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 | OCTOBER 2025 | AUSTRALIA

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Australian enterprises are redefining digital workplaces via GenAI, hybrid work, ESG and localisation

In 2025, Australian enterprises are redefining digital workplace services with GenAI integration, ESG-aligned transformation and hybrid work innovation driven by local regulations, workforce expectations and sector-specific needs.

The convergence of GenAI, hybrid work and ESG mandates has redefined enterprise expectations. Australian organisations now demand localised, intelligent and impact-driven solutions that reflect both global innovation and domestic priorities.

Hybrid work: localised, inclusive and measurable

Hybrid work in Australia has matured into a structured, inclusive and experience-driven model. While global trends influence strategy, Australian enterprises are responding to local workforce expectations, urban decentralisation and public sector mandates.

According to the Australian HR Institute (AHRI), over 80 percent of Australian employers have adopted hybrid models, with a growing emphasis on environment-based work and employee-led flexibility. Providers such as Fujitsu, Infosys and Deloitte are facilitating this shift through IoT-enabled smart offices, digital twins and persona-based support.

The rise of regional delivery hubs, such as TCS' Sydney Digital Garage and DXC's Adelaide RDC, reflects a national push to decentralise services and support hybrid work across urban and remote geographies.

Experience management: XLAs are the new SLAs

Australian enterprises are moving beyond traditional SLAs to adopt XLAs as a core performance metric. This shift is driven by the need to retain talent, optimise hybrid environments and align IT with business outcomes.

Providers such as HCLTech, Infosys and Datacom are embedding XLAs into service

Australian digital workplaces are **foundations for resilience, equity and sustainability.**

delivery using sentiment analytics, real-time telemetry and multilingual support. Datacom's emergence as a Rising Star in continuous productivity and next-gen service desk offerings highlights the growing role of local providers in delivering cloud-native, XLA-driven service desk models.

Platforms such as Wipro's NeuraDesk and Unisys' Service Experience Accelerator are enabling predictive, omnichannel support tailored to Australia's diverse workforce.

GenAI in Australia: from innovation to infrastructure

Australia's digital workplace services market in 2025 is marked by a rapid shift from GenAI experimentation to embedded enterprise infrastructure. Local adoption is being shaped by both global innovation and domestic investment in AI governance, skills and platforms.

Infosys, Wipro and TCS have launched GenAI-native platforms such as Orbit, GenAI Foundry and Cognix™, tailored for Australian clients. Meanwhile, Accenture's acquisition of The Lumery and Cognizant's partnership with Telstra reflect a growing emphasis on local delivery and coinnovation.

Australian enterprises are prioritising agentic AI, AI copilots and immersive collaboration, but with a strong focus on ethical AI and skills readiness. Deloitte and KPMG have launched AI academies and governance frameworks to address the national skills gap, while EY and PwC are embedding AI into workforce planning and ESG reporting.

Sustainability: ESG as a competitive differentiator

Australia's regulatory landscape in 2025 has made ESG compliance a strategic imperative. With mandatory climate disclosures and net-zero targets in place, enterprises are embedding sustainability into every layer of workplace services.

Providers are responding with GreenOps platforms, energy optimisation tools and circular IT programmes. Capgemini's *My Sustainability Score*, Deloitte's GreenLight platform and Infosys' ESG-aligned device-as-a-service (DaaS) models are examples of how sustainability is being operationalised in Australia.

Local partnerships, such as Fujitsu's work with Indigenous suppliers and PwC's milestone of using 100 percent renewable electricity, reflect a uniquely Australian approach to inclusive, measurable ESG transformation.

Workplace outsourcing: from delivery to cocreation

The Australian outsourcing model is shifting from transactional delivery to strategic cocreation. Enterprises are seeking providers that can deliver verticalised solutions, AI-augmented support and ESG-aligned transformation.

Infosys, HCLTech, and Accenture are leading with hybrid delivery models and AI-first platforms, while KPMG and PwC (new entrants in 2025) are gaining traction with advisory-led workplace reinvention.

This shift is also reflected in pricing models: outcome-based contracts, XLA-linked SLAs and coinvestment frameworks are becoming standard across public and private sectors.

AI-augmented workforce: skills, equity and enablement

Australia's workforce transformation is being shaped by AI augmentation, skills development and inclusive design. The National AI Centre reports a surge in AI-related hiring, with the highest demand in analytics, automation and AI coaching.

Providers are embedding AI into workforce platforms; Infosys' Wingspan, TCS' WisdomNext™ and HCLTech's GenAI Foundry are enabling personalised learning, AI coaching and adaptive productivity tools. However, equity remains a national concern. Studies from the University of Sydney and the Australian Human Rights Commission warn of automation risks for women and early-career professionals. Providers that integrate diversity, equity and inclusion (DEI) frameworks, ethical AI and lifelong learning into their services are emerging as trusted partners in workforce transformation.

Conclusion: Australia's digital workplace at a strategic crossroads

Australia's digital workplace services have evolved into a strategic infrastructure that supports regional goals around resilience, inclusion and sustainability.

The convergence of GenAI, hybrid work and ESG mandates has redefined enterprise expectations. Australian organisations now demand localised, intelligent and impact-driven solutions that reflect both global innovation and domestic priorities.

Clients and providers that succeed in this environment are those that:

- embed GenAI into service delivery with ethical, ISO-certified frameworks.
- design for hybrid work with regional hubs, inclusive policies and smart infrastructure.
- operationalise ESG through circular IT, carbon tracking and indigenous partnerships.
- elevate experience through XLAs, sentiment analytics and omnichannel support.
- enable workforce transformation with AI coaching, DEI-aligned learning and adaptive tools.

Australia is not simply following global trends; it is setting new benchmarks in digital workplace transformation. As the lines between IT, HR and facilities blur, workplace services are becoming the essential framework of business strategy.

Australian enterprises and government agencies are demanding workplace services that comply with local ESG mandates, support hybrid work with measurable experience outcomes and embed GenAI into every layer of service delivery.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Accenture	Leader	Leader	Rising Star ★	Product Challenger	Leader	Leader
Atos	Contender	Contender	Product Challenger	Contender	Product Challenger	Contender
Brennan IT	Contender	Contender	Product Challenger	Contender	Contender	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Leader	Leader
CDRU	Not In	Not In	Not In	Contender	Not In	Not In
CGI	Contender	Contender	Contender	Not In	Contender	Product Challenger
Coforge	Not In	Contender	Contender	Contender	Not In	Not In
Cognizant	Product Challenger	Rising Star ★	Product Challenger	Market Challenger	Market Challenger	Product Challenger
Data#3	Contender	Market Challenger	Product Challenger	Not In	Contender	Not In
Datacom	Not In	Leader	Leader	Rising Star ★	Market Challenger	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Deloitte	Contender	Not In	Not In	Not In	Leader	Contender
DXC Technology	Product Challenger	Product Challenger	Leader	Leader	Market Challenger	Product Challenger
EY	Leader	Not In	Not In	Not In	Product Challenger	Contender
Fujitsu	Market Challenger	Leader	Leader	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Not In	Not In	Contender	Not In	Not In
HPE	Contender	Contender	Not In	Not In	Not In	Contender
Infosys	Leader	Leader	Leader	Leader	Leader	Leader
ITC Infotech	Not In	Not In	Not In	Contender	Not In	Not In
Kinetic IT	Contender	Not In	Contender	Product Challenger	Contender	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
KPMG	Rising Star ★	Not In	Not In	Not In	Product Challenger	Contender
Kyndryl	Market Challenger	Product Challenger	Leader	Product Challenger	Product Challenger	Leader
Leidos	Not In	Contender	Product Challenger	Contender	Not In	Not In
Lenovo	Contender	Product Challenger	Product Challenger	Contender	Product Challenger	Contender
Logicalis	Not In	Contender	Contender	Product Challenger	Contender	Not In
LTIMindtree	Contender	Contender	Contender	Product Challenger	Rising Star ★	Contender
Microland	Not In	Not In	Contender	Contender	Not In	Not In
NRI Australia	Not In	Contender	Contender	Not In	Contender	Not In
NTT DATA	Leader	Leader	Leader	Leader	Market Challenger	Leader
Orange Business	Not In	Contender	Not In	Not In	Contender	Not In

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
PwC	Rising Star ★	Not In	Not In	Not In	Leader	Product Challenger
TCS	Leader	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
Telstra	Not In	Contender	Not In	Market Challenger	Not In	Not In
Unisys	Market Challenger	Product Challenger	Leader	Leader	Leader	Rising Star ★
UST	Not In	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader	Leader

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

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

Simplified Illustration Source: ISG 2025

Definition

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

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

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

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

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

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

Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers vendors
- A differentiated positioning of providers by segments (quadrants) based on their competitive strengths and portfolio attractiveness
- 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

Who Should Read This Section

This report is valuable for service providers offering **workplace strategy and enablement services** in **Australia** 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 have an understanding of leading providers that can help them better prepare workforces for changing business dynamics and consequent required models. This report will provide insights into the way these providers can support workforce readiness and adaptability, ensuring they can handle new challenges and growth opportunities.

Technology professionals

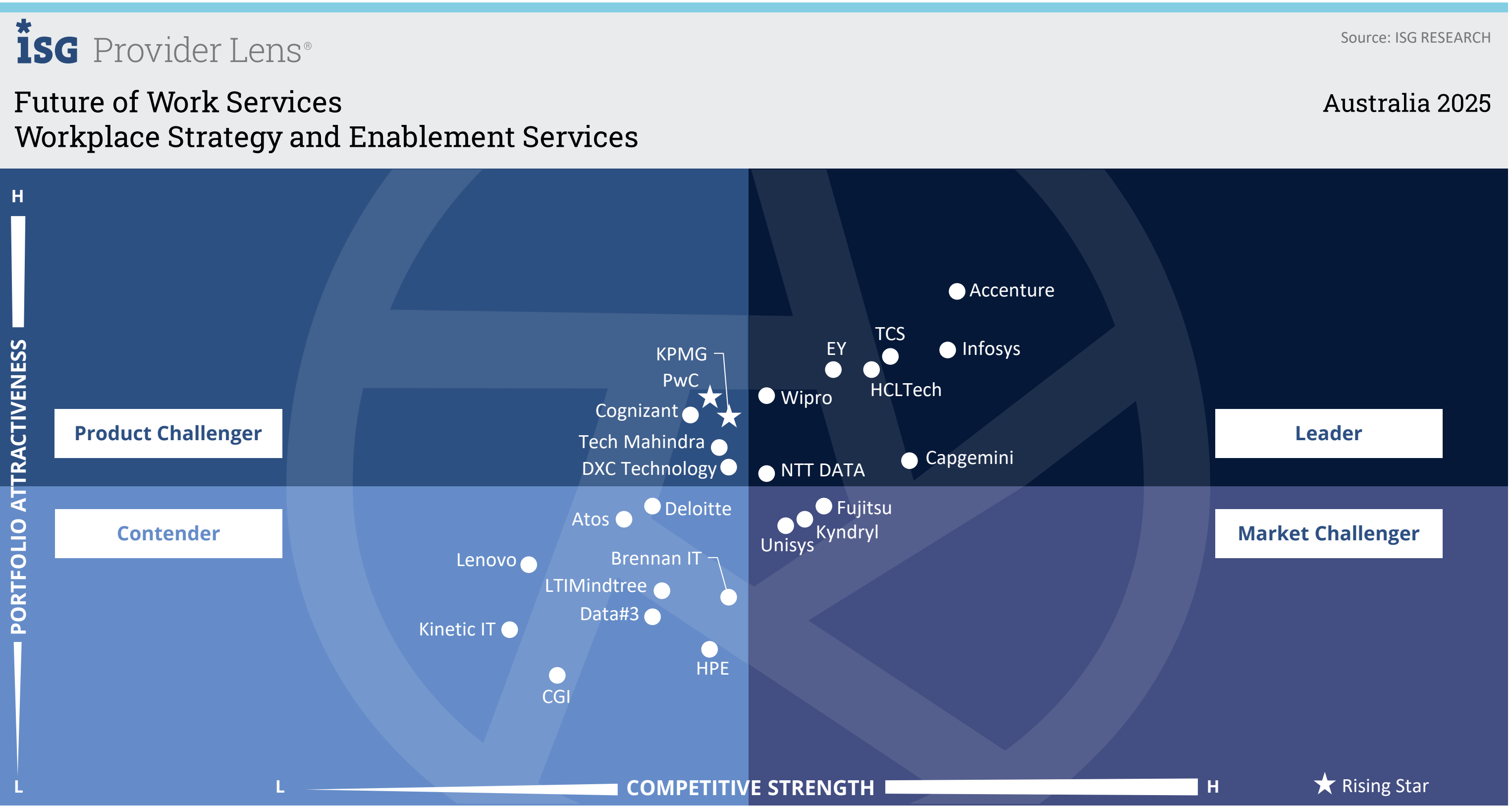
Including workplace technology leaders, should read this report to understand the positioning and capabilities of providers to enable them to enhance services for employees. By gaining insights into the solutions offered by these providers, technology professionals can make informed decisions about adopting and implementing tools and systems to 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 the capabilities and positioning of these providers, strategy professionals can develop and implement a winning workplace strategy in alignment with organisational 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 consultants stay abreast with the current trends and latest developments in the industry, enabling them to make informed recommendations and support clients in establishing effective workplace strategies.



This quadrant assesses providers that offer **strategic workplace services aligned with evolving business models**, talent and sustainability by **integrating digital, physical and human elements** to drive compliant, industry-specific transformation across Australia.

Bruce Guptill

Definition

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

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

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

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

Eligibility Criteria

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

Observations

In 2025, workplace strategy services in Australia are evolving towards AI-first, sustainability-aligned and hybrid-ready models. Providers frequently emphasise GenAI integration, ESG-linked transformation and experience parity across physical and digital environments.

There has been a marked increase in sector-specific delivery and regional leadership investment. Many providers have expanded through acquisitions and partnerships, particularly in cloud and AI. Notable portfolio trends include the rise of AI coaching, DEI-aligned talent models and ESG dashboards. Accenture, Capgemini and Infosys have deepened their AI and sustainability capabilities. EY and HCLTech have expanded through M&A and regional delivery.

New entrants to the quadrant include KPMG and PwC, both recognised as Rising Stars for their AI-powered platforms and ESG-aligned transformation strategies. These additions reflect the growing demand for advisory services that combine ethical AI, hybrid enablement and measurable business outcomes.

From the 37 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and two Rising Stars.

accenture

Accenture expanded its AI-led reinvention and sustainability capabilities in 2025, securing major contracts and enhancing cloud and collaboration services to meet rising enterprise demand in Australia.

Capgemini

Capgemini reported double-digit growth in 2025, driven by GenAI and Copilot investments, expanded delivery centres and enhanced sustainability tools through partnerships with Microsoft and Foxway.

EY

EY expanded its workplace strategy in 2025 via EY-Parthenon and the Net Zero Centre, enhancing DEI, sustainability and digital transformation capabilities through strategic acquisitions.

HCLTech

HCLTech advanced its Fluid Workplace strategy in 2025 with GenAI labs, sustainability dashboards and sector-specific delivery, supported by new regional leadership and automation-led transformation.

Infosys

Infosys introduced the Orbit and NAVI platforms in 2025, expanded ESG-aligned operations and added over 500 Australian FTEs, enhancing AI-first workplace strategy and Microsoft ecosystem integration.

NTT DATA

NTT DATA focussed on agentic AI and immersive support in 2025, expanding ESG-aligned offerings and regional delivery assets to support hybrid workplace transformation.

tcs TATA CONSULTANCY SERVICES

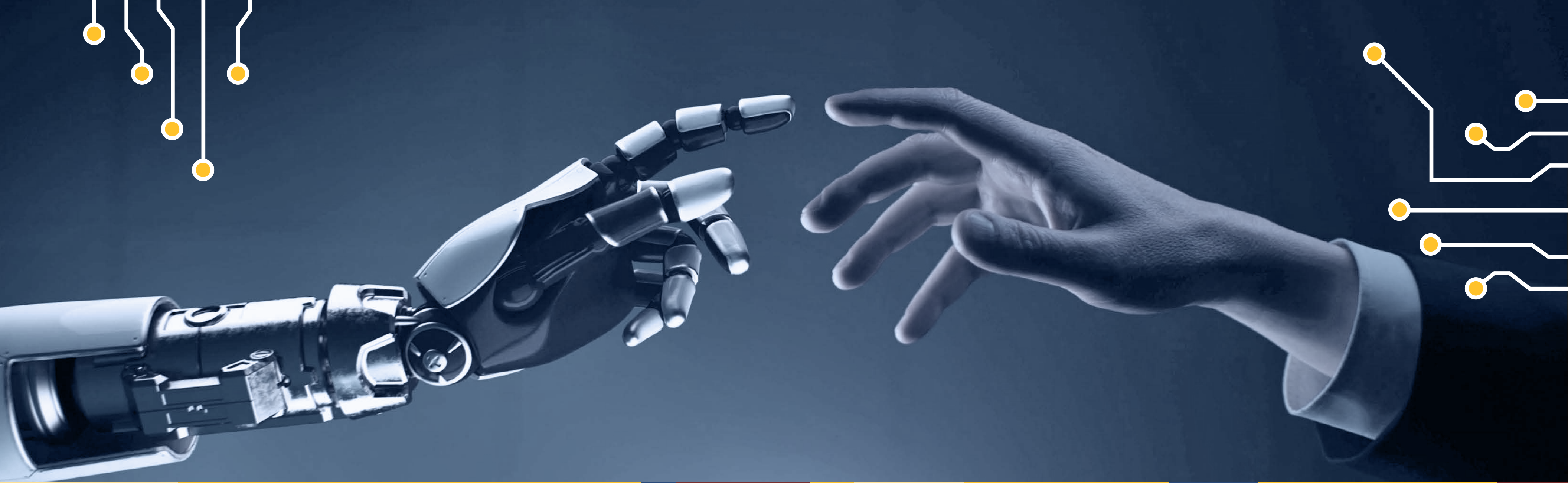
TCS secured more than $250 million in Australian deals in 2025, launched the GoZero Hub and scaled GenAI pilots, reinforcing its leadership in AI-powered workplace transformation.

wipro

Wipro launched Live Workspace™, WaaS360 and GenAI Foundry in 2025, strengthening AI-powered hybrid workplace solutions and expanding Microsoft-aligned capabilities in Australia.

KPMG (Rising Star) entered the quadrant in 2025 with its Velocity platform and Powered Enterprise tools, emphasising AI adoption, DEI and ESG-aligned workplace transformation.

PwC (Rising Star) joined the quadrant in 2025, leveraging its AI Centre of Excellence and Strategy& practice to deliver hybrid workplace innovation and ESG transformation across Australia.



Collaboration and Next-gen Experience Services

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

Technology professionals

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

Cybersecurity professionals

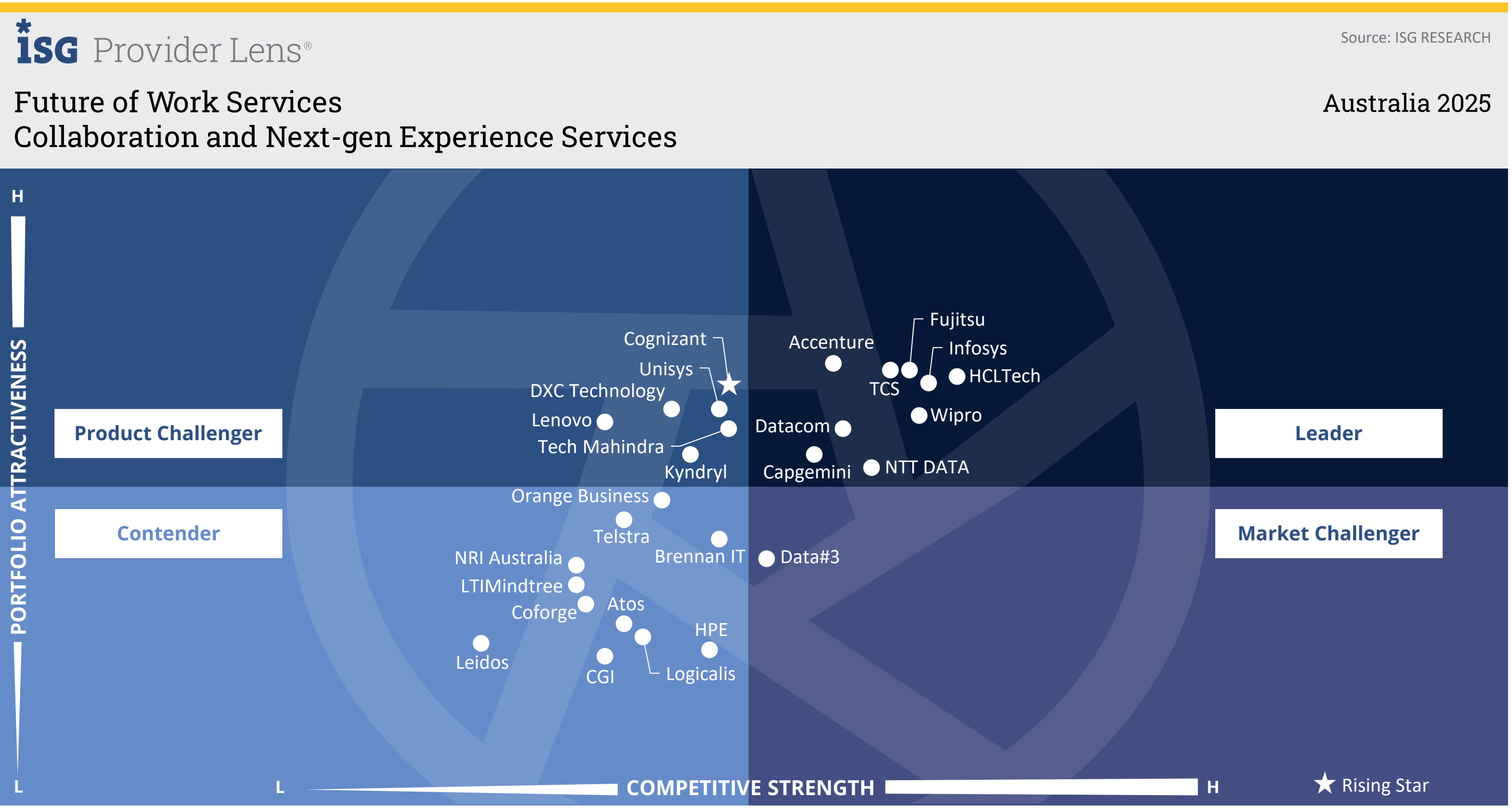
Should read this report to discern how solution providers address challenges related to compliance and security, while maintaining seamless EX. By understanding their strategies, cybersecurity professionals can ensure their organisation's communication and collaboration tools are secure and in compliance with industry standards.

Digital professionals

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

Procurement professionals

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



This quadrant assesses providers that **transform workplace experiences using AI, GenAI and XLAs by driving collaboration, productivity and change** through data-driven insights, human-centric design and measurable business outcomes.

Bruce Guptill

Definition

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

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

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

Eligibility Criteria

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

Observations

The 2025 quadrant indicates a surge in AI- and GenAI-powered collaboration platforms, immersive technologies and XLA-driven delivery models. Providers are more focussed on hybrid work enablement, multilingual support and sentiment analytics to enhance EX.

Many providers have reported significant investment in Microsoft Copilot, Zoom and Cisco ecosystems, with more launching proprietary platforms or expanding innovation labs.

Experience management offices (XMOs) became standard, supporting real-time feedback and adaptive service models. Various providers expanded their regional delivery teams and secured major public sector contracts. Notable changes included Datacom's rise to Leader status and Cognizant's entry as a Rising Star, reflecting its partnership with Telstra and GenAI innovation.

The quadrant also shows increased emphasis on digital dexterity, AR/VR collaboration and ESG-aligned workplace transformation.

Providers that successfully integrated AI with human-centric design and localised delivery gained a competitive advantage.

From the 37 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Accenture expanded its GenAI and immersive technology offerings in 2025, acquired The Lumery and deepened its partnerships with Microsoft and Cisco, enhancing collaboration services through innovation hubs and coinvestment delivery models.

Capgemini enhanced GenAI and Copilot integration in 2025, expanded delivery centres and launched multilingual bots and automation platforms, driving hyperpersonalised collaboration and measurable business outcomes.

Datacom grew rapidly in 2025 through AI-led collaboration, major public sector wins and SaaS/cloud investments, launching Genesys Cloud and Livepro to support hybrid workforce collaboration.

Fujitsu expanded its Australian team and launched Kozuchi AI in 2025, integrating ServiceNow and Microsoft ecosystems to deliver XLA-driven, hybrid-ready collaboration services.

HCLTech achieved 30 percent YoY growth in 2025, launched GenAI labs and expanded partnerships with Microsoft and Cisco, embedding XLAs and persona-based support for hybrid collaboration.

Infosys launched its Orbit and NAVI platforms in 2025, expanded its partnerships with Microsoft and Zoom, and added over 500 FTEs, delivering 40 percent productivity gains and enhanced collaboration experiences.

NTT DATA launched EXPaaS 5A and GenAI-powered collaboration tools in 2025, expanding partner ecosystems and innovation labs to support immersive, hybrid-ready workplace experiences.

TCS delivered more than 30 cloud-centric deals in 2025, launched the Cognix™ and WisdomNext™ platforms and opened the Sydney Digital Garage to drive AI-native, experience-led collaboration.

Wipro introduced MetaEX via Microsoft Mesh, NeuraDesk and GenAI Fellows, enhancing immersive collaboration and ESG-aligned lifecycle management through GenAI-powered platforms and Microsoft partnerships.

Cognizant (Rising Star) entered the quadrant in 2025 with GenAI innovation, a strategic partnership with Telstra and expanded delivery assets, aligning agile collaboration with human-centred transformation goals.

Managed End-user Technology Services

Who Should Read This Section

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

Chief information officers

Should read this report to understand how their existing processes and protocols influence the use of workplace technologies and the limitations in adopting new capabilities. This report will provide them with insights on how to navigate these challenges and leverage managed end-user technology services to enhance their organisation's technological infrastructure.

Technology professionals

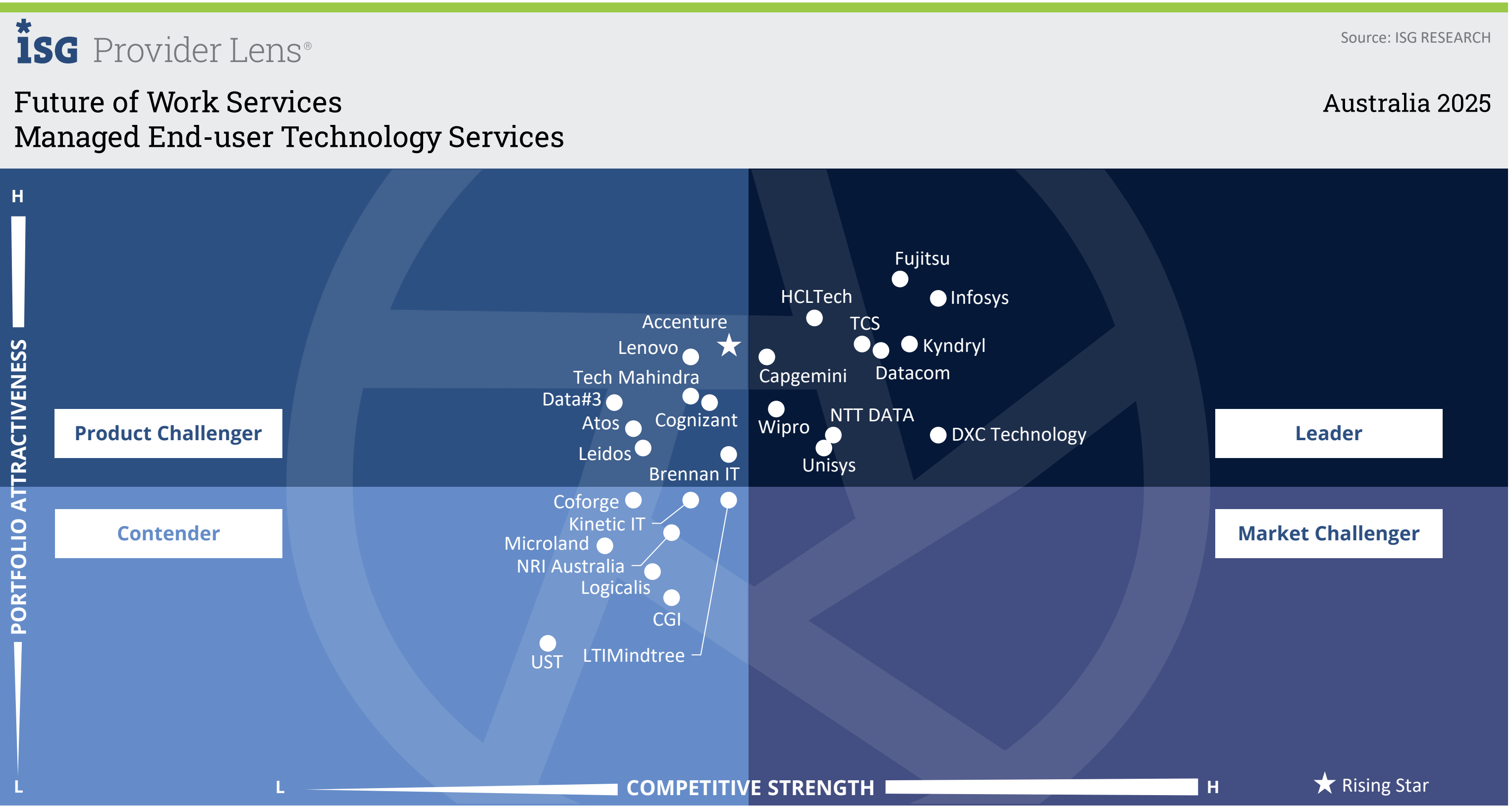
Should read this report to understand how providers' abilities can help them effectively strategise on and select managed digital workplace services. By gaining insights into the capabilities of various providers, technology professionals can make informed decisions about implementing and managing end-user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

Cybersecurity professionals

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

Digital professionals

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



This quadrant evaluates providers that deliver **secure, end-to-end device and workplace technology services** that enhance **digital EX, mobility and productivity** across industries through proactive management and AI-driven support.

Bruce Guptill

Definition

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

Eligibility Criteria

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

Observations

In 2025, managed end-user technology services in Australia shifted towards AI-powered automation, sustainable device lifecycle management and modular, persona-based delivery. The quadrant also reflects the growing demand for scalable, secure and sustainable end-user computing (EUC) services, with providers differentiating through AI integration, local presence and industry-specific enablement.

Providers have increasingly emphasised unified endpoint management (UEM), virtual desktop infrastructure (VDI) and predictive analytics to support hybrid workforces. Many have expanded regional delivery centres and logistics hubs, while integrating platforms such as Microsoft Intune, Nexthink and ServiceNow. ESG-aligned DaaS models and circular IT practices have gained substantial traction.

DXC, Fujitsu and Infosys enhanced automation and analytics, while Capgemini and HCLTech launched GenAI labs and Smart Support Hubs. Accenture entered the quadrant as a Rising Star, signalling its growing focus on DEX and managed services. Lenovo, a 2024 Rising Star, was not listed in 2025.

From the 37 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

Capgemini grew significantly in 2025, launching CHIP AI and expanding sustainable device lifecycle services through partnerships with Microsoft and Foxway, enhancing automation and ESG-aligned end-user support.

Datacom expanded in 2025 with major public contracts, new logistics hubs and HP-integrated Datacom Insights, enhancing device lifecycle visibility and hybrid workforce support.

DXC Technology launched UPtime™ and Copilot integration in 2025, enhancing predictive analytics and expanding its Adelaide RDC to deliver AI-powered, zero-touch end-user support.

Fujitsu scaled its Australian field services in 2025, introduced Config-as-Code automation, and deepened its partnerships with Microsoft and SOTI to deliver secure, scalable device lifecycle solutions.

HCLTech enhanced its managed EUC services in 2025 with GenAI labs, Smart Support Hubs and XLA-driven contracts, supported by partnerships with Microsoft and Cisco.

Infosys expanded its Australian team and SaaS platforms in 2025 by launching ESG-aligned DaaS models and strengthening partnerships with Microsoft and Google for secure, scalable end-user services.

Kyndryl scaled device deployment and launched sustainability tracking tools in 2025, enhancing DEX and lifecycle services through Riverbed and Sydney-based infrastructure.

NTT DATA launched its Smart AI Agent™ and immersive AR/VR training in 2025, expanding regional delivery and innovation labs to support scalable, industry-specific EUC services.

TCS adopted modular, persona-based delivery in 2025, launched Cognix™ and Ignio™ tools, and introduced the Sydney Digital Garage to accelerate AI-driven EUC transformation.

Unisys launched its Service Experience Accelerator (SEA) platform and expanded DSS lifecycle offerings in 2025, emphasising outcome-based pricing and integrated field services for hybrid workplace support.

Wipro generated AU$25 million in 2025, launching WaaS360 and GreenOps to deliver AI-powered, ESG-aligned device lifecycle services supported by GenAI Foundry and Microsoft partnerships.

Accenture (Rising Star) became a Rising Star in 2025, expanding managed services via the acquisition of Bourne Digital, AI/DEX investments and HP-aligned device-as-a-service (DaaS) offerings.

Unisys

Leader

"Unisys is a leader in managed end-user technology services in Australia, driven by SEA-powered automation, DSS lifecycle offerings and outcome-based pricing, supported by local delivery centres and global ecosystem partnerships."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, US. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys' revenue from managed end-user technology services in Australia is driven by Device Subscription Service (DSS) lifecycle offerings, Service Experience Accelerator (SEA) platform integration and outcome-based pricing. Regional delivery centres in Sydney and Melbourne support its expanding capabilities through global M&A and ecosystem partnerships.

Strengths

Device lifecycle and endpoint management: In 2024, Unisys generated $3.3 million from managed end-user technology services in Australia, supporting four large enterprise clients. The company offers UEM, VDI and complete device lifecycle management through its DSS model.

Flexible pricing and contracting: Australian engagements use diverse pricing models — 35 percent outcome-based, 25 percent time and materials and 15 percent each for transactional and per-user models. Many contracts include gain-share components, reflecting Unisys' alignment with client performance and ROI goals.

Regional delivery and capability expansion: With delivery centres in Sydney and Melbourne, Unisys supports clients through global field services and over 460 certified professionals. Investments in AI, UEM and DEX capabilities strengthen its ability to meet evolving enterprise needs across industries.

DEX and automation integration: Unisys combines DEX tools and automated issue resolution via its SEA. The platform supports proactive remediation, intelligent PC refresh and outcome-based service delivery, enhancing user satisfaction and operational efficiency.

Caution

Many enterprises still view service desk, field services and touchless support as isolated functions, which limits integration and reduces the overall impact on productivity and business performance. Unisys can help address these issues through a significant expansion of its offerings, tailored to client-specific environments.

Continuous Productivity Services (Including Next-gen Service Desk)

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

Technology professionals

Including workplace technology leaders, should read this report to learn about providers that can help them modernise service desks and workplace support services. This report will provide insights into the capabilities of various providers, enabling technology professionals to select solutions that can enhance productivity and streamline support services.

Field service professionals

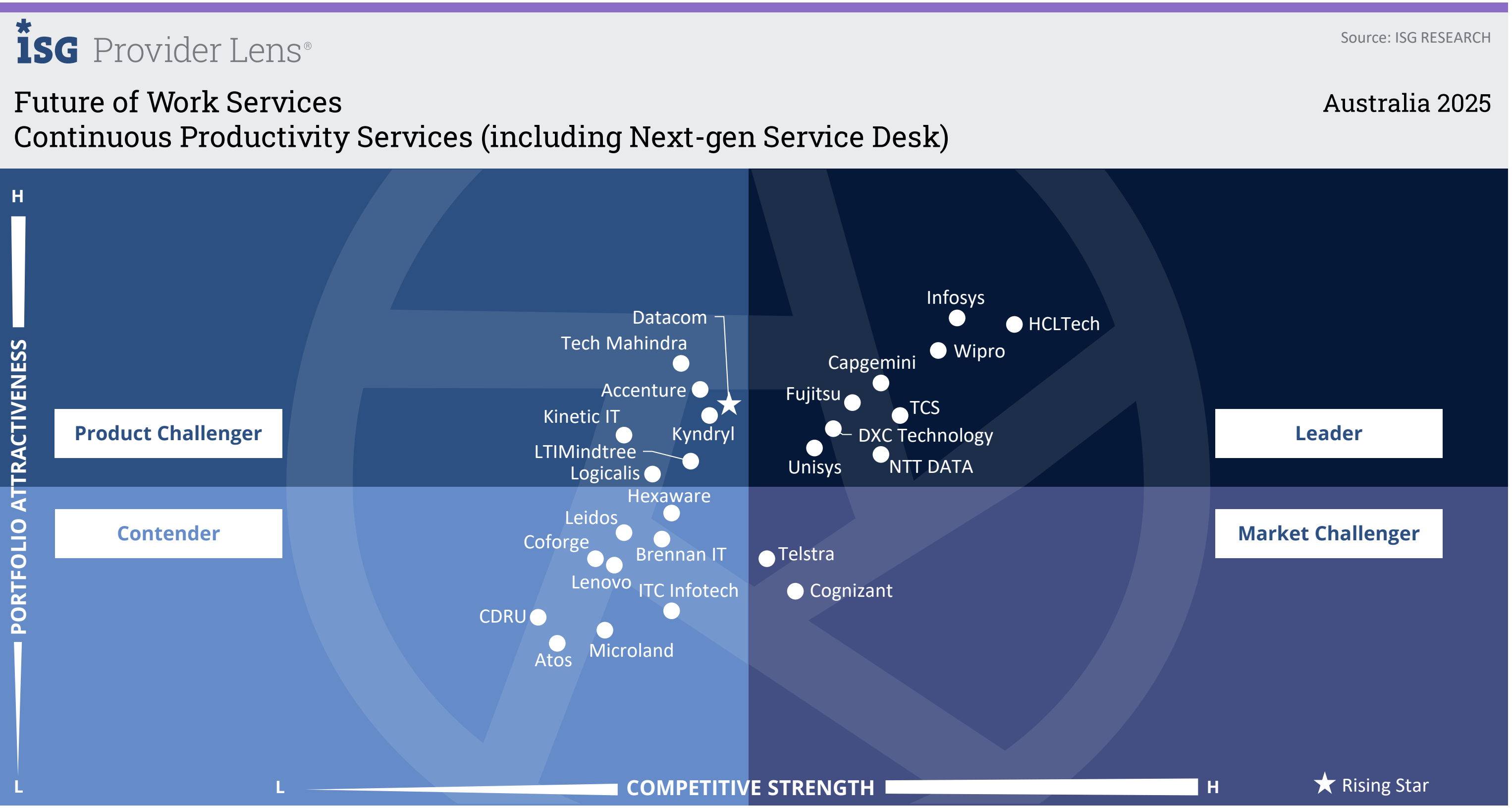
Should read this report to understand how providers implement and expand workplace services to better manage field operations. By gaining insights into the strategies and tools of providers, they can improve the efficiency and effectiveness of their operations.

Digital professionals

Including facility managers, should read this report to understand how providers of digital service desks and workplace support services align with their digital transformation initiatives. This report will help them identify providers offering solutions in tandem with their organisation's digital goals and strategies, facilitating the integration of advanced support services into their digital ecosystem.

Procurement professionals

Should read this report to better understand the current landscape of providers of digital service desks and workplace support services. By gaining insights into the capabilities of various providers, procurement professionals can make informed decisions about sourcing and selecting the solutions best suited to meet their organisation's support service needs.



This quadrant evaluates service providers enabling next-generation workplaces through **AI-driven, autonomous support and XLA-based outcomes**, focussing on **hybrid productivity, innovations in self-service and intelligent automation**.

Bruce Guptill

Definition

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

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

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

Eligibility Criteria

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

Observations

The Continuous Productivity Services (Including Next-gen Service Desk) quadrant in Australia reflects a market in transition, driven by hybrid work models and rising expectations for AI-powered, experience-centric support. Organisations are moving beyond traditional SLAs and seeking intelligent, autonomous workplace services that align with business outcomes and ensure user satisfaction.

Providers are responding with innovations in AI, automation and omnichannel support. Infosys and HCLTech integrate sentiment analysis, virtual assistants and unified dashboards to enhance resolution speed and UX. Fujitsu and Unisys focus on public sector alignment and enterprisewide service integration, while NTT DATA and DXC Technology deploy GenAI, AR-enabled support and smart lockers to improve accessibility. Capgemini, TCS and Datacom emphasise measurable outcomes and scalable, localised delivery.

This year's quadrant shows notable shifts. Logicalis has moved from Contender to a Product Challenger position, reflecting improved portfolio attractiveness. Leidos has shifted from Product Challenger to a Contender. New entrants Microland and Cognizant have joined the Contender and Market Challenger segments, respectively, indicating growing competition in this market alongside diversification.

Looking ahead, the quadrant will favour providers that deliver intelligent, localised and XLA-driven support. As organisations increasingly become digitally mature, the demand for proactive, AI-enhanced service desk models will rise. Provider success will depend on seamless platform integration, regional delivery strength and a focus on UX.

From the 37 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Capgemini delivers AI-powered service desk support in Australia with multilingual bots, agent assist and a unified knowledge base, backed by major public and private sector wins and global recognition for service excellence.

DXC Technology delivers GenAI-powered service desk solutions in Australia, with strong use cases in healthcare, smart lockers and accent-neutralisation tools, showcasing agility in crisis response and commitment to localised, user-friendly support.

Fujitsu operates a 24/7 service desk across five Australian sites, integrating AI, ServiceNow and industry-specific models to deliver scalable, digitally advanced support, tailored to public and private sector needs.

HCLTech delivers AI-powered, end-to-end service desk solutions in Australia with strong localisation, strategic partnerships and unified operations, achieving high client satisfaction and measurable efficiency gains.

Infosys offers AI-driven service desk transformation through platforms such as Cortex and DWX, enabling automation, multilingual support and strong regional delivery through local partnerships and integrated ecosystems.

NTT DATA leverages agentic AI, AR-enabled support and digital twins to deliver intelligent, localised service desk operations in Australia, achieving measurable outcomes for clients in the mining and public sectors.

TCS is gaining traction in Australia with scalable, AI-powered service desk models such as device-as-a-service (DaaS) and zero-touch support, backed by local innovation labs and global platforms that enable contextual, automation-driven workplace solutions.

Continuous Productivity Services (Including Next-gen Service Desk)

Unisys redefines service desk operations with its AI-powered Service Experience Accelerator platform, enterprisewide integration and strong onsite support, enabling predictive, omnichannel experiences across Australia's hybrid work environments.

Wipro's NeuraDesk platform and global delivery model enable AI-powered, multimodal service desk support in Australia, backed by strategic partnerships and industry-specific engagements like its contract with Woodside Energy.

Datacom (Rising Star) delivers XLA-driven, autonomous service desk support through cloud-native platforms and advanced analytics, enabling proactive issue resolution and omnichannel experiences for hybrid workforces in Australia.

Unisys

Leader

"Unisys redefines service desk operations in Australia with its AI-powered Service Experience Accelerator platform and enterprise-wide integration, delivering predictive, omnichannel support for hybrid environments."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys delivers AI-powered, next-generation service desk solutions through its Service Experience Accelerator platform. In Australia, it integrates enterprise service management (ESM) and onsite support for hybrid environments, offering predictive, omnichannel experiences that are tailored to geographically dispersed organisations.

Strengths

AI-powered service desk transformation: Unisys has redefined traditional service desk operations through its Service Experience Accelerator, an AI-driven omnichannel platform that enhances both responsiveness and UX. This platform supports advanced chatbot capabilities and integrates XLAs, enabling proactive and predictive support.

Enterprise-wide service integration: A key differentiator for Unisys is its strategic focus on ESM, which extends IT service management (ITSM) platforms such as ServiceNow beyond IT into HR, finance and legal functions. This approach enables Australian organisations to consolidate tools, streamline workflows and enhance collaboration across departments.

Comprehensive onsite support: Unisys' integration of field services with its service desk operations adds a critical layer of value for clients, particularly in Australia's geographically dispersed and hybrid work environments. The company supports onsite needs such as smart meeting room maintenance, IoT device support and advanced infrastructure services like liquid cooling for AI data centres.

Caution

The technological sophistication of Unisys' service desk offerings may present adoption challenges for midsize or less digitally mature organisations in Australia.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is valuable for service providers offering **smart and sustainable workplace services** in **Australia** 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 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 keeping with these trends and consequently achieve their organisation's sustainability goals.

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 organisations towards improved ESG performance.

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 the ones aligned with their own sustainability objectives.

Consulting professionals

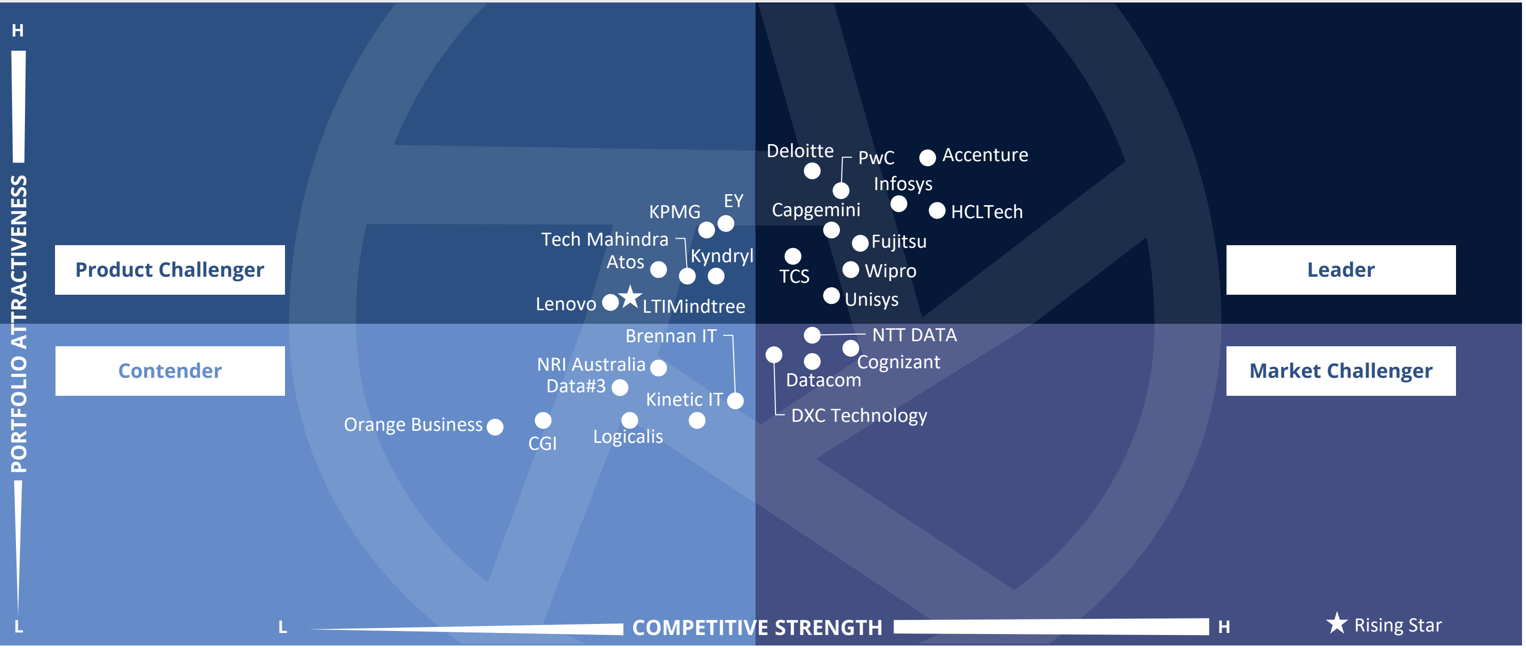
Should read this report to advise companies on sustainability strategies and performance and stay updated on the latest industry trends and developments. By leveraging the insights from this report, consultants can make informed recommendations and support clients in achieving their sustainability goals.

ISG Provider Lens®

Source: ISG RESEARCH

Future of Work Services
Smart and Sustainable Workplace Services

Australia 2025



This quadrant evaluates providers **designing smart, IoT-enabled, inclusive workplaces** that support ESG goals and improve efficiency through adaptive, sustainable and technology-integrated environments for hybrid collaboration.

Bruce Guptill

Definition

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

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

Eligibility Criteria

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

Observations

In Australia, smart and sustainable workplace services have evolved from tactical facilities management to strategic enablers of ESG compliance, hybrid collaboration and employee well-being. Between 2024 and 2025, providers significantly expanded their offerings by integrating IoT, GenAI and ESG-aligned platforms to support adaptive, inclusive and energy-efficient workspaces. This shift reflects the growing enterprise demand for carbon reduction, circular IT practices and smart infrastructure that align with national climate mandates and workforce decentralisation.

Providers such as Accenture, Capgemini, Infosys and Deloitte have deepened their sustainability capabilities through platforms like My Sustainability Score, GreenLight and ESG-aligned desktop-as-a-service (DaaS) models, while Fujitsu and HCLTech have emphasised smart campus design and predictive energy analytics. The rise of GenAI-powered workplace tools, including digital twins, sentiment analytics and immersive collaboration, has enabled hyperpersonalised experiences and measurable EX outcomes.

Providers' strategic partnerships with Microsoft, SAP and Foxway have accelerated innovation, while regional investments, such as TCS' GoZero Hub and DXC's Adelaide RDC, support localised delivery and hybrid enablement. The quadrant also saw new entrants like LTIMindtree, recognised for its Smart Spaces 2.0 platform and ESG reporting capabilities.

Overall, the value of smart workplace services now lies in their ability to operationalise sustainability, enhance EX and deliver compliance-ready, AI-augmented environments. Providers that combine ethical AI, DEI frameworks and sector-specific solutions are emerging as trusted partners in Australia's workplace transformation journey.

From the 37 companies assessed for this study, 28 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture is enhancing its smart workplace services in Australia with AI-driven platforms, ESG-aligned strategies and inclusive hybrid designs, supported by acquisitions and frameworks that enhance operational efficiency and stakeholder engagement.

Capgemini

Capgemini has advanced its Australian workplace services through GenAI, IoT and ESG tools, backed by regional delivery centres and strategic partnerships, enabling scalable, inclusive and sustainable hybrid collaboration environments.

Deloitte.

Deloitte has strengthened its position with certified smart offices, IoT-enabled energy optimisation and ESG platforms, aligning hybrid workplace innovation with sustainability goals and regional workforce transformation strategies.

Fujitsu uvance

Fujitsu has enhanced its smart workplace services in Australia through IoT integration, ServiceNow ESG platforms and inclusive hybrid frameworks, delivering data-driven, compliant and sustainable environments for enterprise clients.

HCLTech

HCLTech is expanding its Australian services with GenAI labs, sustainable device-as-a-service (DaaS), IoT-enabled analytics and regional delivery, driving ESG alignment and hybrid workplace transformation through partnerships and experience-focussed platforms.

Infosys

Infosys has significantly grown its smart workplace services in Australia with IoT-enabled platforms, ESG-aligned infrastructure and inclusive hybrid solutions, supported by regional leadership and strategic partnerships with Microsoft, AWS and JCI.

PwC has advanced its smart workplace strategy in Australia through its Changing Places framework, ESG platforms and technology alliances, driving hybrid innovation, emissions reduction and workplace transformation.

TCS has scaled its smart workplace services in Australia via IoT platforms, ESG consulting and strategic investments such as GoZero Hub, delivering inclusive, energy-efficient and AI-powered workplace modernisation.

Unisys has augmented its presence in Australia with IoT-enabled smart infrastructure, ESG-aligned services and regional investments, delivering inclusive, efficient and sustainable workplace experiences supported by strategic partnerships.

Wipro continues to strengthen its Australian workplace services with IoT platforms, ESG frameworks and immersive hybrid collaboration tools, supported by outcome-based pricing and localised partnerships for scalable, sustainable transformation.

LTIMindtree (Rising Star) offers Smart Spaces 2.0, AI-first platforms and ESG-aligned solutions, supported by APAC delivery hubs and strategic M&A for enterprise transformation.

Unisys

Leader

"Unisys is a leader among Australian service providers, combining smart infrastructure, ESG-aligned solutions and strategic investments to deliver inclusive, efficient and sustainable workplace experiences at scale."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. While building from a relatively small presence, Unisys significantly increased its 2024 revenue and client base for smart and sustainable workplace services in Australia. Growth is driven by IoT-enabled meeting rooms, energy-efficient infrastructure and SEA platform integration. Its regional assets include delivery centres in Sydney and Melbourne, supported by global M&A activity and ecosystem partnerships.

Strengths

Smart infrastructure and IoT integration: Unisys delivers IoT-enabled smart workplace solutions in Australia, including managed meeting rooms, electric vehicle (EV) charging, air quality monitoring and occupancy analytics. These services enhance sustainability, safety and operational efficiency in alignment with ESG goals and smart campus strategies.

Sustainability and ESG alignment: Unisys supports Australian enterprises in reducing workplace carbon emissions through energy-efficient infrastructure, intelligent PC refresh and digital signage. Its solutions help clients align with ESG reporting standards, especially in social and governance aspects.

Inclusive hybrid work enablement: Unisys offers adaptive and inclusive hybrid workspaces with multilingual signage, AR support and smart lockers. Its SEA platform and XLA v4.0 framework ensure parity in experience across roles and locations, with clients reporting improved onboarding by 30 percent and issue resolution by 95 percent.

Regional investment and capability expansion: With delivery centres in Sydney and Melbourne, Unisys has invested over $25 million in AI and expanded its APAC field services. Strategic M&A and partnerships with Microsoft, Dell and ServiceNow enhance its ability to meet the evolving needs of Australian enterprises.

Caution

Unisys has a comprehensive portfolio but a relatively small presence in Australia. The company will need to continue investments and expansions to attract more, and larger, client engagements in the region.

AI-augmented Workforce Services

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

Consulting professionals

Should read this report to advise companies on AI-augmented workforce strategies and performance, ensuring they stay updated on the latest industry trends. By leveraging the insights from this report, consultants can make informed recommendations and support clients in implementing effective AI-augmented workforce solutions.

Technology professionals

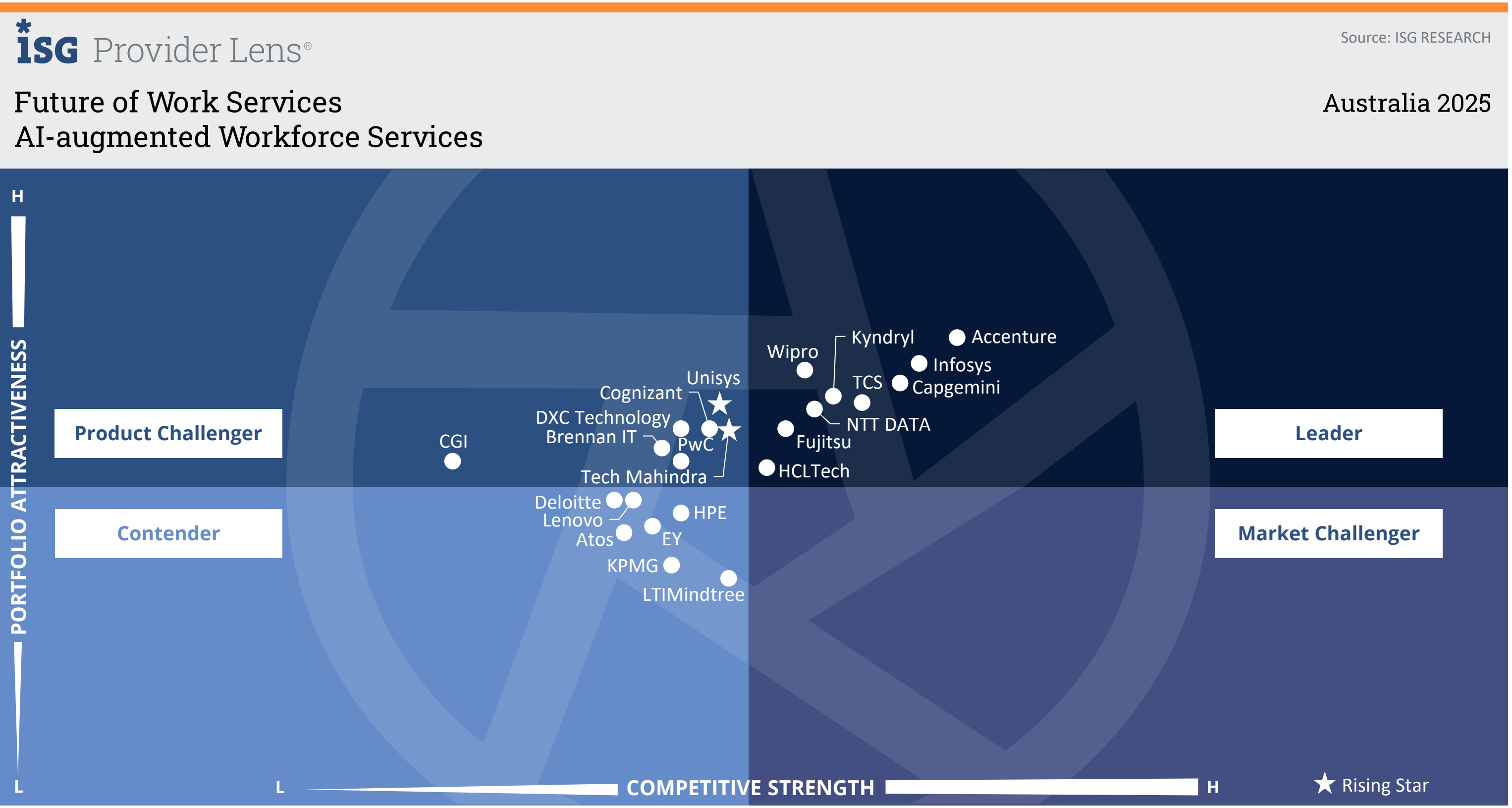
Should read this report to understand how providers' abilities can help them effectively plan AI-augmented workforce services. This report will provide insights into the technological capabilities of various providers, enabling technology professionals to select solutions that enhance workforce productivity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

Chief information officers

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

Strategy professionals

Should read this report to identify the most suitable AI-augmented workforce service providers to develop and implement effective workforce strategies for their companies. This report will enable them to evaluate the capabilities of various providers and select the ones aligned with their own strategic objectives.



This quadrant evaluates providers of **autonomous AI agents that proactively manage workflows**, optimise processes and deliver measurable business outcomes through adaptive and ethically governed workplace solutions.

Bruce Guptill

Definition

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

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

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

Eligibility Criteria

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

Observations

The Australian market for AI-augmented workforce services is undergoing a transformative shift, driven by client- and provider-specific convergences of GenAI, agentic AI and intelligent automation. Service providers are rapidly adapting their offerings to meet the growing demand for hyperpersonalised, experience-led and productivity-enhancing workplace solutions.

ISG's analysis highlights a strong emphasis on continuous productivity, next-generation service desks and AI-powered support ecosystems. This emphasis underscores the importance of agentic AI in empowering both employees and support agents, fostering resilience, adaptability and continuous learning. Key developments include the integration of GenAI assistants, such as Microsoft Copilot and Infosys Topaz, into service desk environments to enable zero-touch resolution, predictive analytics and proactive issue triage. Providers such as HCLTech, Infosys and TCS are investing in XLA-driven models that shift the focus from traditional SLAs to business outcome-based metrics. These models are supported by real-time sentiment analysis, intelligent automation and omnichannel support platforms.

The quadrant also reflects a growing trend towards distributed delivery models, with providers expanding into tier 2 and tier 3 cities to support hybrid workforces. Smart support hubs, AR/VR-enabled remote assistance and self-service kiosks are becoming standard features, enhancing accessibility and reducing operational costs.

Strategic partnerships and innovation labs continue to shift from differentiators to must-haves. Providers like Wipro and Capgemini leverage niche alliances and GenAI engineering arms to cocreate scalable, persona-based solutions.

From the 37 companies assessed for this study, 23 qualified for this quadrant, with nine being Leaders and two Rising Stars.

accenture

Accenture leads in AI-augmented workforce services with scalable, ethical agentic AI via AI Navigator and Trusted Agent Huddle, backed by major investments, a joint venture with Telstra and 10 acquisitions. It stands out in workforce upskilling, outcome-driven impact and ethical governance.

Capgemini

Capgemini delivers sector-specific AI solutions through CHIP AI and Microsoft Copilot, achieving strong outcomes such as 80 percent zero-touch resolution in case studies. Its XMO-led change management and ethical AI governance enhance regional relevance and workforce adoption.

Fujitsu uvance

Fujitsu builds on its Kozuchi and Microsoft Copilot integration, delivering measurable results such as a 30 percent reduction in MTTR. Its five hubs, university partnerships and ethical AI practices support scalable, inclusive transformation across sectors.

HCLTech

HCLTech drives AI workforce transformation with GenAI labs, vertical copilots and XLA-driven engagements. Strategic partnerships and the upskilling of 50,000 employees by 2025 position it as a leader, especially in the telecommunications and banking sectors.

Infosys scales AI workforce services via its Orbit, Cortex and NAVI platforms, achieving a 50 percent reduction in TCO in some cases. Its APAC hubs, ethical AI governance and Wingspan learning platform support sustainable, inclusive transformation in Australia.

Kyndryl's Agentic AI Framework and Skytap on Azure enable legacy environment modernisation without replatforming. A strong local presence, measurable outcomes and workforce readiness programmes drive its leadership in sustainable, AI-driven transformation.

NTT DATA is building around its Workplace Smart AI Agent™ for device recovery and BYOD, supported by AR, XR, smart lockers and a regional CoE. It delivers measurable EX gains and ethical, locally adapted AI services.

TCS leverages Cognix™ and WisdomNext™ for scalable agentic AI, achieving 80 percent ticket resolution automation. Its Sydney innovation hubs, deep ecosystem integration and AI.Cloud Academy support measurable outcomes and ethical workforce transformation.

Wipro's NeuraDesk and zero-touch provisioning enable 40-50 percent reduction in manual effort in case studies. With a growing regional presence, including strong local delivery and ethical AI governance, Wipro leads in scalable, personalised AI workforce services.

Tech Mahindra's (Rising Star) Orion platform enables no-code, secure AI agent deployment. Measurable business improvement outcomes, over 77,000 upskilled associates and a strong local delivery position it as a scalable, ethical AI workforce innovator.

Unisys' (Rising Star) Service Experience Accelerator promises 95 percent rapid resolution and 30 percent onboarding efficiency. With a growing client base, smart workplace technology and strong ethical AI practices, it is a rising force in Australia's AI-augmented workforce services market.

Unisys

Rising Star

"Unisys is a Rising Star in Australia's AI-augmented workforce services, as evident from the significant revenue, over 40 clients, SEA platform innovation, smart workplace tech, and expanded AI and ML capabilities achieved via global COEs and M&A assets."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys reported around $30 million in revenue in 2024 from AI-augmented workforce services in Australia, with more than 40 clients. It drives regional growth through its Service Experience Accelerator, smart building tech and expanded AI/ML capabilities, supported by global COEs and M&A.

Strengths

Autonomous AI capabilities: Unisys' Service Experience Accelerator integrates GenAI and ML to deliver proactive, context-aware digital agents that autonomously manage workflows and knowledge curation. These agents support frontline and hybrid workers across Australia, including aviation and manufacturing clients.

Enterprise integration and measurable impact: Unisys' Service Experience Accelerator and XLA 4.0 are deeply embedded in enterprise ecosystems such as ServiceNow and Microsoft 365, enabling seamless operations. Australian deployments show measurable outcomes such as 95 percent rapid issue resolution and 30 percent onboarding efficiency.

Workforce enablement and change management: Unisys supports workforce transition through advanced organisational change management (OCM), persona-based training and digital assistants. In Australia, this includes smart lockers, AR support and multilingual signage, enhancing adoption and collaboration with AI agents.

Ethical AI and regional relevance: Unisys ensures ethical AI deployment with in-tenant data governance, hallucination prevention and transparency. Australian case studies, such as SmartGate support and post-quantum readiness, demonstrate scalable, locally adaptable solutions that ensure client satisfaction.

Caution

Unisys could substantially strengthen its regional position by investing more in data hygiene and taxonomy, as outdated or inaccurate enterprise data often hinders AI agent performance, creating confusion and operational risk.

Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of August 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Future of Work Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Author

Bruce Guptill
Analyst and Advisor

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

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

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

Research Analyst

Ayushi Gupta
Senior Research Analyst

Ayushi is a Senior Research Analyst at ISG. She is responsible for supporting and co-authoring Provider Lens® studies on Future of Work and Organisational Change Management. Ayushi has 3 years of experience in conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure, and Finance. Along with rich understanding of various business vertical, she has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape and evolving needs of the potential target audience.

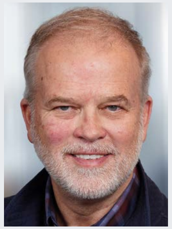
She is good at collaborating seamlessly with US stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualisation, storyboarding, and analysis.

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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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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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