

Workday Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Deloitte.

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Workday's partner dynamics and ecosystem strategy are evolving, driven by digital transformation.

Historically, Workday adopted a closed approach, relying on a proprietary technology stack and a limited set of tightly integrated solutions, which served the company well for many years. However, this model allowed minimal room for partner-driven innovation. To foster a more open ecosystem, Workday is now expanding its Built on Workday program and enhancing the Workday Marketplace, laying the foundation for the Workday Economy.

Workday is making significant investments in its partner ecosystem, focusing on strategic partnerships, innovation, sales and services programs. The partner program aims to offer flexibility in rewards and lower participation costs for partners. To support this growth, Workday empowers local and regional system integrators (SIs) to deliver culturally tailored implementations and support services.

Significant investments go towards localising Workday Financials and Payroll, ensuring compliance with the diverse regulatory and business requirements of countries such as Japan, Australia and Singapore. Additionally, Workday strategically targets prominent regional clients to strengthen its market credibility and establish a robust reference base.

In fast-growing APAC economies, career growth and development are priorities for employees. Workday taps into this sentiment with its AI-powered talent mobility solutions. Central to Workday's APAC strategy are the Workday Skills Cloud and Talent Marketplace, which help employees identify their existing skills and discover internal gigs, projects and full-time roles that match their aspirations. By providing a transparent internal opportunity, these tools show employees a clear path for growth within the company. For enterprises in talent-scarce markets like Australia and Japan, this focus on talent development is critical for retaining top performers and demonstrating a tangible investment in their careers. The modern APAC workforce, largely mobile-first and digitally

GSIIs and
boutique firms
are **shifting** from
generalist Workday
implementers
to **industry-specific
or functional domain
practices.**



native, expects seamless, consumer-grade technology experience. Workday directly addresses this need by unifying the historically fragmented landscape of HR systems. Its single, intuitive interface is a powerful differentiator in a region where employee burnout is a significant concern. By continually expanding in the APAC region, Workday equips enterprises with the necessary tools to address their most pressing challenges — attracting, developing and retaining top talent. The company successfully shifts its narrative from being an efficient HRIS to becoming an indispensable platform for building a high-performing, agile workforce.

Strategic expansion into finance and platform solutions: Workday is rapidly expanding its footprint in the APAC region, moving beyond its traditional HCM focus to compete in the finance and platform-of-choice space. While the company's initial entry into APAC heavily relied on its HCM suite, the current wave of adoption increasingly emphasises modernizing finance. A growing number of APAC-headquartered companies are selecting Workday Financial Management as the core of their digital

transformation, enabling better visibility, improved agility and standardised processes across diverse regional operations. The dynamic economic environment in APAC, characterised by high levels of M&As, requires agile financial systems that can scale and consolidate disparate entities quickly, empowering CFOs in the region to provide real-time insights for strategic decision-making.

Deepened partnership with hyperscalers: Workday's partnership with hyperscalers has evolved into a sophisticated, multifaceted strategy that delivers significant benefits in performance, innovation and extensibility for its customers. While Workday runs its core application on custom-built infrastructure in colocated data centres, it establishes strategic partnerships with all three major hyperscalers. This allows Workday and its customers to leverage the global scale and cutting-edge services of these platforms without migrating its primary application.

The Workday services market within APAC is experiencing **dynamic growth and maturation in 2025**, marked by increasing competition, a strategic shift towards platform innovation

and a strong emphasis on hyperlocalisation. Global SIs (GSIs) and consulting firms, such as Accenture, Deloitte and PwC, continue to dominate large-scale transformations, leveraging their immense resources and C-suite influence. However, **global specialists such as Kainos, Strada and Cognizant** are gaining significant ground through deep product expertise, agility and the development of high-value proprietary intellectual property on the Workday platform, often outperforming in specific niches.

A major trend involves the **integration of AI** into service delivery, with leading partners codeveloping AI solutions with Workday and infusing AI into their methodologies for core consulting, deployment and managed services. Workday's offerings, such as **Workday Extend and Illuminate**, play central roles in this evolution, designed to increase automation, reduce manual effort and improve EX, often replacing third-party tools and costly integrations. The market increasingly demands **industry-specific solutions and accelerators**, moving beyond generic implementations to tailored approaches that speed time to value.

Providers are developing industry-specific model tenants, preconfigured solutions and proprietary accelerators to expedite deployments, reduce risk and apply best practices tailored to industry nuances. Despite this growth, **talent scarcity remains a critical challenge** across the ecosystem, prompting providers to develop innovative talent development strategies and foster collaboration among partners. The overall market is consolidating into clear tiers, with continued M&As expected as larger firms acquire niche capabilities or regional presence. Clients are prioritising Workday for its **efficiency, agility and enhanced EX**, focusing on actionable insights and extensibility.

Rise of the Platform Partner and Workday Extend for APAC: Partners are increasingly transcending traditional service provider roles to become software developers. They are building, marketing and monetising proprietary intellectual property using Workday's platform tools, notably **Workday Extend**. This shifts transforms the landscape from a purely labour-based model to an **IP-driven, value-based one**, which is critical for **hyperlocalisation** and



Executive Summary

enables partners to address unique regional requirements that Workday's core product might not cover.

AI-infused service delivery and Workday Illuminate/Agents: AI is evolving from an add-on to a core component of service delivery, manifesting in consulting (AI-driven **organisational change management** [OCM]), deployment (AI to accelerate processes) and strategic partnerships for next-generation AI technologies. **Workday Illuminate** (Workday's next-gen AI platform) and **agentic AI** play crucial roles in this evolution. Partners are investing heavily in AI capabilities and establishing regional AI centres. One of the Big Four firms has launched an **APAC Agentic AI CoE** with over 6,000 practitioners to support over US\$1 billion in AI implementations, closely integrated with their Global Agentic Network.

Multicountry deployment expertise and hyperlocalisation: Many APJ projects involve multicountry rollouts, valuing partners that can navigate complex regulatory environments. These partners specialise in integrating local payrolls and benefits with Workday, serving as key differentiator in a region with diverse local

requirements. One global payroll specialist provides solutions covering over 60 countries and acts as a turnkey integration accelerator for multicountry payroll. This partner collaborates with Workday to expand into promising markets, developing specific Extend applications to fill local gaps.

Focus on continuous improvement and value realisation post go-live: Application Management Services (AMS) are shifting from reactive support to proactive optimisation. This change drives continuous value for clients and encourages adoption of new Workday features. Long-term relationship focus is crucial for client retention and referrals within the APAC region. AMS is a strategic offering that strengthens and expands relationships with clients and is also a major investment area for Workday in the region.

Talent ecosystem imperative and development: A persistent challenge within the ecosystem shortage of skilled, certified Workday professionals. This issue leads to innovative talent creation solutions and ecosystem collaboration, particularly acute in emerging APAC markets, driving internal training,

apprenticeships and strategic alliances. Providers are **ramping up certifications** among existing team members and some are cross-training resources from other ERP systems into the Workday platform, while also inducting fresh college graduates into Workday roles.

Focus on business outcomes: Partners are increasingly focused on helping clients maximise their Workday investment, extending beyond system implementation to overarching business impact. This includes:

- **Measuring business impact:** There is a strong emphasis on demonstrating measurable ROI and tangible business benefits from Workday deployments, moving from technical implementation to strategic advisory. For example, PwC employs an outcome-driven engagement approach.
- **OCM:** Sophisticated OCM approaches are crucial for managing the human side of transformation, driving user adoption and building sustained change capabilities. Deloitte offers a sophisticated OCM approach with its proprietary ChangeScout platform.

By embracing these strategies, Workday partners enhance their competencies and credibility, driving continuous transformation for clients and ensuring sustained growth in a competitive and dynamic market.

The Workday partner ecosystem in APAC has transformed from a nascent, GSI-led market into a dynamic and mature network. The rise of specialised boutiques, a focus on building local intellectual property with Workday Extend, and significant investment in local talent have defined this evolution. These factors directly enable Workday's accelerated penetration and success in this complex and strategic region.





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Accenture	Leader	Leader	Leader	Leader
Advise Now	Not In	Contender	Contender	Contender
Amaris	Product Challenger	Product Challenger	Not In	Contender
Capgemini	Not In	Not In	Not In	Contender
CloudRock	Contender	Contender	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
Commit Consulting	Not In	Not In	Contender	Not In
Datacom	Product Challenger	Not In	Product Challenger	Product Challenger
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Not In	Product Challenger	Product Challenger	Not In





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
E1 consulting	Contender	Contender	Contender	Not In
EZE Cloud Consulting	Product Challenger	Product Challenger	Contender	Not In
Fusion5	Contender	Product Challenger	Not In	Not In
G-able	Contender	Contender	Not In	Not In
Helios Consulting	Contender	Not In	Not In	Contender
HRMS Consulting	Not In	Contender	Contender	Not In
Huron	Product Challenger	Product Challenger	Not In	Rising Star ★
IBM	Leader	Leader	Leader	Leader
Intecrowd	Contender	Product Challenger	Rising Star ★	Product Challenger
Jade Global	Not In	Not In	Not In	Contender





Provider Positioning

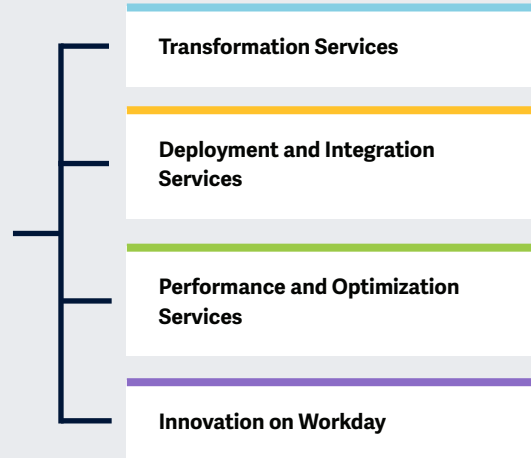
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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Kainos	Leader	Leader	Leader	Leader
KPMG	Leader	Leader	Leader	Leader
Mercer	Leader	Product Challenger	Product Challenger	Product Challenger
Mivada	Contender	Not In	Not In	Not In
PwC	Leader	Leader	Leader	Leader
QMetrix	Market Challenger	Product Challenger	Not In	Not In
SamsungSDS	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Strada	Leader	Leader	Leader	Leader
UST	Not In	Contender	Product Challenger	Not In



The Workday study focuses on the **road map of Workday** and its service partners to provide **intelligent HCM and financial management**.

Simplified Illustration Source: ISG 2025



Definition

The Workday Transformation Services quadrant evaluates providers based on their capabilities in Workday consulting, strategy and advisory services, with an emphasis on digital HCM transformation, adoption of emerging technologies and organizational change management. Providers are assessed on their ability to deliver comprehensive digital workforce strategies, seamless integration of the Workday platform and effective management of technology-driven organizational changes. A key differentiator for providers is their ability to leverage AI-driven enhanced solutions such as Workday Illuminate, integrated with predictive analytics, intelligent process automation, GenAI and agentic AI to optimize UX, streamline HR operations and boost workforce productivity within the Workday ecosystem. Leaders in this quadrant assist clients with accelerating their digital transformation and speeding up time to value by addressing industry-specific challenges.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: Transformation Services, Deployment and Integration Services, Performance and Optimization Services and Innovation on Workday

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

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

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





Provider Classifications: Quadrant Key

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

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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

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.





Transformation Services

Who Should Read This Section

This report is valuable for service providers offering transformation services in the APAC 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.

Strategy professionals

Should review this report to gain insights into evolving trends in Workday transformation services. It will help them choose the right partner for a long-term road map on the Workday platform. These providers support enterprises in the development of a digital acceleration strategy, aiding them in selecting the appropriate Workday products tailored to their specific needs in accordance with their organisation's size and goals.

IT and technology professionals

Should read this report to learn about industry-specific Workday solutions and providers' prowess in undertaking consulting projects for diverse industries and functions. This understanding will provide insights into the way service providers design Workday solutions and leverage their ecosystem to seamlessly run the platform with third-party systems.

Business and financial leaders

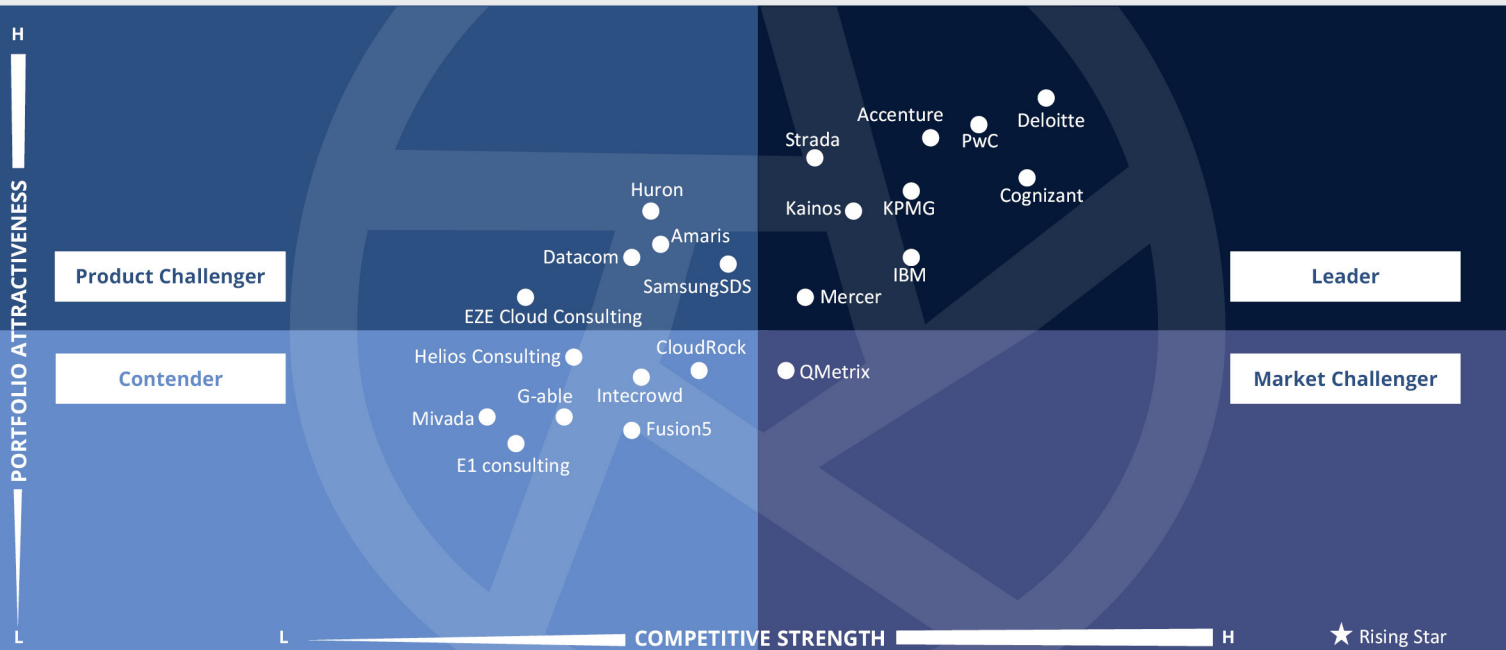
Focused on driving business outcomes should read this report to understand the design frameworks, evaluation methodologies, and process maturity and complexities associated with Workday adoption across industries. This report provides a view of unique and successful use cases across industry verticals, highlighting a provider's domain knowledge and capabilities.



ISG Provider Lens®
 Workday Ecosystem
 Transformation Services

Source: ISG RESEARCH

APAC 2025



Workday specialists have developed visions for how **the platform can be an engine for enterprise transformation**, and can guide clients through the planning needed to gain business value from their implementation.

Ashwin Gaidhani



Transformation Services

Definition

The Workday Transformation Services quadrant evaluates providers based on their capabilities in Workday consulting, strategy and advisory services, with an emphasis on digital HCM transformation, adoption of emerging technologies and organizational change management. Providers are assessed on their ability to deliver comprehensive digital workforce strategies, seamless integration of the Workday platform and effective management of technology-driven organizational changes. A key differentiator for providers is their ability to leverage AI-driven enhanced solutions such as Workday Illuminate, integrated with predictive analytics, intelligent process automation, GenAI and agentic AI to optimize UX, streamline HR operations and boost workforce productivity within the Workday ecosystem. Leaders in this quadrant assist clients with accelerating their digital transformation and speeding up time to value by addressing industry-specific challenges.

Eligibility Criteria

1. Have the ability to identify opportunities to develop **new Workday competencies** using **best practices** and to create an **adoption road map with frameworks, tools and templates**
2. Can evaluate the **HR management landscape to design service transformation strategies, set up road maps** and provide in-depth, industry-specific knowledge of the Workday product portfolio
3. Focus on **digital business transformation competencies** and have expertise in industry-specific functions and strategic consulting, including ESG and GRC
4. Possess Workday platform certifications to **predict long-term technology developments** and adoption to ensure **timely delivery of solutions** using **expertise** and **partnerships**
5. Have change management experience and a **Workday-certified resource pool** with solution-building expertise.



Transformation Services

Observations

Service providers in this quadrant have traditionally been easy to classify as either Workday specialists or business transformation consulting specialists. However, these distinctions are becoming less clear as Workday's presence grows in the APAC region and global consulting firms continue to expand their dedicated Workday practices. Niche Workday specialists may find it challenging to achieve leadership status and support clients effectively across the region's large, culturally diverse region.

Consulting specialists are deepening their relationships with Workday by pursuing additional certifications and dedicating more resources to the platform. These efforts enable them to integrate Workday's capabilities and requirements into the proven consulting processes they have developed for other systems and change programs. Providers retain their specialties, focusing on their relative expertise in different industries.

The technology transformation occurring within the Workday platform is not as apparent in Transformation Services as it is in other quadrants. While service providers are making clients aware of how AI can support transformation and improve operations, AI is not yet widely employed in the consulting process. Some providers are effectively using analytics when assessing client needs and determining optimal future states.

From the 29 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.



Accenture's extensive consulting scope, experience with multinational companies and close collaboration with Workday benefit clients in APAC.



Cognizant, following its acquisition of Collaborative Solutions, has the longest-standing partnership with Workday. It actively engages in co-sell and referral programs to drive new subscriptions and SKUs, indicating a strong collaborative go-to-market approach.



Deloitte stands out in the Workday ecosystem, recognised as the 2025 Workday Global Partner of the Year. As a Titanium sponsor of Workday events, it maintains high visibility and a deep strategic relationship with Workday.



IBM brings valuable insights into business transformation and technology trends during Workday consulting engagements.



Kainos is a full-scope Workday specialist, offering tailored solutions based on industry and size.



KPMG possesses extensive experience in consulting and the Workday environment, making it a reliable partner for transformation planning.



The development of proprietary tools such as **Mercer Accelerate™** and Mercer Assure + Change enhances Mercer's consulting capabilities with tangible technological assets. These tools address key client concerns around speed of deployment and post-go-live risks.



Transformation Services



PwC's significant tax practice provides essential tax consulting expertise for Workday Financials and payroll tax, ensuring compliance and optimal configuration. This includes solutions such as the Pillar 2 Extend Solution for global minimum tax compliance.



Strada collaborates with technology partners such as NAYYA (AI-driven personalised benefits), SpryPoint (utility billing software for large transformation) and DataScaleHR (AI-powered data conversion). It provides advisory support for clients migrating to AWS from on-premises solutions, which is linked to potential Workday adoption.



Deloitte



"Deloitte employs a balanced approach across industries, providing sector-specific solutions aimed at achieving business outcomes by addressing critical workforce and finance strategic priorities."

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries in more than 700 offices. In FY24, the company generated \$67.2 billion in revenue, with Consulting as its largest segment. It has a dedicated APAC leadership team to spearhead Workday consulting services in the region. Deloitte's global strength is complemented by investments in the APAC region. With over 5,000 partners and 100,000 professionals across 23 APAC geographies, the company has the local presence to deliver localised, culturally attuned advisory and consulting services.

Strengths

Innovation in scalable Workday solutions:

Deloitte is well-positioned to deliver large-scale, transformative Workday solutions in the APAC region, as underscored by numerous awards it has received. A notable achievement includes its recognition at the 2023 Workday Partner Innovation Awards for the Agile@Scale: A Workforce Resource Management Solution developed for a major telecommunications organisation in the APAC region.

Expertise with industry-specific

accelerators: Deloitte has developed a suite of industry-focused accelerators for sectors such as financial services, technology, media and healthcare. These preconfigured solutions, developed from decades of industry experience, expedite the design

and deployment of Workday systems while addressing sector-specific regulatory and business process requirements.

Strategic global partnership for regional

advantage: Deloitte's long-standing global alliance with Workday, established in 2009, provides a significant competitive advantage in the APAC region. This deep partnership ensures that Deloitte's consultants have early access to Workday's product road map and a direct line of collaboration, which they leverage to benefit their regional clients.

Caution

Deloitte's broad capabilities are ideal for large-scale, complex transformations. However, for specialised or emerging Workday-specific strategic advisory needs, its approach may seem less tailored or agile compared to boutique or pure-play Workday consultancies that have a more focused delivery model.





Deployment and Integration Services

Who Should Read This Section

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

Technology leaders

Should read this report to better understand the latest technological trends aligned with Workday features, functionalities and components. This report will help them identify a suitable provider that can tailor the Workday platform to meet their specific needs in terms of configuring modules and workflows to align with business processes and goals.

Engineers and architects

Responsible for Workday implementations can use this report to understand the developments in Workday and the support available to build tools or accelerators. This report provides insights into the strengths and shortcomings of providers in the platform deployment and integration space in terms of data migration support, automation capabilities and portfolio of accelerators and templates for seamless implementation, among other capabilities.

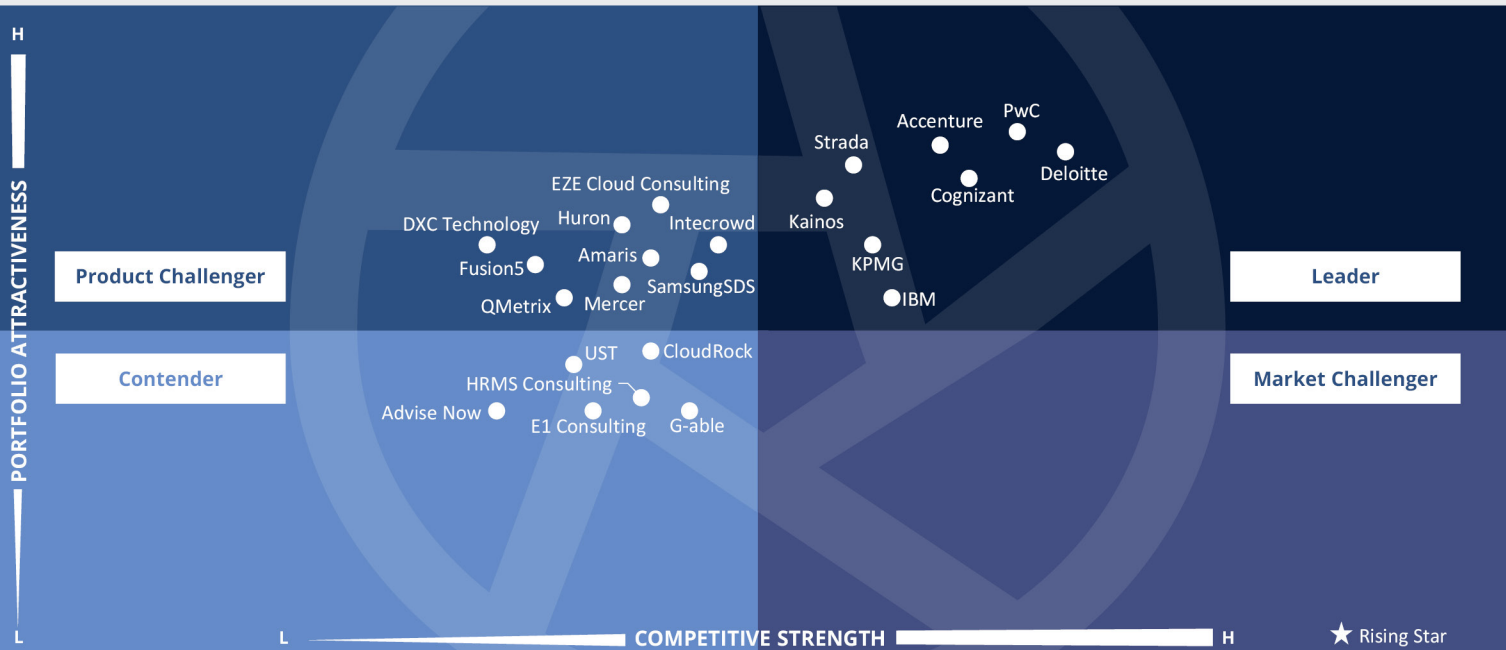
Business leaders

Should read this report to identify the right system integration partner that would help them meet business requirements through Workday implementations. The report provides insights on the training and change management support a provider can offer, which is a critical aspect of choosing the right implementation partner for successful project delivery and overall post-implementation support.



Workday Ecosystem Deployment and Integration Services

APAC 2025



Offering maturity is impressive in this quadrant. Clients benefit from many test platforms, APIs and other software integrations, support services and accelerators that service providers have developed for **fast Workday implementation and adoption**.

Ashwin Gaidhani



Deployment and Integration Services

Definition

The Workday Deployment and Integration Services quadrant assesses providers on expertise in core and phase X implementations; data migration practices; and integrations with CRM, ERP and complementary enterprise systems. Evaluation metrics include a provider's proven methodologies for accelerated deployments, accuracy and reliability of data migration tools, seamless interoperability across enterprise platforms, and scalable integration frameworks. Providers are distinguished by their innovative AI integrations for data validation and automated deployment testing, including the use of GenAI solutions that enhance system configuration, data integrity and real-time connectivity for efficiency and minimal disruptions during Workday deployments.

Providers with deep functional knowledge and a strategic assessment of deployment readiness to address unique industry challenges and process requirements, while ensuring successful change management, have a competitive edge in the Workday ecosystem.

Eligibility Criteria

1. Can deploy new features on the **Workday platform** and **Integration Cloud**
2. Have the ability to **integrate, align, develop, optimize** and **test** Workday products across various modules
3. Offer expertise in **diverse system integrations and migrations with ERP, SAP, CRM (ServiceNow) and internal collaborative systems** (such as Microsoft Teams and Slack)
4. Provide **maintenance support and installation services; offer upgrades; and handle patch and lifecycle management**
5. Use **emerging technologies** such as **automation, data science, AI, ML and cognitive computing** to enable digital transformations and drive implementations



Deployment and Integration Services

Observations

Service providers are demonstrating their hard and soft skills necessary for successfully rolling out Workday for APAC clients. This includes effective project management methodologies, training and change management services, integration expertise and proprietary technology to convert client data and processes for the Workday environment. These well-structured approaches help prevent implementation delays, enabling clients to access more services and functionality from day one. Some providers have specific service offerings for midsize enterprises.

Providers' proprietary technology plays a strong role in Workday deployment and serves as a key differentiator among service providers. Deployment accelerators for specific industries and Workday modules are areas where providers compete strongly. Prebuilt integrations to other enterprise software solutions enhance competition and allow enterprise clients to benefit from streamlined rollouts.

Industry and process expertise serves as another differentiator for deployment and integration services providers. Most providers possess more experience and offerings with Workday HCM than Financials, although the financial services industry remains a strong focus area.

From the 29 companies assessed for this study, 23 qualified for this quadrant, with eight being Leaders.



Accenture's expertise across the entire IT landscape, including major ERPs, is a critical advantage. It enables the design and development of integrations that are not only technically sound but also strategically aligned with clients' broader IT and business goals.



Cognizant claims a 100 percent deployment success rate and offers both prescriptive Launch deployments and consultative

Enterprise deployments. It leverages proprietary tools and methodologies acquired through the Collaborative Solutions partnership.



Deloitte develops implementation accelerators across various industries, including insurance, investment management and healthcare. The company is increasing investments in verticalised solutions with preconfigured platforms and assets, often integrating AI capabilities.



IBM's Workday services encompass planning, integration and post-implementation support and management, applying automation at every stage.



Kainos harnesses a range of libraries, accelerators and other assets it has developed to streamline Workday implementations.



KPMG provides tools and automation that accelerate Workday deployments and remain in place after go-live to reduce ongoing support requirements.



PwC commits to an outcome-driven engagement model, focusing on achieving measurable business results rather than solely on technology implementation, supported by numerous case studies.



Strada's Data Conversion Accelerator tool performs over 4,000 automated integrity checks on client data before loading it into Workday, significantly improving data quality and reducing conversion efforts.



Deloitte



"Deloitte leverages its broader firm capabilities by incorporating expertise from areas such as cybersecurity, tax, global mobility, payroll and BPO, enabling it to provide end-to-end services that extend beyond typical Workday implementations."

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries in more than 700 offices. In FY24, the company generated \$67.2 billion in revenue, with Consulting as its largest segment. By prioritising the human aspect of transformation from the outset, focusing on user adoption, training and evolving job roles, Deloitte ensures that the Workday platform fulfils its promised value and supports long-term strategic goals for business. The company serves a significant number of enterprise clients in the APAC region.

Strengths

Successful client engagement: Deloitte holds the highest quality rating in the Workday ecosystem, with 97 percent of active projects rated green. For a large Energy, Resources, & Industrial organisation, Deloitte consolidated 17 disparate HR systems onto one unified Workday platform for 130,000 workers across 38 countries, enhancing employee experience and standardising global processes.

Deep industry-specific expertise and preconfigured accelerators: Deloitte's industry knowledge has led to the creation of preconfigured IndustryPrint solutions for banking, healthcare, media and technology. This approach speeds up implementation, reduces risks and tailors Workday configuration to specific operational and

regulatory needs, resulting in faster, more relevant deployments.

Comprehensive, end-to-end transformation capabilities: Deloitte views Workday deployment as a holistic business transformation initiative. Its strength lies in merging technical implementation with change management, talent strategy and process re-engineering, ensuring the organisations are equipped and ready to adopt its new system.

Caution

Deloitte's strong emphasis on business process re-engineering and large-scale transformation is a key differentiator. However, it should remain mindful of clients prioritising speed to value, ensuring that agile, rapid deployment approaches are not overshadowed by broader change initiatives.





Performance and Optimization Services

Who Should Read This Section

This report is valuable for service providers offering performance and optimisation services in the APAC 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.

Operations and delivery leaders

Overseeing EX, business planning and financial management should read this report to comprehend how Workday service providers maintain their service quality and credibility. The report offers insights into providers' delivery centers, certified resources and cost-optimisation strategies that ensure the Workday platform operates without any disruption.

Service line leaders and functional professionals

Should read this report to rationalise the suitability of Workday resources and workflows across functions. The report examines a provider's portfolio and expertise in Workday modules, including relevant use cases, providing valuable guidance to service line and functional managers in choosing the right partner.

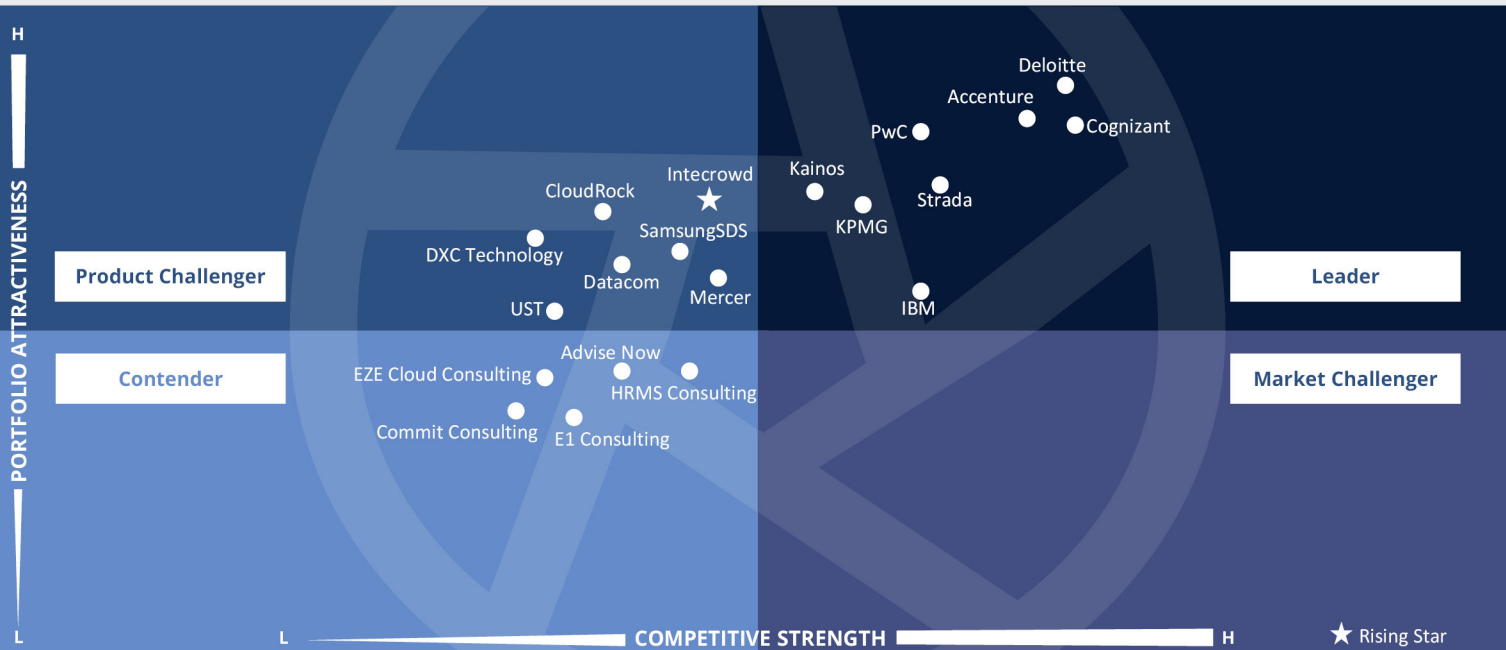
IT leaders

Who oversee technical infrastructure and ensure a system's reliability and security posture can utilise this report to select the most dependable provider. This report assesses a provider's ability to seamlessly manage updates of the Workday platform and oversee maintenance and monitoring needs, alongside ensuring data compliance and security.



Workday Ecosystem Performance and Optimization Services

APAC 2025



Reliable, innovative service delivery is a strength with the Workday partner ecosystem, which gives clients good options for effective service providers.

Ashwin Gaidhani



Performance and Optimization Services

Definition

The Performance and Optimization Services quadrant evaluates providers on their expertise in managing, enhancing and optimizing Workday environments that include their application management services, robust change and release management practices and effective business-specific customization capabilities. Much emphasis is placed on their ability to leverage the AWS cloud infrastructure to enhance Workday scalability, resilience, experience and operational efficiency. The evaluation also focuses on their proficiency in expanding Workday's capabilities via advanced integrations, extensions and AI-powered innovations, including automated request handling, managing and optimizing Workday Extend applications and using intelligent monitoring to proactively improve platform performance, UX and value realization.

For this quadrant, factors such as transparency, flexibility and scalability offered by providers are key evaluation criteria alongside commitment to innovation and continuous improvement.

Eligibility Criteria

1. Can support, optimize and enhance **Workday HCM, financial management, analytics, Enterprise Interface Builder (EIB), Workday Extend, data load, reporting and security**
2. Have the ability to undertake **Workday release management, install new packages** based on the release schedule and manage **controlled changes** in the environment via **change management practices**
3. Deliver **Workday maintenance support** and maintain a bug-free environment
4. Support testing of the **Workday integration code base, including third-party systems (business process as a service [BPaaS])** to ensure the availability and maintenance of the Workday platform and complementary software
5. Can build **strong partnerships with technology integration providers and critical third-party software providers** (Accu-Time Systems and ADP), covering the breadth of the application management services (AMS) portfolio



Performance and Optimization Services

Observations

Workday services delivery is mature without being stale for clients in the Asia-Pacific region. Several service providers are trying to expand in the region, which will help keep the market competitive.

Service providers in this quadrant are highly focused on optimising managed Workday services and encouraging clients to promptly implement updates and pursue other upgrades, including proprietary add-on solutions they have developed. Futureproofing is a common theme, with leading providers proactively reviewing client operations and recommending potential improvement paths.

Intelligent automation, self-healing capabilities and AI are prominent in Workday managed services delivery. The large global managed services providers (MSPs) in the market have successfully adapted their core service delivery technologies to support Workday. This includes using predictive analytics and AI for proactive troubleshooting to ensure strong uptime.

Providers have created proprietary offerings that provide skills development, automate specific business process tasks, help comply with different tax regulations and Workday translation to Asian languages. There is also a significant amount of Workday-specific customisation within Workday managed service that may be immediately apparent — providers have implemented client-specific and industry-specific Workday enhancements that remain highly invisible because they have not been commercialised through Workday Marketplace. From the 29 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture has various automation options to maintain reliability in Workday services and help clients get more value from their software. Its ability to bundle Workday AMS with extensive managed services offerings spans infrastructure, cybersecurity and BPO



Cognizant boasts the “largest AMS practice in the ecosystem,” supporting over 450 AMS clients. They provide a full spectrum of coverage, including dedicated, squad-based shared services and staff augmentation, allowing tailored support for various client sizes.

Deloitte.

Deloitte's global Workday practice includes over 3,566 Workday practitioners and 9,291 Workday certifications. It has delivered over 1,800 projects to more than 800 clients in over 160 countries while winning the Workday Partner Industry Innovation Award for four consecutive years (2021-2024).



IBM integrates IBM Watson platform to deliver intelligent and automated solutions — leveraging IBM watsonx Orchestrate and Watson Assistant to streamline HR processes,

enhance EX with conversational AI and provide predictive analytics for more informed decision-making.

kainos®

Kainos consistently receives outstanding customer satisfaction scores for its managed services, highlighting its commitment to client success and service quality. It provides dedicated, expert-led support to help clients optimize, adapt and innovate their Workday platform post go-live.



KPMG offers a range of base services and add-on solutions that Workday clients can select based on their needs, innovation timetables and budgets.



Performance and Optimization Services



PwC delivers global on-demand Workday operations support, focused on reducing operational costs while maintaining solution security. Their support model integrates intelligent case routing and automated knowledge-based recommendations, and real-time dashboards to streamline ticket resolution.



Strada is actively expanding into the India and Polish markets, developing specific Workday Extend and Built on Workday applications to address localised needs and pain points in these regions.

Intecrowd

Intecrowd (Rising Star): Intecrowd (Rising Star) clients benefit from its strong Workday focus and flexible services. Its new translation application helps organisations that require a Workday employee interface in multiple languages.



Deloitte



“Deloitte aims to move clients from merely maintaining systems to continuously innovating and leveraging tools and accelerators to gain insights, accelerate time to value, reduce risks and eliminate manual effort.”

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, UK. It has more than 460,000 employees across over 150 countries in more than 700 offices. In FY24, the company generated \$67.2 billion in revenue, with Consulting as its largest segment. Deloitte's Workday managed services, branded as *Workday Operate*, have become a key strength due to their proactive and forward-looking approach. Instead of merely offering reactive support (such as fixing breaks and managing tickets), this service offering is designed to continuously optimise and enhance clients' Workday platform.

Strengths

Strategic acquisition: Deloitte's acquisition of SimplrOps enables it to offer differentiated services. It leverages innovation to drive enhanced time to value and facilitate risk reduction. Specific outcomes include a 50 percent reduction in release management effort and a 20 percent reduction in incidents and problems. SimplrOps' SaaS technology maximises ERP and HCM investment value, enhancing Deloitte's offerings and client benefits.

Proactive, analytics-driven approach:

A major strength of Deloitte's Operate services is the integration of analytics and deep platform knowledge to provide clients with actionable insights, recommend improvements, and help them prepare for and adopt new Workday features. This proactive

stance helps organisations maintain their systems and continually increase their ROI.

Global scale with local expertise: Deloitte's global presence, combined with local and regional delivery centres, provides a key advantage in managed services by offering 24/7 multilingual support for multinational corporations. They provide flexible service models, from on-demand specialist support to fully outsourced Workday application management. These models enable clients to choose a service level tailored to their needs, budget and internal capabilities, ensuring optimal support without overcommitting resources.

Caution

While Deloitte's offerings emphasise continuous optimisation, practical and scalable use of Workday's advanced AI and emerging agentic AI capabilities within AMS remains in early stages for many clients. It should adopt a measured, results-driven approach while investing in platform optimisation initiatives to avoid overpromising outcomes.





Innovation on Workday

Who Should Read This Section

This report is valuable for service providers offering innovation on Workday in the APAC 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.

Strategy and innovation leaders

Should review this report to gain insights into how Workday facilitates digital transformation and enhances competitiveness, aiding strategic planning and long-term growth through innovation. This report explores the latest offerings and portfolio of service providers on the Workday platform, which will enable C-suite professionals to obtain a thorough understanding of the latest developments in the Workday ecosystem and determine their impact.

Technology and application development professionals

Should review this report to understand the latest features, functionalities and components of the Workday platform, along with their configuration and integration. The Workday platform has transformed from a basic HCM system into a comprehensive, AI-driven workforce management solution, offering a diverse array of functionalities, and this report highlights providers' capabilities in developing innovative solutions leveraging functionalities from Workday Extend.

Engineering teams

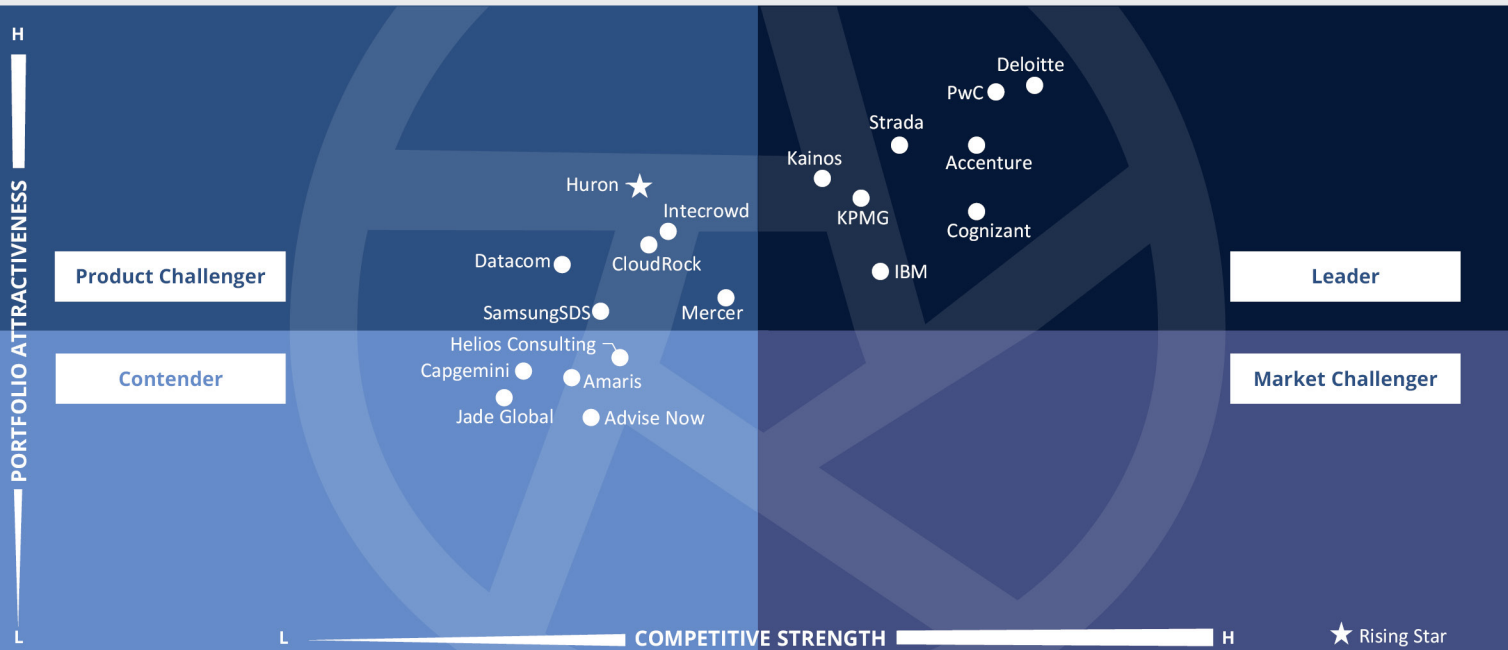
Including solution architects, should read this report to gain insights into software development and thus build IPs/accelerators for cloud platforms/industries by analysing the best fit Workday solution. The report focusses on the engineering capabilities of providers with insights into their technology partner ecosystem.



ISG Provider Lens®
 Workday Ecosystem
 Innovation on Workday

Source: ISG RESEARCH

APAC 2025



Service providers working throughout APAC **are meeting Workday's challenge to innovate with AI** to create new functionality.

Ashwin Gaidhani



Innovation on Workday

Definition

The Innovation on Workday quadrant evaluates providers based on their ability to develop custom applications on the Workday Extend platform, while leveraging AI components from Workday Illuminate. The assessment criteria include proficiency in building business modernization solutions for HCM, capabilities in integrating Workday Orchestrate for workflow automation, expertise in AI Gateway and skills in applying Workday Illuminate's Accelerate, Assist, Transform capabilities. Providers are measured on their competency in creating both client-specific and industry-focused applications and hosting them in the Workday Marketplace that covers published offerings, adoption rates, customer ratings, solution categories and depth of vertical functionality. This quadrant assesses providers based on their technical expertise, industry knowledge, innovation capabilities and overall contribution to expanding Workday Extend's core functionality, experience and modularity.

Eligibility Criteria

1. Possess **certifications** and proven technical resources skilled in **custom application development on Workday Extend**
2. Have experience in **integrating Workday Illuminate's AI capabilities**, particularly Orchestrate and AI Gateway components
3. Have **custom-developed, industry-relevant and validated applications** hosted and available in the Workday Marketplace.
4. Can highlight client references showcasing **successful deployments of Workday Extend** solutions with measurable outcomes
5. Claim a **proven track record of delivering tailored solutions** to finance and HR verticals
6. Demonstrate capability in rapidly **innovating and adapting Workday solutions** to evolving business requirements, including automation, cloud, and **Workday Extend and Workday illuminate**
7. Demonstrate compliance with Workday's standards and data privacy policies and have established application security best practices
8. Have proven expertise in **integrating custom Workday Extend solutions seamlessly with existing client systems and third-party platforms**
9. Show **expertise in creating intuitive and user-centric designs**, improving user engagement and satisfaction



Innovation on Workday

Observations

Leading Workday service providers in the APAC region are also recognised as innovators within the entire Workday ecosystem. For example, Deloitte, IBM, Kainos, KPMG and PwC were among the first members of Workday's AI Agent Partner Network, which was announced in June 2025. Clients have benefited from the presence of strong innovators in the region by having access to Workday-certified solutions to help meet country-specific requirements, with many more innovations currently underway.

AI is a clear focus area for Workday and will likely become a stronger differentiator between leading ecosystem performers and others. However, the use of AI in production-level Workday environments appears less widespread and mature compared to its application in other enterprise-level systems, such as ITSM, ESM and SAP. Workday may have recognised this gap, as evidenced by the new Agent System of Record (ASOR) AI program announced in February and the AI tool release and emphasis at Workday DevCon 2025 in June.

A question to follow is whether Workday specialists, who have historically been strong on innovation, will be able to keep pace with global MSPs, technology and consulting firms in AI development for the Workday environment.

From the 29 companies assessed for this study, 19 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture is embracing AI for the Workday environment by developing new capabilities and use cases. From 2021-2024, it consistently won Workday Innovation Awards for the government and public sector, and technology and media verticals.

cognizant

Cognizant's developed applications and custom solutions are strategically positioned by Workday during upfront subscription sales to fill functional gaps across various verticals, geographies and customer segments.

Deloitte.

Deloitte is cross-skilling its talent from other HCM platforms to leverage existing domain expertise for Workday projects. The company also has talent acquisition programmes such as Workday on Campus with Adelaide University, introducing Workday concepts to undergraduates and offering internship opportunities.

IBM.

IBM worked with Workday to create reusable solutions that address needs in specific industries, and it has more developments underway. The company positions itself as the innovator's choice among large-scale Workday partners through a focus on AI, cocreation and deep technology integration.

kainos®

Kainos has already delivered many Workday innovations and continues to invest heavily in R&D, which reflect its strong innovation culture.

KPMG

KPMG is an early mover in AI within the Workday environment and is positioned to continue as a leading innovator for the platform.

pwc

PwC's innovation strategy emphasises developing Workday model tenants for key sectors. These preconfigured tenants leverage industry best practices, accelerating implementation and providing solutions tailored to specific industry needs.



Innovation on Workday



STRADA

Strada's strength is rooted in its deep, longstanding partnership with Workday, its commitment to innovation through proprietary tools and Workday Extend applications, and its focus on delivering measurable, industry-specific outcomes for clients.



HURON

Huron (Rising Star) makes strong use of analytics to optimise operations for Workday customers and to find opportunities to create new efficiencies and value.



Deloitte



“Deloitte is actively investing in developing Workday markets within APAC, including India, Korea and Japan, while adapting its go-to-market strategy to local nuances.”

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, UK. It has more than 460,000 employees across over 150 countries in more than 700 offices.. In FY24, the company generated \$67.2 billion in revenue, with Consulting as its largest segment. Deloitte uses Workday Extend to bridge gaps and innovate where Workday's core product might not fully meet client-specific needs, especially in complex or industry-specific scenarios. Its proprietary offerings include FSI Advanced Compensation Solution and AU TFN (Australia) and Superannuation app for its APAC clients.

Strengths

Advancing AI and GenAI capabilities:

Deloitte integrates AI and GenAI into Workday services to accelerate time to value, simplify work and reduce costs. It has launched innovation centres across APAC to showcase its Workday investments, particularly in AI and agentic AI. A notable example is the GenAI Recruitment Engine, an LLM-driven virtual interview platform developed in India. This engine conducts avatar-based interviews, evaluates functional and behavioural skills without human involvement, delivers unbiased fitment results and integrates with HRMS platforms such as Workday.

Workday Extend applications: Deloitte, as one of the four early developer partners for Workday Extend, boasts a catalogue of

over 50 Extend applications. In ANZ, it has created Workday Extend applications tailored to local needs such as tax file number (TFN) collection and superannuation fund selection to streamline onboarding and ensure compliance with Australian regulations.

Industry accelerators: Deloitte develops industry accelerators globally and for APAC-relevant sectors such as higher education, healthcare, retail and banking. Accelerate2zero, developed in New Zealand, helps organisations report and plan for future emissions. ClimateAdapt enables the quantification of financial exposure to climate risks and the development of adaptive plans.

Caution

Deloitte is a mature partner in the Workday ecosystem. Given its extensive thought leadership on Future of Work (FoW), organisational design and HR strategy, it could create a suite of Deloitte-branded FoW applications on Workday Extend to expand its market share.





Appendix

The ISG Provider Lens 2025 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the APAC market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

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



Author & Editor Biographies

Lead Author



Ashwin Gaidhani
Research Partner, India

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens® research projects for the markets in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in

technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.

Research Analyst



Megha Dodke
Research Specialist

Megha Dodke joined ISG as a Research Specialist in October 2024. Based in Bangalore, India, she holds a Master's degree in Marketing and a certification in Product Strategy from the Indian Institute of Management, Kozhikode (IIM-K). Megha brings over 12 years of diverse experience in Business Research, Market and Competitive Intelligence, Sales Enablement, and Strategic Advisory across multiple industry verticals.

At ISG, Megha focuses on enterprise platform research, with a specialization in areas such as Enterprise Service Management (ESM), ServiceNow, and Workday. She has a strong track record

of conducting in-depth research and analysis on emerging technologies, market dynamics, and the capabilities of IT service providers—including consulting, managed services, implementation, and innovation.

Her work supports clients through strategic advisory, briefings, workshops, and consulting engagements. Prior to this, she has worked with organizations including HP Inc., Accenture, Talent Neuron and Transparency Market Research.



Author & Editor Biographies

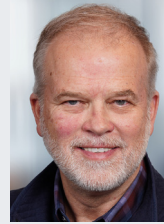


Study Sponsor

Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens/ISG Research

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 partner 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.



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, while 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.

For more information, visit isg-one.com.





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REPORT: WORKDAY ECOSYSTEM