IDC MarketScape: European Human-First Digital Workplace Services 2025 Vendor Assessment
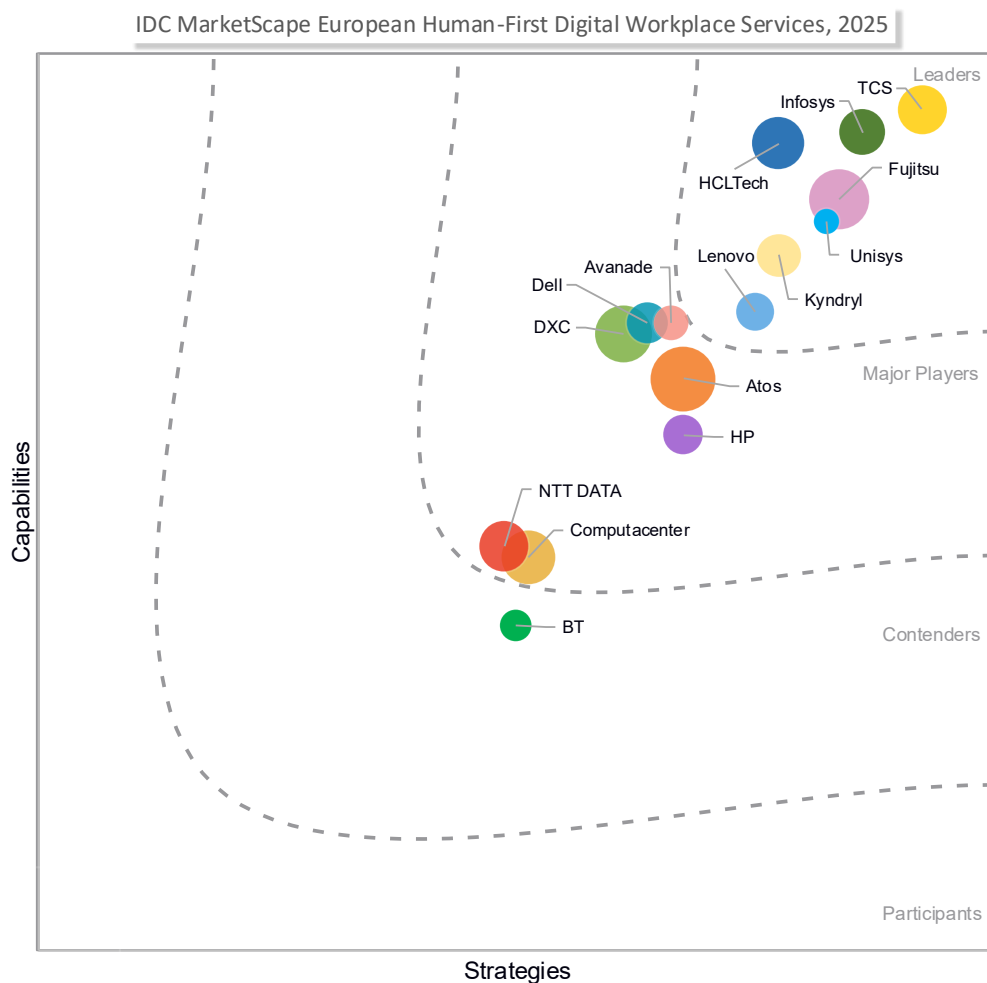
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: European Human-First Digital Workplace Services Vendor Assessment

IDC MarketScape European Human-First Digital Workplace Services, 2025

Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: European Human-First Digital Workplace Services 2025 Vendor Assessment (Doc # EUR153005325).

IDC OPINION

Digital workplace services represent a pivotal transformation in how organizations approach enterprise technology management and employee productivity. Defined as the set of business and IT services focused on the planning, building, running, and/or supporting of digital workplace technology solutions — including personal computing devices, smart office devices, and unified communications & collaboration (UC&C) tools — the market's trajectory underscores several key trends. The industry has evolved beyond foundational capabilities such as device management and collaboration, and it now supports customers to embrace a human-centric, experience-led paradigm. In 2025, more human-focused providers aligned workplace technologies with employee needs, reducing digital friction and boosting adoption, productivity, and satisfaction through persona-based design, targeted enablement, and continuous experience measurement. This shift is powered by automation and analytics and is increasingly measured through experience-level agreements (XLAs) alongside traditional service-level agreements (SLAs).

Customer priorities have also evolved — flexibility in pricing, comprehensive life-cycle solutions, and proactive vendor engagement are now more valued than simple cost competitiveness. Experience-led transformation is critical, with nearly 9 out of 10 vendors offering robust XLA frameworks that measure and continually improve employee engagement, satisfaction, and productivity. All major providers assessed in this report deliver full life-cycle services — from consulting/advisory and implementation/migration to operations and support — underpinned by extensive European partner ecosystems composed of strategic and niche technology partners.

Major drivers of differentiation in 2025 include the maturity and adaptability of XLA frameworks, the depth and breadth of consulting/advisory capabilities, the integration of AI/ML and other forms of intelligent automation, and the ability to deliver hyper-personalized experiences tailored to user personas and unique business contexts. Furthermore, security, innovation in automation, and effective operational change management are now essential, not optional. Sustainability and social responsibility initiatives are also gaining importance as organizations

increasingly seek to align their digital workplace investments with European regulation and global environmental, social, and governance (ESG) goals.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

As the digital workplace services market comprises contributions from several different foundation markets in IDC's IT services taxonomy, IDC does not have a pre-existing market share estimate to use for entry criteria prior to this study. Instead, services vendors with total services revenues greater than $3 billion globally and significant presence in Europe were invited to participate.

Additional requirements were as follows:

- Has expertise in end-user computing solutions and delivers full life-cycle services, spanning consulting/advisory, implementation/migration, management, and support
- Offers a distinctive, standardized, commercial service for the digital workplace, including productivity tools, collaboration platforms, and security solutions
- Has the service in general availability throughout Europe
- Has customers using these services for at least 12 months as of January 2024
- Includes change management in their offers to support a shift to desired cultural behavior, values, and experiences in the digital workplace
- Offers tools and diagnostics that enable measurement of cultural and/or experience change success factors

ADVICE FOR TECHNOLOGY BUYERS

IDC offers the following recommendations to Europe-based organizations looking to embark on a human-first digital workplace journey:

- **Prioritize a human-centric focus.** Prioritize vendors with a demonstrable commitment to placing employee experience at the center of their digital workplace services. Evaluate how well XLAs are established, tracked, and contractually integrated, as well as how providers leverage real-time analytics and sentiment measurement to proactively drive enhancements in employee engagement and productivity. Look beyond standard SLAs; investigate the vendor's XLA framework maturity, ability to customize metrics, and willingness to link service commitments to business outcomes.
- **Evaluate consulting and advisory strength.** Given the market's move beyond managed support, scrutinize the depth of each vendor's consulting and advisory services. Seek partners that can envision, strategize, and co-create a transformation road map that connects workplace modernization to business goals. Investigate their approach to automation, change

management, and ongoing transformation support, including their frameworks for design thinking, user-journey mapping, and "moments that matter."

- **Examine partner ecosystems and innovation.** Assess vendors' partner ecosystems — not only their relationships with top-tier technology partners, but also their involvement with niche, start-up, or industry-specific solution providers. Robust alliances indicate the potential for tailored solutions, deeper innovation, and the ability to accelerate the adoption of new capabilities such as GenAI, AR/VR, or cybersecurity enhancements.

- **Evaluate security and automation capabilities.** Ensure providers' security offerings are multilayered and incorporate modern approaches such as zero trust, AI-powered threat detection, and proactive incident response. Automation should extend beyond help desks to encompass the entire service life cycle, reducing manual interventions and improving service speed, accuracy, and reliability.

- **Emphasize change management and employee well-being.** Change management must be mature, comprehensive, and designed to minimize disruption and maximize engagement during technology transitions. The vendor should offer frameworks and supporting services that ensure the sustained adoption of new tools and processes. Examine their focus on employee wellness, including digital dexterity, upskilling opportunities, and inclusivity initiatives.

- **Consider pricing flexibility and sustainability.** Prioritize vendors offering flexible pricing models — outcome-based, consumption, or hybrid — to ensure alignment with specific organizational needs and budgetary constraints. Scrutinize the vendor's ESG commitments, sustainability frameworks, and their ability to help clients achieve measurable ESG goals.

- **Evaluate local expertise and compliance.** For organizations operating in Europe, confirm that vendors possess deep expertise in local data privacy regulations and workforce governance, ensuring compliant and culturally sensitive deployments.

By considering these multidimensional factors, technology buyers can select digital workplace services providers that best align with their organizational priorities for productivity, employee experience, innovation, security, and sustainability.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Unisys

According to IDC's analysis and feedback from customers, Unisys is recognized as a **Leader** in the 2025 IDC MarketScape for Human-First Digital Workplace Services.

Unisys offers a comprehensive portfolio of digital workplace services that focus on building, running, and supporting integrated digital workplace technology solutions. Its portfolio spans consulting and advisory, implementation and migration, managed workplace services, service desk, and support operations.

Central to its delivery is the Service Experience Accelerator (SEA) platform. This is a proprietary technology that underpins most Unisys DWS offerings, seamlessly combining AI, knowledge curation, automation, and service orchestration for superior incident resolution, device life-cycle management, and predictive support.

Unisys emphasizes personalized, persona-based workplace experiences facilitated through extensive use of XLAs that measure business outcomes and employee experience holistically across devices, services, and ecosystems. Its approach includes substantial organizational change management (OCM) to drive the adoption of transformative technologies such as generative AI, smart offices, and unified communication tools.

Unisys also delivers sustainable workplace solutions, including circular IT asset management and energy efficiency for device life-cycle management, supported by AI-powered forecasting tools. Its next-generation service desk reimagines support with AI-enabled virtual agents, augmented reality for field service, smart lockers, and digital signage to minimize disruption and improve both frontline and information worker experiences.

Strengths

Unisys stands out by extending digital workplace capabilities beyond traditional knowledge workers to frontline and blue-collar employees through tailored device subscriptions, augmented-reality-enabled onsite support, smart office solutions, and advanced communication tools accessible via personal and shared devices.

Unisys' sophisticated XLA 3.0 framework leverages an advanced Experience Management Office with real-time data from multiple telemetry sources, behavioral analytics, and business-outcome mapping, enabling close alignment between workplace technology performance and organizational objectives.

Challenges

Despite additions to consulting and advisory services, Unisys' business mix remains heavily weighted toward managed services and support, which may overshadow its evolving transformation and consulting capabilities in customer perception.

Although active globally, Unisys has a stronger presence and deeper market penetration in European regions such as the U.K. and Germany, and it may need to expand advisory and consulting intensity in broader geographies.

Consider Unisys When

Consider Unisys when seeking a vendor with a robust AI-powered digital workplace platform that deeply integrates experience-level agreements and persona-based customization, offering end-to-end managed services complemented by advanced automation and sustainability focus, particularly for organizations valuing strong operational support alongside transformation initiatives.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects a vendor's current capabilities and menu of services, and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis (i.e., strategies axis) indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, as well as business and go-to-market plans for the next three to five years.

The 50/50 strategy vs. capability weighting in this report means that 50% of the emphasis is on strategic planning and vision, while 50% focuses on actual ability to deliver, adapt, and execute effectively. This approach recognizes that in fast-moving, AI-enabled work environments, a future-proof, adaptable strategy is as critical as best-in-class capabilities for ensuring long-term success for human-first services.

The size of the individual vendor markers in the IDC MarketScape represents the financial performance of each vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through

structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores — and ultimately, vendor positions on the IDC MarketScape — on detailed surveys and interviews with vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC characterizes digital workplace services as a collection of business and IT services that encompass planning, building, running, and supporting capabilities for digital workplace technology solutions. This includes personal computing devices, smart office gadgets, and unified communications & collaboration tools. The goal is to streamline the management of enterprise workplace technology, enhance productivity through extensive automation, and provide exceptional employee experience.

Additionally, IDC describes intelligent digital workplace services as a comprehensive suite of business and IT services that align with the foundational markets detailed in *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022). At its essence, digital workplace services aim to boost employee productivity. While much of the digital transformation investment has been directed toward organizations looking to revamp their front-office strategies, digital workplace services aim to apply these same principles with a focus on employees, treating them as valued customers.

The initial part of this definition examines digital workplace services from the perspective of employees — specifically, the types of services they will recognize and how these will alter their work habits. The concluding section addresses digital workplace services from the employer's perspective — particularly the backend changes that organizations must implement to facilitate these services.

Digital workplace services may include at least the following technology components:

- End-user computing management and security solutions, which include System Center Configuration Manager (SCCM), desktop and application virtualization, application delivery and management, unified endpoint management, content management and file-sharing solutions, unified directory, identity access solutions, endpoint security, and DLP solutions
- Integration and support capabilities for enterprise-grade apps addressing productivity, collaboration (including UCaaS), enterprise social networking, as well as business and customer relationship apps (ERP, CRM, etc.)
- Next-generation integrated service management and digital support services (for HR, IT, procurement, and shared services) including smart ticket

generation, automated service request fulfillment, chatbots, and digital assistants for self-service support through a single point of interaction portal

- Intelligent analytics to track the performance of devices, apps, and networks, and most importantly, to track the adoption and usage of apps and devices by employees (the latter helps with change management and to drive employee experience)

- Intelligent IT/security automation to predict issues causing downtime and proactively reduce incidents or reduce the time to resolve them, which also retains this information via a knowledge management repository to capture, categorize, and proactively reuse solutions to common issues

- Digital workplace framework that supports granular and customizable user personas by functional role/industry/access modes and such

- A cloud-agnostic point of view that can leverage the entire on-prem datacenter, private cloud, or public cloud paradigm, depending on the use case and context of the workload

In keeping with this IDC MarketScape's focus on a human-first approach to digital workplace services in Europe, the study places strong emphasis on:

- Enabling enterprises for optimized and secure workplace experience and operations in a hybrid work context (experience parity, seamless connectivity, remote worker security, etc.)

- Supporting enterprise ESG initiatives and objectives through workplace experiences, operations, and enablement (environment-friendly sourcing, circular economy, sustainable workplaces, workplace inclusivity, sustainable IT asset management, etc.)

- Delivering an enhanced and highly customized workplace experience across user personas and every stage of the employee life cycle — that is, from hire to retire (experience management office, XLAs, change management, etc.)

- Driving higher workplace efficiency and productivity through extensive and embedded automation, integration, and intelligence (digital assistants, AI agents, automated workplace operations, and so forth)

LEARN MORE

Related Research

- *IDC FutureScape: Worldwide Future of Work 2026 Predictions* (IDC #US53859325, October 2025)

- *The Human Factor at Work in the Digital Business and AI Era* (IDC #EUR153233825, March 2025)

- *How Autonomous AI Agents will Change People, Places, and Processes in the Future of Work in EMEA* (IDC #EUR15279622, February 2025)

- *Future of Work: Investments in Physical and Digital Workspaces in EMEA, 2024* (IDC #EUR152594924, September 2024)

Synopsis

This IDC MarketScape evaluates 15 IT service providers that deliver digital workplace services throughout Europe. It relies on an extensive framework and criteria that evaluate providers against factors most likely to drive success in the European DWS market, focusing on a human-first approach in both the short and long terms.

"Blending human ingenuity with AI doesn't just create efficiency — it unlocks possibilities neither could achieve alone. Organizations that embrace human-centric digital workplace services consistently outperform their peers, unleashing greater creativity, agency, and productivity. The real opportunity isn't replacing people with machines, but empowering them through technology. By augmenting human capabilities, vendors can drive adaptability and resilience that ensure long-lasting and superior results for their customers," said Meike Escherich, associate research director, IDC's AI-enabled Future of Work, EMEA.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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