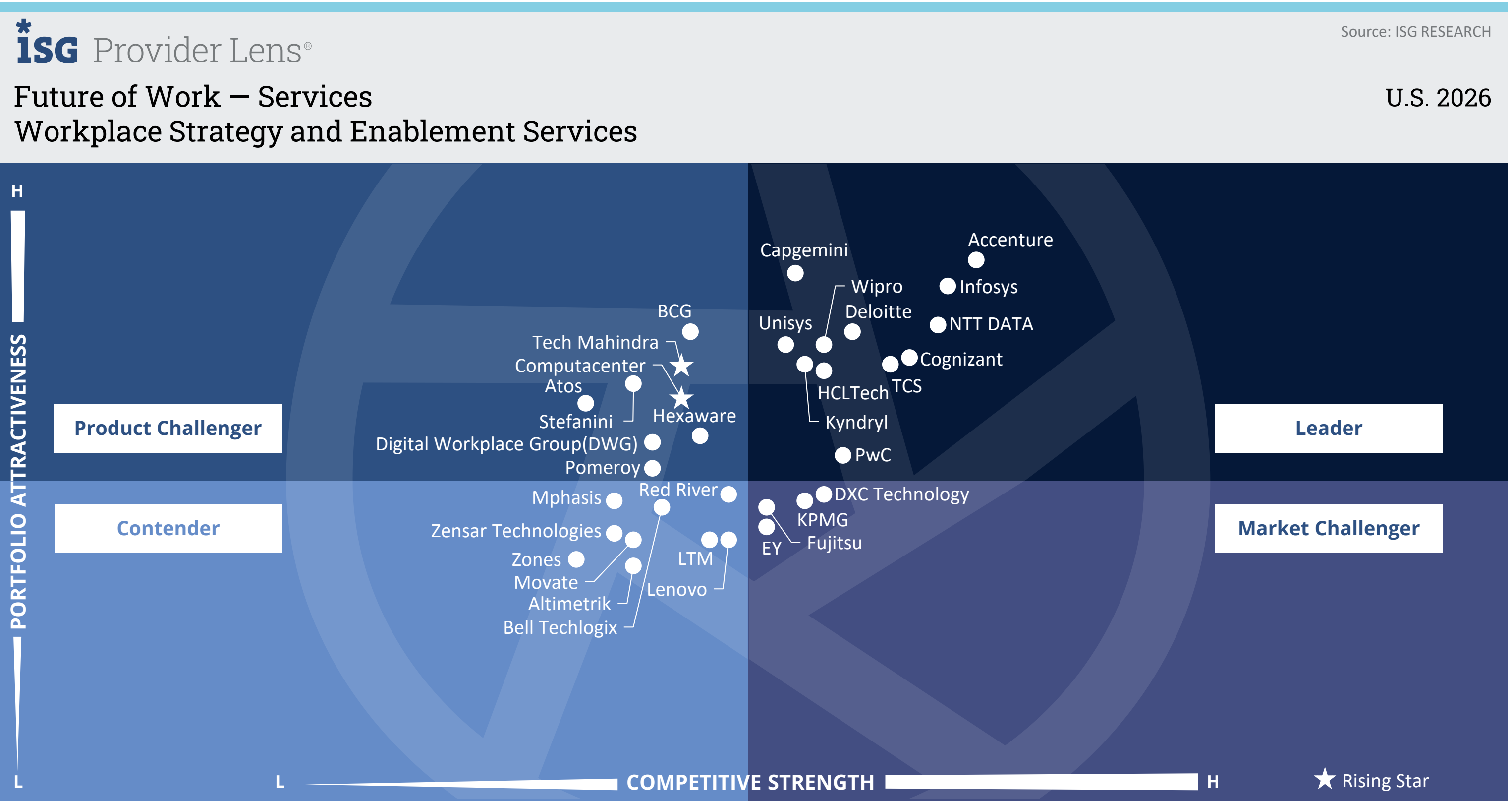
Including workplace technology leaders, should read this report to understand provider positioning and capabilities to help them enhance services for employees. By gaining insights into the provider services, technology professionals can make informed decisions about adopting and implementing tools and systems that improve EX and drive productivity.

Strategy professionals

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

Consultant professionals

Should read this report to offer the right advice to companies on workplace strategies to enhance performance. This report will help them stay abreast of the current trends and latest industry developments, enabling them to make informed recommendations and support their clients.



This quadrant assesses providers' ability to **define and operationalize** a **workplace vision integrating human, digital and physical dimensions**, with emphasis on **responsible AI, workforce readiness and strategy-to-execution outcomes**.

Bruce Guptill

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 to translate strategy into execution, addressing procurement, adoption readiness and experience 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

The U.S. digital workplace strategy and enablement services market has progressed beyond conceptual design toward embedded execution practices in terms of enterprise operating models. Organizations seek more than future-of-work visions and prioritize translating strategies into practical, measurable workforce outcomes that integrate human, digital and physical workplace dimensions.

Over the past year, enterprise priorities have shifted toward improving AI readiness and responsible AI adoption, particularly aligning generative and agentic AI capabilities with roles, workflows and governance frameworks. This initiative has increased the demand for services that combine strategy, workforce enablement and change management into cohesive transformation programs. Organizations are also increasingly relying on experience-based measurement models, including XLAs and experience management functions, to ensure workplace investments deliver demonstrable value.

Economic pressures and talent constraints have further accelerated the demand for enablement services that reduce friction, accelerate adoption and shorten time-to-value. In response, the market has seen tighter integration of advisory, ecosystem coordination and execution capabilities. M&A and alliances have primarily targeted AI, analytics and change enablement capabilities, reflecting a shift toward scalable and governed transformation.

Looking into 2027 and beyond, enterprises will increasingly expect strategy providers to own outcomes as well as vision, while providers will differentiate through their ability to operationalize AI-enabled workplaces with measurable business impact.

From the 53 companies assessed for this study, 33 qualified for this quadrant, with 12 being Leaders and two Rising Stars.

accenture

Accenture has advanced beyond advisory to apply agent-based AI, experience-driven design and workforce reskilling to industrialize digital workplace change across complex enterprise environments.

Capgemini

Capgemini refined its workplace portfolio by translating AI concepts into deployable services and partner-built offerings that shorten the path from experimentation to controlled, enterprise-wide adoption.

cognizant

Cognizant continues to advance the use of WorkNEXT as a platform centric workplace model that restructures digital support around insight based optimization rather than transactional delivery.

Deloitte.

Deloitte has deepened its portfolio by pairing agentic AI execution with human capital transformation and ecosystem integration, enabling enterprises to turn AI goals into governed, repeatable productivity improvements across hybrid work environments.

HCLTech

HCLTech expanded its competitive edge through FLUID AI Workplace orchestration, AI-driven experience operations and enriched device ecosystems, allowing enterprises to continuously adapt workplace capabilities to dynamic productivity, cost and experience demands.

Infosys continues to evolve its Topaz, NAVI, Orbit, Infosys Workplace Suite and DWX Command Center platforms and tools into adaptive services combinations that integrate technology, operations, governance and UX.

Kyndryl continues to strengthen its workplace proposition by combining agentic AI, the Kyndryl Bridge platform and consulting-led change, helping enterprises move beyond reactive support toward resilient, experience-centric workplace operations.

NTT DATA advanced its capabilities by integrating experience enablement with network and security services, supporting enterprises in delivering consistent, compliant and resilient digital workplace experiences across complex, distributed environments.

PwC embeds responsible GenAI, workforce transformation and cross-functional orchestration into enablement programs, helping enterprises convert collaboration and AI investments into lasting productivity and operational resilience.

TCS has extended its Cognix platform into workplace enablement, blending AI orchestration, experience analytics and HR alignment to help enterprises scale GenAI adoption while delivering measurable improvements in productivity and workforce outcomes.

Unisys reinforced its workplace portfolio with a stronger focus on security, experience analytics and infrastructure alignment, enabling organizations in regulated industries and the public sector to modernize hybrid work without compromising trust or operational continuity.

Wipro is embedding AI insights and service integration capabilities to reposition workplace services around sustained performance improvement rather than device-level support.

Computacenter

Computacenter (Rising Star) expanded U.S. consulting depth through acquisitions, strengthening digital engineering and professional services and advancing integrated, strategy-to-execution workplace transformation.

Tech Mahindra (Rising Star) positioning through AI-led workplace strategy, anchored in FLEX Digital Workplace Services and XLA-driven execution for scalable, experience-centric transformation with strong automation, governance and measurable outcomes.

Unisys

Leader

"Unisys holds the Leader status for its security-first workplace strategy and enablement capabilities, enabling hybrid work modernization without compromising regulatory rigor or service stability."

Bruce Guptill

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. Unisys delivers a digital workplace strategy with a focus on security-aligned hybrid work, experience stability and operational consistency. Its U.S. market positioning emphasizes secure workplace design, experience analytics and modernization aligned with compliance, regulatory and mission requirements, particularly for the public sector and regulated enterprises seeking to modernize hybrid work without increasing operational risk.

Strengths

Experience-driven productivity enablement: Unisys incorporates experience observation, automation and analytics into day to day workplace operations. These capabilities surface performance degradation early, limit user disruption and support steadier workforce effectiveness, shifting services away from ticket based response toward sustained operational improvement.

Integrated modernization across environments: Workplace initiatives are coordinated with infrastructure renewal and service model change. This coordination simplifies management structures, strengthens stability and supports workplace evolution alongside endpoint, network and support modernization efforts.

Industry-focused workplace enablement: Targeted investments support the public sector and regulated organizations with workplace solutions aligning with compliance, security and workforce requirements. This approach ensures continuity of mission-critical operations and transformation.

Security-led hybrid workplace strategy: Unisys has evolved its digital workplace approach by embedding security architecture, identity controls and zero trust design directly into hybrid work enablement. This foundation allows organizations to modernize distributed work models while maintaining rigorous oversight of access, data handling and regulatory obligations across complex environments.

Caution

Unisys' strong emphasis on security and infrastructure alignment may require buyers seeking rapid experience led innovation to explicitly balance controls with flexibility, ensuring workplace programs remain agile and adoption focused rather than overly constrained by governance requirements.

Digital Workplace Operations and Support Services – Large Account

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

Workplace technology leaders

Including CIOs and heads of workplace services, should read this report to understand how service providers deliver scalable, resilient and experience-centric workplace operations. The report will help 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

Should read this report to assess providers' capabilities in managing routine digital workplace operations, including service desk, endpoint support and operational governance. The report highlights the approaches to proactive monitoring, incident resolution 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

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 tools and support required for effective and productive work.

Security and risk management professionals

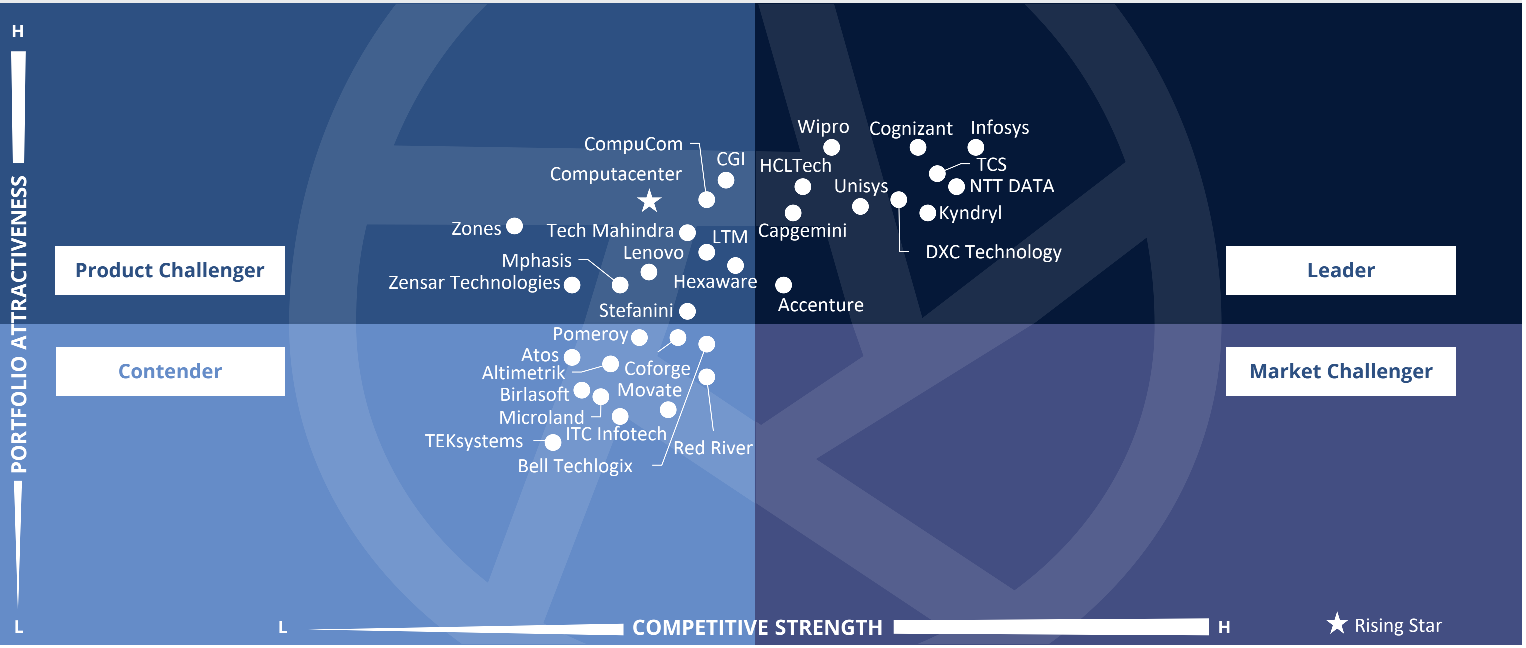
Should read this report to evaluate how providers of workplace operations embed security, compliance and risk controls into end-user support and device management services. The report outlines the operational practices that help balance secure access with usability, highlighting how providers support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

Source: ISG RESEARCH

ISG Provider Lens®

Future of Work – Services
Digital Workplace Operations and Support Services – Large Account

U.S. 2026



This quadrant assesses providers that assume **end-to-end responsibility for digital workplace build-and-run transformation**, emphasizing AI-powered, experience-led operations, DEX/XLA-driven delivery **and scalable, resilient support for large enterprises**.

Bruce Guptill

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**
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

The U.S. digital workplace operations and support services market is evolving into a model centered on AI-enabled, experience-driven operational accountability. Enterprises are moving beyond fragmented support structures and engaging with providers that deliver integrated, end-to-end workplace services, encompassing build, run and continuous optimization across complex environments.

Relative to the previous year, buying behavior has shifted away from cost efficiency and tool deployment toward consistent productivity, EX and operational resilience. Organizations are increasingly adopting data-driven operating models that leverage DEX telemetry, automation and advanced analytics to anticipate issues, reduce disruption and improve service predictability. This transition is supported by the growing adoption of XLA-based governance, linking service performance to workforce outcomes rather than traditional SLA metrics.

The past year also saw a strong focus on standardization and simplification, driven by persistent skills shortages and the introduction of AI PCs, copilots and agentic automation into the workplace. Providers responded through incremental M&A and capability expansion, particularly in automation, analytics and experience management platforms.

Looking ahead to 2027, enterprises will increasingly expect workplace operations to function as predictive and self-healing systems. Providers will compete on their ability to deliver scalable, AI-augmented services with measurable experience and productivity outcomes.

From the 53 companies assessed for this study, 33 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

Accenture transforms complex digital workplaces through large-scale automation, industrialized transition-to-run models and metrics-driven governance, enabling enterprises to stabilize operations, manage complexity and continuously improve performance across global environments.

Capgemini supports large enterprises by combining intelligent run services, tightly coordinated device lifecycles and experience-aligned service governance, helping organizations achieve predictable workplace performance and consistent support across distributed global environments.

Cognizant positions strongly by turning workplace platforms into standardized operational services, using analytics-driven automation and platform-centric delivery to reduce fragmentation and improve consistency across large, globally distributed support estates.

DXC Technology maintains leadership through disciplined transition execution, structured operational platforms and embedded automation. It supports stable, well-governed digital workplace operations for enterprises managing hybrid, legacy and multi-vendor environments.

HCLTech differentiates its workplace operations through intelligent orchestration, predictive issue remediation and coordinated endpoint lifecycle services, enabling cost-efficient, scalable and resilient support for large enterprises with distributed workforces.

Infosys advances digital workplace operations using predictive monitoring, unified operational visibility and lifecycle-aligned support models. It helps enterprises shift toward proactive management and consistent service governance across complex global environments.

Kyndryl operates large digital workplaces using insight-driven governance, integrated operational platforms and advanced automation, supporting enterprises to transition from reactive support models to resilient and performance-oriented operations.

NTT DATA strengthens its position by aligning workplace operations with connectivity, security and device lifecycle services, enabling consistent service quality and operational stability across highly distributed and infrastructure-intensive enterprise environments.

TCS sustains its leadership position by scaling intelligent workplace run services, global device lifecycle operations and industry-aligned delivery models. It enables resilient workplace environments with measurable improvements in productivity and operational efficiency.

Unisys emphasizes outcome-based workplace operations, advanced support automation and flexible device consumption models, enabling secure, well-governed digital workplace environments that balance operational discipline with workforce needs.

Wipro positions workplace operations around data-driven insights, outcome-focused measurement and integrated endpoint services, helping large enterprises run scalable, standardized workplace environments aligned with productivity and service consistency goals.

Computacenter

Computacenter (Rising Star) offers operational depth, disciplined transition-to-run execution and lifecycle-centric endpoint services, supporting large enterprises that prioritize reliability, consistency and execution rigor across complex, distributed workplace environments.

Leader

"Unisys' approach combines XLA-led operations, AI-enabled support automation and flexible device lifecycle models to help large enterprises run secure, experience-centric digital workplaces with measurable outcomes and operational resilience."

Bruce Guptill

Unisys

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. Unisys is recognized for operating secure, well-governed digital workplace environments, particularly where compliance, stability and service consistency are critical enterprise requirements across diverse industry sectors. In the U.S., Unisys' workplace operations services find relevance in regulated and mission-sensitive environments, aligning support models closely with national security, governance and risk management priorities.

Strengths

XLA-driven workplace operations: Unisys offers advanced XLA-led workplace operations through its XLA 4.0 and Experience Management Office model. It focuses on outcome-based service delivery and proactive remediation, clearly linking workplace support performance, productivity and user sentiment.

AI-enabled support automation: Unisys' expanded AI-assisted service desk capabilities and support automation through the Service Experience Accelerator and telemetry-driven analytics. This approach reduces incident resolution times, improves first-contact resolution and enables enterprises to shift from reactive support to predictive, experience-centric operations.

Flexible device subscription: Unisys enhanced its Device Subscription Service to offer expanded lifecycle, financing and refresh flexibility across global environments. These enhancements support more predictable costs, simplified asset management, enhanced device availability, hybrid workforce support and sustainability-aligned refresh strategies.

Secure global run delivery: Unisys is scaling its global field services, virtual desktop infrastructure (VDI) and secure endpoint operations with a focus on regulated and mission-critical environments. This approach meets the requirements for resilient workplace operations, consistent security controls and reliable support across geographically distributed users.

Caution

Unisys' differentiated, experience-led workplace operations model may require organizations to align on metrics and operating assumptions early. Buyers should ensure organizational readiness for XLA-based governance to fully realize value beyond traditional SLA-focused support models.

Digital Workplace Operations and Support Services – Midmarket

Who Should Read This Section

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

Workplace technology leaders

Including CIOs and heads of workplace services, should read this report to understand how service providers deliver scalable, resilient and experience-centric workplace operations. The report will help 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

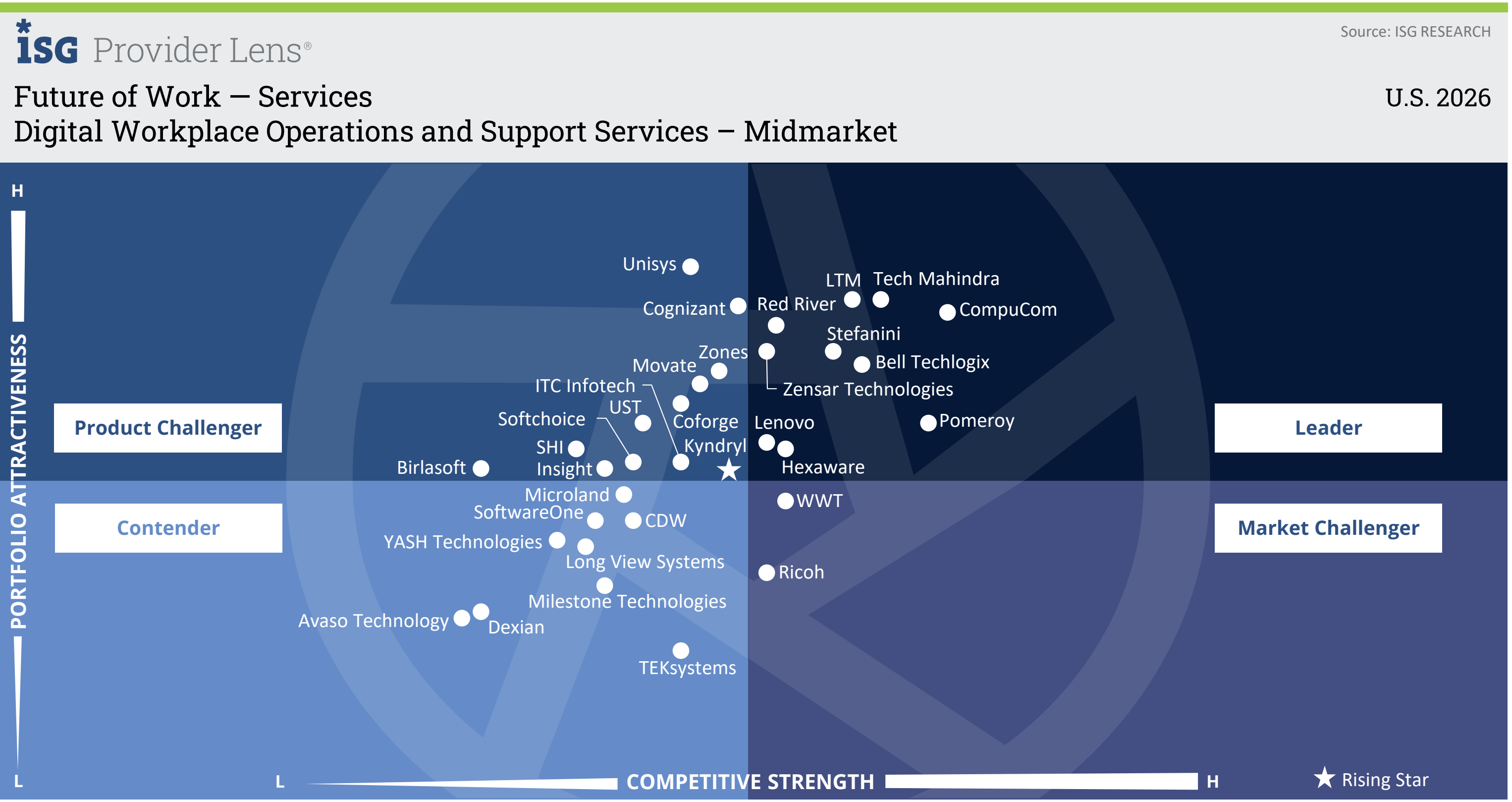
Should read this report to assess providers' capabilities in managing routine digital workplace operations, including service desk, endpoint support and operational governance. The report highlights the approaches to proactive monitoring, incident resolution, and continuous improvement, enabling IT operations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

Digital workplace and EX professionals

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 tools and support required for effective and productive work.

Security and risk management professionals

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



This quadrant assesses providers serving **midsize enterprises**, focusing on **end-to-end digital workplace operations**, **experience-led delivery** and the **local presence and flexibility** these clients require.

Bruce Guptill

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**
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

The demand for digital workplace operations and support services in the U.S. midmarket continues to mature, increasingly aligning with enterprise trends. However, enterprises maintain distinct priorities, typically emphasizing localized resources.

Midmarket enterprises have moved beyond ad hoc hybrid support, seeking reliable, streamlined operating models that deliver consistent day-to-day workplace performance for distributed and frontline-heavy workforces.

Purchasing decisions have shifted from basic cost reduction toward improved productivity, experience stability and operational resilience. Unlike large enterprises, midmarket organizations emphasize simplicity, speed and reduced delivery risk, preferring standardized, right-sized offerings that consolidate service desk, endpoint and field services with clearly defined provider accountability.

Automation and DEX capabilities gained traction during this period, with pragmatic adoption focused on proven use cases such as proactive remediation, ticket deflection and experience insights. Interest in XLA-based models is growing, typically as an enhancement rather than a full contractual redesign. M&A activities align with enterprise trends, with a stronger focus on regional delivery capability and operational maturity.

By the end of 2027, midmarket organizations are expected to adopt more standardized, outcome-based workplace services, while providers will differentiate through simplicity, speed of deployment and the ability to deliver consistent, predictable outcomes with minimal complexity.

From the 53 companies assessed for this study, 33 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Bell Techlogix

Bell Techlogix delivers modular, automation-focused workplace operations designed for midmarket scale, combining disciplined transitions, pragmatic experience prioritization and partner ecosystems to deliver predictable outcomes without enterprise complexity.

compucom

CompuCom strengthens its leadership position through deep commitment to lifecycle observability, proactive experience monitoring and automation-led support models that transform workplace operations from reactive service delivery into measurable productivity enablement.

HEXAWARE

Hexaware advances autonomous digital workplace operations through proprietary platforms that blend intelligent remediation, experience-aware prioritization and cost-efficient midmarket packaging to deliver scalable, self-optimizing support environments.

Lenovo

Lenovo differentiates with subscription-based workplace operations that unify device lifecycle services, persona-aware support and ecosystem integration, enabling cost control, operational consistency and readiness for next-generation endpoint computing.

LTM

LTM sustains momentum by embedding intelligent automation and predictive analytics into modular workplace operations, enabling lean IT teams to improve service reliability, accelerate remediation and enhance experience-linked performance.

Pomeroy

Pomeroy elevates midmarket workplace operations by combining zero-touch automation, immersive experience centers and expanding global delivery to shift support from ticket resolution to proactive, outcomes-driven performance.

Red River

Red River scales secure hybrid workplace operations anchored in Azure Virtual Desktop, zero trust collaboration and robust lifecycle services, enabling rapid deployment, resilience and compliance across distributed midmarket environments.

Stefanini combines cognitive service platforms with modular architectures that embed experience signals into daily operations, enabling midmarket enterprises to scale automation incrementally while maintaining service quality and regional responsiveness.

Tech Mahindra enhances localized workplace operations with intelligent platforms and industry-aligned delivery models, supported by a strong ecosystem for scale. The result is operational reliability that translates directly into workforce productivity gains and consistent digital adoption.

Zensar Technologies accelerates onboarding, improves operational efficiency and maintains workforce continuity through automation-led endpoint services, industry-specific delivery models and regional support.

Kyndryl (Rising Star) emerges through focused investments in experience-oriented governance, secure hybrid workplace capabilities and cloud-aligned platforms that strengthen operational predictability and outcome-based service delivery for midmarket clients.

AI-augmented Collaboration and Experience Services

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

Workplace technology leaders

Including CIOs and heads of digital workplace and collaboration platforms, should read this report to learn how service providers apply AI to enhance collaboration ecosystems and EX. The report will help 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

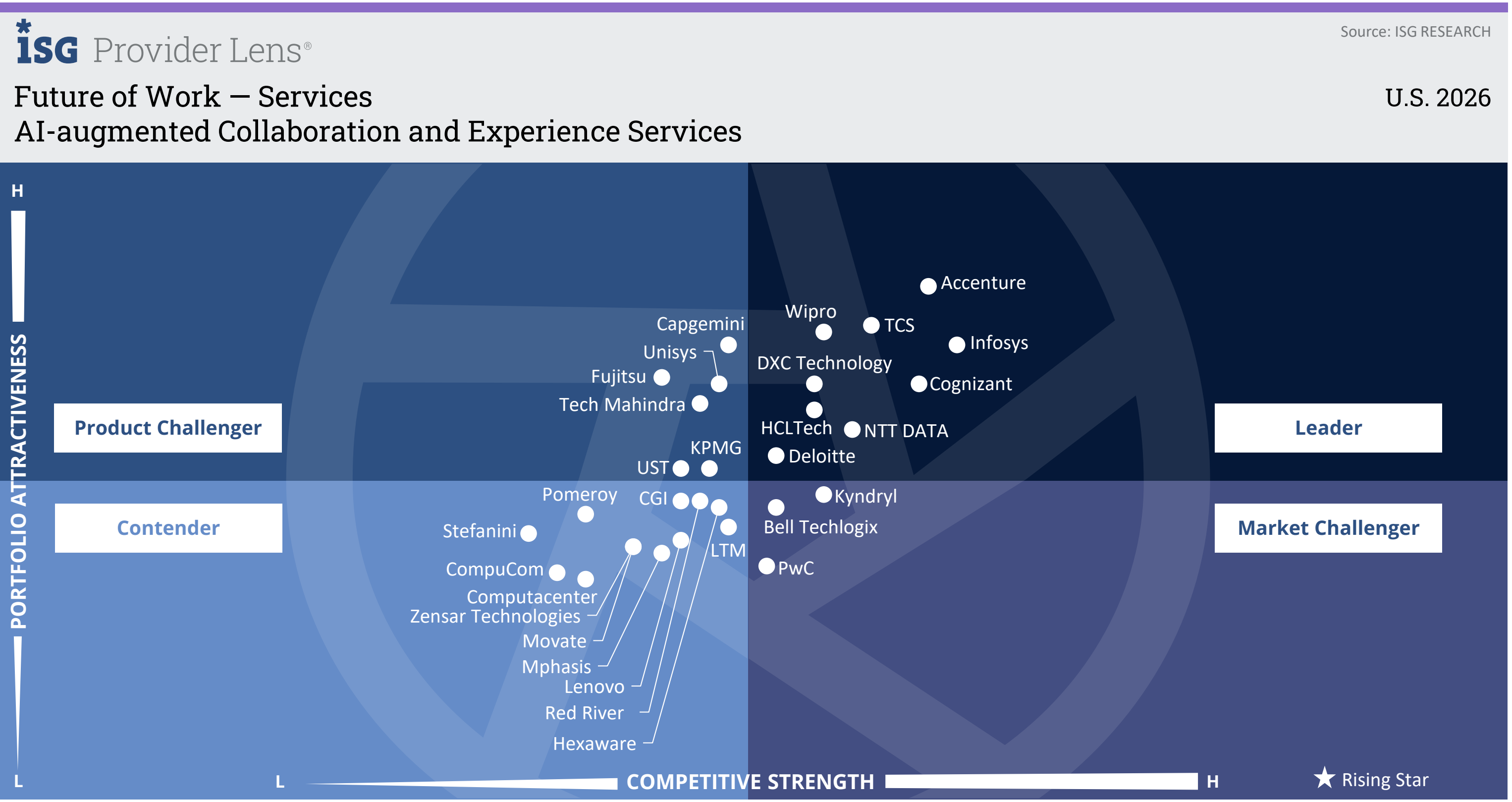
Should read this report to assess how AI-augmented collaboration and experience services support enterprise-wide digital and EX transformation initiatives. The report provides insights into how providers use AI to optimize workflows, personalize interactions and reduce friction across collaboration tools,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

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 highlights 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

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



Type This quadrant assesses providers that design, deploy and optimize technology and professional **services enhanced with AI** adaptations to **improve collaboration and communication** while augmenting and improving users' **digital workplace experiences**.

Bruce Guptill

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

The U.S. market for AI-augmented collaboration and experience management services has reached a critical turning point as organizations transition from experimentation to structured, AI-enabled collaboration operating models. Collaboration platforms are now widely regarded as the central interface for work, shaping how employees communicate, create and make decisions across digital environments.

In contrast to the previous year's focus on deploying copilots and meeting intelligence, enterprises are now prioritizing sustained adoption, experience consistency and measurable business value. The integration of AI across meetings, messaging and workflow processes has introduced new challenges related to governance, trust and human–AI coordination. This has driven demand for integrated services that combine experience measurement, change enablement and policy-aligned AI orchestration.

Experience management frameworks, including XLAs and DEX analytics, have become core components of service delivery rather than supplementary tools. Reflecting this evolution, M&A activities focus on experience analytics, workflow intelligence and orchestration capabilities rather than foundational collaboration platforms.

By the end of 2027, enterprises will focus on stabilizing AI-augmented collaboration as a core operating capability. They will favor providers that can balance innovation with governance, optimize experiences at scale and demonstrate sustained workforce adoption and value realization.

From the 53 companies assessed for this study, 30 qualified for this quadrant, with nine being Leaders.

accenture

Accenture has broadly embedded Copilot and agentic AI to advance collaboration and experience management across workflows. This has helped improve clients' productivity, governance, and measurable outcomes through large-scale, integrated digital workplace programs.

cognizant

Cognizant has evolved its WorkNEXT platform to unify collaboration and experience management using agentic AI and analytics. It has strengthened scalability, workforce readiness, and scenario-led adoption to deliver optimized enterprise outcomes.

Deloitte.

Deloitte offers human-centered collaboration and experience management through its agentic network and governance-driven AI frameworks. It has enhanced trust, scalability, and adaptability through flexible, platform-agnostic ecosystems supporting integrated human-AI work.

DXC

DXC Technology has integrated automation and analytics across its collaboration and experience management services. It has improved consistency, visibility, and performance through stronger governance, experience measurement, and continuous optimization.

HCLTech emphasizes AI-first services combining automation, GenAI, and platforms. It has improved orchestration, workflow intelligence, and monitoring to enable scalable, efficient, and low-touch workplace operations.

Infosys has expanded AI-driven collaboration and experience management through agent orchestration and platform integration. It has improved observability, autonomous support, and adaptive environments that enhance productivity, consistency, and enterprise agility.

NTT DATA utilizes agentic AI, predictive analytics, and platform-based delivery in collaboration and experience management. It has improved its offerings' reliability, lifecycle optimization, and ecosystem alignment for scalable, consistent enterprise workplace performance.

TCS is using its Cognix and integrated platforms embedding automation and analytics. It has improved observability, lifecycle integration, and ecosystem connectivity to enable scalable, resilient, outcome-driven transformation.

Wipro platforms unify collaboration and experience management through embedded automation, analytics, and AI. It has improved adaptability, service delivery, and user experience with insight-driven, scalable workplace transformation models.

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.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

C-suite executives

Should read this report to understand the latest smart and sustainable workplace service trends . This report will provide insights to these executives, equipping them to make strategic decisions on allocating resources effectively in keeping with these trends and consequently achieve their organization's sustainability goals.

Chief sustainability officers and ESG

Professionals should read this report for insights into developing and implementing effective sustainability strategies. Understanding the latest advancements and best practices in smart and sustainable workplace services will help them improve their organization's ESG performance.

Strategy professionals

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

Consulting professionals

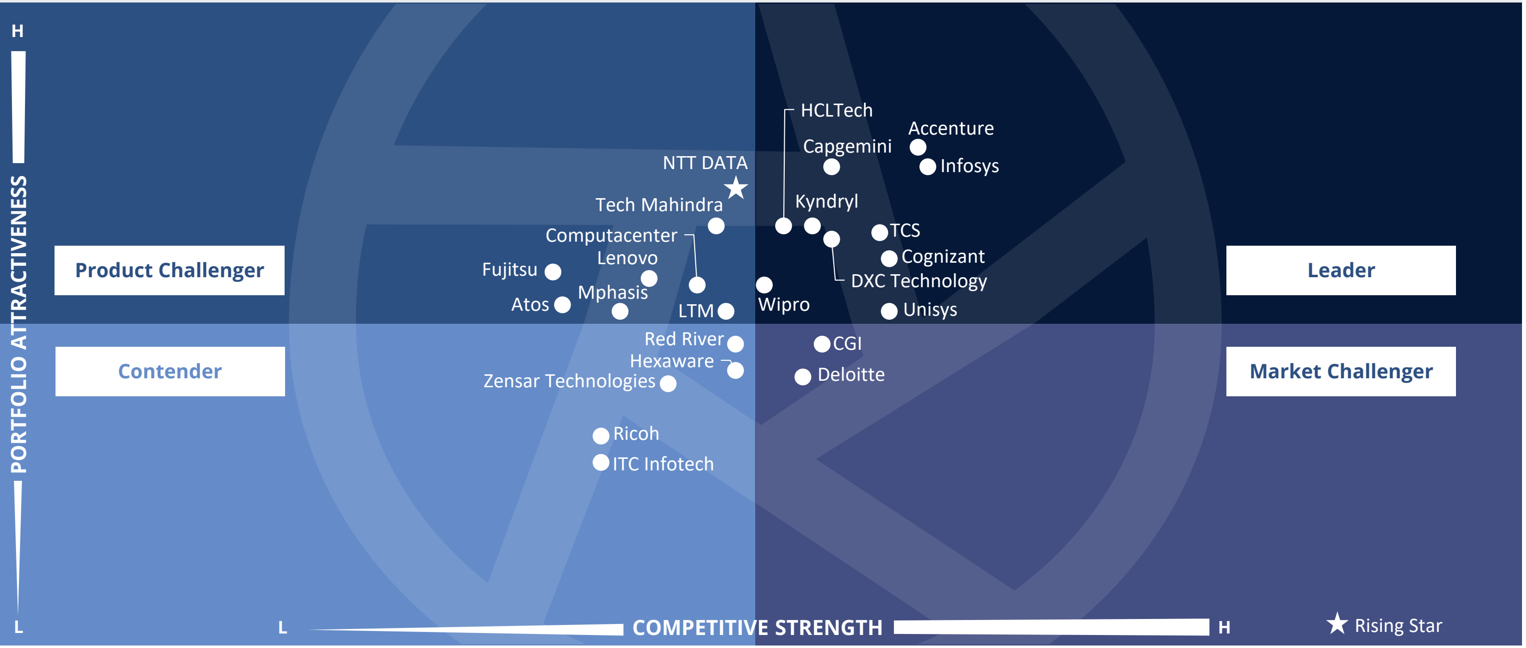
Should read this report to advise companies on sustainability strategies and performance and stay updated on the latest industry trends and developments. By leveraging the insights from this report, consultants can recommendations and support clients in achieving their sustainability goals.

ISG Provider Lens®

Source: ISG RESEARCH

Future of Work — Services
Smart and Sustainable Workplace Services

U.S. 2026



This quadrant evaluates providers' ability to **design and manage intelligent, connected workplace environments** that unify physical and digital experiences, with a focus on **hybrid collaboration, data-driven optimization, and sustainability and ESG-aligned outcomes**.

Bruce Guptill

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

The smart and sustainable workplace services market in the U.S. is evolving rapidly as enterprises converge digital business and workplace transformation, smart building technologies, and ESG into unified operating models. Since early 2025, clients have shifted from pilot programs to enterprise-scale deployments, driven by hybrid work normalization, rising energy costs and regulatory ESG reporting requirements.

Compared to last year, IT, facilities and sustainability functions are more closely aligned in the market, and enterprises expect measurable outcomes such as carbon reduction and higher space utilization. The integration of IoT, digital twins and AI-driven analytics is enabling *living workplaces* that continuously optimize occupancy, energy use and EX. GenAI and Copilot-centric collaboration ecosystems are accelerating adoption with predictive support, automation and personalized experiences.

Providers are differentiating through engineering-led orchestration, platform consolidation and lifecycle-based sustainability, including circular devices and energy-aware operations. Recent M&A activities have enhanced digital engineering, AI and sustainability analytics, reinforcing convergence between OT and IT services. Leaders in this quadrant reflect this shift, emphasizing scalable, analytics-rich platforms and integrated ESG reporting to deliver resilient, data-driven workplace environments.

From the 53 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture has strengthened its leadership position over the past year by expanding engineering-led orchestration, integrating GenAI and digital twin, and advancing ESG measurement platforms to deliver real-time, enterprise-scale workplace optimization.

Capgemini

Capgemini maintain its position by embedding Copilot-driven transformation, enhancing Applied Innovation Exchange models, and scaling AI-powered analytics and digital twin capabilities to operationalize sustainability and hybrid workplace performance improvements.

cognizant

Cognizant progresses by upgrading WorkNEXT with GenAI copilots and predictive analytics, delivering proactive workplace operations, integrated ESG and industry-aligned smart workplace optimization.

DXC

DXC Technology strengthens its leadership position with expanded circular device lifecycle programs, enhanced collaboration analytics and standardized hybrid environments, boosting sustainability outcomes and operational consistency across enterprise workplace deployments.

HCLTech

HCLTech has made significant upgrades to its Fluid AI Workplace platform, integrating GenAI, enhancing telemetry-driven insights and expanding circular asset lifecycle capabilities to improve energy efficiency and personalized workplace experiences.

Infosys

Infosys strengthens its leadership position by scaling Topaz GenAI assets, enhancing autonomous workplace operations and advancing digital twin and responsible AI frameworks to deliver more governed, efficient and sustainable workplace environments.

kyndryl

Kyndryl has strengthened its presence in the U.S. market over the past year by enhancing AI-driven observability and digital twin capabilities, improving experience-to-sustainability correlation, and expanding analytics within its Kyndryl Bridge platform to support predictive, resilient workplace operations.

TCS enhances its Digital Twindex and AI-driven digital twin platforms, expands real-time simulation and energy optimization capabilities, and strengthens ESG analytics to enable more autonomous and sustainable workplace management.

Unisys enhances its Sustainable Workplace solution with deeper IoT integration, improved experience analytics and expanded automation capabilities, strengthening real-time environmental monitoring and ESG-aligned workplace insights across hybrid environments.

Wipro upgrades its AI Live Workspace with GenAI orchestration, predictive automation, ESG analytics integration and strong lifecycle management capabilities to deliver more efficient, reliable hybrid workplace operations.

NTT DATA (Rising Star) is strengthening its position by scaling its Smart AI Agent ecosystem and enhancing agentic orchestration, predictive lifecycle analytics and experience reliability engineering to deliver more autonomous, intelligent and sustainability-aligned workplace services.

Leader

"Unisys stands out by linking IoT-enabled workplace intelligence with managed hybrid collaboration and experience-aligned analytics that translate physical workplace behavior into ESG-relevant insights."

Bruce Guptill

Unisys

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. Unisys offers digital workplace services centered on managed collaboration, IoT-enabled workplace analytics and digital experience platforms that enable visibility, operational efficiency and sustainability insights across hybrid workplaces. In the U.S., Unisys focuses on AI-powered support, lifecycle services, and experience analytics to help enterprises optimize workplace operations, reduce waste, and enhance sustainability while improving employee experience and operational efficiency outcomes.

Strengths

Environmental sensing for workplaces: Unisys' Sustainable Workplace and Appspace, integrated with IoT sensors, provide real-time data from smart building controls to monitor occupancy, air quality and environmental conditions. These insights support automated space optimization, improved energy efficiency and healthier workplace environments.

Managed hybrid collaboration estates: Unisys' Managed Meeting Rooms and Microsoft 365 and Teams, combined with AV partners and Genesys Cloud, deliver end-to-end hybrid collaboration environments. These services ensure optimized utilization, proactive monitoring and consistent support across distributed workplace settings.

Experience-aligned workplace analytics: Unisys' Experience-as-a-Service, XMO and Next-Generation Service Desk integrate with Nexthink Infinity and AI automation tools to deliver real-time telemetry and predictive insights. This enables XLAs aligned to business outcomes, driving continuous UX improvement.

Workplace-based sustainability insight: Unisys Sustainable Workplace and Device Subscription Service integrates Appspace, IoT sensors and lifecycle analytics with Nexthink telemetry. This enables energy optimization, resource efficiency tracking and ESG-aligned reporting across workplace and device ecosystems.

Caution

Unisys' smart workplace offerings depend on effective integration of facilities and IT data. Phased instrumentation, data harmonization and governance alignment are often necessary to ensure reliable insights and measurable sustainability outcomes.

Appendix

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

Study Sponsor:
Iain Fisher

Lead Author:
Bruce Guptill

Editor:
Upasana Hembram

Research Analyst:
Varsha Sengar

Data Analyst:
Aishwarya Peteriya

Consultant Advisors:
Jim Kane, Jason McAuliffe and Jochen Steudle

Project Manager:
Akshaya Hegde

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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

Bruce Guptill
Lead Analyst

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

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

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

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.

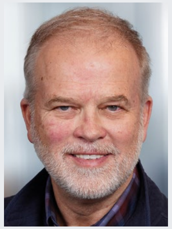
Prior to this role, she has carried out multiple ad-hoc projects and competitive benchmarking reports delivering industry level actionable insights and recommendations.

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®

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

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