ISG Provider Lens®

Future of Work Services

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

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QUADRANT REPORT | OCTOBER 2025 | GERMANY

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Accelerating reluctance or reluctant acceleration: Germany's bet on the agentic promise

The German workplace in 2025 is being reshaped by a confluence of powerful and often contradictory forces that present unprecedented challenges for organizations and their workforce strategies. The macroeconomic environment is marked by pronounced stagnation, with the national economy struggling to generate meaningful growth following two consecutive years of contraction, amid U.S. trade policy uncertainty. Although expansionary defense and infrastructure spending offer some stimulus, the impact of U.S. tariffs is expected to reduce growth by 0.1 percentage points in 2025 and 0.3 points in 2026.

This economic malaise creates a particularly complex labor market paradox that defines workplace dynamics in 2025. While cyclical unemployment has reached its highest level since 2020, a deep-seated demographic decline is exacerbating acute structural labor shortages in critical sectors, forcing organizations to rely on international talent to fill these gaps.

The *Mangelberufe* challenge and the hunt for global talent

The labor shortage is most pronounced in specific high-demand fields officially designated as *Mangelberufe* (shortage occupations). In 2025, the government significantly expanded the list of these occupations, acknowledging the broadening scope of the crisis. The most critical deficits are concentrated in STEM fields (engineers, IT specialists, data scientists), healthcare (doctors, nurses, dentists, midwives), construction (architects, site managers) and education.

In response to the domestic market's inability to meet labor demand, Germany has strategically intensified its efforts to attract global talent. This shift elevates immigration from a social issue to a core tenet of national economic policy. The flagship initiative is the significant expansion and liberalization of the EU Blue Card program for skilled non-EU professionals.

AI is increasingly seen as a **driver of job transformation** rather than outright replacement.

This policy represents a direct admission that Germany's long-term economic vitality now fundamentally depends on its ability to compete for and integrate foreign talent, creating a permanent strategic imperative for businesses to develop robust international recruitment capabilities.

Within this challenging context, two transformative trends are defining the future of work:

- First, hybrid work models have become a permanent fixture in the corporate landscape. No longer a pandemic-era contingency, flexible work is now a strategic tool for talent attraction and retention, signaling a fundamental shift away from Germany's traditional *presence culture*.
- Second, and more profoundly, AI is reaching an inflection point. Corporate adoption is accelerating from a niche technology to a strategic imperative, with investment surging across all sectors. This top-down push is met by a massive, bottom-up wave of informal AI use by employees, creating a *Shadow AI* ecosystem that presents significant productivity opportunities and urgent governance challenges. The emergence of agentic AI, autonomous systems capable of independent action, marks the next frontier. However, business leaders are tempering their ambitions with a growing awareness of the associated risks, pointing toward a future defined by human-agent collaboration rather than full automation.

While understanding what an AI-empowered business entails is beginning to develop, the vision of what an AI-empowered society will look like largely remains unclear. It is evident that these transformations are unfolding within a new and comprehensive regulatory framework, headlined by the EU's AI Act.

As Germany implements its national *High-Tech Strategy 2025* to foster an *AI Made in Germany* ecosystem, businesses must navigate a complex legal landscape, balancing innovation with compliance.

For leaders, the path forward requires a multifaceted strategy that encompasses addressing the structural skills mismatch through a dual approach of international recruitment and domestic reskilling, formalizing flexible work policies, governing the burgeoning use of AI, and preparing for a future where technology augments rather than replaces human ingenuity.

The evolving workplace: Hybrid is here to stay

The profound shifts in work organization triggered by the global pandemic have now consolidated into a new and stable equilibrium in Germany. Flexible work, particularly hybrid models, has transitioned from a temporary necessity into a permanent and strategic feature of the modern workplace. This evolution signifies a deep cultural change, compelling companies to fundamentally rethink the role of the physical office and the nature of management.

Data from the ifo study in early 2025 confirms that hybrid work has become an entrenched part of the German labor market, with no evidence of a widespread return-to-office trend. A February 2025 ifo Business Survey found that 24.5 percent of German employees worked from home at least part of the time. This figure has remained remarkably stable since April 2022, indicating that companies and employees have settled into a sustainable new model despite publicly discussing RTO mandates. Interestingly, this situation is not unique to Germany, as a recent paper by Stanford Professor Nick Bloom et al. finds.

According to the ifo study, the adoption of remote work varies significantly by sector, reflecting the operational realities of different industries. Knowledge-based service providers lead the way, with a home office rate of 34.3 percent. They are followed by manufacturing, where 16.9 percent of employees have hybrid arrangements, and trade at 12.5 percent. Unsurprisingly, the construction industry has the lowest adoption rate, at just 4.6 percent.

A comprehensive survey by the ZEW Institute corroborates this trend, showing that 82 percent of companies in the information economy and 48 percent in manufacturing now offer home office options, marking a dramatic increase from pre-pandemic levels. Crucially, these companies anticipate that the prevalence of remote work will continue to grow over the next two years, solidifying its place in the future of work.

The drivers of flexibility: A win-win proposition

The persistence of hybrid work is rooted in a clear value proposition for both employees and employers. For the workforce, the primary benefits include tangible improvements in work-life balance, greater autonomy over schedules, and significant time and cost savings from reduced commuting. This preference has become a powerful force in the labor market; one study found that more than 40 percent of European job seekers would outright reject a job offer that did not include remote work options.

What began as a crisis response has evolved into a key strategic lever for employers. In Germany's tight market for skilled labor, offering flexibility has become a critical tool for attracting and retaining top talent.

Beyond talent management, companies also report benefits such as improved employee engagement and productivity, alongside the potential for significant cost efficiencies through optimizing and reducing physical office space.

This combination of employee demand and strategic business advantage has cemented the hybrid model's position as the new standard for office-based work.

The future of the office: From desks to destinations

The entrenchment of hybrid work is catalyzing a fundamental reimagining of the corporate office. The stabilization of remote work at a significant level signals the definitive decline of Germany's traditional *Anwesenheitskultur*, or presence culture, that often equates physical visibility in the office with productivity and commitment.

The new paradigm emphasizes outcomes over hours logged at a desk. This cultural shift requires a new generation of management skills focused on leading distributed teams, fostering trust without constant direct oversight and maintaining a cohesive corporate identity across physical and digital spaces, a significant evolution for Germany's traditionally hierarchical management style.

In this new model, the office is no longer the default place for individual task work. Instead, companies are redesigning their physical footprints to serve as hubs for activities that benefit most from in-person interaction: collaboration, innovation, mentorship and culture-building.

A booming coworking market in major German cities such as Berlin and Munich supports this *office as a destination* concept. These flexible spaces provide a valuable third place for individuals and teams, offering a professional environment that bridges the gap between the isolated home office and the traditional corporate headquarters.

The future points toward increasingly fluid models where employees, enabled by robust digital infrastructure and clear corporate policies, can choose their work location—whether it be home, the corporate hub or a coworking space—based on the specific demands of the task at hand.

Moreover, hybrid work has transcended its status as the new normal; work has simply become work again, with the office desk being one of many places where people perform their tasks. Innovative office designs from architectural and design leaders such as M Moser Associates, Gensler or Steelcase highlight that the office should be understood as an ecosystem of smart and adaptable places, rather than a collection of desks.

By focusing on this trifecta of place, people and technology, businesses can build places for high-performance teams, seek providers that understand this focal point and demonstrate leadership in bringing all dimensions together.

The AI inflection point: Adoption, perception and the agentic frontier

In 2025, AI has definitively moved from the periphery to the core of the German business landscape. Its integration is proceeding along two parallel tracks: a strategic, top-down push by corporations recognizing AI as a competitive necessity, and widespread, bottom-up adoption by employees using publicly available tools to enhance their daily work.

This dual-track adoption is creating immense opportunities for productivity and innovation while also exposing significant new challenges related to governance, skills and the very nature of work.

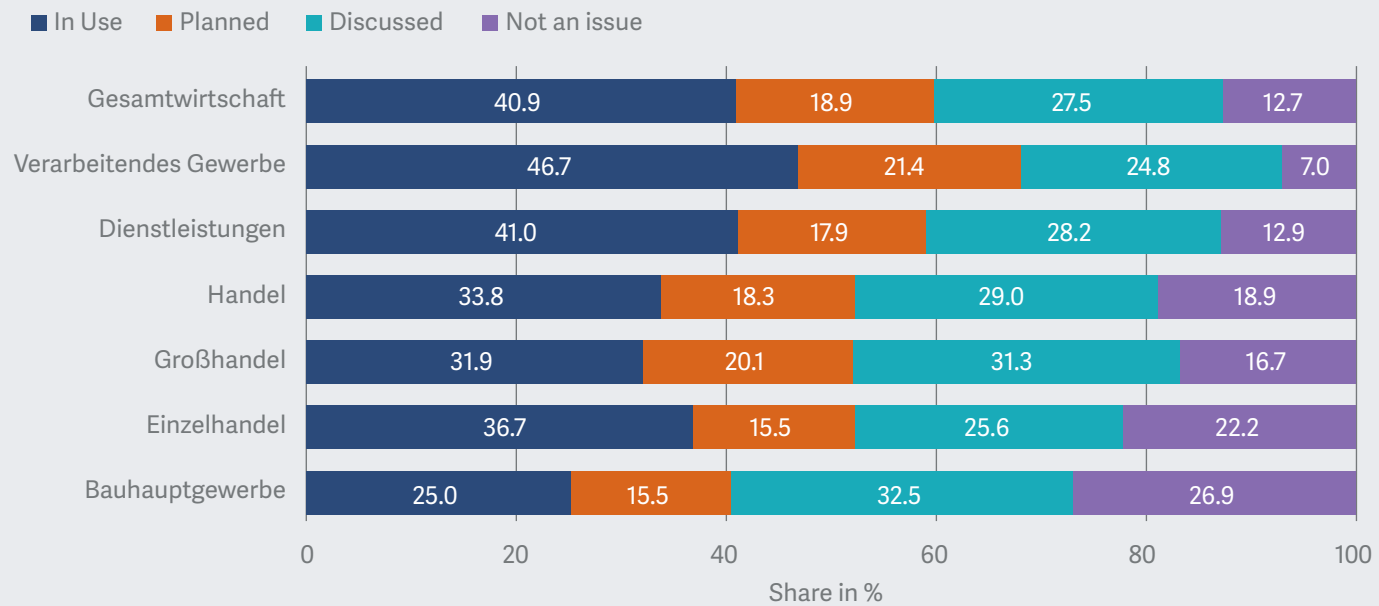
Business adoption accelerates across the board

AI is no longer an experimental technology but a strategic imperative for German businesses. A landmark ifo Institute survey from June 2025 revealed that 40.9 percent of German companies are now actively using AI in their business processes, a substantial increase from the previous year. An additional 18.9 percent are in the planning phase, indicating that a clear majority of the economy is now engaged with the technology.

This rapid adoption is confirmed by a KPMG study, which found that 91 percent of German companies now view generative AI (GenAI) as critical to their business model, a dramatic rise from 55 percent the previous year. This strategic shift is backed by significant financial commitment, with 82 percent of companies planning to increase their AI budgets in the next twelve months, and more than half planning increases of 40 percent or more.

Adoption rates vary significantly by sector, creating a tiered landscape. Unsurprisingly, data-intensive and knowledge-based industries are leading the charge, with the highest

Artificial Intelligence in German Companies



Source: ifo Business Surveys, May 2025.

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penetration in advertising and market research (84.3 percent), IT services (73.7 percent) and the automotive industry (70.4 percent). The ifo study finds that more traditional sectors such as hospitality (31.3 percent), food and beverage manufacturing (21 percent) and textiles (18.8 percent) are lagging but still show growing engagement. A clear digital divide is also apparent based on company size: 56 percent of large corporations use AI, compared to just 38 percent of SMEs and 31 percent of microenterprises.

The rise of agentic AI: The next technological frontier

Beyond established AI applications, the next frontier of agentic AI is rapidly emerging. These autonomous AI systems can independently plan, reason and execute complex, multistep tasks to achieve a goal with minimal human oversight.

This technology represents a paradigm shift from AI as a tool to AI as a team member. Germany's enterprise agentic AI market reflects this potential, with analysts, including those in ISG, predicting a compound annual growth rate between 30 percent and 45 percent until 2030.

German industry is actively engaging with this new frontier. Major automotive players such as Mercedes-Benz and BMW are already deploying agentic systems for conversational navigation and supply chain optimization. The focus of these advanced deployments is shifting from optimizing discrete tasks to reinventing entire end-to-end business processes. However, this ambition is tempered by a growing *trust paradox*.

While executives view agentic AI as a competitive necessity, a global Capgemini survey reveals that trust in fully autonomous systems has plummeted from 43 percent to 27 percent in the past year. This decline reflects a more mature understanding of the profound risks associated with data privacy, algorithmic bias and loss of control as the technology moves from abstract hype to concrete implementation. It also suggests the most successful path forward will not be a headlong race toward full automation. Instead, it will involve the careful design of sophisticated human-agent collaboration models, where AI agents handle complex execution while humans provide critical judgment, ethical oversight and strategic direction. This approach places a premium on process redesign and workforce upskilling over the technology itself.

The employee perspective: Proactive use and cautious optimism

One of the most striking findings of 2025 is the extent of bottom-up AI adoption by the German workforce. A landmark study by the ZEW Institute revealed that more than 60 percent of German employees are already using AI at work. Critically, much of this usage is informal, with employees independently using publicly available tools, such as ChatGPT, without formal introduction or approval from their employers.

This has led to the emergence of a vast *Shadow AI* ecosystem, operating largely outside corporate governance and security frameworks. The disconnect between top-down strategy and bottom-up reality means that official corporate adoption statistics significantly understate the true penetration of AI in daily workflows while simultaneously creating urgent risks related to data security and compliance that most companies are ill-equipped to manage.

AI usage among employees is not uniform. It is most prevalent among young and highly educated workers. According to ZEW, nearly 80 percent of employees with a university degree use AI, compared to less than a third of those with no formal qualifications, pointing to a new skills gap emerging within the workforce. The impact of AI usage is decidedly mixed. Employees who use AI report improved autonomy and freedom in their work, but they also experience complex job requirements, high deadline pressure and frequent symptoms of information overload and burnout.

AI is increasingly seen as a driver of job transformation rather than outright replacement

Concerns about job security persist but appear to be moderating. While the Continental's survey on AI from 2023 found that 61 percent of Germans feared job losses due to AI, the previously mentioned ifo survey from 2025 indicated that 27.1 percent of companies expect AI to lead to job cuts within the next five years. This suggests that a more nuanced understanding is developing, where AI is seen as a driver of job transformation rather than an outright replacement. This perspective is

supported by global sentiment data, which shows that optimism about the net benefits of AI has grown by 10 percentage points in Germany since 2022, as indicated by the Stanford 2025 AI Index Report.

Charting the future: Policy, regulation and strategic recommendations

The profound transformations in the German workplace are not occurring in a vacuum. They are being actively shaped by a robust national and European policy framework designed to foster technological leadership while establishing clear ethical and legal guardrails.

For business leaders, navigating this evolving landscape requires a proactive approach to leveraging government support and ensuring regulatory compliance, particularly concerning the landmark EU AI Act.

Germany's national AI strategy: Building *AI Made in Germany*

The German federal government has placed AI at the heart of its long-term economic and technological policy. The cornerstone of this effort is the High-Tech Strategy 2025, an ambitious plan to establish *AI Made in Germany* as a globally recognized trademark for cutting-edge and trustworthy AI applications. To fund this vision, the government has committed a total of €5 billion through 2025.

The strategy is built on several key pillars. A primary focus is on bolstering the foundational infrastructure for AI development through massive investments in high-performance computing. This includes the establishment of national AI Gigafactories, which will provide research institutions and universities with access to the vast computational power needed to train next-generation AI models.

Another crucial element is accelerating the transfer of AI research into practical business applications, with a particular emphasis on supporting the Mittelstand (SMEs). Programs such as KI4KMU are designed to provide grants for pilot testing, infrastructure and training to help small firms adopt AI.

Finally, the strategy heavily emphasizes human capital development, aiming to create more than 100 new AI professorships, expand lifelong learning platforms such as the AI Campus and implement a National Skills Strategy to upskill the workforce for an AI-driven economy.

The EU AI Act: Navigating the new regulatory landscape

The primary regulatory framework governing AI in Germany is the EU's AI Act, the world's first

Date	Provision	Implications for businesses
February 2, 2025	Ban on Unacceptable Risk AI Systems	Immediate compliance is required. Systems involving social scoring, cognitive manipulation or most real-time biometric surveillance are prohibited.
August 2, 2025	Rules for General-Purpose AI (GPAI) Models	Providers of models such as ChatGPT must adhere to new transparency obligations, including publishing summaries of training data and preventing the generation of illegal content.
August 2, 2026	Main Body of the Act Applies	Most provisions, including those for limited-risk systems (for example, chatbots requiring disclosure), become fully effective.
August 2, 2027	Rules for High-Risk AI Systems	Systems used in critical areas such as employment (recruitment, performance management), credit scoring and critical infrastructure must comply with stringent requirements for risk management, data governance, human oversight and transparency.

Table 1: EU AI Act Key Implementation Timeline; Source: EU

comprehensive law on AI. Germany's national strategy is explicitly designed to align with this pan-European framework, which sets a global standard for AI governance through the *Brussels Effect*.

The Act's complexity, however, presents a significant implementation challenge, particularly for the SMEs that form the backbone of the German economy. Recognizing this, the German government has stated its intention to pursue an *innovation-friendly implementation with minimal bureaucracy*, a goal whose success will be critical for the widespread adoption of compliant AI. The AI Act employs a tiered, risk-based approach with a staggered implementation timeline that businesses must closely monitor.

Strategic recommendations for business leaders

Business leaders should adopt a proactive, multifaceted strategy as listed below to successfully navigate the complex and rapidly evolving German workplace of 2025.

1. **Embrace the structural mismatch in talent:** Leaders must internalize that the skilled labor shortage is a long-term structural reality, not a temporary cyclical issue. A dual-pronged talent strategy is essential. First, organizations should aggressively leverage programs such as the expanded EU Blue Card to recruit critical international talent immediately. Second, they should make significant, sustained investments in domestic reskilling and upskilling programs to bridge the gap between existing workforce capabilities and future demands, particularly in digital and AI-related competencies.
2. **Formalize and strategize flexible work:** Leaders must move beyond reactive or ad-hoc hybrid work policies and develop a clear, formal and strategic framework for flexible work. This framework should define expectations regarding presence and availability, support asynchronous communication and invest in the digital tools necessary for seamless collaboration. It also involves redesigning physical office spaces to function as hubs for innovation and culture while equipping managers with the skills required to lead and effectively motivate distributed teams.
3. **Govern the *Shadow AI* ecosystem:** Leaders must acknowledge that employees are already using AI tools extensively, and attempting to ban this bottom-up adoption is futile and counterproductive. The strategic response is to govern it. They should establish clear and practical corporate policies for using GenAI, provide employees with sanctioned, secure and powerful AI tools, and launch comprehensive training programs. This training should focus on the technical use of the tools as well as ethical considerations, data privacy and responsible AI principles. This approach transforms a significant security risk into a powerful, managed productivity advantage.
4. **Prepare for AI Act compliance proactively:** Leaders should not wait for the final implementation deadlines to act but must begin an immediate audit of all current and planned AI systems to classify them according to the Act's risk tiers (unacceptable, high, limited, minimal). For any system that could be classified as high-risk—particularly in HR, finance and customer-facing operations—they should initiate the development of the necessary compliance infrastructure. This includes establishing robust processes for risk management, data governance, transparency documentation and ensuring meaningful human oversight.
5. **Adopt a human-centric agentic AI strategy:** Leaders should approach the next wave of agentic AI not as a tool for cost-cutting through workforce replacement, but as a platform for profound human-agent collaboration. They must focus initial investments on redesigning core business processes where AI agents can autonomously execute complex tasks, freeing human employees to focus on higher-value activities that require strategic thinking, creativity, complex problem-solving and ethical judgment. The most significant value will be unlocked not by replacing humans, but by augmenting them.

Quadrant 1 observations: Workplace Strategy and Enablement Services

Key Takeaways

- Leaders dominate Germany's mature market; entry requires a full suite of advisory, technology and sustainability skills
- AI is now table stakes. Differentiation comes from responsible AI governance, aligning with EU and German regulations
- Sustainability has moved from strategy to operations, focusing on measurable ROI and TCO reduction
- True end-to-end capability is rare; many providers have gaps in either high-level advisory or physical space execution
- The German Mittelstand represents a key growth frontier for agile providers such as Rising Star Stefanini
- Change management is productized with AI-driven platforms to de-risk adoption and prove value

Three powerful, interconnected pillars are reshaping Germany's Workplace Strategy and Enablement Services market. Providers that successfully navigate these trends are positioning themselves as indispensable partners for enterprises seeking to build resilient, productive and future-ready work environments.

Pillar 1: The AI imperative — from tool to transformation engine

AI has transcended its role as a mere productivity tool to become the central engine of workplace transformation. Leading providers are embedding AI across the entire service value chain, moving beyond simple automation to sophisticated, data-driven strategic enablement. This includes using AI engines to mine collaboration data for optimizing physical real estate, deploying AI-powered diagnostics to orchestrate large-scale change programs and creating rolling AI innovation pipelines that feature virtual agents and predictive engagement analytics.

However, in the highly regulated German and EU context, technical capability alone is insufficient. The most strategic providers are differentiating themselves through a focus on governance and ethics. The discourse is rapidly maturing from *what AI can do* to *how AI should be governed*. This is a direct response to market-specific regulatory pressures, chiefly the GDPR and the forthcoming EU AI Act.

The emergence of branded ethical AI and responsible AI frameworks is not merely a marketing exercise. It represents a fundamental strategic pivot, turning a complex compliance necessity into a source of competitive advantage. By proactively addressing client anxieties around data privacy, algorithmic bias and transparency, these providers build critical trust and de-risk AI adoption for German enterprises operating under strict co-determination and data protection regimes.

Pillar 2: The ESG mandate — operationalizing sustainability

Sustainability has definitively moved from a corporate social responsibility sidebar to a core operational and strategic imperative. Client demand has shifted from high-level ESG strategy to tangible, measurable execution that impacts the bottom line. The focus is now on operationalizing sustainability within the workplace to achieve quantifiable reductions in carbon emissions, energy consumption and electronic waste, all while improving the TCO.

Providers are responding with a new generation of practical, data-driven solutions, such as the gamification of eco-friendly behaviors by providing employees with real-time data on their device energy use, directly linking individual actions to corporate goals.

Pillar 3: The experience economy — industrializing EX, DEX and OCM

In a tight labor market defined by hybrid work, EX has become a critical determinant of talent attraction, retention and productivity.

Leading providers are moving beyond anecdotal improvements to industrialize the measurement and management of the overall EX and its digital component, the digital employee experience (DEX). This involves deploying structured methodologies and platforms that provide continuous, data-driven insights. The focus on experience is inextricably linked to organizational change management (OCM). Recognizing that even the best strategy fails without user adoption, providers are productizing their OCM capabilities.

The industrialization of EX and OCM enables enterprises to de-risk transformation initiatives and demonstrate measurable returns on their workplace investments.

What defines a leading provider in Quadrant 1

Leaders in Workplace Strategy and Enablement Services demonstrate a holistic understanding of work and the workplace, moving beyond technology delivery to shape enterprise-level vision through C-Suite Advisory.

They connect workplace transformation directly to business outcomes, linking areas such as employee well-being to revenue growth and ensuring that workplace initiatives support talent retention, regulatory compliance, and profitability.

A defining trait is their ability to drive multidisciplinary execution, integrating human capital, digital technology, real estate, legal, and sustainability functions under a cohesive governance model to deliver end-to-end transformations.

Leaders also excel in platform-powered innovation, leveraging proprietary analytics platforms, AI-fueled design frameworks, and structured innovation models to provide scalable, repeatable, and data-driven solutions.

They combine global innovation with local regulatory expertise, ensuring compliance with the EU AI Act, GDPR, and co-determination requirements while tailoring services to the needs of the local market.

Leaders advance inclusive, adaptive work experiences, designing solutions that support diverse workstyles, ensure accessibility, and foster a culture of well-being and collaboration.

Quadrant 1: Key takeaways for enterprise buyers

- Probe providers on their integrated *people + tech + space* delivery; ask for references that span all three domains
- Prioritize partners with demonstrable responsible AI frameworks that proactively address GDPR and the EU AI Act
- Demand sustainability proposals with clear financial models, showing ROI through energy savings and TCO reduction

Quadrant 1: Key takeaways for IT and workplace leaders

- Invest in data-driven EX and DEX platforms to create a baseline and measure the impact of transformation initiatives
- Co-develop change management plans with providers; leverage their automated tools to drive adoption and prove ROI
- Focus on IT/OT convergence for frontline workers, a key area for productivity gains in German manufacturing

Quadrant 1: Key takeaways for providers

- Close the advisory gap; tech-heavy providers must invest in or acquire strategic consulting talent to engage the C-suite
- Develop a specific, streamlined offering for the German Mittelstand to capture this underserved market segment
- Showcase German-specific case studies that address co-determination, works councils and local regulations.

Quadrant 1: Outlook and market evolution

The German workplace services market will evolve along several key vectors, driven by technological maturation, regulatory enforcement and shifting client expectations.

The current wave of GenAI adoption, characterized by copilot integrations and prompt libraries, will give way to a more sophisticated phase focused on autonomous workflows and AI-driven organizational design. The central question will shift from *how AI can assist our employees* to *how AI can redefine work itself*.

The full implementation of the EU AI Act will cement responsible AI as a non-negotiable, auditable requirement, erecting significant market barriers for any provider lacking a transparent and robust governance framework.

Concurrently, today's static hybrid work models will evolve into dynamic resourcing. AI-powered analytics will enable organizations to move beyond fixed in-office schedules, instead of predicting and allocating resources in real-time based on project needs, optimizing physical space and collaborative energy.

This escalating complexity will catalyze the rise of the *Transformation Orchestrator*. Clients will increasingly struggle with multivendor

management as solutions become intricate ecosystems, integrating AI, IoT from smart buildings, ESG reporting platforms, real estate analytics and HR systems.

The provider cautions in this study, highlighting gaps such as the need for real estate expertise or deep strategic advisory, foreshadow this trend. Enterprises will seek a single partner capable of managing this complex web of technologies and services under a unified governance model, accountable not for SLAs but for business-level outcomes defined by XLAs.

The providers best positioned for this evolution are the Leaders who have already built strong, multidisciplinary governance models and have a track record of orchestrating large-scale, multifaceted transformations.

Quadrant 2 observations: Collaboration and Next-gen Experience Services

Key takeaways

- XLAs are becoming increasingly part of everyday language in workplace service delivery; SLAs remain legacy but necessary; focus on business outcomes rather than solely on system uptime
- GenAI is a dual mandate: drive productivity, but govern with sovereign-ready frameworks
- The XMO is the brain of the modern workplace, turning DEX data into action
- The German Mittelstand is the next frontier, requiring simplified, bundled offerings
- Local proof is paramount; German case studies and references are non-negotiable
- Data sovereignty is not optional; it is a core requirement for German enterprises

The German market for collaboration services is undergoing a profound transformation, driven by a convergence of technological innovation and evolving business priorities. The most significant trend is the decisive shift from legacy SLAs, focused on technical uptime, to outcome-oriented XLAs. This reflects a market-wide recognition that the value of workplace technology lies not in its availability, but in its ability to enhance productivity and employee satisfaction.

Fueling this shift is the rise of the Experience Management Office (XMO) as a central governance function, which uses Digital Experience (DEX) analytics to translate telemetry and sentiment data into actionable business improvements. Concurrently, the rapid emergence of GenAI, particularly Microsoft Copilot, has created a dual mandate for providers: they must deploy these powerful tools and provide robust governance frameworks to ensure compliance with the EU AI Act and Germany's strict data privacy laws (DSGVO). This emphasis on data sovereignty, often requiring local data centers and C5 certification, remains a critical differentiator. The complexity of modern enterprise environments also necessitates a vendor-agnostic approach, with Leaders demonstrating expertise across Microsoft, Cisco, Zoom and even open-source platforms.

What defines a leading provider in Quadrant 2

Leaders in this quadrant master the art of integrating technology with business outcomes. Their portfolio attractiveness and competitive strength are both exceptionally high. They have moved decisively beyond SLAs, embedding outcome-driven XLAs and a dedicated XMO into their core delivery model. A defining trait is their sophisticated approach to GenAI, offering deployment of tools such as Copilot and comprehensive governance frameworks that address EU AI Act and DSGVO compliance. The Leaders demonstrate deep local commitment through German data centers, a strong regional presence and a portfolio of reference clients from the Mittelstand and regulated industries. Their expertise is vendor-agnostic, seamlessly managing complex ecosystems of Microsoft, Cisco, Zoom and other platforms to deliver a unified, secure and productive EX.

Quadrant 2: Key takeaways for enterprise buyers

- Demand outcome-based XLAs; tie provider fees to sentiment and productivity gains
- Scrutinize GenAI governance and how the provider will ensure EU AI Act and DSGVO compliance
- Prioritize providers with proven German references in your specific industry
- Quadrant 2: Key takeaways for IT and workplace leaders
- Champion an XMO to centralize governance and prove the ROI of your tech spend

- Invest in DEX tools to move from reactive support to proactive experience management
- Plan for a multivendor reality; ensure your partner can manage Teams, Zoom and Cisco

Quadrant 2: Key takeaways for providers

- Develop bundled, easy-to-consume offerings specifically for the German Mittelstand
- Invest in local marketing and showcase German client success stories with hard metrics
- Build and certify sovereign cloud solutions; it is a key differentiator in Germany

Quadrant 2: Outlook and market evolution

Looking ahead, the German collaboration services market will consolidate around providers that have fully mastered the integrated *XLA-XMO-DEX* operating model.

The EU AI Act will transition from a future consideration to an active enforcement reality, compelling providers to offer *compliance-as-a-service* as a standard component of their GenAI offerings.

The focus of innovation will evolve from deploying collaboration platforms to orchestrating agentic AI workflows, where autonomous agents perform complex tasks across multiple applications, making concepts such as agentic workplaces mainstream.

This will necessitate even more sophisticated governance. The competitive divide will widen between providers who successfully create scalable, secure and sovereign offerings for the Mittelstand and those focused solely on the large enterprise segment. Providers who can demonstrate quantifiable productivity and engagement gains through a combination of AI, analytics and human-centric change management will capture the majority of market share.

Quadrant 3 observations: Managed End-user Technology Services

Key Takeaways

- AI-driven self-healing is now table stakes for managing hybrid workplace complexity
- Sustainability is a core differentiator, linking ESG goals to cost savings and compliance
- Device-as-a-Service (DaaS) models dominate, shifting IT spend from CapEx to OpEx
- Deep German presence is crucial for logistics, support and for navigating local regulations
- DEX has transformed into a requirement and expectation, serving as a primary metric of success
- Providers are embedding security deeply, with Zero Trust as the guiding principle

ISG observes two strategic imperatives for managed end-user technology services in Germany.

Firstly, AI-driven hyperautomation, sustainable circular economy principles and an intense focus on DEX. Providers are leveraging AI to enable proactive, self-healing support, orchestrate complex global supply chains and embed zero-trust security measures. This automation is essential for managing the complexity and scale of distributed, hybrid workforces efficiently.

Secondly, Device-as-a-Service (DaaS) has become the standard commercial model, wrapping hardware, software and lifecycle services into predictable OpEx constructs that increasingly feature auditable ESG reporting and carbon-tracking. This directly addresses enterprise demands for both financial predictability and demonstrable progress against sustainability goals.

These technological and commercial shifts support a demanding hybrid workforce where seamless, secure and sustainable technology experiences are paramount for productivity and talent retention. In a competitive landscape, the ability to deliver these advanced services with a strong local presence for logistics, field support and regulatory fluency remains a key and powerful differentiator.

What defines a leading provider in Quadrant 3

Leaders in this quadrant possess comprehensive, end-to-end service portfolios covering the entire device lifecycle, from global sourcing and zero-touch deployment to AI-driven support and sustainable disposal. Their competitive prowess is evidenced by a large base of referenceable large-enterprise clients in Germany, extensive global and local

delivery networks and significant investments in innovation, particularly in AI, automation and DEX platforms.

These providers actively lead the market narrative, shaping client expectations around emergent themes such as the circular economy and proactive, self-healing IT environments. Furthermore, they maintain deep strategic partnerships with key technology vendors such as Microsoft, ServiceNow and major device OEMs, enabling them to deliver integrated, best-in-class solutions at scale.

Quadrant 3: Key takeaways for enterprise buyers

- Prioritize providers that prove sustainability ROI with auditable carbon reporting
- Demand evidence of strong local logistics and on-site support for hybrid workforces
- Scrutinize AI claims; seek demos of proactive, self-healing capabilities

Quadrant 3: Key takeaways for IT and workplace leaders

- Shift focus from SLAs to XLAs, using DEX telemetry to measure real productivity
- Leverage DaaS models to move to predictable OpEx and fund innovation elsewhere
- Partner with providers that offer robust Zero Trust security frameworks for all endpoints

Quadrant 3: Key takeaways for providers

- Translate global capabilities into packaged, priced offerings for the German Mittelstand
- Invest in vertical-specific solutions to create defensible, high-margin niches
- Publish German-specific case studies that quantify business value and compliance

Quadrant 3: Outlook and market evolution

Autonomous workplace management will dominate the future German market for managed end-user technology services. The current wave of GenAI will mature from conversational assistants into agentic AI platforms that manage the entire device lifecycle with minimal human intervention, from procurement negotiation to predictive replacement.

The EU AI Act and Corporate Sustainability Reporting Directive (CSRD) will make integrated security and ESG reporting non-negotiable, forcing providers to offer *compliance-as-a-service* as a standard component of their offerings. This will lead to market consolidation, as providers without deep AI and sustainability engineering talent will be acquired or relegated to niche player status. The distinction between physical and virtual endpoints will blur completely.

Providers will be expected to manage a unified digital persona that follows the employee across any device or location, governed by a single, telemetry-driven control plane that ensures a consistent, secure and productive experience everywhere.

Quadrant 4 observations: Continuous Productivity Services (Including Next-gen Service Desk)

Key takeaways

- AI/automation is now table stakes; differentiation lies in business outcome integration
- Market leaders in Germany can handle both SLAs and XLAs
- Frontline worker support is the next major competitive battleground for growth
- Data sovereignty and EU AI Act readiness are emerging as key trust factors for buyers
- Physical self-service (kiosks, lockers) is a tangible, high-value differentiator
- Providers must show local German references to win in this mature, risk-averse market

The German market for continuous productivity services has reached a clear consensus on the core technological pillars required for next-generation support.

Across the provider landscape, there is a pervasive and standardized adoption of AI and GenAI for automation, including self-healing capabilities, intelligent chatbots and Microsoft Copilot integrations. This is coupled with a near-universal strategic pivot from legacy SLAs to include business-focused XLAs.

Furthermore, the proliferation of omnichannel support models, blending digital interfaces with physical self-service options such as tech bars and smart kiosks, is now a common feature,

alongside a deep investment in predictive analytics and real-time sentiment analysis to preemptively address issues.

This technological convergence signifies a mature market where the foundational tools are no longer a source of differentiation. The competitive battleground has shifted from the technologies offered to how they are integrated and applied to address uniquely German challenges.

What defines a leading provider in Quadrant 4

True market leadership is now demonstrated through the contextual application of the standardized toolkit. For instance, providers are differentiating by addressing the stringent requirements of German data sovereignty and EU AI Act readiness. Others are tailoring their solutions to navigate the complexities of Germany's co-determination culture, acknowledging the importance of works-council scrutiny in technology deployment.

A further critical differentiator is the growing focus on Germany's industrial backbone, with providers developing specialized suites for frontline engagement to support the large, non-desk-based workforce in manufacturing and logistics.

Therefore, while the technology stack is common, its nuanced application to the German market's specific regulatory, cultural and industrial fabric now separates the Leaders from the rest of the pack.

Quadrant 4: Key takeaways for enterprise buyers

- Prioritize providers with proven, referenceable XLA models tied to your specific KPIs
- Scrutinize provider roadmaps for EU AI Act compliance and data sovereignty guarantees
- Evaluate frontline and industrial support capabilities, not just office-based solutions

Quadrant 4: Key takeaways for IT and workplace leaders

- Champion a *shift-left* culture by actively promoting self-service tools internally
- Partner with HR to use experience analytics (X-Data) to address productivity gaps
- Build the business case for investment based on productivity gains, not just IT cost savings

Quadrant 4: Key takeaways for providers

- Invest in building a strong narrative and reference cases for frontline industries
- Proactively publish whitepapers and compliance guides for the EU AI Act in German
- Develop tiered, flexible offerings to capture both large enterprise and Mittelstand clients

Quadrant 4: Outlook and market evolution

The market for continuous productivity services in Germany is poised for a significant transformation in the period leading to 2027, driven by the convergence of regulatory mandates, persistent economic pressures and advancing technology.

This evolution will be defined by what can be termed the *Great Replatforming*, a fundamental re-architecting of AI-driven service delivery models in response to the phased implementation of the EU AI Act.

As key obligations for general-purpose AI and high-risk systems become enforceable between 2025 and 2027, providers will be compelled to move beyond opaque, proprietary AI engines. Success will require a shift to modular, transparent and auditable AI systems that can demonstrate compliance with stringent requirements around data governance, risk management and transparency.

Consequently, AI Act readiness will transition from a marketing talking point to a critical, non-negotiable criterion in procurement decisions. Enterprise buyers in Germany will increasingly select partners based on their demonstrated ability to navigate this complex regulatory landscape and indemnify them from compliance risks.

Simultaneously, Germany's macroeconomic outlook, which projects a slow economic recovery alongside an intensifying, demographically driven skill shortage, will keep driving XLAs as the superior commercial model that will extend the common output-centric SLA stack with business-relevant outcomes.

Every IT service investment will face intense scrutiny and must be directly and contractually linked to measurable productivity gains and tangible business value.

The providers that will emerge as the undisputed market leaders of the post-2027 era will be those who successfully navigate this dual challenge: executing a complex regulatory replatforming of their core AI services while simultaneously delivering and proving quantifiable productivity outcomes, particularly for Germany's vital industrial and frontline sectors.

Quadrant 5 observations: Smart and Sustainable Workplace Services

Key takeaways

- ESG is now the core driver, not an add-on; auditable data is paramount for compliance and strategy
- Circular economy for IT hardware has become a key, tangible lever for reducing Scope 3 emissions
- Leaders fuse IT services with building technology (OT) for holistic, efficient solutions
- IoT and AI are the standard toolkit for optimizing energy consumption and physical space utilization
- German-specific regulatory and industrial know-how is a significant competitive differentiator
- The market is shifting from technology provision to outcome-based strategic partnerships

The German market for smart and sustainable workplace services is undergoing a fundamental transformation, driven by the powerful confluence of ESG mandates and the normalization of hybrid work.

The central narrative emerging from provider strategies is the shift of workplace technology from a tool for productivity to a strategic asset for achieving corporate sustainability goals. This evolution rests on three key pillars.

First is the universal adoption of IoT and AI for the real-time automation and optimization of energy and space, moving from static management to dynamic, data-driven control. Second is the maturation of the circular economy for IT hardware. This has evolved from a niche concept to a mainstream strategy for reducing costs and, crucially, tackling hard-to-abate Scope 3 emissions through sophisticated remanufacture-redeploy-recycle models. Third is the rise of integrated ESG platforms, which serve as a single source of truth by ingesting data from IT, facilities, HR and supply chains to provide a unified, auditable view of an organization's carbon footprint, a non-negotiable requirement for regulatory reporting under CSRD.

What defines a leading provider in Quadrant 5

In this specific quadrant, Leaders distinguish themselves by offering end-to-end solutions that address the full spectrum of client needs.

This begins with strategic ESG and decarbonization advisory and extends to deep technical integration of IT and OT systems.

Furthermore, Leaders demonstrate proven, large-scale operational capabilities such as high-volume circular IT services. They can point to a portfolio of referenceable German client successes that validate their impact on both cost reduction and sustainability performance.

Their ability to deliver measurable outcomes, from energy savings to CSRD-ready reporting, solidifies their premier status.

Quadrant 5: Key takeaways for enterprise buyers

- Demand auditable, CSRD-ready data from day one; link provider KPIs directly to your public ESG commitments to ensure alignment
- Prioritize partners with proven IT/OT integration capabilities and deep expertise in Germany's industrial and regulatory landscape
- Scrutinize a provider's circular economy maturity and scale; this is a critical lever for reducing your Scope 3 emissions

Quadrant 5: Key takeaways for IT and workplace leaders

- Select platforms that unify EX, facilities and ESG data into a single, actionable pane of glass
- Ensure solutions are scalable and can integrate with your existing building management systems (BMS) to avoid creating new data silos

- Co-develop a multiyear transformation roadmap with your chosen partner; avoid buying a point solution and instead build a strategic relationship

Quadrant 5: Key takeaways for providers

- Invest heavily in local ESG consulting and regulatory expertise specific to the German market; generic global offerings are insufficient
- Develop modular, transparent pricing for GreenOps and smart building services to lower adoption barriers and simplify procurement
- Aggressively market German client case studies with quantified, third-party-validated carbon and cost savings to build credibility

Quadrant 5: Outlook and market evolution

The distinction between workplace services and sustainability services will effectively dissolve. The market will be defined by intelligent, autonomous and financially sophisticated solutions.

Three key shifts will shape the competitive landscape as listed below:

First, GenAI will evolve from user-facing chatbots to become the core intelligence layer of building management, capable of analyzing complex variables to suggest novel energy-saving strategies and automating the narrative generation for ESG reports.

Second, the regulatory environment will deepen. The EU AI Act will introduce a new compliance dimension, compelling providers to ensure the transparency, fairness and governance of the algorithms powering their smart platforms.

Third, spurred by persistent energy price uncertainty, outcome-based contracting will become the norm. Contracts will increasingly be structured around shared risk and reward models for energy savings and carbon reduction, moving beyond fixed fees to partnerships where providers have direct financial skin in the game.

Providers unable to quantify their value and back it with commercial guarantees will be left behind.

Quadrant 6 observations: AI-augmented Workforce Services

Key Takeaways

- Governance is not a feature but the product; EU AI Act readiness is the top differentiator
- Proprietary agent orchestration platforms are the new strategic battleground for providers
- Success requires moving beyond generic Copilots to delivering industry-specific, autonomous agents
- Workforce upskilling and change management are critical for adoption and works council approval
- Data sovereignty is non-negotiable; providers with strong EU-hosting capabilities have an edge
- The German Mittelstand is an emerging, high-potential market for accessible AI solutions

The German market for AI-augmented workforce services is defined by a powerful dual focus: an urgent drive to adopt cutting-edge GenAI and agentic capabilities, counterbalanced by an uncompromising demand for robust, transparent and auditable governance. This dynamic shapes every aspect of provider strategy and enterprise adoption. The primary technology theme is the rapid emergence of autonomous digital agents that move beyond simple automation to perform complex, context-aware tasks, a core tenet of this quadrant's definition.

A clear trend among market Leaders is the development of proprietary agentic orchestration platforms. These platforms act as the central nervous system for deploying, managing and governing diverse AI agents, demonstrating a strategic move by providers to establish themselves as the foundational technology layer for their clients' AI ecosystems. Deep and seamless integration with core enterprise systems, particularly Salesforce, SAP, ServiceNow and Microsoft 365, is considered table stakes, as the value of AI agents is directly proportional to their ability to access and act upon enterprise data within existing workflows.

However, technology alone is insufficient. Every leading provider emphasizes the criticality of comprehensive workforce upskilling and

structured change management programs. This reflects a mature understanding that successful AI augmentation is as much a human challenge as a technical one. Gaining the trust and cooperation of Germany's influential works councils is paramount, and making transparent communication and employee-centric transition plans is essential for any successful deployment.

Underpinning all these themes is the non-negotiable requirement for regulatory compliance and data sovereignty. Adherence to the EU AI Act and GDPR is not merely a legal checkbox but a central pillar of a provider's value proposition. The most sophisticated providers have moved beyond basic compliance to productize their governance capabilities. They offer branded responsible AI or trustworthy AI frameworks, complete with tools for bias detection, explainability and audit trails. This transforms a regulatory necessity into a competitive advantage, allowing providers to build deep, trust-based relationships with risk-averse German enterprises and position themselves as the safest choice in a high-stakes market.

What defines a leading provider in Quadrant 6

Leaders in the German AI-augmented Workforce Services market offer a comprehensive, end-to-end portfolio that addresses the full lifecycle of AI adoption, from strategic advisory to technical implementation and ongoing managed services. Their defining characteristic is possessing proprietary, often vendor-agnostic, agent orchestration platforms.

Leaders differentiate themselves with extensive libraries of prebuilt, industry-specific autonomous agents designed for industries critical to the German economy, such as automotive, manufacturing and finance.

This demonstrates a deep understanding of local market needs and accelerates time to value for clients. Furthermore, every Leader brings to market a branded, auditable, responsible AI framework that proactively addresses the stringent requirements of the EU AI Act, GDPR and German works councils. They maintain premier-tier alliances with multiple hyperscalers and AI technology firms, including Google, Microsoft and NVIDIA, ensuring their clients have access to the most advanced models and infrastructure. Leaders also back their technological prowess with deep consulting expertise in OCM and workforce upskilling, positioning themselves not merely as vendors but as indispensable partners in strategic transformation.

Quadrant 6: Key takeaways for enterprise buyers

- Prioritize providers with auditable, EU AI Act-aligned governance frameworks from day one
- Demand a vendor-agnostic orchestration strategy to avoid long-term lock-in to a single AI ecosystem
- Start with pilots that have clear, measurable business outcomes to secure stakeholder buy-in

Quadrant 6: Key takeaways for IT and workplace leaders

- Invest heavily in workforce upskilling and AI literacy programs to enable human-agent collaboration
- Establish a centralized AI CoE to govern use-case selection and standards
- Work proactively with works councils, using provider-supplied artefacts to build trust and transparency
- Quadrant 6: Key takeaways for providers
- Productize your governance frameworks; turn compliance from a cost center into a revenue driver
- Develop turnkey solutions and agile playbooks to capture the underserved German midmarket
- Invest in multi-agent orchestration and interoperability to manage complex, cross-platform workflows

Quadrant 6: Outlook and market evolution

Looking ahead, the German market for AI-augmented services will transition from a phase of exploratory adoption to one of industrial-scale optimization and governance. The full enforcement of the EU AI Act will be the primary catalyst for this shift. The focus will move beyond establishing pre-emptive governance frameworks to a pressing need for continuous, real-time compliance monitoring and automated auditing capabilities. This will create a new market for managed services

focused on AI governance, effectively offering an *AI Compliance Officer as a Service*, which will become a significant recurring revenue stream for leading providers.

The current *platform wars* over proprietary agentic orchestrators will also evolve. As enterprises deploy agents from multiple vendors, the demand for interoperability will grow, pushing providers toward more open standards to avoid being marginalized. ISG predicts a wave of consolidation as smaller, niche players who lack scalable, auditable and interoperable platforms will likely be acquired or exit the market. Technologically, the market will mature from single-purpose agents to sophisticated, collaborative *agent crews* capable of autonomously managing entire business functions. The geopolitical emphasis on European digital sovereignty will also provide a significant tailwind for providers offering fully integrated, sovereign AI stacks, from the infrastructure layer to the application.

The distinction between human and digital workers will continue to blur, making strategic workforce planning and the design of AI-era job architectures a central and non-negotiable component of every major transformation engagement.

The shift to agentic AI marks a new era of work, where algorithms move from tools to teammates, challenging German firms to rethink work and the workplace. Success will hinge on cultivating curiosity and adopting an AI-first mindset, while treating DEX as baseline hygiene and recognizing the office as just one node in a fluid work network, where experience is measured, not assumed, and ecosystems merge physical and digital spaces to lift productivity.

Provider Positioning

Page 1 of 4

	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	Leader	Product Challenger	Leader	Leader
ACP Group	Contender	Contender	Contender	Contender	Not In	Contender
All for One Group	Contender	Contender	Contender	Contender	Not In	Not In
Arvato Systems	Not In	Market Challenger	Market Challenger	Contender	Not In	Contender
Atos	Product Challenger	Product Challenger	Product Challenger	Leader	Product Challenger	Product Challenger
Axians	Contender	Contender	Contender	Contender	Not In	Not In
BCG	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
Bechtle	Leader	Leader	Leader	Leader	Leader	Rising Star ★
Campana Schott	Contender	Contender	Contender	Not In	Contender	Contender
CANCOM	Contender	Market Challenger	Market Challenger	Market Challenger	Contender	Contender

Provider Positioning

Page 2 of 4

	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
Capgemini	Leader	Leader	Leader	Leader	Leader	Leader
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Computacenter	Leader	Leader	Leader	Leader	Leader	Contender
DATAGROUP	Contender	Contender	Market Challenger	Market Challenger	Not In	Contender
Deloitte	Leader	Not In	Not In	Not In	Leader	Leader
Deutsche Telekom	Leader	Leader	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
EY	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
Fujitsu	Not In	Contender	Not In	Contender	Contender	Contender
Getronics	Contender	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Product Challenger

Provider Positioning

Page 3 of 4

	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
HCLTech	Product Challenger	Leader	Leader	Leader	Leader	Leader
Infosys	Leader	Leader	Leader	Leader	Leader	Leader
IT-HAUS GmbH	Not In	Contender	Contender	Contender	Not In	Not In
KPMG	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender	Product Challenger
Lenovo	Not In	Product Challenger	Leader	Product Challenger	Product Challenger	Contender
McKinsey & Company	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger
MSG Systems AG	Not In	Not In	Not In	Not In	Contender	Not In
netgo	Contender	Market Challenger	Rising Star ★	Market Challenger	Contender	Contender
NTT DATA	Product Challenger	Leader	Rising Star ★	Rising Star ★	Product Challenger	Leader

Provider Positioning

Page 4 of 4

	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	Leader	Not In	Not In	Not In	Not In	Leader
SoftwareOne	Contender	Contender	Contender	Not In	Not In	Not In
Stefanini	Rising Star ★	Rising Star ★	Product Challenger	Product Challenger	Contender	Contender
SVA	Contender	Contender	Contender	Not In	Not In	Not In
TCS	Product Challenger	Product Challenger	Product Challenger	Leader	Leader	Leader
Tech Mahindra	Contender	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Trans4mation	Not In	Not In	Contender	Contender	Not In	Not In
Unisys	Leader	Leader	Leader	Leader	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Leader	Leader

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

Simplified Illustration Source: ISG 2025

Definition

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

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

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

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

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

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

Scope of the Report

This ISG Provider Lens® quadrant report covers the following 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® Future of Work Services 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

Who Should Read This Section

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

Chief experience officers (CXOs)

Should read this report to identify the leading providers that can help them better prepare workforces for changing business models and dynamics in the post-pandemic world. This report will provide insights into how these providers can support workforce readiness and adaptability, ensuring employees can handle new challenges and opportunities.

Technology professionals

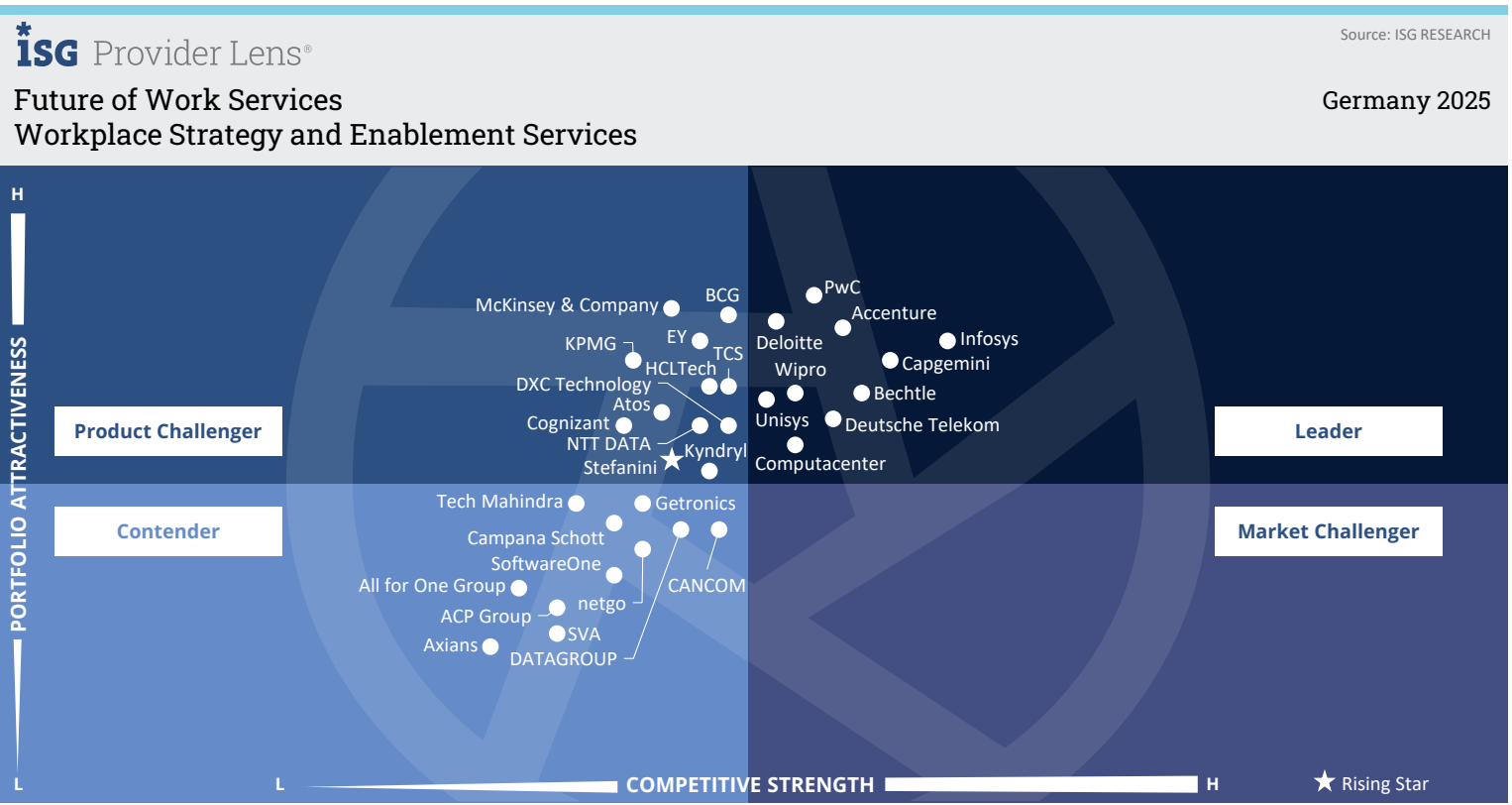
Including workplace technology leaders, should read this report to understand the positioning and capabilities of providers to enhance employee services. By gaining insights into the technological solutions offered by these providers, technology professionals can make informed decisions about implementing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

Strategy professionals

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

Consultant professionals

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



This quadrant assesses providers enabling a people-centric, **responsible AI-driven transformation** and holistic **reinvention of work and workplaces** for German businesses. This capability is critical amid hybrid work saturation and the impending EU AI Act.

Roman Pelzel

Definition

This quadrant evaluates providers offering workplace strategy and enablement services across industries. Organizations tailor their advice and strategy by region, market direction and organizational responsibility, offering strategic capabilities for enterprisewide workplaces.

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

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

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

The German market for Workplace Strategy and Enablement Services is characterized by its maturity and the consolidation of competent providers. A strong cohort of Leaders dominates this competitive landscape, each demonstrating a comprehensive ability to integrate human, digital and physical workplace strategies.

Primary battlegrounds have shifted toward platform-powered innovations and the operationalization of sustainability, the industrialization of EX through AI-powered platforms, and the provision of truly integrated, multidisciplinary execution across human capital, digital, real estate, legal and sustainability functions—all of which link workplace transformation directly to C-suite objectives. Leaders excel in leveraging these three pillars. This high barrier to entry signifies that foundational capabilities are now table stakes; differentiation is being forged in more advanced arenas.

Providers are increasingly judged not just on their technological prowess but on their ability to orchestrate complex change programs that navigate Germany's unique regulatory and co-determination landscape.

The emergence of Stefanini as a Rising Star signals a new competitive dynamic, particularly in addressing the needs of the vital Mittelstand segment with more agile and AI-first offerings.

There were no Market Challengers this year. Product Challengers boast deep, broad portfolios of services and technologies but lack the regional scale, brand recognition or integration capabilities needed to convert that innovation into market impact. Contenders are providers that need to improve on both the portfolio attractiveness and competitive strength dimensions.

From the 39 assessed for this study, 33 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture pioneers responsible AI governance and hybrid-work solutions for German enterprises through oversight automation and composable technology. It balances agility with governance to accelerate time to value, ensuring sustained competitiveness in compliance with EU regulations.

BECHTLE

Bechtle accelerates digital-to-physical workplace modernization across human, digital and built environments with its three-pillar DEX blueprint. The company embeds ethical AI leadership for EU AI Act compliance and drives adoption via its OCM-led EX maturity model.

Capgemini

Capgemini drives sustainable workforce transformation and enablement for German enterprises through its AI-strategic advisory, led by its XMO. The company embeds digital coaches and gamification into its framework to accelerate rollouts and de-risk change.

Computacenter

Computacenter orchestrates workplace transformations for German organizations through its advisory, design and delivery services. It embeds structured OCM and uses XLAs and its XMO, in-app digital coaches and gamified sustainability to drive measurable behavioral change.

Deloitte.

Deloitte orchestrates Future of Work transformations for German enterprises through its Transformation Intelligence™ and EX design frameworks. It embeds ServiceNow and Microsoft accelerators with Trustworthy AI™ governance to drive resilience and impact.

Deutsche Telekom drives hybrid work adoption and workplace transformation in Germany with a holistic OCM and enabling strategy. It integrates strategy and toolset, culture and mindset, and employee and skillset diagnostics into a unified roadmap to drive time to value.

Infosys empowers German organizations with EX-centric transformations via human-centered, persona-driven journey mapping. The company leverages its Living Labs, product-centric value delivery model and experience dashboards to link every story to measurable outcomes.

PwC facilitates flexible workplace models for German enterprises by integrating persona analytics, location data and Microsoft frontline apps. Its NextGen Change engine uses gamified pulse checks to drive swift stakeholder engagement and achieve measurable improvements in EX.

Unisys delivers unified workplace strategies for German enterprises by integrating its AI-powered Service Experience Accelerator with a sustainability-first advisory approach. Its holistic *Design → Deploy → Support* model aligns culture, technology and place to achieve measurable outcomes.

Wipro orchestrates persona-based workplace transformations in Germany, leveraging 18 Experience Design Studios and Smart Adopt diagnostics. The firm's 4A Framework de-risks change and accelerates strategy sign-off with rapid use case identification and XLA outcomes.

Stefanini (Rising Star) delivers AI-first workplace strategies for German clients by integrating GenAI coaching with change management to align people, digital tools and facilities. Its maturity roadmap and SAI analytics enhance DEX, optimize cost and ensure ESG alignment.

Leader

"Unisys uses its AI-powered Service Experience Accelerator and sustainability-first advisory to deliver unified workplace strategies that combine carbon-reduction roadmaps with immersive digital tools, empowering clients to lead in productivity and ESG."

Roman Pelzel

Unisys

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. The company's sustainability-driven workplace strategy and enablement advisory helps German organizations align culture, technology and place through a holistic approach. Unisys' end-to-end *Design → Deploy → Support* model realizes tailored roadmaps, AI-powered prototypes and continuous change management, while sustainability-driven consulting embeds EU-compliant carbon-reduction strategies, smart office solutions and circular economy principles.

Strengths

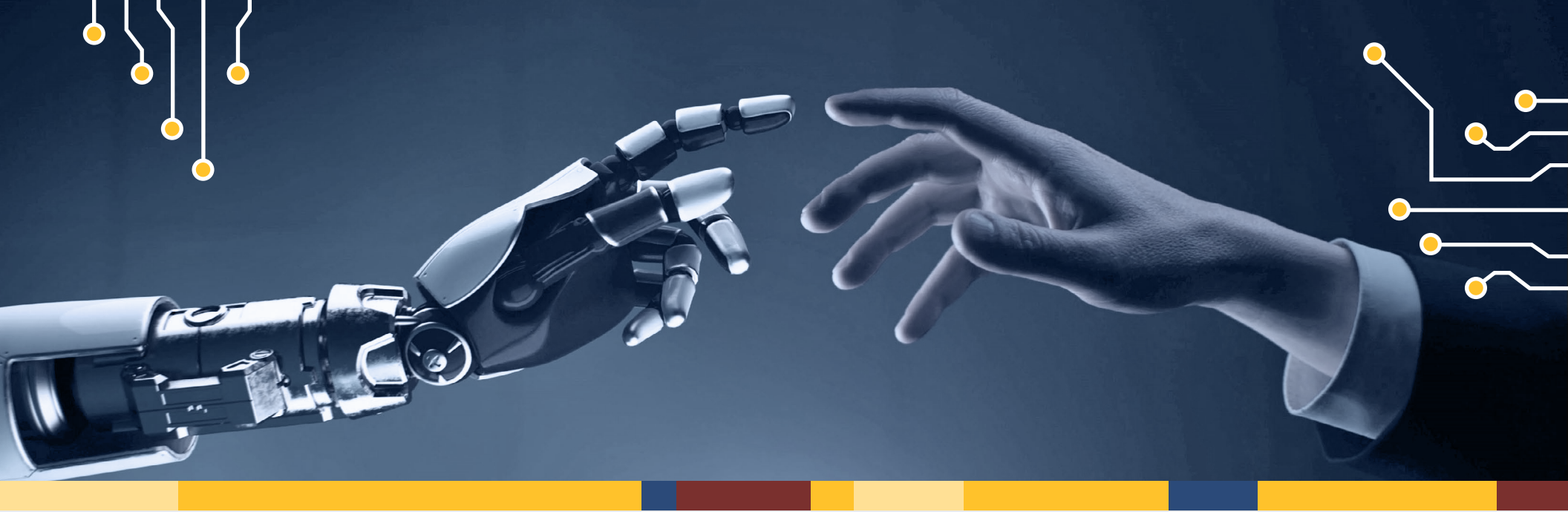
Unified workplace strategy: Unisys delivers a vendor-neutral advisory that seamlessly integrates human-centric programs, digital tooling and physical workspace optimization into a cohesive strategy for German enterprises. Leveraging soft systems thinking, talent model redesign, AI-driven experience frameworks and real estate governance, the company identifies interdependencies to align culture, technology and place.

End-to-end strategy execution: With its *Design → Deploy → Support* delivery model, Unisys acts as a single accountable partner, from strategic visioning to PoC prototyping and 24/7 change management support. Its clients engage in workshops to cocreate tailored roadmaps, validate solutions via custom PoCs in AI and smart office domains, and ensure sustainable adoption through OCM and unified experience management.

Sustainability-driven strategy: Unisys embeds ESG and smart building expertise into its workplace consulting, guiding clients in carbon reduction roadmaps, energy-efficient design and EU compliance. By incorporating lifecycle assessments, IoT-enabled building analytics and circular economy principles, Unisys helps organizations minimize environmental impact while optimizing the total cost of occupancy. This approach differentiates Unisys by combining operational efficiency with green credentials.

Caution

Unisys could bolster its German advisory presence by showcasing more local case studies and references. Publicly sharing the firm's success stories, especially on ESG-driven and AI-augmented workplace transformations, would boost visibility, offer credible proof points and build client confidence in its strategic services.



Collaboration and Next-gen Experience Services

Who Should Read This Section

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

Technology professionals

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

Cybersecurity professionals

Should read this report to understand how solution providers address challenges related to compliance and security while maintaining a seamless EX. By understanding various providers' security measures and compliance strategies, cybersecurity professionals can ensure that their organization's communication and collaboration tools are secure and compliant with industry standards.

Digital professionals

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

Procurement professionals

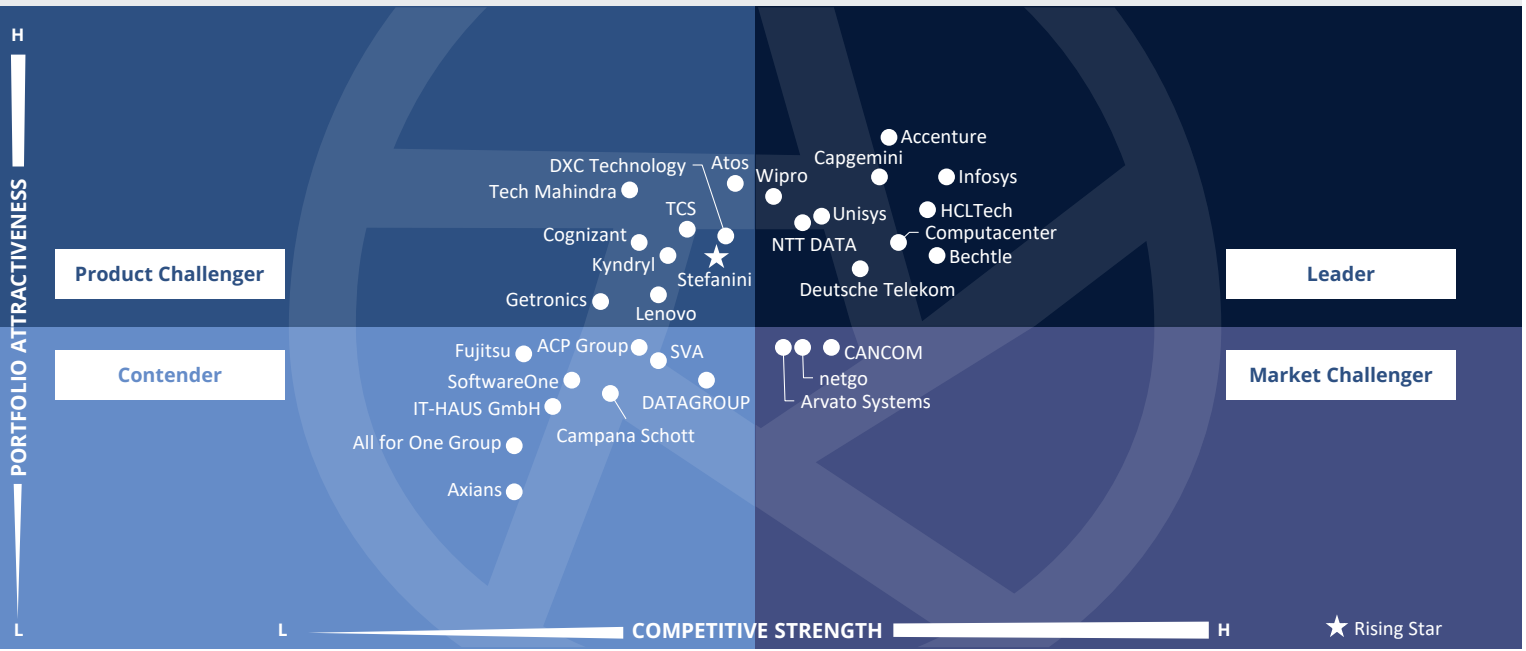
Should read this report to better understand the current landscape of unified communication and collaboration solution providers. By gaining insights into various providers' market positioning and capabilities, procurement professionals can make informed decisions about sourcing and selecting the best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

ISG Provider Lens®

Source: ISG RESEARCH

Future of Work Services
Collaboration and Next-gen Experience Services

Germany 2025



This quadrant evaluates providers' capabilities to **enhance the digital employee experience** (DEX) through managed services for workplace technology ecosystems, **fostering collaboration** and **aligning digital acceleration with human needs and business results**.

Roman Pelzel

Collaboration and Next-gen Experience Services

Definition

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

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

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

Eligibility Criteria

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

Observations

The market for improving EX with technology is competitive and maturing. Leaders have successfully pivoted from technology management to holistic experience orchestration, demonstrating the integration of technology with business outcomes. This approach requires a deep understanding of local business culture and a strong track record of success, making local references and case studies more valuable than ever.

Leaders embed outcome-driven XLAs and a dedicated XMO into their core delivery model. These providers have a sophisticated approach to GenAI, from AI assistance to governance frameworks. They show deep local commitment through German data centers and a strong local presence. Their expertise is vendor-agnostic, seamlessly managing complex ecosystems of Microsoft, Cisco, Zoom and other platforms to deliver a unified, secure and productive EX.

The providers that thrive are those that act as true transformation partners, bridging the gap between IT, HR and business operations to deliver measurable improvements in productivity, engagement and compliance.

Stefanini is recognized as a Rising Star this year. Expanding its market share in Germany, the company's EX-centric mindset and advanced toolset position it to effectively challenge established players, particularly within the German Mittelstand.

A Product Challenger would be defined by a highly innovative portfolio that has yet to achieve broad market penetration in Germany. A Market Challenger leverages significant competitive strength but has a less advanced portfolio in this specific domain. Contenders in this quadrant exhibit developing capabilities in both portfolio attractiveness and competitive strength.

From the 39 companies assessed for this study, 31 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture delivers EX-focused unified collaboration solutions, leveraging its Avanade alliance and Copilot innovation, with a strong presence in Germany. The company links XLA dashboards to real-time workforce metrics, ensuring productivity and compliance at scale.

Bechtle empowers clients in Germany with plug-and-play collaboration solutions, blending top DEX providers for rapid deployments and instant enablement. Its mobile conferencing and data-driven EX monitoring drive consistent, user-validated experience gains.

Capgemini orchestrates AI-driven collaboration in Germany with its Copilot and Agents Factory, AskAdam AI and data-centric XMO. The company integrates sovereign cloud security, predictive support and ESG-ready compliance for agile experience management.

Computacenter delivers vendor-agnostic, data-driven collaboration in Germany by merging sentiment analysis, ticketing and telemetry streams. The company's XLA dashboards, DEX and Copilot governance accelerate adoption and reveal measurable productivity improvements.

Deutsche Telekom empowers organizations in Germany with managed unified communications deployments, tailored training and open source suites via T-Systems. Its advisory approach, C5-certified infrastructure and unified identity management enable trusted, compliant collaboration.

HCLTech leverages its digital experience office and Kalido to deliver measurable EX gains for German enterprises. Its AI-powered Digital Literacy Buddy provides personalized upskilling, driving fast technology adoption and enhanced workforce agility.

Infosys integrates AI-first tools, XLA analytics and Orbit's unified platform to advance enterprise collaboration in Germany. The company's configurable modules and responsible AI guardrails enhance the digital experience, productivity and compliance across systems.

NTT DATA unifies Teams, Cisco and Zoom environments with AI-powered workplace services and federated SBCs. Its contract-based XLA stack, persona analytics and omnichannel support accelerate adoption and deliver tangible experience outcomes for German enterprises.

Unisys blends its XMO, sentiment analytics and XLA v4.0 to advance seamless collaboration for German enterprises. The company enables real-time interventions, optimizes meeting environments and promotes sustainable EX across enterprise workplaces.

Wipro empowers organizations in Germany with its ExperienceNXT platform, which integrates sustainability, human-centered design and AI-powered change management to enhance the collaboration experience.

Stefanini (Rising Star) integrates Teams, Zoom and Webex within its proactive ITQX platform, providing German clients with transparent, outcome-based EX management. The company's automated alerts and journey mapping optimize digital dexterity and user satisfaction.

Leader

"Unisys' fully managed collaboration suite, centered around its XLA v4.0 ecosystem and AI-driven XMO, delivers unified, data-backed insights and sustainable EX, empowering German clients to redefine productivity and resilience."

Roman Pelzel

Unisys

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 is well recognized for its EX-centric capabilities, facilitating seamless collaboration with fully managed Microsoft Copilot, Microsoft 365 and Teams, Zoom/Cisco meeting rooms and voice solutions under a unified support umbrella. The dedicated XMO centralizes collaboration metrics, sentiment analytics and ML insights while integrating its XLA v4.0 ecosystem. Unisys empowers German clients to create sustainable and EX-centric work environments.

Strengths

XLA v4.0 ecosystem: Unisys' XLA v4.0 framework extends beyond persona-level metrics to encompass the entire workplace ecosystem, including scheduling, collaboration spaces, site services, accessibility and employee well-being programs. Unifying these domains under a single experience governance model enables the company to deliver seamless wayfinding, optimized room utilization and environment-driven comfort. Its clients realize tangible outcomes such as rapid onboarding journeys or smart device refreshes.

XMO-led analytics: Unisys establishes a dedicated XMO that centralizes collaboration metrics, sentiment analytics and ML insights into a unified governance forum. The XMO orchestrates performance reviews, flags emerging issues and drives targeted interventions. The company ensures that collaboration ecosystems remain resilient by institutionalizing continuous improvement cycles.

Seamless collaboration suite: Unisys delivers a fully managed collaboration ecosystem, encompassing Microsoft 365, Copilot and Teams, Zoom/Cisco meeting rooms and voice services under a single support umbrella. By standardizing configurations, proactively monitoring call and meeting room performance, and providing specialized frontline and hybrid user enablement, Unisys ensures consistent, high-quality experiences across roles and locations.

Caution

While Unisys' founding role in the XLA Institute underscores its experience and expertise, it could enhance market impact by sharing more German-specific insights and case studies. Embedding local regulatory context and industry examples could deepen resonance, strengthen credibility and accelerate adoption.

Managed End-user Technology Services

Who Should Read This Section

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

Chief information officers

Should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities. This report will provide insights into how CIOs can navigate these challenges and leverage managed end-user technology services to enhance their organization's technological infrastructure.

Technology professionals

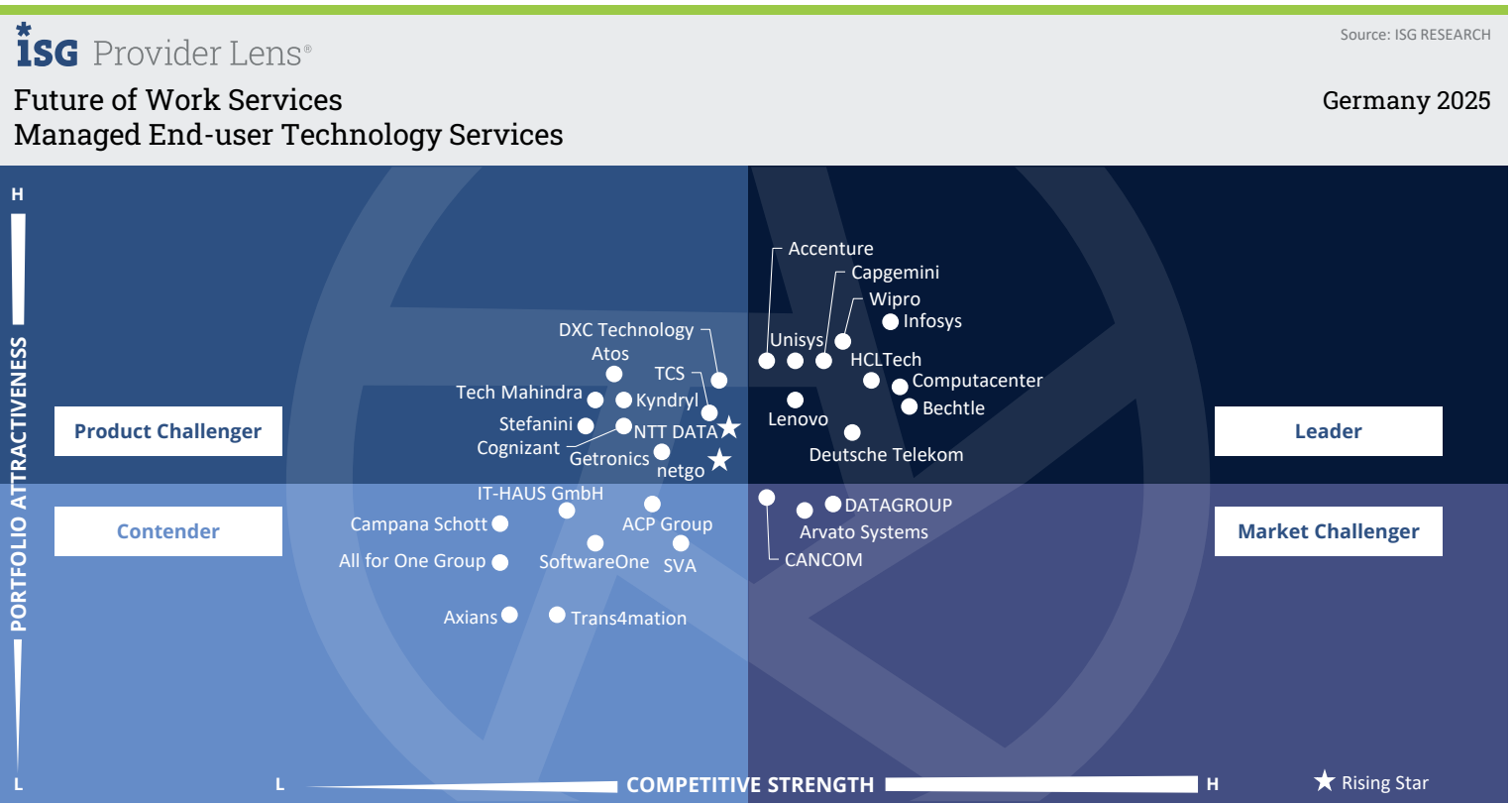
Should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed digital workplace services. By gaining insights into the capabilities of various providers, technology professionals can make informed decisions about implementing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

Cybersecurity professionals

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

Digital professionals

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



This quadrant assesses providers managing end-user technology in Germany, where **DEX-enabled** and **GenAI-driven automation, sustainable device lifecycle management** and **AI-augmented field services** are now critical for navigating hybrid work complexities.

Roman Pelzel

Definition

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

Eligibility Criteria

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

Observations

The German market for managed end-user technology services is defined by a convergence of three strategic imperatives: AI-driven hyperautomation, sustainable circular economy principles and an intense focus on DEX. The market has reached a new stage of maturity as enterprises are no longer experimenting with remote work; they are optimizing it for productivity, security and EX, placing immense pressure on providers to deliver seamless, location-agnostic support.

Leaders are using AI to enable proactive, self-healing support, orchestrate complex global supply chains and embed zero-trust security measures. This is essential for efficiently managing the complexity and scale of distributed, hybrid workforces. Concurrently, Device-as-a-Service has become a preferred commercial model, wrapping hardware, software and lifecycle services into predictable OpEx constructs that increasingly feature auditable ESG reporting.

This year's Rising Star is awarded to netgo for its approach to serving the German Mittelstand and NTT DATA for combining its strong local presence with a modern, agile service architecture and a strong focus on AI-augmented support.

Product Challengers have a highly attractive portfolio but have yet to achieve the market penetration of Leaders. Market Challengers demonstrate a significant market presence and a large client base. However, their portfolio attractiveness is rated as weaker than that of Leaders. Contenders show developing capabilities, reflecting a market position that is still maturing in terms of both portfolio attractiveness and competitive strength, but signifying a relevant and credible market player that meets the stringent eligibility criteria.

From the 39 companies assessed for this study, 31 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture delivers fully automated lifecycle services, integrating myWizard automation, AI Refinery insights and zero trust policies, leveraging predictive, policy-driven endpoint management with built-in security and multilingual support for German enterprises.

BECHTLE

Bechtle delivers automated workplace operations across Germany, leveraging zero-touch provisioning and its certified Service Factory to deliver fully configured devices and standardize patching. This approach ensures consistent uptime and agile deployments for all business types.

Capgemini

Capgemini orchestrates AI-powered device lifecycle services for German enterprises, integrating self-healing support, circular economy DaaS, and real-time carbon baselining. Real-time telemetry and carbon reporting connect device performance with sustainability metrics.

Computacenter

Computacenter's end-to-end device lifecycle management uses AIOps to ensure proactive fixes and consistent uptime. The company blends global sourcing, persona-based catalogs and its German logistics hub to facilitate rapid multivendor deployment, swap support and circular recovery.

Deutsche Telekom and T-Systems orchestrate managed device lifecycles in Germany, integrating automated provisioning and rapid field repairs. They empower the mobile workforce by uniting device leasing, custom configuration, deployments and eco-friendly recycling.

HCLTech orchestrates device and employee support for German enterprises, combining predictive analytics, interactive 3D guides and Ware4IT lifecycle tools. Its automated ITSM workflows and asset traceability ensure rapid, compliant service delivery.

Infosys combines its DWX Command Center, circular DaaS and OEM alliances to provide German enterprises with automated device telemetry, compliance controls and virtual support. This integrated model enhances uptime, asset visibility and sustainability.

Lenovo delivers automation-first device lifecycle management in Germany through its TruScale DaaS 2.0 offering. It unites predictive UEM, breach-warrantied cyber resilience and zero-touch deployment with AI-powered Care of One™ for proactive support.

Unisys empowers German enterprises with global field support, AR and VR expert guidance and subscription-based device lifecycle services. The company's multimodal model streamlines provisioning, enhances EX and ensures consistent, localized service.

Wipro delivers managed end-user technology solutions for German enterprises by unifying WaaS360 DaaS, virtuaDesk AI VDI, and automated ServiceNow workflows. Its telemetry-driven lifecycle, smart kiosks, and AR and VR support enable agile, compliant operations in hybrid settings.

netgo (Rising Star) equips German clients with modular workplace as a service, AI-enabled helpdesks and carbon-tracked device management. The company's workplace offering for legal and tax advisors stands out, while 35 locations offer responsive on-site support.

NTT DATA (Rising Star) enables secure, sustainable device management in Germany with AI-powered self-healing, zero-touch provisioning and certified circular device services. The company's 32-site network and rapid smart-refresh processes reduce carbon footprint, costs and downtime.

Leader

"Unisys' device subscription service and global field engineer network empower German clients with comprehensive endpoint management, multicountry procurement flexibility, and AR- and VR-enabled support for efficient device lifecycles and enhanced EX."

Roman Pelzel

Unisys

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 offers comprehensive device subscription services in Germany, bundling hardware, software, lifecycle support, procurement flexibility and financing across multicountry environments. Backed by its global field services network and an ecosystem-driven delivery model that integrates hyperscaler and specialist alliances, Unisys accelerates deployment, simplifies vendor management and drives continuous innovation for German enterprises.

Strengths

End-to-end device subscription: Unisys' device subscription service bundles hardware, software, lifecycle support, procurement flexibility and financing into a predictable per-seat model across multicountry environments. It features persona-driven device catalogs, legacy fleet buyback options and telemetry-led analytics for dynamic refresh planning, enhancing provisioning, onboarding and eco-friendly asset recovery.

Ecosystem-driven delivery: Unisys combines a vast network of global alliances, from hyperscalers such as AWS and Microsoft to specialized innovators such as Appspace and Cardinality.ai. Utilizing a four-pillar engagement model that spans comarketing, enablement, joint solution design and rigorous governance, this integrated approach accelerates solution development, simplifies vendor management and ensures continuous innovation.

Global field services: Unisys' enterprise field services and private-label field-services operation spans 120 countries with more than 7,300 certified engineers, delivering 4.2 million annual on-site calls with a 98 percent first-visit-fix rate. Beyond traditional break or fix, the company deploys self-help kiosks, home-based support and genius bar-style tech cafés, augmented by AR- and VR-enabled expert guidance and contextual AI assistants to accelerate resolutions. This multimodal, branded ecosystem ensures rapid, consistent and localized service.

Caution

While Unisys' device subscription service offers advanced end-to-end lifecycle management, migrating existing on-premises endpoint operations can be complex. Highlighting proven migration paths, pilot programs and phased rollout plans would reassure German clients and streamline the adoption of this comprehensive model.

Continuous Productivity Services (Including Next-gen Service Desk)

Who Should Read This Section

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

Technology professionals

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

Field service professionals

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

Digital professionals

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

Procurement professionals

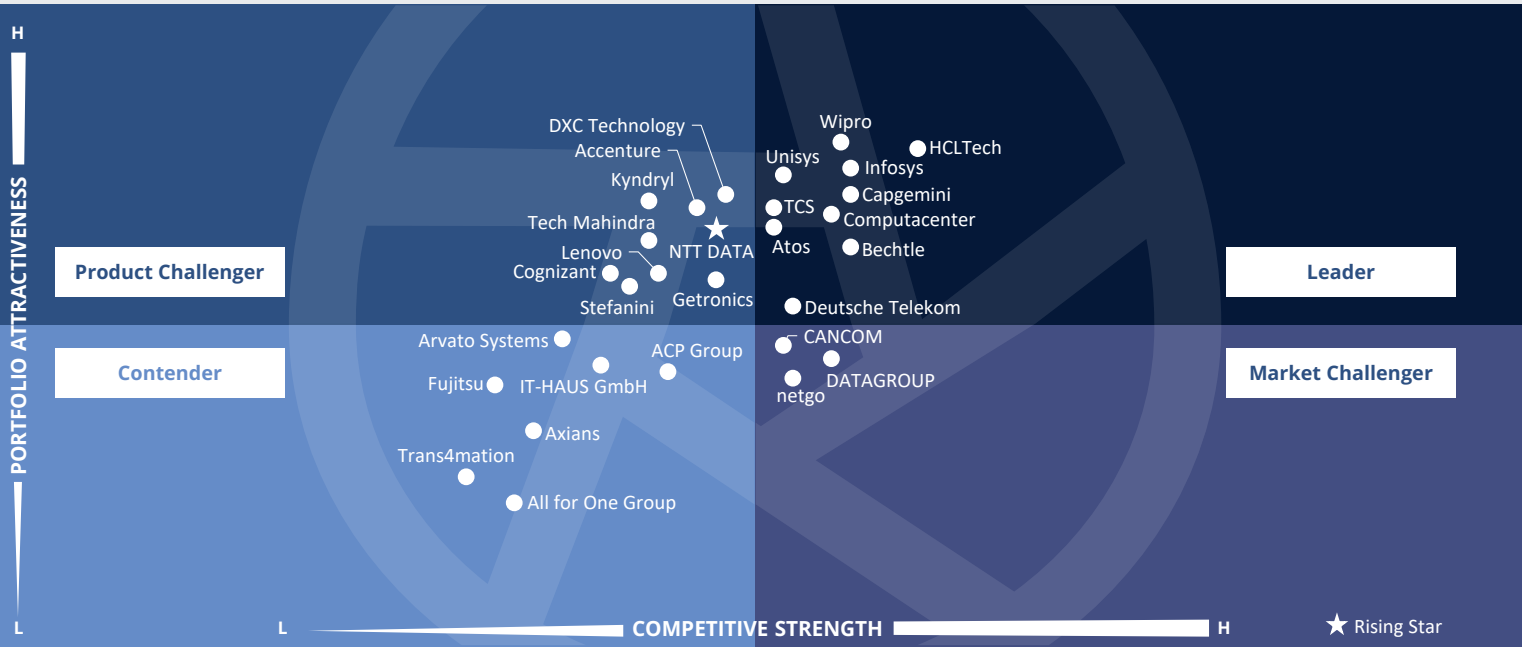
Should read this report to better understand the current landscape of digital service desk and workplace support service providers in Germany. By gaining insights into various providers' market positioning and capabilities, procurement professionals can make informed decisions about sourcing and selecting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

ISG Provider Lens®

Source: ISG RESEARCH

Future of Work Services
Continuous Productivity Services (Including Next-gen Service Desk)

Germany 2025



This quadrant assesses service providers' **support for today's productivity needs,** regardless of place and time. It evaluates the capability to **move from reactive** to **proactive support and outcome-driven** enablement with a strong focus on **shift left** and **AI**.

Roman Pelzel

Continuous Productivity Services (Including Next-gen Service Desk)

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 strategic importance of continuously supporting employee productivity has never been greater for German businesses. The landscape is dominated by well-entrenched players, reflecting a market where scale, a comprehensive portfolio and a proven track record are formidable barriers to entry. These Leaders excel at integrating AI, automation and sophisticated XLA frameworks at an enterprise scale. They typically augment these technical capabilities with deep, industry-specific expertise tailored to the German markets.

In the current German economic context, businesses are under immense pressure to get maximum value from every investment. Consequently, the services evaluated in this quadrant are critical for business resilience and growth. Providers are expected to be strategic partners to augment, automate and optimize DEX, thereby directly contributing to the productivity required to navigate these headwinds.

NTT DATA exemplifies the Rising Star profile by demonstrating technically mature, AI-driven capabilities that are gaining traction and are poised to challenge the Leaders.

Product Challengers' portfolio reflects excellent service and technology stacks, often demonstrating an unmatched breadth and depth of capabilities. To progress, they must strengthen their competitive strength and market presence. Market Challengers demonstrate a strong presence and a significant competitive edge over other vendors, often built on strong competitive strength. Contenders are promising providers with an evolving portfolio and competitive strength, and meet the fundamental evaluation criteria, qualifying them for inclusion in this quadrant.

From the 39 companies assessed for this study, 29 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Atos

Atos Group orchestrates experience-centric operations in Germany through predictive incident avoidance, self-service tech bars and multilingual voice-to-chat services. Its contextual knowledge base and XLAs contribute to cost reduction, minimized downtime and enhanced productivity.

BECHTLE

Bechtle provides experience-centric support for German organizations, leveraging AI-powered Copilot, Evocenta and Emma AI to automate ticket resolution. The company's 24/7 omnichannel self-service and integrated security drive resilience and user satisfaction.

Capgemini

Capgemini enables experience-focused workplace support in Germany via CHIP AI, AskAdam bots and nearshore hubs. The company's AI-driven knowledge center and outcome-based contracts reduce costs, decrease handle times and improve first-contact resolution rates.

Computacenter

Computacenter integrates GenAI, predictive analytics and global support channels for German clients. Its XLAs and XMO connect invisible IT interventions directly to productivity enhancements and continuous UX improvement.

Deutsche Telekom, via T-Systems, integrates GenAI Copilot into Microsoft Teams, automating routine issue resolution and reducing helpdesk workloads. Its digital adoption center, local cloud and expert playbooks accelerate productivity for German clients.

HCLTech orchestrates agile, personalized workplace experiences in Germany by integrating NeoX mobile applications, GenAI service desks and frontline engagement platforms. Its unified analytics and shift-left support model maximizes productivity and expedites issue resolution.

Infosys powers seamless IT service experiences via its DWX Command Center, combining sentiment and device data to forecast failures and orchestrate self-healing. In Germany, the firm's Cortex platform deflects tickets, shortens handle times and enhances digital productivity.

TCS enables predictive, experience-led workplace services in Germany through Cognix™/ignio™ auto-healing and multilingual support hubs. Its unified EX-centric ecosystem automates resolutions and shifts field interventions to virtual platforms, aligning with XLA-driven outcomes.

Unisys utilizes predictive analytics, GenAI and Copilot-managed support for German clients, streamlining digital workflows for all employees. The firm's integrated Service Experience Accelerator drives frictionless, responsive and future-ready IT environments.

Wipro combines NeuraDesk AI automation, self-healing remediation and conversational IT concierge to deliver EX-centric support for German enterprises. Its AR and VR Realview field support and SmartOps agent facilitate streamlined deployments and sustain continuous productivity.

NTT DATA (Rising Star) provides outcome-driven digital support in Germany, using its Smart AI Agent™ desk to enhance DEX, self-healing and first-contact resolution. The firm's XMO and advanced automation ensure sustained productivity.

Leader

"Combining its Service Experience Accelerator, Copilot management and frontline enablement, Unisys' integrated approach offers German clients a seamless, AI-powered support ecosystem that minimizes downtime and maximizes operational efficiency."

Roman Pelzel

Unisys

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' Service Experience Accelerator (SEA) drives predictive EUX by leveraging microservices, GenAI chatbots and a data-and-ML core to process requests, provide guidance, trigger actions and facilitate continuous learning. Complemented by its GenAI Copilot Management and frontline worker enablement, the company empowers German enterprises to automate support processes, refine knowledge curation and optimize workplace experiences across industries.

Strengths

Smart service orchestrator: Unisys' Service Experience Accelerator delivers a revolutionary EUX framework that unifies omnichannel CX and AI-driven knowledge management into a single platform. By integrating real-time telemetry, sentiment analytics and GenAI agents, it identifies friction points, automates resolution workflows and continuously refines the knowledge base.

GenAI Copilot management: Unisys' Managed Services for Microsoft Copilot streamline AI integration from initial pilot design through enterprise-wide rollout and continuous optimization. Embedded change management practices and unified experience management ensure Copilot features align with user personas and business goals. Unisys drives rapid AI-driven productivity gains by automating prompt tuning, usage analytics and user training.

Frontline worker enablement: Unisys enhances non-desk employees' capabilities with modern collaboration tools, mobile and wearable device management, and tailored training programs. Its approach bundles device provisioning, connectivity optimization and persona-based experience designs to address the unique needs of manufacturing, logistics and retail workforces. By extending digital workflows to the frontline, Unisys increases operational visibility, boosts worker engagement and drives real-time productivity improvements.

Caution

Unisys' AI-driven support capabilities excel in predictive automation. However, their value could be enhanced by clearly detailing how SEA and Copilot services adhere to the EU AI Act and GDPR requirements. Publishing compliance whitepapers and local case studies would further differentiate it in the German market.

Smart and Sustainable Workplace Services

Who Should Read This Section

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

C-suite executives

Should read this report to understand the latest smart and sustainable workplace services trends to assist in resource allocation and strategy development. This report will provide insights into how these trends can influence strategic decisions and help executives allocate resources effectively to achieve sustainability goals.

Chief sustainability officers and ESG

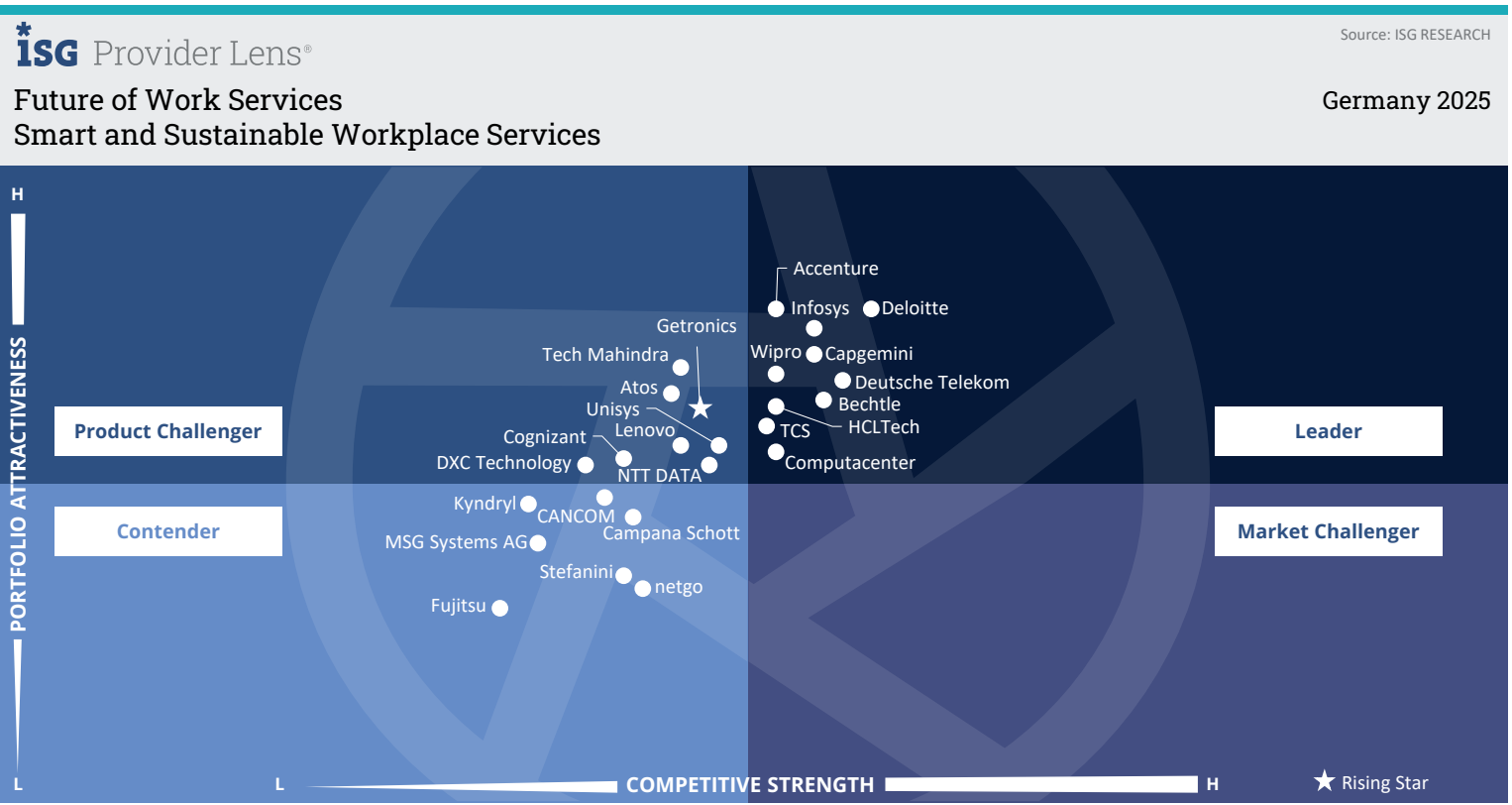
Professionals should read this report for updated insights on developing and implementing effective, sustainable strategies. By understanding the latest advancements and best practices in smart and sustainable workplace services, they can drive their organizations toward improved environmental, social and governance (ESG) performance.

Strategy professionals

Should read this report to identify the best smart and sustainable workplace service providers for developing and implementing effective ESG strategies. This report will help them evaluate the capabilities of various providers and select those that align with their organization's sustainability objectives.

Consultant professionals

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



This quadrant assesses service providers' capabilities to deliver **smart, IoT-enabled workplace experiences** through designing, implementing and managing **integrated and sustainable work environments** to help clients meet their **operational and ESG** goals.

Roman Pelzel

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

The German demand for smart and sustainable workplaces is at a pivotal inflection point, shaped by the convergence of hybrid work models and the urgent, non-negotiable demands for energy efficiency and regulatory compliance.

Leadership is no longer defined by discrete technology offerings but by the ability to deliver integrated, data-driven platforms that generate operational savings and quantifiable, auditable ESG improvements. The competitive landscape is intensely focused on providers that can demonstrate a deep understanding of Germany's unique economic and regulatory context.

Providers are differentiating through strategic alliances that bridge the traditional gap between IT and OT, such as building management systems, and by embedding circular economy principles directly into their service delivery and hardware lifecycle management. This evolution reflects a market maturing from simply providing smart office tools to becoming strategic partners in corporate decarbonization and sustainable transformation journeys, as well as in navigating regulatory requirements.

With its AI-powered Smart Office solution, which unites IoT, space management and ESG insights, Getronics stands out as a Rising Star in this year's quadrant.

Product Challengers are defined by an attractive portfolio and need to strengthen their market penetration, brand recognition or proven capacity that characterizes the Leaders. Contenders are qualified and credible providers who are actively investing in their services. To more effectively challenge established providers in the future, they must enhance their portfolio depth and expand their market footprint. ISG did not observe any Market Challengers this year.

From the 39 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture integrates building automation, cloud and ESG data with Siemens engineering to help German firms meet carbon targets, optimize space and create healthier workplaces. Its pilots and dashboards provide evidence of sustainable, cost-efficient operations.

BECHTLE

Bechtle combines IoT-enabled energy optimization, responsible device lifecycle management and adaptive hybrid spaces to help German enterprises achieve sustainable, user-focused workplaces that prioritize comfort, accessibility and cost efficiency.

Capgemini

Capgemini delivers end-to-end sustainable workplace services in Germany, embedding IoT analytics, real-time carbon tracking and circular device strategies. Its Energy Command Center platform supports ESG compliance and the development of adaptive, employee-focused spaces.

Computacenter

Computacenter integrates circular device lifecycle management, carbon dashboards and optimized logistics for German enterprises. These services help clients meet CSRD requirements, protect workforce uptime and prove Scope-3 ESG impact.

Deloitte.

Deloitte, leveraging its Berlin-based Sustainability & Climate GmbH, realizes comprehensive green workplace transformation through IoT-enabled baselines, ESG reporting and Circle Economy alliances. These frameworks help German clients accelerate net zero adoption.

Deutsche Telekom integrates circular economy solutions, smart buildings and IoT-enabled smart spaces for German organizations. The data-driven approach ensures compliance, actionable progress tracking and efficient grant management.

HCLTech

HCLTech powers circular device management for German enterprises through BSI Kitemark™ certification, regional remanufacturing hubs and energy analytics dashboards. This model enables carbon-neutral workplaces and delivers measurable emissions reduction.

Infosys

Infosys combines DWX automation, smart space analytics and persona-based device strategies to deliver sustainable workplaces in Germany. Its e-waste governance and refurbish-reuse models help achieve lower emissions, cost savings and occupant-centric environments.

TCS TATA CONSULTANCY SERVICES

TCS transforms German offices into climate-smart, employee-first spaces with IoT-driven energy management, occupancy-aware hot-desking and GreenOps analytics. The company's EX-centric, circular-IT approach delivers measurable energy savings and CSRD-ready reporting.

wipro

Wipro extends asset life and reduces e-waste for German enterprises through its WaaS360 circular economy model. It leverages AI-driven demand forecasting for device buy-back, refurbishment and secure disposal, while IoT analytics optimize office energy and space use.

getronics

Getronics (Rising Star) delivers smart workplace transformation in Germany by uniting IoT-driven occupancy analytics, audit-grade ESG dashboards and blockchain-secured device logistics. Its solutions reduce e-waste, optimize assets and enhance hybrid work experiences.

AI-augmented Workforce Services

Who Should Read This Section

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

Consultant professionals

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

Technology professionals

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

Chief information officers

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

Strategy professionals

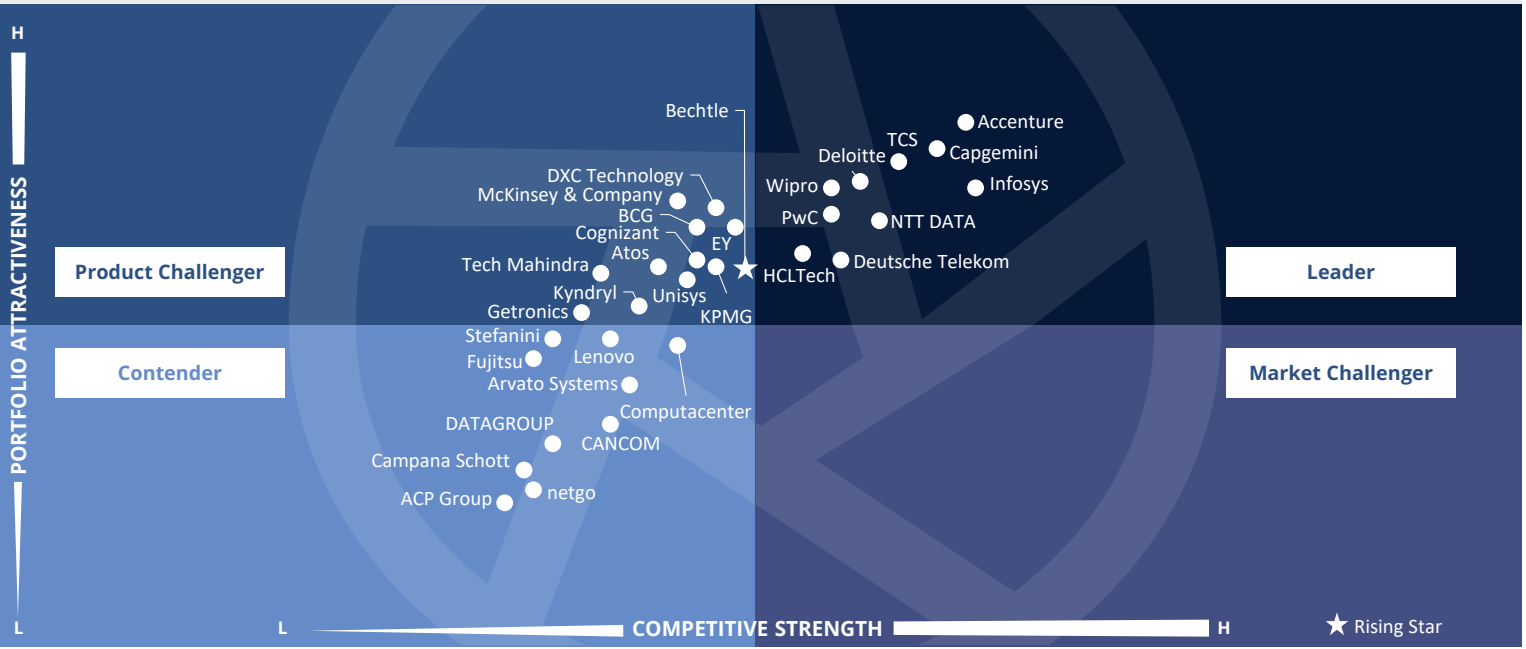
Should read this report to identify the best AI-augmented workforce service providers for developing and implementing effective workforce strategies. This report will help them evaluate the capabilities of various providers and select those that align with their organization's strategic objectives.

ISG Provider Lens®

Source: ISG RESEARCH

Future of Work Services
AI-augmented Workforce Services

Germany 2025



This quadrant assesses providers of advanced **agentic AI solutions** that autonomously manage workflows and **augment** human productivity, leveraging **proven governance frameworks**, **scalable orchestration platforms** and exemplary **regulatory compliance**.

Roman Pelzel

Definition

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

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

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

Eligibility Criteria

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

Observations

This year's newly introduced AI-augmented Workforce Services quadrant for Germany reveals a market defined by intense competition among global systems integrators, all vying to establish dominance through proprietary agentic platforms and robust governance frameworks.

The landscape is shaped by Germany's unique socio-economic context, marked by a persistent skilled labor shortage, strong works council influence and stringent data protection laws, including the EU AI Act and GDPR. This environment forces providers to deliver technological innovation, demonstrable compliance, ethical transparency and comprehensive change management.

Leaders are differentiating by moving beyond generic GenAI rollouts to offer extensive libraries of prebuilt, industry-specific autonomous agents designed for industries critical to the German economy, multi-agent orchestration and verifiable, outcome-based ROI.

Bechtle earns Rising Star status by empowering the German Mittelstand with democratized AI, leveraging its IPAI consortium engagement.

Product Challengers feature a strong, high-quality portfolio but have a more limited competitive market presence. Market Challengers, conversely, possess strong competitive strength and a significant market footprint but may have a less developed or comprehensive portfolio compared to Leaders. Contenders are providers who meet the study's stringent inclusion criteria and offer valuable services, but currently score lower on both axes. It is important to note that inclusion in the study as a Contender is a significant achievement, indicating a provider's relevance and promise in the market. ISG did not observe any Market Challengers in this new quadrant.

From the 39 companies assessed for this study, 32 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture delivers industry-specific AI agents to German enterprises, leveraging its global specialist network, AI Refinery platform, and robust EU AI Act-compliant governance. Targeted LearnVantage upskilling accelerates human-agent collaboration and adoption.

Capgemini

Capgemini enables AI-driven workforce transformation for German enterprises through its Copilot and Agents Factory, deploying intelligent agents, benefit dashboards and governance toolkits. The AskAdam conversational agent further accelerates productivity and compliance.

Deloitte.

Deloitte delivers compliant AI workforce transformation in Germany through Trustworthy AI™ governance, Zora AI™ agents and localized upskilling. Its hyperscaler coinnovation ensures low-latency, secure agent deployment and regulatory-aligned workforce augmentation.

Deutsche Telekom delivers compliant, high-velocity AI innovation in Germany by combining Business GPT, robust IT security and AI use case advisory. Semasuite® analytics quickly highlights employee sentiment and experience gaps for targeted improvements.

HCLTech

HCLTech enables German enterprises to scale AI automation confidently by embedding bias detection, human-in-the-loop validation and conditional access into every agent. The firm's governance-driven platform ensures continuous regulatory alignment and secure deployments.

Infosys

Infosys accelerates secure AI workforce augmentation for German enterprises using more than 200 Topaz AI agents, automated scenario analysis and multi-agent orchestration, all governed by its ISO/IEC 42001-certified responsible AI framework and bias monitoring.

NTT DATA accelerates AI-powered workforce transformation in Germany by fusing IoT edge analytics, context-aware agent crews and responsible AI governance. The company's multilingual, audit-ready solutions cater to diverse industries and works council expectations.

PwC combines AgentOS, an agentic workforce blueprint and NextGen Change engine to help German clients build AI-positive cultures and safe human-AI collaboration. The firm's embedded governance and bias checks ensure transparent, audit-ready deployments.

TCS scales digital coworkers across German enterprises with its Agentic Garden, orchestration engine and multilingual GenAI agents. The AI Cloud Academy accelerates adoption, while responsible AI guardrails and GDPR-aligned operations ensure compliant deployment.

Wipro leverages its GenAI Foundry, localized prompt libraries and observability dashboards to help German organizations pilot and scale AI copilot and agents. The firm's responsible AI controls and model risk assessments de-risk experimentation and ensure compliance.

Bechtle (Rising Star) adopts an AI-centric ecosystem and a phase-oriented methodology with its Innovation Labs to deliver tailored GenAI pilots and rapid deployment for German organizations. Its CoE-led governance and IPAI partnership ensure scalable, compliant and sustainable outcomes.

Appendix

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

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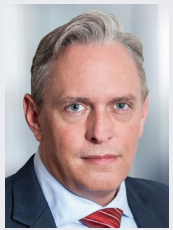
The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this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



Roman Pelzel

Assistant Director and Principal Analyst

Roman Pelzel is a thought leader and trusted advisor with 30 years of experience leading and facilitating outcome-centric digital work and workplace strategies and technology transformations across different industries, including cloud adoption and ITIL-based service management.

As a Principal Analyst and Advisor at ISG, he is dedicated to transforming digital work in the DACH region. He frequently speaks on human-centric digital work, EX and digital experience management.

Roman is presently contributing as a Lead Analyst and Author with the ISG Provider Lens® for Salesforce Ecosystem Partners, Oracle Ecosystem Partners and Future of Work Services.

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 Organizational Change Management. Ayushi has three years of experience conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure and Finance. Along with a rich understanding of various business verticals, she has also been responsible for collating and analyzing 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 U.S. stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualization, storyboarding and analysis.

Study Sponsor

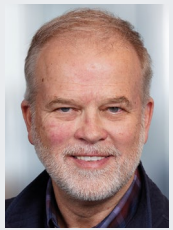
Iain Fisher

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.

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ISG

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

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

For more information, visit isg-one.com.

ISG Provider Lens®

OCTOBER, 2025

REPORT: FUTURE OF WORK SERVICES