ISG Provider Lens®

Future of Work Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: unisys

QUADRANT REPORT | OCTOBER 2025 | U.S. PUBLIC SECTOR

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Report Author: Bruce Guptill

Public sector workplace services evolve through GenAI, hybrid and ESG

Current Market Conditions, Developments and Trends

In 2025, the U.S. public sector — especially state, local and education (SLED) organizations is undergoing a profound transformation in how digital workplace services are conceived, procured and implemented. Key developments include:

- **GenAI integration:** GenAI has moved from experimentation to embedded capability. Over 75 percent of large enterprises, including public sector entities, now use GenAI in at least one function. Public sector providers are deploying GenAI for service desk automation, predictive analytics and immersive collaboration.
- **Hybrid work recalibration:** Hybrid work is no longer a policy debate but a design imperative. Structured hybrid models dominate, with 84 percent of organizations adopting them. Experience parity across remote and physical environments is now a core KPI.
- **Experience management (XLA):** XLAs are becoming standard. Nearly 70 percent of organizations plan to adopt XLAs by 2026, with public sector agencies using them to improve frontline engagement and service quality.
- **Sustainability and ESG:** ESG has become a board-level priority. Smart workplace technologies — IoT, digital twins and AI-powered analytics are enabling real-time tracking of energy use and emissions. Over 45 percent of public sector occupiers plan to adopt energy and emissions management tools.
- **AI-augmented workforce:** AI is augmenting — not replacing public sector roles. Federal and SLED agencies are investing in AI-first talent models, immersive learning and ethical AI governance.

Digital workplace services enable **mission success, workforce resilience and citizen trust.**

- **Procurement evolution:** SLED procurement is shifting toward bundled, outcome-based contracts. Agencies are prioritizing providers that offer strategic advisory, verticalized solutions and measurable impact.

How have these changed since ISG's 2024 report?

Compared to the 2024 landscape:

- GenAI has matured from pilot projects to enterprise-wide integration. In 2024, GenAI was a disruptor; in 2025, it is foundational.
- Hybrid work has stabilized. The 2024 report emphasized enabling hybrid work; in 2025, the focus is on optimizing it through environment-based working (EBW) and smart infrastructure.
- Experience metrics have evolved. In 2024, experience was emerging as a differentiator. In 2025, it is a strategic imperative, with XLAs replacing SLAs in many contracts.
- Sustainability has shifted from compliance to competitive advantage. ESG is now embedded in workplace services and not just reported on.
- AI-augmented workforce services were nascent in 2024. In 2025, they are a distinct service category, with providers offering agentic AI, immersive learning and DEI-integrated design.
- Procurement models have shifted from siloed IT contracts to integrated transformation deals, with a growing emphasis on strategic partnerships.

What have been the most significant factors driving such changes?

Several macro and sector-specific forces have accelerated the following shifts:

- Federal and state policy mandates regarding sustainability, digital equity and workforce modernization
- Post-pandemic workforce expectations for flexibility, personalization and purpose-driven work
- Technological maturity of GenAI, IoT and cloud-native platforms enables scalable, secure and intelligent services
- Budgetary pressures and the end of American Rescue Pla Act (ARPA) funding force SLED agencies to prioritize ROI and operational efficiency
- Cybersecurity threats and regulatory scrutiny drive demand for integrated, secure and compliant workplace solutions
- Public trust and citizen expectations are increasingly tied to digital service quality and accessibility

How have these changes affected when, how and why U.S. PS clients, especially SLED clients, acquire and implement such services?

As compared to 2024 and earlier, public sector clients are now:

- Acquiring services earlier in the transformation lifecycle — seeking advisory and cocreation engagements before issuing RFPs
- Prioritizing integrated solutions that combine IT, HR, facilities and sustainability into unified workplace strategies
- Demanding outcome-based contracts with XLAs tied to employee experience, service quality and ESG metrics
- Favoring providers with vertical expertise and proven public sector credentials, especially those offering GenAI governance and ethical AI frameworks
- Implementing services in modular phases, allowing for iterative improvement, risk mitigation and budget alignment
- Using procurement vehicles that support agile contracting, such as cooperative purchasing agreements and prenegotiated frameworks

Through FY26, what significant or disruptive changes do we expect to see?

- **Mainstreaming of agentic AI in public sector workflows:** Autonomous digital agents will become standard in service desks, HR and citizen engagement. These agents will handle complex tasks, freeing human workers for higher-value activities.

- **Experience management as a core procurement criterion:** XLAs will be embedded in most SLED contracts, with sentiment analytics and behavioral telemetry driving continuous improvement.
- **Sustainability-driven workplace redesign:** ESG metrics will influence reporting, procurement, space planning and workforce strategy. Smart buildings, circular IT and carbon dashboards will be standard.

How will these changes affect how client firms contract with and do business with the providers of such services?

- **Strategic partnerships over vendor contracts:** SLED clients will seek providers that act as transformation partners, not just service vendors. Coinnovation, joint governance and shared KPIs will define successful engagements.
- **Shift to outcome-based pricing:** Contracts will increasingly tie compensation to business outcomes — such as improved employee retention, reduced emissions, or citizen satisfaction, rather than service volumes.
- **Increased emphasis on compliance and ethics:** Providers will need to demonstrate technical capability and compliance with AI ethics, data privacy, accessibility and sustainability mandates.
- **Demand for verticalized solutions:** Providers offering tailored solutions for education, healthcare, justice and municipal services will gain a competitive advantage.
- **Procurement modernization:** Agencies will adopt increasingly flexible, modular and collaborative procurement models, including prenegotiated frameworks, agile contracting and innovation sandboxes.

Conclusion:

In 2025, digital workplace services for the U.S. public sector will have evolved into strategic levers for transformation. The convergence of GenAI, hybrid work and ESG imperatives is reshaping how SLED agencies define value, engage providers and deliver services.

Looking ahead to 2026, the most successful approaches will be those that:

- **Embed GenAI** across the service stack with ethical governance
- **Design for hybrid work** with experience parity and smart infrastructure
- **Operationalize sustainability** through circular IT and carbon intelligence
- **Elevate experience** through XLAs and sentiment analytics
- **Enable workforce transformation** with AI-augmented tools and inclusive design

As the boundaries between IT, HR and facilities blur, workplace services are becoming the connective tissue of public sector modernization. Providers that deliver integrated, intelligent and outcome-driven solutions will win contracts and will help shape the future of government work.

SLED agencies are redefining digital workplace priorities, demanding GenAI-powered, experience-centric and sustainability-aligned services that deliver measurable outcomes across hybrid environments.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Bell Techlogix	Contender	Not In	Contender	Contender	Not In	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CGI	Leader	Leader	Leader	Leader	Leader	Market Challenger
Coforge	Not In	Not In	Contender	Not In	Not In	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender	Leader
CompuCom	Not In	Not In	Not In	Not In	Not In	Contender
Computacenter	Product Challenger	Contender	Contender	Contender	Not In	Contender

Provider Positioning

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

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
Kyndryl	Leader	Market Challenger	Leader	Leader	Market Challenger	Leader
Leidos	Not In	Contender	Not In	Not In	Not In	Not In
Lenovo	Not In	Not In	Not In	Not In	Not In	Contender
LTIMindtree	Not In	Not In	Not In	Not In	Not In	Contender
Movate	Contender	Contender	Contender	Contender	Not In	Contender
Mphasis	Contender	Contender	Contender	Contender	Contender	Contender
NTT DATA	Leader	Leader	Leader	Leader	Leader	Leader
PwC	Not In	Not In	Not In	Not In	Not In	Contender
Red River	Market Challenger	Not In	Not In	Leader	Not In	Product Challenger

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (Including Next-gen Service Desk)	Smart and Sustainable Workplace Services	AI-augmented Workforce Services
TCS	Product Challenger	Contender	Product Challenger	Product Challenger	Contender	Leader
Tech Mahindra	Product Challenger	Contender	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Unisys	Leader	Leader	Leader	Leader	Leader	Leader
UST	Not In	Not In	Contender	Not In	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Zensar Technologies	Contender	Contender	Product Challenger	Contender	Contender	Product Challenger
Zones	Market Challenger	Market Challenger	Leader	Leader	Not In	Not In

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

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

Simplified Illustration Source: ISG 2025

Definition

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

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

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

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating prepandemic 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-gen thinking changes the future workplace landscape.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following six (spell out the number of quadrants; do not use a digit) quadrants for services: Workplace Strategy and Enablement Services, Collaboration and Next-gen Experience Services, Managed End-user Technology Services, Continuous Productivity Services (including Next-gen Service Desk), Smart and Sustainable Workplace Services and AI-augmented Workforce Services.

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

- Transparency on the strengths and weaknesses of relevant providers/ software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Workplace Strategy and Enablement Services

This report is valuable for providers offering **workplace strategy and enablement services** in the **U.S. public sector** 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)

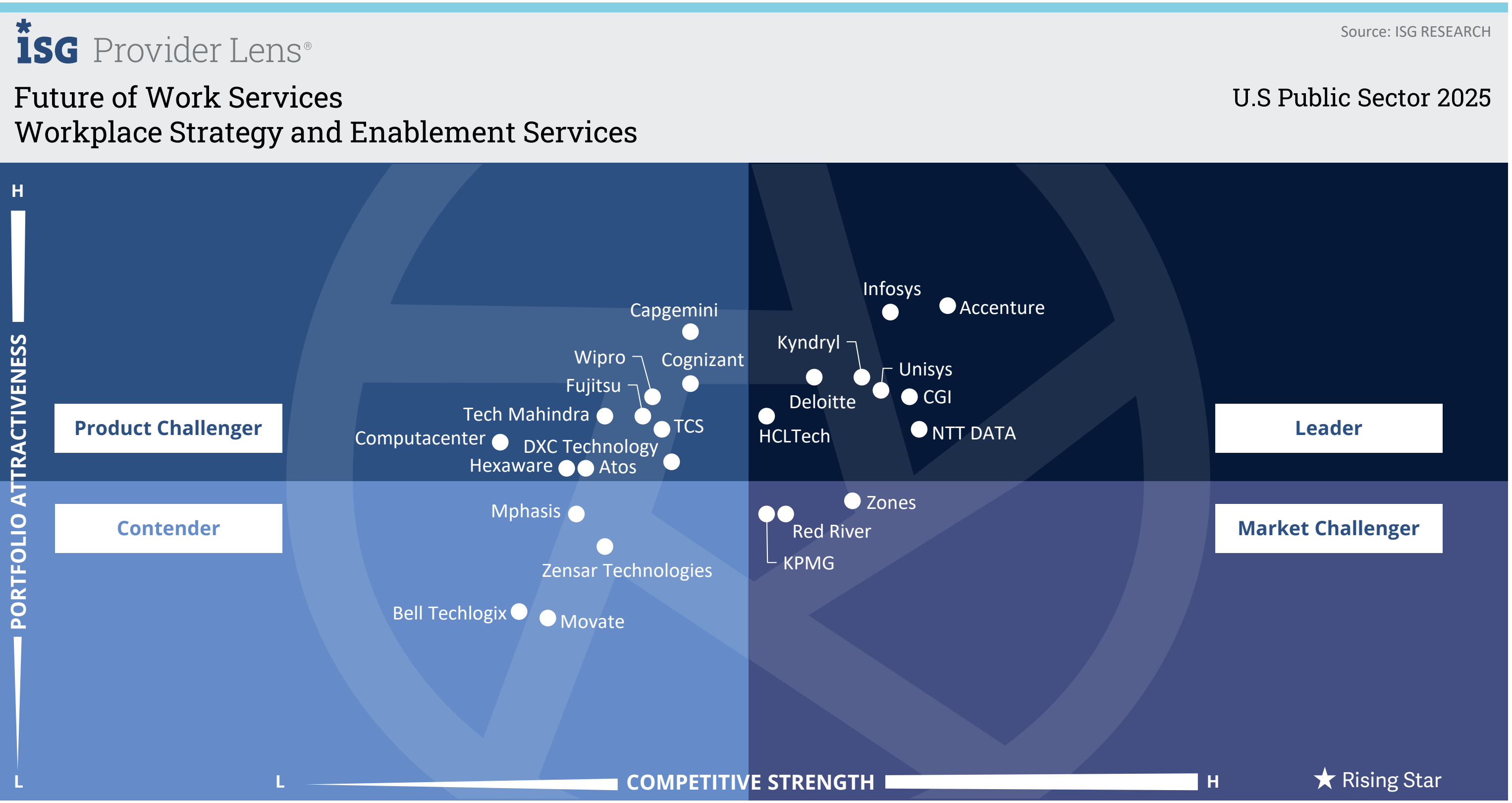
Should read this report to understand how leading providers can help them better prepare their workforces for the changing business models and dynamics in the post-pandemic world. They can recognize the link between workforce readiness and improved CX, which drives business growth. CXOs will be better equipped to align their organizational goals with customer-centric initiatives, ensuring that CX remains at the forefront of their business strategy.

Strategy professionals

Should read this report to identify the most suitable workplace strategy and enablement service providers. These providers can help companies develop and implement a winning workplace strategy. Professionals can compare their organization's strategies with those of industry leaders to identify gaps and opportunities.

Consulting professionals

Should read this report to advise companies on workplace strategies and performance, ensuring they stay up-to-date on industry trends and developments. By doing so, they can offer companies customized recommendations through the transition to ensure minimal disruption and maximum engagement.



This quadrant assesses providers of workplace strategy services that **align human, digital and physical environments with evolving business models, talent needs and industry-specific requirements.**

Bruce Guptill

Definition

In this quadrant, ISG evaluates providers offering workplace strategy and enablement services in the U.S. public sector. Providers tailor their advice and strategies according to the U.S. public sector, market direction, and organizational responsibility, offering strategic capabilities for both agencywide and government workplaces.

Providers consider modern business models and talent approaches while offering guidance, compliance and strategies collectively suited to human, digital and physical workplaces. 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 requires work on procurement and CX, project and change management and effective workplace strategy delivery. Tailoring these capabilities is crucial, as regulations vary by industry.

Eligibility Criteria

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

Observations

In 2025, workplace strategy services evolved to emphasize hybrid enablement, GenAI integration and sustainability. Providers expanded capabilities through strategic acquisitions, partnerships and new frameworks supporting agile talent models and immersive collaboration. Compared to 2024, more firms now offer AI-first consulting and vendor-neutral advisory, with increased focus on measurable outcomes and experience parity.

M&A activity and regional expansion, especially in the U.S. public sector, enabled increased engagement and tailored transformation strategies. Providers introduced platforms for smart work environments, digital twin simulations and ESG-aligned infrastructure planning. The quadrant saw a shift from traditional IT-centric models to holistic, business-driven approaches integrating cloud, IoT and workforce analytics. While most leaders retained their positions, several new entrants emerged with differentiated offerings in AI, sustainability and hybrid workspace design.

The quadrant reflects the growing demand for strategic workplace modernization that balances operational efficiency, employee experience and regulatory compliance. Providers must now address delivery consistency, regional staffing and integration complexity to meet evolving public sector needs and maintain leadership in this rapidly transforming domain.

From the 34 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders.

accenture

Accenture introduced its Smart Work Anywhere and LearnVantage capabilities to public sector clients, emphasizing GenAI, immersive collaboration and workforce transformation through strategic acquisitions and expanded U.S. public sector contracts.

CGI

CGI expanded hybrid work strategies and sustainability-driven asset optimization. It also added new platforms and partnerships to support scalable transformation for government clients.

Deloitte.

Deloitte launched its DREAM digital twin platform and GovConnect.ai and deepened partnerships with AWS and Google to support immersive training and hybrid work modernization.

HCLTech

HCLTech officially launched its U.S. public sector subsidiary, HCLTech Public Sector Solutions, focused on government agencies and education (SLED) organizations, with AI-led digital transformation, cybersecurity and citizen engagement solutions.

Infosys

Infosys rolled out NAVI, Orbit and Cortex platforms, expanded its Infosys Public Services and increased U.S. public sector revenue share through scalable, AI-driven transformation services.

kyndryl

Kyndryl piloted its Agentic AI Framework while emphasizing sustainability and DEI in hybrid workplace models. It also expanded its Bridge platform to improve predictive insights.

NTT DATA

NTT DATA deployed an extended Smart AI Agent suite and Experience-as-a-Service (EXPaaS) platform. Sustainability and hybrid work enablements are strongly emphasized through IoT and ESG-aligned services.

unisys

Unisys expanded its GenAI-driven advisory and hybrid workspace integration, building around IoT-enabled sustainability and inclusive talent strategies.

Unisys

Leader

"Unisys' GenAI-driven advisory, hybrid workspace integration, inclusive talent strategies and IoT-enabled sustainability, align exactly with SLED agency missions, compliance and operational resilience across federal, state and education sectors."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has expanded its public sector digital workplace portfolio through AI-driven modernization, cloud migration and cybersecurity. It supports public sector clients with over 70,000 connected professionals, secure digital workplace platforms and AI-driven service accelerators. It has secured hundreds of federal, state and local contracts, offering scalable cloud, cybersecurity and workplace solutions tailored to government needs.

Strengths

Strategic advisory and business model innovation: Unisys provides strategic advisory services focusing on GenAI integration, workplace modernization and sustainable transformation. Its consulting-led approach aligns with agency missions, regional mandates and evolving service delivery models to drive innovation and operational resilience.

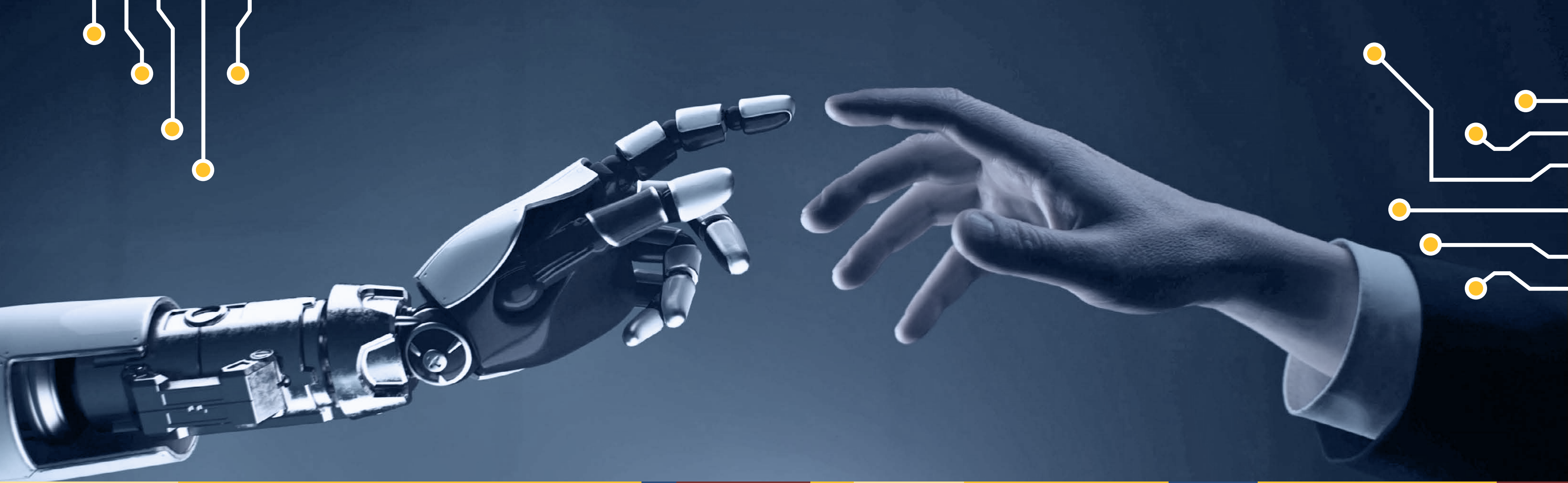
Workplace integration: It enables government agencies to unify digital and physical workspaces through XLA 4.0, smart buildings and hybrid workplace solutions. Services include AR support, IoT-driven sustainability and secure smart lockers, ensuring equitable, efficient experiences for remote and onsite public sector employees.

Talent models and ethical practices: It advances inclusive talent strategies for public sector agencies, emphasizing DEI, ethical sourcing and AI upskilling. Its Client Security Officer program supports compliance with federal and regional regulations, while workforce transformation initiatives address evolving needs in cloud, RPA and cybersecurity.

Sustainability and asset strategy: Unisys helps government clients meet sustainability goals through IoT-enabled energy optimization, intelligent PC refresh and lifecycle services. Its Device Subscription Service (DSS) and analytics-driven asset management improve environmental outcomes and cost efficiency across public sector operations.

Caution

Unisys must focus on improving field service scalability and managing project volatility to ensure consistent value delivery, partner alignment and client confidence in its AI-driven digital workplace transformation offerings.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is valuable for providers offering **collaboration and next-gen experience services** in the **U.S. public sector** 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.

Procurement professionals

Should read this report to understand the current landscape of unified communication and collaboration service providers. They can discover tools that enhance team collaboration and communication across departments while ensuring the chosen services align with the organization's broader objectives.

Customer service professionals

Should read this report to understand how service providers address the challenges related to compliance and security while maintaining a seamless EX. They can understand how customer feedback mechanisms can be aligned with compliance requirements to enhance service delivery. This report explores training programs designed to equip customer service teams with the knowledge needed to navigate compliance and security challenges.

Digital professionals

Should read this report to understand how unified communication and collaboration service providers can support and align with their digital transformation initiatives. They can gain insights into how these services can streamline workflows and reduce operational silos while discovering metrics and KPIs to evaluate the effectiveness of communication and collaboration initiatives.

This quadrant evaluates providers that **enhance CX and EX through AI-driven workplace services**, aligning technology adoption with human needs, collaboration and measurable business outcomes.

Bruce Guptill

Definition

In this quadrant, ISG assesses 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 initiatives with human needs and measurable business results.

Next-generation experience services promote technology adoption. Providers engage with clients in outcome-focused models using XLA approaches. Experience management office (XMO) capabilities gather actionable insights through data, sentiment analysis, ML and change management.

Providers enhance and support communication, collaboration and productivity stacks using AI and GenAI for organizations. They offer consulting and advisory services for HR and operations, guiding change management and technology adoption.

Eligibility Criteria

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

Observations

Collaboration and experience services for the public sector advanced significantly through 2025, driven by AI-first strategies, immersive technologies and deep integration of GenAI and agentic tools. Providers expanded their offerings to include multiagent orchestration, sentiment analytics and XLA-based delivery models, replacing traditional SLA frameworks.

Compared to 2024, there was a notable increase in platform unification, with providers integrating Microsoft, AWS, Google and Cisco ecosystems to support secure, hybrid collaboration. Immersive learning, AR/VR-enabled support and digital dexterity programs became standard components of experience transformation.

Several providers introduced new platforms or significantly enhanced existing ones, while others deepened partnerships or launched dedicated public sector subsidiaries. M&A activity and strategic alliances further fueled innovation and delivery scale.

The quadrant also saw a shift toward outcome-based models, with experience management offices (XMOs) and AI-powered assistants supporting measurable improvements in user engagement and service delivery.

As demand for secure, inclusive and scalable collaboration grows, providers must now focus on improving integration consistency, regional delivery and change management to meet evolving expectations across diverse government environments.

From the 34 companies assessed for this study, 24 qualified for this quadrant, with seven being Leaders.

accenture

Accenture launched its Trusted Agent Huddle and Copilot Business Transformation Practices and expanded AI-powered collaboration across Microsoft, AWS and Google ecosystems.

CGI

CGI introduced its EngageHub platform coupled with immersive learning tools, while expanding AI and GenAI integration for scalable, human-centered collaboration.

Deloitte.

Deloitte rolled out advanced EDGE and GovConnect.ai platforms, emphasizing multilingual GenAI services and immersive collaboration tools for public sector modernization.

HCLTech

HCLTech deployed its WorkBlaze and UWX platforms to a broader public sector audience through its new sector-focused subsidiary. It also expanded Copilot and multicloud integration for secure, scalable collaboration.

Infosys

Infosys enhanced its NAVI and Orbit platforms for sector clients. It also deepened its partnerships with Microsoft and Zoho; expanded immersive collaboration and AI-first strategy.

NTT DATA

NTT DATA introduced Smart AI Agents and unified collaboration stacks and emphasized AR/VR learning and sentiment-driven experience management for sector client organizations.

unisys

Unisys’ PowerSuite and XLA 4.0 enable new capabilities for sector client organizations, including through leveraged GenAI-driven collaboration and unified communication optimization.

Unisys

Leader

"Unisys, a Leader in the Collaboration and Next-gen Experience Services quadrant, combines GenAI, XLA 4.0 and PowerSuite and delivers intelligent, human-centered, outcome-driven collaboration across sector domain ecosystems and business functions."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has expanded public sector collaboration and DEX services through major contracts, including a $650 million U.S. Internal Revenue Service IT deal and $460 million Department of Homeland Security modernization. Growth is driven by GenAI, hybrid cloud and XLA 4.0 investments, with increased staffing and M&As enhancing secure, experience-led service delivery.

Strengths

XLA-driven experience management: Unisys applies XLA 4.0 and its XMO to public sector environments, integrating sentiment and performance metrics. This strategy enables agencies to proactively align EX with mission outcomes, improving service delivery and operational transparency.

AI and GenAI-enhanced collaboration: Unisys enhances collaboration with GenAI-powered tools like Microsoft Copilot, intelligent meeting rooms, and digital assistants. Its Service Experience Accelerator integrates AI, telemetry, and automation to streamline workflows, improve knowledge access, and empower hybrid and frontline workers with secure, personalized, and scalable collaboration experiences.

PowerSuite collaboration optimization: Unisys PowerSuite optimizes collaboration platforms for government clients, delivering actionable insights, governance and performance analytics. Integrated with XLA 4.0 and XMO, it supports experience-driven service delivery across Microsoft Teams, Zoom and other agency-preferred tools.

Unified communication and productivity stack support: Unisys uses PowerSuite to centralize unified communications and collaboration (UCC) management, offering predictive analytics, governance and rapid issue resolution. It ensures secure, seamless collaboration across platforms such as Teams and Zoom and supports mission-critical communication and productivity.

Caution

Unisys should focus on improving real-time collaboration quality, reducing *watermelon effect* risks in DEX metrics and strengthening partner integration to enhance public sector value. Ensuring consistent, user-aligned outcomes across diverse agency environments and mission-critical digital ecosystems is critical.

Managed End-user Technology Services

Who Should Read This Section

This report is valuable for providers offering **managed end-user technology services** in the **U.S. public sector** 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 (CIOs)

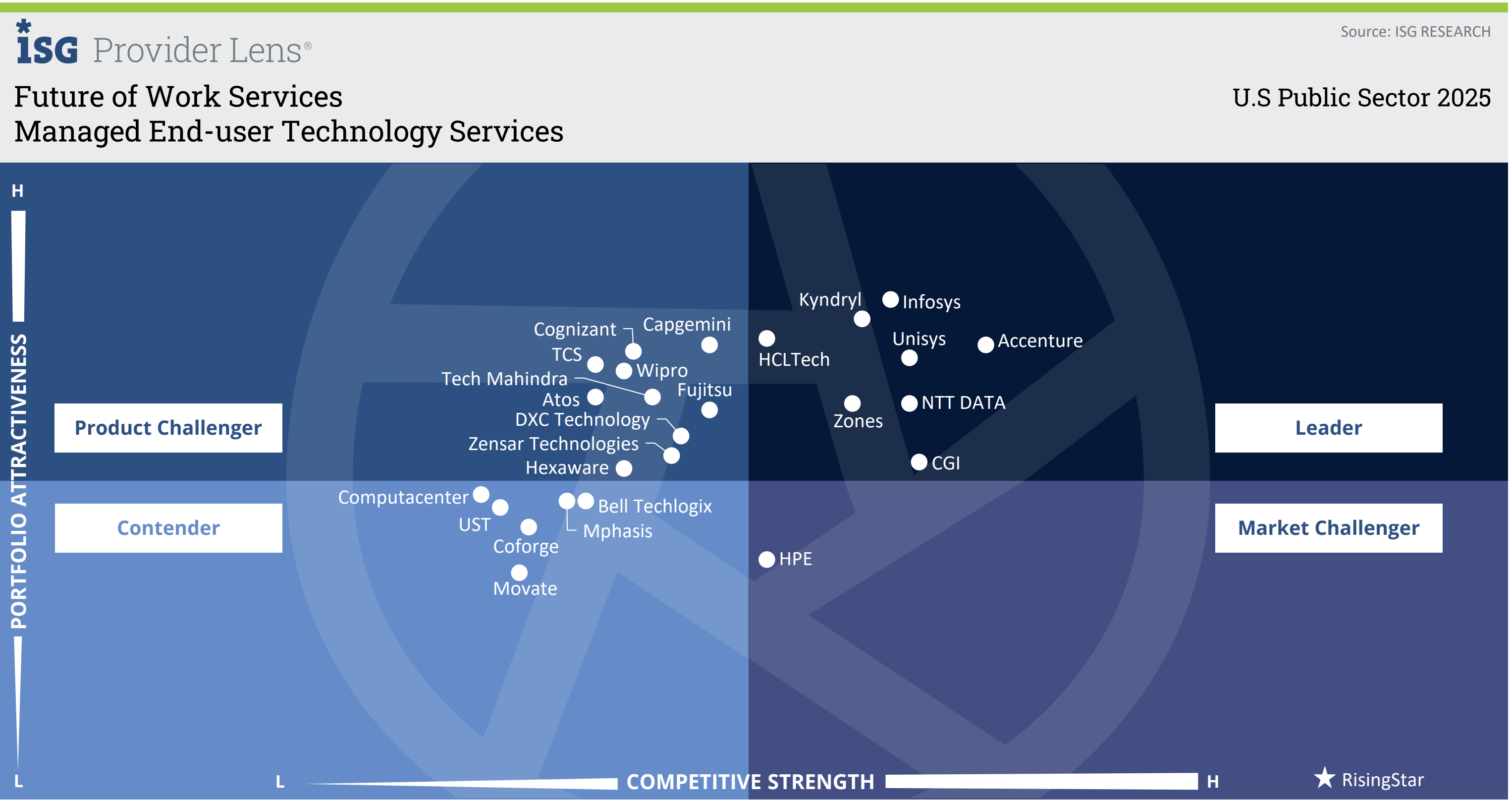
Should read this report to understand how existing processes and protocols influence an enterprise's use of workplace technologies. The report highlights the potential limitations of adopting new capabilities and technologies and outlines strategies to mitigate these challenges. CIOs will find guidance on fostering a culture of innovation and adaptability within their teams.

Technology professionals

Should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed end-user technology services. The report discusses building effective partnerships with service providers for ongoing support and innovation. It highlights best practices for deploying managed digital workplace services within their organizations.

Cybersecurity professionals

Should read this report to understand how providers address significant compliance and security challenges while maintaining a seamless EX. They can learn about innovative technologies and tools that enhance security while supporting user engagement. The findings will help IT security managers assess the effectiveness of existing security measures and identify areas for improvement. By learning about innovative technologies, they can enhance their security frameworks.



This quadrant assesses providers **enabling secure, managed end-user technology services for U.S. SLED organizations**, focusing on device lifecycle, mobility, collaboration and digital experience.

Bruce Guptill

Definition

In this quadrant, ISG evaluates service providers that manage technology for SLED IT departments to support end users. Provisioning, managing and securing devices are the primary steps to enabling digital workplaces. 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), providing devices with integrated collaboration and productivity capabilities. These services can also be tailored to specific SLED domains, such as taxation, licensing, transportation and human services.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. **Provide connected, always-on and updated end-user devices** for secure collaboration and productivity
3. Support **unified endpoint management (UEM), organizational mobility management, application provisioning and patch management**
4. 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
5. Provide **DEX solutions for automated issue resolution**
6. Demonstrate **experience in providing virtual desktop services on premises and on cloud** (desktop as a service)
7. **Offer related field services**, IMAC (Install, Move, Add and Change/ Configure) and break or fix services
8. Provide **remote and onsite field support** and **in-person technical assistance**
9. Include **end-user technology services management** in at least 75 percent of regional contracts

Observations

In 2025, managed end-user technology services for the public sector experienced significant growth, with providers expanding their portfolios to include AI-driven automation, device-as-a-service (DaaS) and proactive digital experience management. Compared to 2024, there was a marked shift toward zero-touch provisioning, telemetry-based lifecycle planning and integration of GenAI for endpoint support and issue resolution.

Providers emphasized compliance-ready models, sustainability and hybrid work enablement, with many scaling their U.S. public sector presence through new delivery centers, acquisitions and strategic partnerships. Several firms introduced or enhanced virtual desktop infrastructure (VDI) and mobile device management solutions tailored to mission-critical environments.

The quadrant also saw increased adoption of XLA-based performance metrics, replacing traditional SLA models to better align with user satisfaction and operational outcomes. M&A activity and OEM alliances further strengthened capabilities in endpoint security, automation and field services.

As demand for scalable, secure and sustainable device management grows, providers must now address regional delivery consistency, legacy system integration and cost transparency to maintain competitiveness and meet evolving public sector expectations.

From the 34 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders.

accenture

Accenture continued to expand GenAI investments and win federal, state and municipal contracts. The company introduced great mobile device security assessments and strategic partnerships for IT modernization.

CGI

CGI added to its EngageHub platform and expanded lifecycle services and greatly emphasized AI-driven DEX and scalable field support.

HCLTech

HCLTech managed over 1 million endpoints, in part through its Smart Support Hubs and FlexSpace 5G offerings, while expanding its U.S. delivery centers.

Infosys

Infosys introduced DWX Command Center and AR support offerings. The company also expanded its DaaS offerings and regional delivery hubs.

kyndryl

Kyndryl widely deployed its Azure Virtual Desktop and Nerdio offerings, which are supported by telemetry-driven endpoint management and cyber resilience.

NTT DATA

NTT DATA rolled out the Smart AI Agent suite and Experience-as-a-Service (ExPaaS) platform to several significant sector clients. It also modernized its VDI infrastructure and expanded global field services.

unisys

Unisys introduced its Device Subscription Service and AI-powered service experience accelerator to enhance client capabilities. The company also forcefully advanced its proactive support and field services.

ZONES

Zones launched tiered device bundles and AI-driven service desks optimized for sector clients, and expanded its Microsoft ecosystem integration and added significant new public sector contracts.

Unisys

Leader

"Unisys, a Leader in this quadrant, driven by innovations such as Device Subscription Service (DSS), Remote OS and GenAI-powered Service Experience Accelerator, delivering secure, scalable and proactive digital workplace support globally."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has continued to expand and evolve its managed end-user technology and EUC services in the U.S., focusing on UX, automation and sustainability. It delivers persona-based EUC services that prioritize UX, leveraging predictive analytics, automation and sentiment analysis to link IT performance with business outcomes. The company also embeds proactive device monitoring and vulnerability detection into its EUC offerings.

Strengths

End-to-end device lifecycle management: Unisys supports public agencies with DSS, covering procurement, provisioning, patching and secure retirement. DSS enables telemetry-driven refresh planning, flexible financing and evergreen catalogs, ensuring consistent productivity, compliance and cost efficiency across government IT environments.

Unified endpoint and virtual desktop services: Unisys delivers secure, scalable endpoint and VDI services for public sector clients through Microsoft, VMware, Citrix and Jamf. Integrated with ServiceNow and AI automation, these services support BYOD, mobility and compliance in mission-critical government operations.

Proactive experience and issue resolution: Unisys enhances public sector DEX using 1E, Nexthink and its AI-powered Service Experience Accelerator. These tools proactively detect and resolve issues, reduce downtime and align IT support with agency performance goals and employee sentiment.

Global field services and industry tailoring: Unisys supports over 4.5 million devices with over 7,300 field engineers, delivering IMAC, break/fix and in-person services. Its persona-based, industry-specific approach ensures secure, continuous support tailored to public sector needs, including healthcare, education and critical infrastructure.

Caution

Unisys can enhance its DSS, Remote OS and ChromeOS services by improving sector procurement consistency and increasing its change management agility to meet evolving, rapidly-increasing and diverse demands for scalable, secure and cost-effective device use and support.

Continuous Productivity Services (Including Next-gen Service Desk)

This report is valuable for providers offering **continuous productivity services (including next-gen service desk)** in the **U.S. public sector** 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.

Public sector professionals

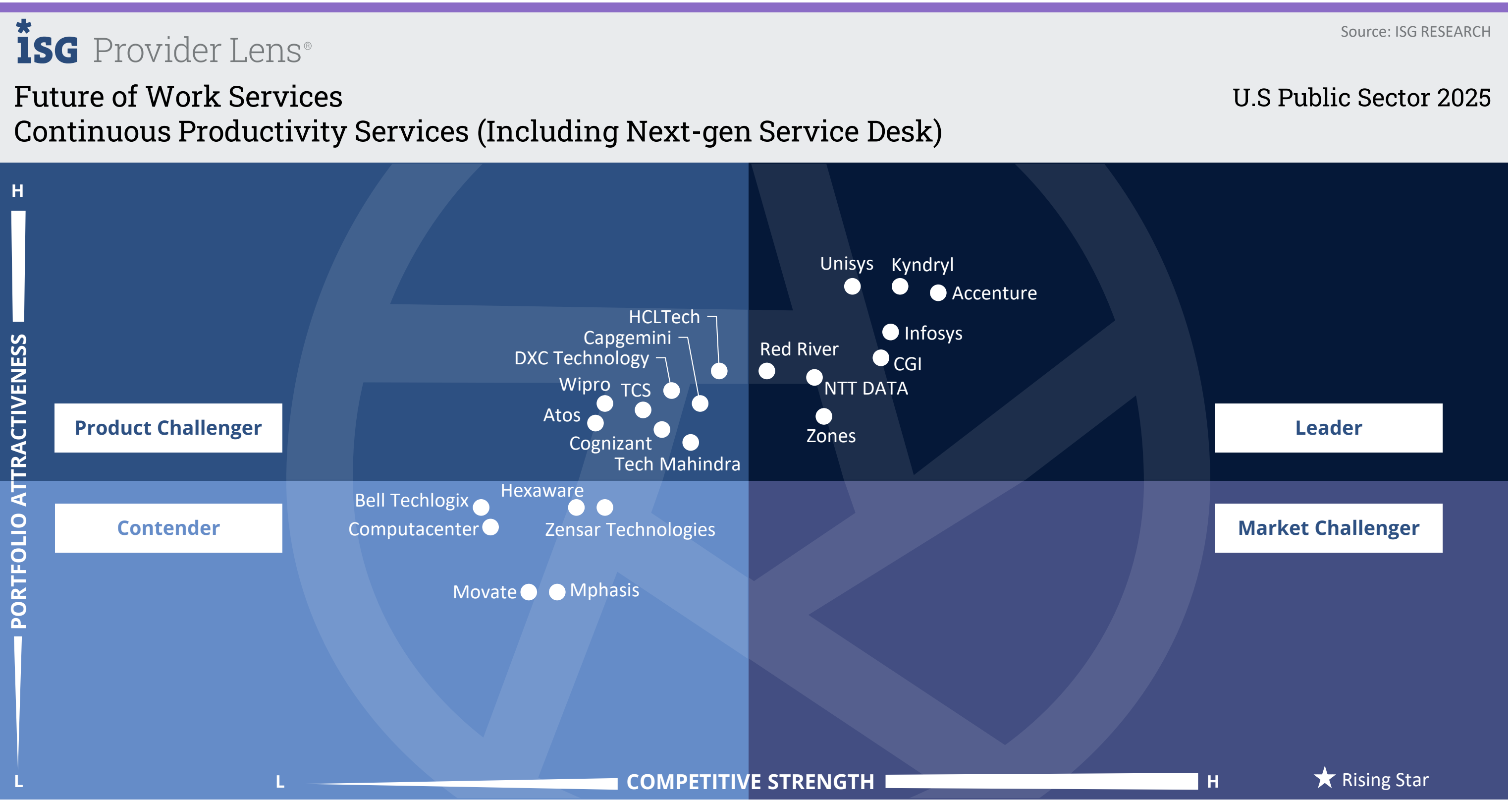
Should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select continuous productivity services. The report discusses building effective partnerships with service providers for ongoing support and innovation. It highlights the best practices for deploying continuous productivity services within their organizations.

Field service professionals

Should read this report to understand how service providers implement and increase the use of workplace services to better manage field service operations. They can gain insights into key performance indicators (KPIs) that can help measure the effectiveness of field service operations. Field service professionals will be equipped with the knowledge and tools necessary to drive improvements in their operations.

Digital professionals

Including facility management leaders, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives. They can gain insights into how these services can streamline workflows and reduce operational silos while discovering metrics and KPIs to evaluate the effectiveness of continuous productivity services.



This quadrant evaluates providers **enabling flexible, AI-driven workplace support**, emphasizing automation, sentiment analysis and XLAs to enhance productivity in hybrid, next-generation public sector environments.

Bruce Guptill

Definition

In this quadrant, ISG assesses service providers supporting the productivity needs of next-generation, human and hybrid workplaces. Today's workforce prefers the flexibility to work from anywhere and anytime, requiring a different IT operating model driven by changes in business models and market channels.

Providers must offer enhanced support capabilities, making traditional service desk offerings less appealing but still 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 save costs.

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

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Provide **deliver-anywhere autonomous workplace support**
3. Offer **fully integrated analytics and automation** for issue resolution
4. Deliver **contextualized AI support** for workplaces
5. Provide **service desk augmentation**
6. Offer **XLA-driven support** instead of SLA-driven decisions
7. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
8. Provide **automated and contextualized support for end users** based on their roles and work
9. **Quantify workplace support function performance** beyond traditional service metrics
10. Have a **robust local presence** with workplace engagements around service desk services

Observations

In 2025, continuous productivity services evolved into a critical enabler of hybrid work and digital transformation across the public sector. Providers expanded their portfolios to include AI-powered service desks, omnichannel support and immersive self-service tools such as kiosks, DigiLockers and AR/VR-enabled assistance. Compared to 2024, there has been a clear shift through 2025 from SLA-based models to XLA-driven frameworks, emphasizing user sentiment, business outcomes and proactive issue resolution.

GenAI integration became a core differentiator, with many providers launching intelligent agents, predictive analytics and self-healing capabilities to reduce downtime and improve UX. M&A activity and strategic partnerships with platform vendors such as Microsoft, ServiceNow and AWS supported rapid innovation and delivery scale. Several providers introduced dedicated public sector offerings or expanded regional delivery to meet compliance and performance needs.

The quadrant also saw increased investment in workforce transformation, with training and change management programs supporting AI adoption. As demand for secure, scalable and outcome-focused support grows, providers must now address integration complexity, regional consistency and personalization to maintain leadership and deliver measurable value.

From the 34 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders.

accenture

Accenture aggressively pushed its LearnVantage and AI-powered AR/VR tools to sector clients, emphasizing GenAI-driven service desk and proactive issue resolution.

CGI

CGI launched its PulseAI and immersive self-service tools, shifting toward XLA-based metrics and expanded localized delivery.

Infosys

Infosys enhanced its Cortex and DWX platforms to reflect sector client circumstances. It introduced GenAI assistants and AR support with expanded omnichannel service desk capabilities.

kyndryl

Kyndryl rolled out Interactive AI and Experience Management as a service, which includes robust omnichannel support and cognitive analytics optimized for sector clients' requirements.

NTT DATA

NTT DATA deployed Smart AI Agents and immersive support tools to a broad range of sector clients, while transitioning to XLA-led delivery and expanding multilingual GenAI support.

Red River

Red River broadly integrated AI, RPA and AIOps into sector-customized services with XLA. It expanded its OEM partnerships for secure IT ecosystems.

unisys

Unisys further leveraged its new Service Experience Accelerator and XLA 4.0 capabilities, emphasizing proactive automation and omnichannel support.

ZONES

Zones launched an expanded AI-driven service desk with broader performance analytics and automation capabilities, which led to new and expanded public sector contracts.

Unisys

Leader

"Unisys leads in continuous productivity services with its Service Experience Accelerator, offering AI-powered, omnichannel, XLA-driven support and automation that enhance UX, reduce downtime and align IT with business outcomes."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has significantly evolved its continuous productivity and next-gen service desk services, including for U.S. public sector clients, focusing on AI, automation and employee-centric support to align with the demands of hybrid work and AI-driven operations. It has been transitioning clients from traditional ticket-based support to proactive, AI-powered service delivery, using predictive workflows and self-healing capabilities.

Strengths

AI-driven, omnichannel support: Unisys enhances public sector service desks with its Service Experience Accelerator, integrating Azure OpenAI and Genesys Cloud. This approach offers secure, sentiment-aware support across chat, voice, kiosks and digital lockers improving constituent satisfaction and accelerating resolution in government environments.

Proactive and autonomous workplace support: With over 22.5 million automated fixes annually and 1.9 million devices proactively monitored, Unisys offers location-agnostic support. Its AI-powered health monitoring and predictive analytics reduce downtime and support costs while improving employee productivity and experience.

XLA-centric experience management: Unisys is replacing its SLA-driven engagement and delivery models with XLA 4.0, measuring ecosystem-level experience across personas, devices and environments. This approach links IT performance to business outcomes, enabling continuous improvement and strategic alignment with enterprise goals.

Field services and self-service innovation: Unisys delivers next-gen field services to public agencies via smart lockers, AR-enabled remote support and virtual tech cafés. These tools reduce service desk dependency, improve uptime and empower users with secure, autonomous issue resolution.

Caution

Unisys can further optimize its Service Experience Accelerator and XLA 4.0 use by improving GenAI onboarding, ensuring regional service desk consistency and personalizing proactive support to better align with clients' evolving and often undetermined digital workplace support and productivity requirements.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is valuable for providers offering **smart and sustainable workplace services** in the **U.S. public sector** 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

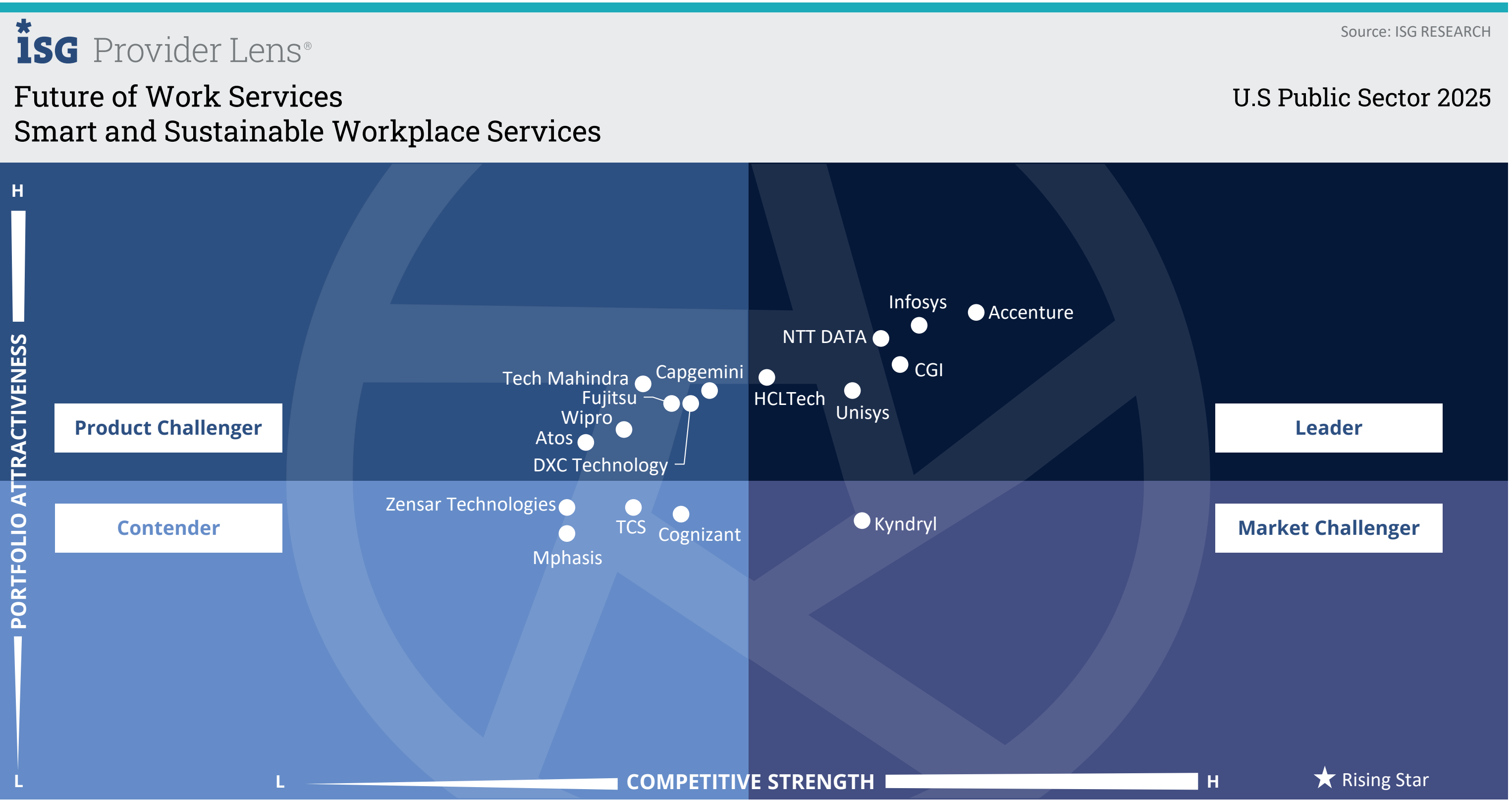
Should read this report to understand the latest trends in smart and sustainable workplace services, aiding in resource allocation and strategy development. The report outlines best practices that streamline processes and reduce operational costs while maintaining quality. It also highlights implementing eco-friendly practices that align with corporate social responsibility objectives.

Chief sustainability officers and ESG professionals

Including sustainability managers and ESG analysts, should read this report for insights on developing and implementing effective, sustainable strategies. The report includes guidance on developing a long-term vision for sustainability that integrates with overall business strategy. It identifies opportunities for sustainable investments that align with corporate goals.

Strategy professionals

Should read this report to identify the most suitable smart and sustainable workplace service providers that can help companies develop and implement a successful ESG strategy. They can compare their organizations' strategies with those of industry leaders to identify gaps and opportunities. By leveraging the insights provided, they can ensure that their clients are well-prepared to meet the challenges of today's evolving work landscape.



This quadrant evaluates providers enabling smart, sustainable, inclusive workplaces through IoT, analytics and ESG-aligned strategies that **enhance collaboration, efficiency and employee well-being** in public sector environments.

Bruce Guptill

Definition

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

With growing public sector real estate 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. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Support **smart office spaces** and provide workplace analytics, hot desking, smart building and facility management **by leveraging IoT and the latest technologies**
3. **Support asset efficiency and address energy management requirements**
4. Provide **inclusive, adaptable, responsible and integrated hybrid working solutions** and spaces
5. Provide **services to reduce carbon emissions** from workplaces
6. Assist in aligning client **strategies and metrics for ESG reporting**, particularly focusing on workspace utilization within the social and governance dimensions

Observations

In 2025, smart and sustainable workplace services gained momentum across the public sector, driven by ESG mandates, hybrid work strategies and IoT-enabled infrastructure modernization. Compared to 2024, providers expanded their offerings to include AI-powered building management, carbon tracking and predictive maintenance tools in 2025.

IoT integration became central to optimizing energy use, space utilization and employee well-being. Several firms introduced platforms for smart asset management, circular device lifecycles and sustainability analytics, aligning with net-zero goals and regulatory compliance. M&A activity and strategic partnerships — particularly in smart building technologies and ESG reporting — enabled providers to scale delivery and deepen public sector engagement.

The quadrant saw increased emphasis on experience parity across remote and physical environments, with unified communications and accessibility features supporting inclusive hybrid work.

While most leaders retained their positions, new entrants and expanded U.S. operations reshaped competitive dynamics. As agencies prioritize sustainability and operational efficiency, providers must now focus on regional delivery depth, vertical-specific expertise and integration of AI and IoT across legacy systems to meet evolving expectations and maintain leadership.

From the 34 companies assessed for this study, 17 qualified for this quadrant, with six being Leaders.

accenture

Accenture piloted smart buildings and acquired the IQT Group. The company also partnered with Johnson Controls to integrate IoT and digital twins for net-zero infrastructure.

CGI

CGI expanded ESG investments and IoT-enabled workplace analytics and hybrid collaboration. This helped it to secure several large SLED contracts, including a 10-year contract with LA County.

HCLTech

HCLTech launched WorkBlaze and LibreSpace, emphasizing interactive and real-time ESG dashboards with carbon tracking. It significantly expanded U.S. operations to better support sector clients.

Infosys

Infosys introduced Wingspan and NAVI platforms, expanded its ESG tracking and smart office services and improved its circular device lifecycle management capabilities.

NTT DATA

NTT DATA widely deployed smart lockers and IoT-enabled analytics for sector client organizations while reducing energy use in public buildings and improving hybrid work and ESG reporting.

unisys

Unisys expanded telemetry-based insights and smart building management offerings, emphasizing energy optimization and inclusive hybrid work solutions.

Leader

"Unisys is a sector leader in smart and sustainable workplace services due to its deep public sector focus and advanced capabilities in IoT, ESG analytics, hybrid work and AI-driven experience platforms."

Bruce Guptill

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. Since 2024, Unisys has expanded its smart and sustainable workplace capabilities for U.S. public sector clients by deploying IoT-enabled smart conference rooms, integrating ServiceNow for proactive alerts, and using QR codes for real-time support and training. Factors driving further growth include investments in AI, sustainability, and digital transformation capabilities.

Strengths

IoT integration in smart workplaces: Unisys delivers IoT-enabled smart workplace solutions, including hot desking, occupancy analytics and smart building management. Its Service Experience Accelerator and telemetry-based insights support adaptive, data-driven environments that enhance collaboration, safety and operational efficiency in public sector offices.

Energy and asset efficiency: It integrates energy management into its workplace services through intelligent PC refresh, smart HVAC and lighting systems. Its sustainable workplace platform helps agencies reduce energy consumption and optimize asset utilization, supporting cost-effective and environmentally responsible operations.

Inclusive hybrid work solutions: Unisys offers inclusive, hybrid-ready environments with unified communications, smart meeting rooms and accessibility features. Its solutions ensure experience parity for remote and in-office workers, tailored to diverse public sector workforce needs, including frontline and knowledge workers.

ESG alignment and reporting: Unisys supports ESG goals with workplace analytics that track space utilization, carbon emissions and employee well being. Its XLA 4.0 framework and AI-driven insights help agencies align workplace strategies with social and governance reporting requirements, enhancing transparency and accountability.

Caution

Unisys can further improve its smart workplace services by expanding regional delivery depth, accelerating vertical-specific digital workplace support and enhancing partner-driven innovation to match the scale, breadth and AI-led automation maturity of larger competitors.

AI-augmented Workforce Services

Who Should Read This Section

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

Consulting professionals

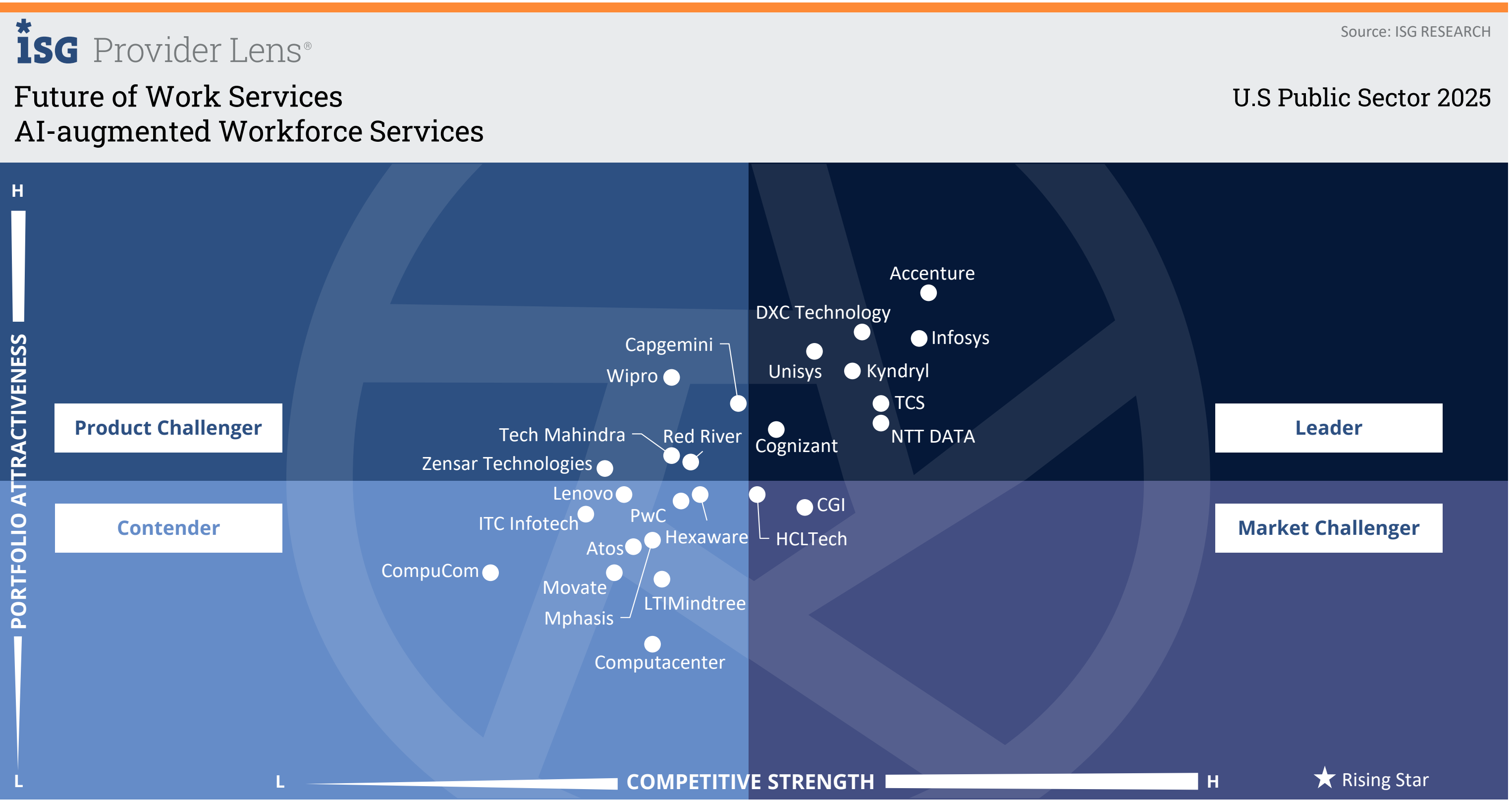
Should read this report to advise companies on AI-augmented workforce strategies and performance, ensuring they stay up-to-date on industry trends and developments. By doing so, they can offer companies customized recommendations through the transition to ensure minimal disruption and maximum engagement. By leveraging the insights provided, they can ensure that their clients are well-prepared to meet the challenges of today's evolving work landscape.

Technology professionals

Should read this report to understand how providers' relative positioning and abilities can help them effectively plan AI-augmented workforce services. The report discusses building effective partnerships with service providers for ongoing support and innovation and highlights the best practices for deploying AI-augmented workforce services within organizations.

Chief information officers (CIOs)

Should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies. The report highlights the potential limitations of adopting new capabilities and technologies and outlines strategies to mitigate these challenges. CIOs will find guidance on fostering a culture of innovation and adaptability within their teams.



This quadrant evaluates providers of autonomous AI agents that **optimize workflows, enhance productivity and deliver measurable public sector outcomes** through intelligent, adaptive and ethically governed workplace solutions.

Bruce Guptill

Definition

This quadrant evaluates providers of advanced agentic solutions using AI and ML as autonomous digital agents. These agents enable proactive decision-making, contextual learning and seamless enterprise interaction. They act as active participants in the workplace ecosystem and autonomously manage workflows, 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. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Offer services with **autonomous functionalities** that comprise proactive, context-aware and continuously self-improving actions **beyond scripted routines** and **traditional automation**, differentiating them from conventional managed services or broader workplace strategies
3. Ensure **deep integration with existing digital workplace ecosystems** for seamless operations
4. Have achieved **outcome-driven impact** with **verifiable** gains (e.g., productivity gains, cost reductions and enhanced UX for targeted job roles or personas)
5. Support **workforce transition** by offering comprehensive **training and upskilling** to drive adoption and enable effective collaboration with digital agents
6. Adhere to **ethical governance** standards, ensuring fairness, accountability and transparency in AI deployment
7. Provide services incorporating robust **feedback mechanisms** for continuous **evaluation** and **adjustment**
8. Offer **U.S. public sector-specific case studies** demonstrating **scalability, relevance** and adaptability to local market demands

Observations

Introduced in 2025, this new quadrant reflects the rapid emergence of agentic AI solutions in the public sector. Providers now deliver autonomous, context-aware digital agents that support workflow automation, decision-making and personalized UX. These agents are deeply integrated into enterprise systems and are designed to operate independently, continuously learning and adapting.

The quadrant highlights a shift from traditional automation to intelligent, self-governing systems that augment human capabilities. Providers invested heavily in GenAI platforms, launched AI CoE and formed strategic partnerships with cloud and AI leaders to accelerate deployment.

Workforce transformation is a key focus, with large-scale training programs and change management frameworks supporting adoption. Ethical AI governance, transparency and compliance are emphasized across offerings.

While all providers in this quadrant are new entrants, many leveraged existing strengths in digital workplace services to expand into AI augmentation. As public sector organizations explore AI to improve service delivery and operational efficiency, providers must address integration complexity, workforce readiness and regulatory alignment to ensure successful, scalable adoption.

From the 34 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders.

Accenture launched its AI Refinery and NVIDIA Business Group, focusing on human-centric AI adoption and agentic workforce transformation.

Cognizant introduced its Agent Foundry and Neuro AI, leveraging GenAI investments and strategic partnerships with Microsoft and ServiceNow.

DXC Technology rolled out DXC UPtime and OASIS platforms, with sector engagements building around autonomous workflow automation.

Infosys deployed over 200 AI agents via its Topaz offering, principally centered on self-healing systems and platform-supported workforce augmentation.

Kyndryl piloted its Agentic AI Framework for sector clients, focusing on workflow orchestration and ethical governance for public sector operational transformation.

NTT DATA leveraged its Smart AI Agent Suite and GenAI Talent Framework to enable and improve ethical governance and scalable agentic deployments in multiple public sector environments.

TCS introduced capabilities that leverage its Cognix and AI.Cloud, including CareerHub and responsible AI for public sector workforce augmentation.

Unisys rolled out its Service Experience Accelerator to leverage and improve autonomous GenAI agents and ethical, scalable AI deployment.

Unisys

Leader

"Unisys leads in this quadrant by delivering autonomous GenAI agents via its service experience accelerator, driving measurable productivity gains, seamless enterprise integration and workforce empowerment through ethical, scalable and context-aware AI."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys emphasizes human-AI collaboration over replacement, focusing on augmented intelligence to enhance decision-making. Its ClearPath Forward 2050 strategy drives public sector AI workforce services through GenAI, agentic automation and responsible AI practices addressing bias, infrastructure and skills gaps.

Strengths

Agentic AI and autonomous capabilities: Unisys' Service Experience Accelerator (SEA) powers autonomous digital agents using GenAI and telemetry. Public sector deployments streamline ITSM and HR workflows, enabling proactive issue resolution and intelligent support across government agencies, enhancing service delivery and operational efficiency.

Enterprise integration and measurable outcomes: SEA's microservices architecture integrates securely with public sector systems. Government clients report 9,800 onboarding hours saved and 40,000 proactive remediations in six months, demonstrating measurable efficiency gains in citizen services and internal operations.

Workforce enablement and change management: Unisys supports public sector workforce transformation with advanced OCM, AR/VR tools and digital human interfaces. These initiatives improve AI adoption in frontline and hybrid roles, boosting productivity and collaboration across government agencies.

Ethical AI and regional scalability: Unisys ensures ethical AI deployment in public sector environments with in-tenant GenAI, hallucination prevention and data sovereignty controls. Regional successes in aviation and logistics highlight scalable, responsible AI augmentation for secure, localized impact.

Caution

Unisys can strengthen SEA's value across sector agencies, departments and domains by accelerating governance frameworks, improving AI agent autonomous adaptability and enhancing OCM maturity to help clients safely scale GenAI value in workforce transformation and realize measurable, role-specific productivity outcomes.

Appendix

The ISG Provider Lens® 2025 – Future of Work Services study analyzes the relevant software vendors/service providers in the U.S. Public sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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

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

The study was conducted in the following steps:

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

Lead Author

Bruce Guptill
Analyst and Advisor

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

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

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

Research Analyst

Khyati Tomar
Senior Research Analyst

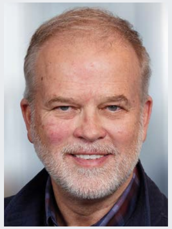
Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. Khyati has over 5+ years of experience in the IT research industry. Before this role, she gained over 2.5 years of experience in the technology research industry, where she conducted various consulting and custom projects and co-authored CIS reports, primarily focusing on the public sector vertical. In her current role, she supports lead analysts in the research process, authors the Enterprise Context and Global Summary reports, and co-authors focal points and quadrant reports.

Study Sponsor

Iain Fisher
Director and Principal Analyst

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning.

He provides major market insights leading to changes to business models and operating models to drive out new ways of working. Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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

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OCTOBER, 2025

REPORT: FUTURE OF WORK SERVICES