ISG Provider Lens®

# Workday Ecosystem

A report analyzing the strengths and competitive positioning of Workday service provider partners

Customized report courtesy of:
Deloitte.

**QUADRANT REPORT | OCTOBER 2025 | EUROPE**

## Table of Contents


Executive Summary 03

Provider Positioning 06

Introduction
- Definition 08
- Scope of Report 09
- Provider Classifications 09

Appendix
- Methodology & Team 40
- Author & Editor Biographies 41
- About Our Company & Research 43

Transformation Services 11 - 17
- Who Should Read This Section 12
- Quadrant 13
- Definition & Eligibility Criteria 14
- Observations 15
- Provider Profiles 17

Deployment and Integration Services 18 - 24
- Who Should Read This Section 19
- Quadrant 20
- Definition & Eligibility Criteria 21
- Observations 22
- Provider Profiles 24

Performance and Optimization Services 25 - 31
- Who Should Read This Section 26
- Quadrant 27
- Definition & Eligibility Criteria 28
- Observations 29
- Provider Profiles 31

Innovation on Workday 32 - 38
- Who Should Read This Section 33
- Quadrant 34
- Definition & Eligibility Criteria 35
- Observations 36
- Provider Profiles 38

*Report Author: Gaurang Pagdi*

**Capitalizing on Workday's AI and innovation wave in Europe**

The market for Workday-enabled HR, finance and planning solutions across Europe is moving into a stage of advanced maturity. The initial push for cloud-based transformation has been replaced by an emphasis on maximizing ROI, embedding AI at scale and linking technology adoption directly to business outcomes. Enterprises are no longer merely going live with Workday; they are optimizing, extending and integrating it into the strategic core of their operations.

Workday continues to be a leading choice for European organizations seeking a unified, secure and scalable platform. Its road map, anchored in its AI platform (Illuminate), analytics, Workday Extend and ESG reporting, aligns with the region's complex regulatory requirements, multilingual needs and diverse cultural contexts. Simultaneously, the ecosystem of partners, including global system integrators, consulting firms and niche specialists has become indispensable in tailoring deployments, ensuring compliance and sustaining adoption. Together, Workday and its partners are driving operational agility, regulatory readiness and differentiated EX across Europe.

**From adoption to value realization**

Cloud adoption has become the baseline, with the new priority being the delivery of measurable business outcomes from Workday investments. Enterprises expect reductions in time to hire, swift financial close cycles and tangible productivity gains. Workday's native analytics, continuous updates and embedded best practices enable the refinement of processes without the need for disruptive overhauls.

Partners are embedding value measurement into every stage of the Workday lifecycle. Common practices include diagnostic-led optimization, peer benchmarking and targeted automation. Furthermore, industry-specific accelerators such as prebuilt compliance templates or sector-focused reporting packs enable quick time to value.

**AI-driven innovations** help European enterprises boost **efficiency, compliance** and **agility.**

### AI and intelligent automation at the core

Workday's AI strategy has moved beyond experimentation into operational reality. At the center is *Illuminate*, its framework for AI agents designed to perform specific HR and finance roles such as hiring assistants, payroll verifiers, financial auditors and policy compliance agents, delivering measurable efficiency gains. These agents are managed within the Agent System of Record (ASR), a governance layer ensuring consistency, security and accountability across Workday-built and partner-created agents.

Workday's focus on agentic AI, capable of completing multistep tasks without human intervention, is unlocking new possibilities, including conversational hiring journeys for frontline roles, compliance-ready onboarding experiences and automated close processes that integrate data from across enterprises. For partners, the release of AI developer toolsets, including Workday's Expanded AI Gateway and Developer Copilot that accelerates app creation, unlocks opportunities to build region-specific solutions such as GDPR-aware compliance agents, multilingual onboarding bots and localized payroll assistants. This innovation is backed by Workday's two decades of unified HR and finance data, ensuring model accuracy and context-aware outputs, critical in Europe's tightly regulated environment.

### Regulatory and compliance excellence

Europe's multijurisdictional regulatory environment, anchored by GDPR and expanded by ESG mandates, tax rules and employment laws, demands robust compliance capabilities. Workday's embedded audit trails, consent management tools and regulatory updates ensure readiness for evolving legal requirements.

Partners provide the localization layer by tailoring Workday's compliance features to each market. They develop multicountry frameworks within a single tenant, conduct audit-readiness simulations and maintain continuous regulatory monitoring. In sectors such as banking and healthcare, where compliance breaches incur high penalties, these combined capabilities serve as a key differentiator.

### Sustainability and ESG as strategic priorities

The Corporate Sustainability Reporting Directive (CSRD) and other European frameworks are transforming ESG from a corporate responsibility measure to a board-level compliance requirement. Workday's ESG tools integrate sustainability metrics such as carbon footprint, diversity data and governance indicators into the same environment as HR and financial data, enabling consolidated reporting and insight generation. Partners are extending these capabilities with industry-specific ESG accelerators, including carbon impact trackers for manufacturing, diversity dashboards for healthcare and supply chain risk monitors for retail. This integration allows organizations to link ESG performance directly to operational KPIs, improving transparency and fostering stakeholder trust.

### Localized EX and talent retention

In a competitive labor market across Europe, EX is a strategic priority. Workday's self-service, mobile-first design and personalized dashboards empower employees to access HR and finance tasks from anywhere. Partners enhance these capabilities with localized workflows, cultural customizations and integration into regional collaboration tools. For industries such as hospitality and retail, mobile-first onboarding in local languages has reduced attrition within the first 90 days. Meanwhile, in professional services, personalized career development dashboards have boosted internal mobility.

### Optimizing Workday Extend for market-specific needs

Workday Extend enables organizations to tailor core platform functionality to local and industry-specific requirements without custom code outside the system. In Europe, this flexibility supports regulatory compliance, specialized workflows and multilingual service delivery.

Partners are developing Extend apps such as tax calculators for specific countries across Europe, localized expense approval flows and GDPR consent trackers. These apps integrate seamlessly with core Workday, improving adoption and reducing operational friction.

**Overcoming cross-border complexity**

Operating across multiple European countries creates challenges in payroll, benefits, taxation and compliance. Workday's multicountry capabilities, supported by partner-led localization, enable organizations to centralize governance while facilitating local execution.

Global system integrators often deploy regional hubs for payroll and compliance, supported by shared governance frameworks. This hybrid approach delivers standardization for efficiency while retaining the flexibility to meet country-specific requirements.

**Embedding optimization beyond go-live**

After deployment, organizations in Europe are turning to application management services (AMS) to sustain adoption and drive continuous improvement. Workday's biannual updates introduce new features, but adoption requires testing, change management and configuration tuning. Partners differentiate by integrating AI into AMS for automated release testing, predictive issue detection and ongoing skills enablement. This approach ensures that configurations evolve with business needs and that clients continue to maximize ROI following the initial go-live.

**Partner ecosystem evolution**

The partner ecosystem in Europe is diversifying. Global system integrators bring scale, cross-industry expertise and proprietary automation frameworks, while niche players excel in localized delivery, industry-specific compliance and cultural adoption. Cosourcing models are becoming increasingly popular, blending internal expertise with partner specializations for ongoing operations.

An emerging class of intellectual property (IP)-led innovators is delivering proprietary software, often in the form of Extend apps that enhance Workday functionality, from automated compliance checks to advanced analytics. This approach accelerates time to value and creates new revenue streams for partners, while increasing the platform's stickiness for clients.

**Outlook for 2025 and beyond**

The Workday market in Europe is transitioning from being cloud-enabled to autonomous-ready. The next phase of transformation will be driven by integrated AI agents, continuous optimization and embedding compliance and ESG into core workflows. Workday's innovation road map, anchored in Illuminate, agentic AI and an open developer ecosystem, positions it to address Europe's dual demands for agility and governance.

With a partner ecosystem that blends global scale with local nuance, the opportunity is evident that enterprises in Europe can achieve operational efficiency, regulatory certainty and employee engagement, all within a future-ready digital core.

Enterprises in Europe will accelerate Workday adoption in 2025, leveraging AI and cloud innovation to drive strategic goals, boost efficiency, strengthen compliance and deliver enhanced EX across diverse markets.

# Provider Positioning



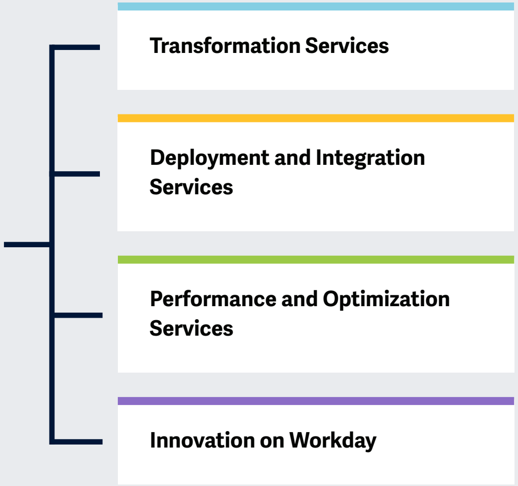
| | Transformation Services | Deployment and Integration Services | Performance and Optimization Services | Innovation on Workday |
|---|---|---|---|---|
| Accenture | Leader | Leader | Leader | Leader |
| BNB | Contender | Contender | Contender | Product Challenger |
| Capgemini | Product Challenger | Product Challenger | Product Challenger | Contender |
| CloudRock | Contender | Contender | Product Challenger | Product Challenger |
| Cognizant | Leader | Leader | Leader | Leader |
| Deloitte | Leader | Leader | Leader | Leader |
| DXC Technology | Product Challenger | Product Challenger | Product Challenger | Product Challenger |
| E1 Consulting | Contender | Contender | Contender | Not In |
| Genpact | Contender | Not In | Not In | Not In |
| Hexaware | Product Challenger | Product Challenger | Product Challenger | Contender |
| HR Path | Leader | Leader | Leader | Product Challenger |

## Provider Positioning

**Page 2 of 2**

| | Transformation Services | Deployment and Integration Services | Performance and Optimization Services | Innovation on Workday |
|---|---|---|---|---|
| IBM | Market Challenger | Market Challenger | Leader | Market Challenger |
| Invisors | Product Challenger | Rising Star ★ | Product Challenger | Leader |
| Kainos | Leader | Leader | Leader | Leader |
| KPMG | Leader | Leader | Product Challenger | Leader |
| Mercer | Leader | Product Challenger | Product Challenger | Product Challenger |
| Preos | Contender | Product Challenger | Not In | Not In |
| PwC | Leader | Leader | Leader | Leader |
| Strada | Leader | Leader | Leader | Leader |
| UST | Not In | Contender | Contender | Contender |
| Vivicta | Product Challenger | Product Challenger | Product Challenger | Product Challenger |

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**

Workday's commitment to innovation, its adaptability and its ongoing focus on product enhancement have enabled it to stay ahead of competition, attract new clients and expand its market presence. Currently, Workday has a share of more than 40 percent in the cloud HCM market, primarily driven by its ability to ensure superior UX. Despite the complexity of customization, Workday's modern user interface and focus on customer satisfaction set it apart from its competitors.

The recent Spring 2025 release, with over 350 new features along with innovations such as Workday Illuminate, Workday Orchestrate and AI agents for HR and finance, is going to revolutionize the way digital HCM services are delivered by its partners and consumed by enterprise clients. These new solutions leverage AI to streamline tasks, enhance decision-making and transform business processes, reinforcing Workday's commitment to innovation and enhanced UX.

Workday's partnerships with industry leaders such as Salesforce and Equifax have strengthened its market position. These partnerships have expanded Workday's HCM capabilities on these platforms, ensuring seamless integration with Workday modules.

In mid-2024, Workday introduced the Built on Workday program to leverage generative AI (GenAI) and agentic AI, enhancing its HCM and finance solutions. This initiative empowers partners to develop specialized applications, enabling Workday to offer increasingly comprehensive and tailored solutions and also opening new revenue streams for partners. Additionally, in September 2024, Workday, in collaboration with key service partners such as Accenture, CrossVue, Deloitte, Invisors, Kainos, KPMG, Mercer and PwC, launched the Industry Accelerator program, featuring 12 preconfigured solution accelerators.

## Scope of the Report

In this ISG Provider Lens® quadrant study, ISG includes the following four quadrants: 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
- Focus on Europe market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

## 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 a 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.

# Transformation Services

## Who Should Read This Section

This report is valuable for service providers offering **transformation services** in Europe region 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

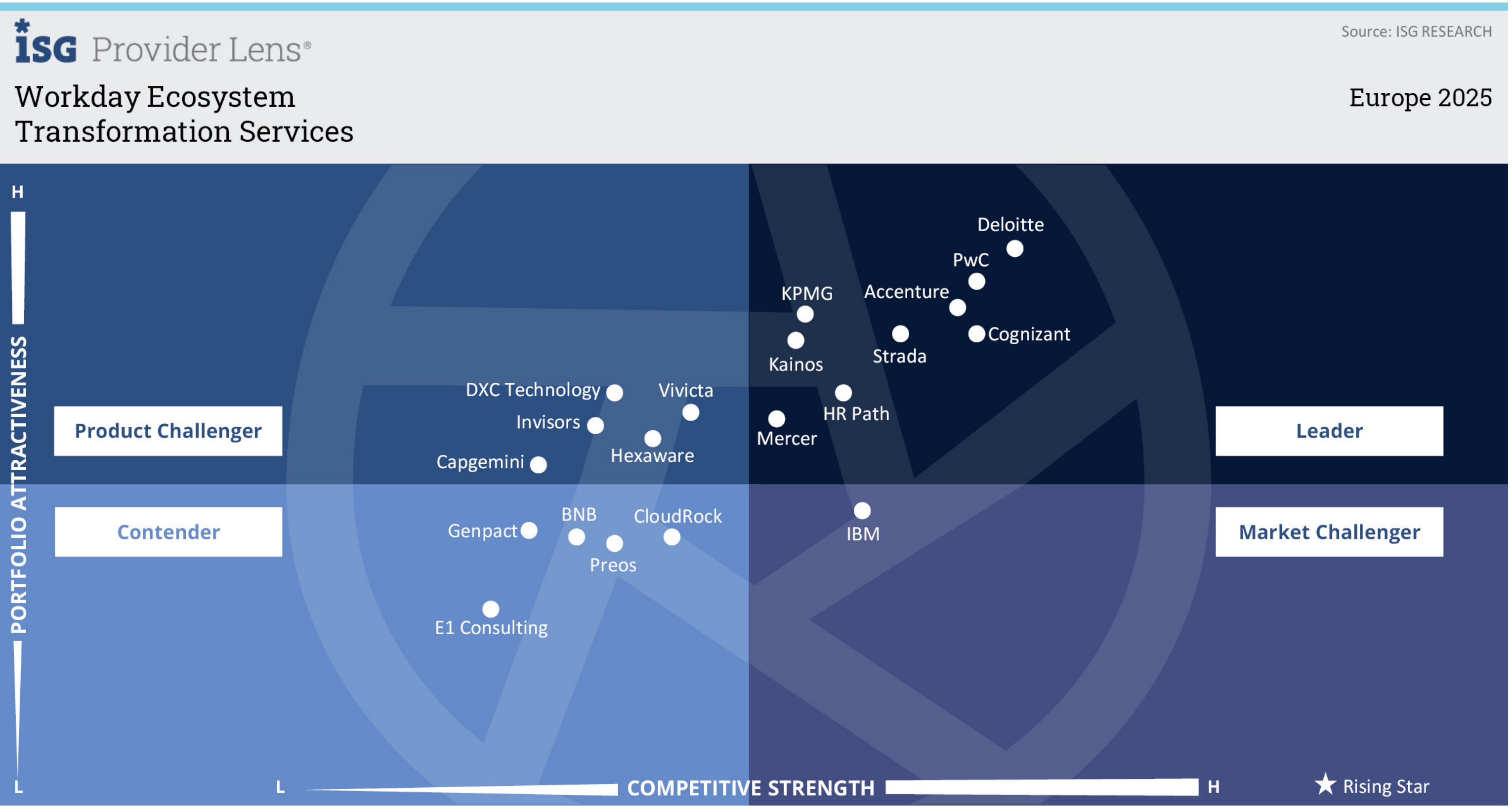
Should review this report to gain insights into evolving trends in Workday transformation services. It will help them choose the right partner for a long-term road map on the Workday platform. These providers support enterprises in the development of a digital acceleration strategy, aiding them in selecting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




This quadrant evaluates providers delivering Workday **transformation** services, focusing on consulting and advisory capabilities to **modernize** HCM platforms, align processes with business **strategy** and drive measurable **organizational improvements.**

*Gaurang Pagdi*

## 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

## Observations

Workday transformation services in Europe have evolved into consulting-led programs that align business strategy with HR and finance modernization. Providers position Workday as the intelligent digital core of enterprises, using strategic advisory, industry-specific insights and value-led frameworks to redefine operating models, improve governance and enhance EX.

Engagements typically begin with diagnostics and value case creation, enabling measurable KPIs for efficiency, cost optimization and talent outcomes. Providers leverage Workday's Illuminate and ASR to advise on AI readiness and embed intelligent agents into transformation road maps. These agents automate repetitive tasks, provide predictive insights and improve decision-making while adhering to European regulatory standards.

Change management is crucial, with persona-based training, multilingual communication and cultural alignment driving adoption across diverse markets. The integration of EX into strategy design ensures that personalization, self-service and mobile capabilities are optimized for engagement and retention.

Sustainability and compliance have become core advisory pillars, with providers embedding Workday's ESG tools into transformation blueprints to meet mandates such as the CSRD. Many adopt phased, outcome-driven road maps that deliver quick wins while sustaining momentum.

By 2025, transformation services are strategic, AI-enabled and outcomes-focused, helping enterprises modernize HR and finance functions, build future-ready operating models and achieve lasting business agility.

From the 21 companies assessed for this study, 20 qualified for this quadrant, with nine being Leaders.

accenture

**Accenture's** transformation methodology blends strategy and organizational change, leveraging AI and industry accelerators to deliver Workday-led initiatives that sustain beyond golive.

cognizant

**Cognizant** enables transformation through long-standing Workday expertise, verticalized consulting and an advisory-led approach backed by global delivery and commercial innovation in Europe.

Deloitte.

**Deloitte's** holistic transformation model connects strategy to operations across HR and finance, leveraging its deep industry know-how and multidisciplinary strength to deliver sustainable, business-aligned change.

HR Path. Your way to people success

**HR Path's** transformation services are evolving with advisory-led engagement models, combining Eaton Square's consulting depth with Workday delivery experience to support strategy-to-execution journeys for HR and finance.

kainos

**Kainos** offers an outcome-focused transformation approach grounded in domain expertise, structured enablement and value tracking. Its alignment with business case realization makes it a strong transformation partner in EMEA.

KPMG

**KPMG's** Powered HR model connects strategy to systems, combining HR, analytics and cloud-driven operations to ensure sustainable, compliant transformation across Europe.

### Mercer

**Mercer** focuses on aligning HR strategy and transformation with organizational design and EX, with change enablement embedded from the outset.

pwc

**PwC** blends HR and finance transformation with regulatory, tax and industry expertise to drive end-to-end change. Its midmarket focus and region-specific capabilities make it a strategic Workday transformation partner.

STRADA

**Strada's** transformation capability stands out through its commitment to long-term value realization beyond go-live success. It enables clients in healthcare, the public sector and high-growth tech industries to future-proof HR and finance operations.

# Deloitte

Leader

> "Deloitte integrates advisory, industry and technical capabilities to drive Workday-enabled business transformations extending beyond implementation, especially within complex enterprise environments in Europe."
>
> *Gaurang Pagdi*

### Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte leads in enterprise digital transformation and the Workday partner ecosystem. Across the Global Delivery Network (GDN), it has served various Workday clients, from complex transformation projects for global enterprises to preconfigured transformation projects designed for local, midmarket companies.

### Strengths

**Business-led transformation model:** Deloitte's transformation services take a business-first approach that integrates functions such as tax, cybersecurity, legal and finance advisory into Workday-led change programs. This approach enables clients to align their HR and finance transformations with broad operating model changes, rather than treating technology as a standalone initiative. From strategy through sustainment, the company ensures that transformations deliver both short-term efficiency and long-term strategic value.

**Industry-specific accelerators:** Deloitte has made significant investments in developing a portfolio of industry accelerators across healthcare, manufacturing, life sciences, higher education and financial services. These accelerators incorporate best practices, preconfigured workflows and regulatory alignments to expedite implementation while enhancing relevance and business impact in regulated industries in Europe.

**Multidisciplinary team integration:** Deloitte integrates multidisciplinary teams into transformation engagements, from Workday consultants to finance, cybersecurity and tax experts. This approach enables seamless management of complex topics such as statutory compliance, workforce evolution and AI-readiness during transformation.

### Caution

While Deloitte's depth in transformation is acknowledged, some midmarket clients may find its approach heavily structured and complex. Streamlined transformation options or expedited MVPs could appeal more in cost-sensitive markets in Europe.

# Deployment and Integration Services

## Who Should Read This Section

This report is valuable for service providers offering **deployment and integration services** in Europe 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

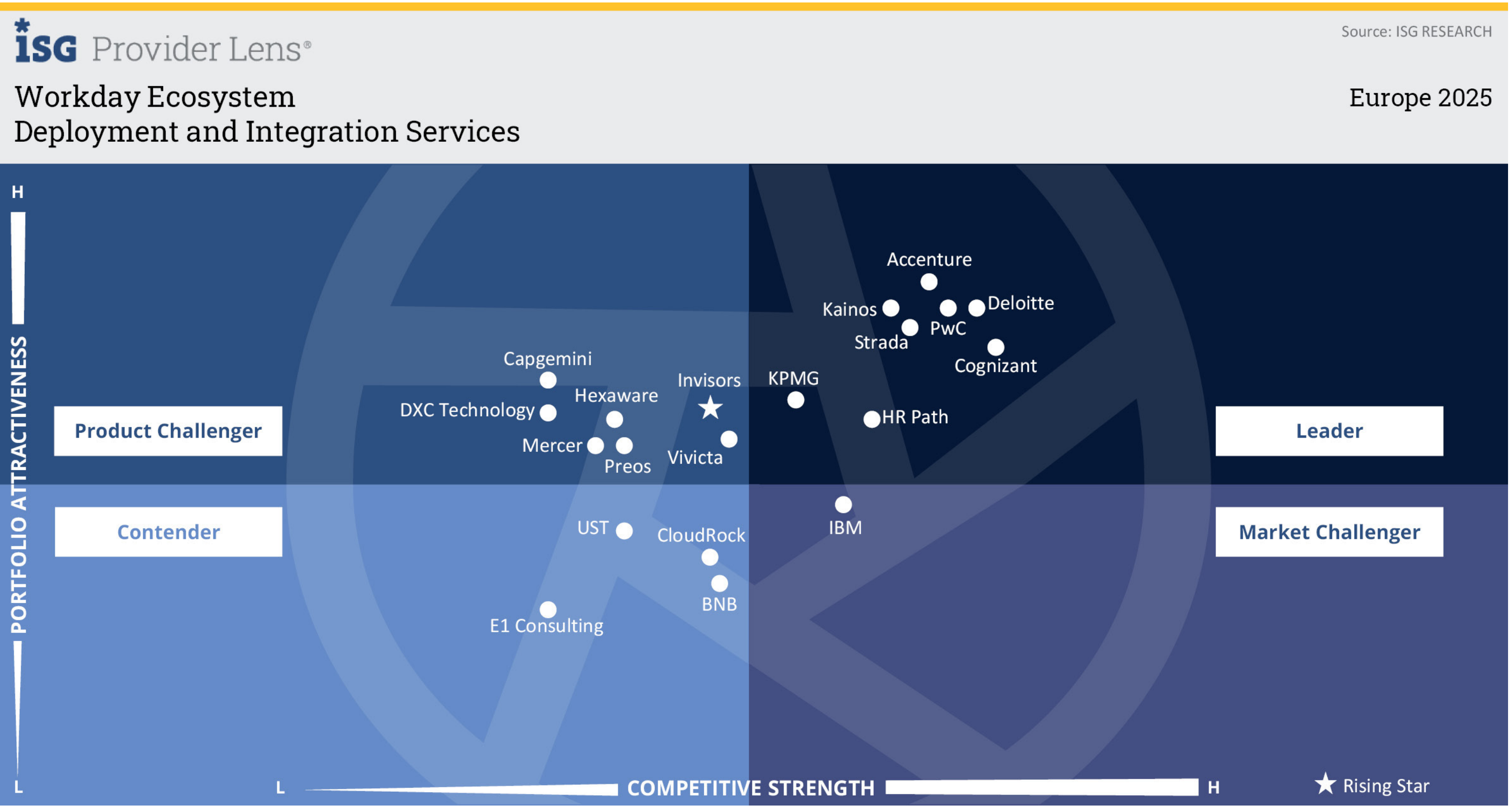
Should read this report to better understand the latest technological trends aligned with Workday features, functionalities and components. This report will help them identify a suitable provider that can tailor the Workday platform to meet their specific needs in terms of configuring modules and workflows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




This quadrant evaluates providers delivering Workday deployment and integration services, focusing on delivery methodologies, **industry-specific frameworks** and integration capabilities ensuring a **seamless, scalable** and **value-driven** transformation.

*Gaurang Pagdi*

## 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

## Observations

Workday deployment and integration services in Europe focus on delivering rapid, high-quality implementations that minimize disruption and accelerate time to value. Providers combine Workday-certified expertise with proven delivery frameworks to transition organizations from legacy systems to modern, cloud-based HR and finance platforms. These engagements are designed to balance speed with precision, ensuring configurations meet business objectives and European compliance requirements.

Delivery approaches are becoming increasingly modular and automation-led, leveraging preconfigured industry templates, data migration accelerators and automated testing platforms to streamline deployment. Providers also use AI-enabled tools to validate data, predict integration issues and optimize configuration decisions before go-live.

Integration services are crucial for connecting Workday with broad enterprise ecosystems, including ERP, payroll, CRM and supply chain systems. Providers design secure, scalable integration architectures that enable seamless data flow, improve process visibility and reduce manual intervention. This capability is particularly vital for multinational organizations operating across various European jurisdictions, where localized integrations address country-specific payroll, tax and benefits requirements.

Deployment and integration services, characterized by speed, accuracy and resilience, deliver Workday solutions that seamlessly integrate into enterprise operations. They comply with diverse regulatory landscapes and provide a scalable foundation for continuous optimization, with change enablement continuing to serve as a key differentiator.

From the 21 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one Rising Star.

**Accenture** delivers fast, reliable rollouts with clean data migration and robust integrations into ERP, CRM, payroll and HR systems, tailored to European compliance through certified talent and repeatable delivery assets.

**Cognizant's** deployment model aligns technical depth with commercial agility, helping European clients achieve efficient go-lives and seamless transitions, especially in industries such as education and the public sector.

**Deloitte's** deployment strength in Europe stems from its process rigor, local statutory alignment and codelivery experience with Workday, enabling accelerated and compliant implementations at enterprise scale.

**HR Path's** deployment playbook balances rapid rollout options with industry-specific depth, backed by Workday-approved methodologies and expanding capabilities in integration, data migration and tenant configuration.

**Kainos** delivers consistent, high-quality Workday implementations across EMEA through accelerators such as Spark&Grow, low-code migration tools and standardized delivery methods, enabling fast, scalable deployments with strong Workday alignment.

**KPMG** delivers scalable, repeatable Workday deployments across HR and finance by combining local regulatory knowledge, global templates and industry experience.

**PwC's** finance-led deployment approach, combined with deep tax and compliance expertise, makes it a preferred partner for clients in Europe seeking business-aligned Workday implementations across geographies.

**Strada** accelerates Workday deployments by leveraging repeatable frameworks, automated testing and a comprehensive integration catalog. These capabilities reduce deployment time, cost and complexity for clients in Europe that navigate multientity and compliance-heavy landscapes.

**Invisors (Rising Star)** stands out with an exclusive focus on Workday and its growing footprint across the U.K. and Europe. By combining industry depth and scalable delivery, the company facilitates rapid implementation of solutions without compromising quality or control.

# Deloitte

Leader

"Deloitte's scalable, automation-driven deployment model, coupled with local compliance expertise and strong collaboration with Workday, delivers seamless, high-quality Workday rollouts across Europe."

*Gaurang Pagdi*

## Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Focusing on the human aspect of the transformation from the outset by addressing user adoption, training and evolving job roles, Deloitte ensures that the Workday platform delivers on its promised value and drives long-term strategic goals of businesses. It boasts a large number of enterprise clients in Europe.

## Strengths

**Global reach with local deployment network:** Deloitte's deployment model combines centralized Workday expertise with local statutory and compliance specialists across Europe. This ensures multicountry implementations achieve global consistency and local regulatory compliance, a key differentiator in Europe.

**AI-driven delivery platform:** Deloitte mandates the use of its Ascend delivery platform, embedding AI and automation to reduce deployment effort, accelerate timelines and drive standardization. Clients benefit from real-time visibility, reusable templates and lower delivery risk.

**Agile implementation framework:** Deloitte supports agile Workday deployments through iterative design and rapid prototyping. This approach ensures better alignment with evolving requirements and enables continuous user feedback integration, particularly important for midmarket clients in Europe.

**Workday codelivery alignment:** Deloitte collaborates directly with Workday's *Professional Services (ProServe)* team through codelivery models and sub-prime arrangements. This joint execution model improves integration efficiency and minimizes transition friction for clients with complex global footprints.

## Caution

Small or midsize enterprises may perceive Deloitte's deployment structure as resource-intensive. Customization flexibility and regional pricing adjustments are key to expanding relevance in broader European markets.

# Performance and Optimization Services

### Who Should Read This Section

This report is valuable for service providers offering **performance and optimization services** in Europe 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

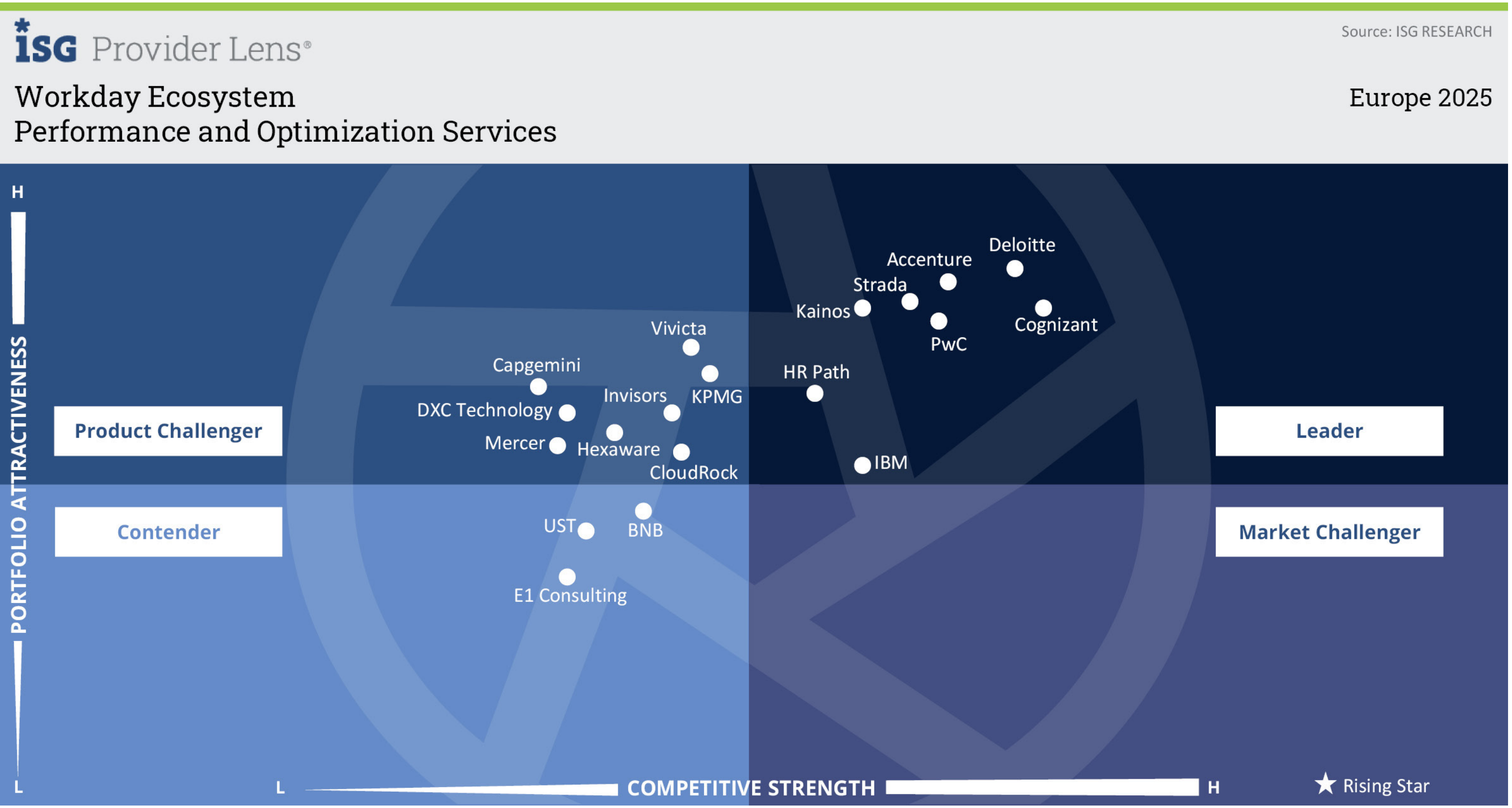
Overseeing EX, business planning and financial management should read this report to comprehend how Workday service providers maintain their service quality and credibility. The report offers insights into providers' delivery centers, certified resources and cost-optimization strategies that ensure the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

### Service line leaders and functional professionals

Should read this report to rationalize 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.




This quadrant evaluates providers delivering Workday application management and optimization services, assessing their ability to **maintain, modernize** and **enhance** the platform to ensure sustained performance and long-term **operational excellence.**

*Gaurang Pagdi*

## 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 application management services (AMS) portfolio

### Observations

Workday application management and optimization services in Europe have shifted from traditional post-go-live support to continuous value delivery. Providers now combine maintenance with proactive modernization, ensuring the platform adapts to evolving business needs, regulatory updates and Workday's innovation cycles.

While these services cover routine administration, release management and issue resolution, providers increasingly focus on **value-led optimization,** which includes identifying underutilized features, enhancing workflows and introducing new capabilities to improve efficiency and UX. They leverage **AI-enabled monitoring tools** and automated testing platforms to assess system performance, detect anomalies and validate readiness for biannual Workday releases.

Modern AMS models integrate AI and analytics to provide predictive insights, streamline repetitive administrative tasks and improve decision-making. For example, AI-driven recommendations can optimize workforce scheduling, payroll accuracy or expense processing, while maintaining compliance with European regulations such as GDPR.

Providers also embed change management into AMS, offering ongoing training, multilingual support and adoption programs to ensure new features are fully utilized. Many deliver outcome-based service models, linking AMS KPIs to tangible business metrics such as reduced processing times, improved data accuracy and increased employee satisfaction.

AMS and optimization services go beyond keeping Workday operational by continually enhancing its impact. Providers act as strategic partners, ensuring Workday remains a high-performing, compliant and future-ready platform that consistently delivers business value.

From the 21 companies assessed for this study, 19 qualified for this quadrant, with eight being Leaders.

accenture

**Accenture** supports continuous performance improvements through analytics, governance and change monitoring beyond implementation. Leveraging its expertise in finance and HR, the company optimizes European processes within Workday environments.

cognizant

**Cognizant** enables clients to extend and scale their Workday capabilities through structured AMS, accelerators for data-heavy environments and advisory-led optimization aligned with business maturity.

Deloitte.

**Deloitte's** performance services balance AI-led optimization with deep functional insight, helping clients maximize investments across HR and finance while sustaining value beyond deployment.

HR Path
Your way to people success

**HR Path** complements its implementation strengths with structured post-go-live offerings, including stabilization, analytics and targeted AMS support through modular services tailored to client readiness and internal capabilities.

IBM

**IBM** delivers structured, AI-augmented AMS for Workday, combining automation, analytics and proactive support to improve performance and reduce manual effort post-go-live.

kainos

**Kainos** ensures sustained performance post-go-live through integrated ServiceNow workflows, compliance-ready optimization packages and ROI-linked tracking, helping clients derive long-term value from their Workday investments.

**PwC** drives platform optimization through targeted enablement programs, continuous innovation adoption and local client collaboration. It is a trusted AMS partner for Workday customers across geographies.

**Strada** enables clients to continuously refine and extend their Workday ROI by integrating process benchmarks, real-time diagnostic insights and post-deployment innovation across HR, finance and payroll functions.

Leader

"Deloitte combines technology, analytics and consulting to deliver Workday optimization services that not only improve ROI but also enable continuous innovation aligned to enterprise goals."

*Gaurang Pagdi*

# Deloitte

## Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte's key strength lies in its Workday managed services, branded as *Deloitte Workday Operate*, as the offering is proactive and forward-looking. Instead of merely offering reactive support, which includes fixing breaks and managing tickets, the service is designed to continuously optimize and enhance clients' Workday platform.

## Strengths

**Embedded operate model:** Deloitte's Operate services now comprise a significant portion of its Workday business and include integrated support across various functions such as payroll, tax, legal and cybersecurity. European clients benefit from post-deployment services that go beyond ticket resolution to performance enhancement and risk mitigation.

**SimplrOps for process intelligence:** Through its acquisition of SimplrOps, Deloitte provides clients with automated business process diagnostics and impact analysis. This enables faster, data-backed optimization decisions and helps clients adapt Workday to evolving business needs.

**Renewal readiness framework:** Deloitte partners with clients nearing their license renewal to identify underutilized modules and value leakage. This leads to targeted reconfiguration, integration of shelved capabilities and improved platform stickiness ahead of recontracting.

**Value-centric governance:** Deloitte's performance engagements include structured governance models that measure user adoption, benchmark KPIs and link Workday utilization to strategic outcomes, helping clients translate optimization into tangible business gains.

## Caution

Deloitte offers a comprehensive range of optimization services, which may favor large enterprises with extended Workday stacks. However, midmarket firms may seek lighter, modular performance improvement options with faster payback periods.

# Innovation on Workday

## Who Should Read This Section

This report is valuable for service providers offering **innovation on Workday** in Europe 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

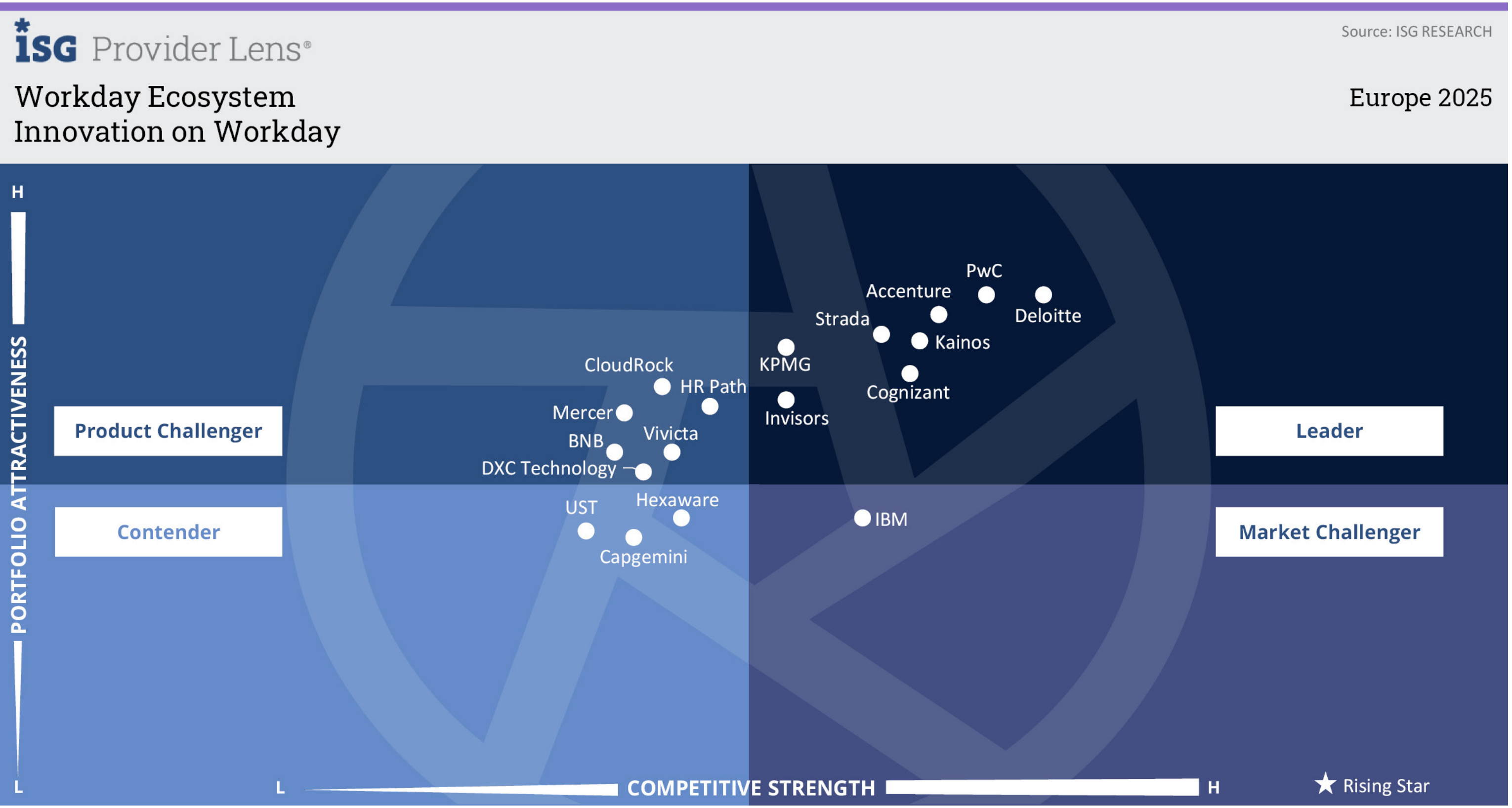
Should review this report to gain insights into how Workday facilitates digital transformation and enhances competitiveness, aiding strategic planning and long-term growth through innovation. This report explores the latest offerings and portfolio of service providers on the Workday platform, which will 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 analyzing the best fit ServiceNow solution. The report focuses on the engineering capabilities of providers with insights into their technology partner ecosystem.




This quadrant evaluates providers' ability to deliver innovation by designing and **implementing new capabilities,** applications and **AI-driven solutions** that address evolving **business needs** while creating measurable **operational** and **strategic** value.

*Gaurang Pagdi*

**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

### Observations

Workday innovation in Europe has evolved from incremental feature extensions to transformative, AI-enabled solutions that expand the platform's core capabilities. Providers are leveraging Workday Extend, the Workday Marketplace and the new AI developer toolset to design role-specific agents, localized applications and industry accelerators that address functional gaps and deliver measurable business outcomes.

Recent advancements such as Illuminate AI agents and the ASR allow providers to embed autonomous, multistep workflows directly into HR and finance processes. Examples include GDPR-compliant onboarding assistants, region-specific payroll calculators and ESG reporting dashboards aligned to European mandates.

Innovation efforts increasingly focus on cocreation with clients and Workday, using agile development to deliver quick, high-impact solutions while ensuring scalability and compliance. Providers are also integrating Workday data with broad enterprise analytics and AI ecosystems, creating new insights that inform strategic decisions.

In this region, Workday innovation is defined by providers' ability to bridge platform capabilities with business ambitions. Providers that can deliver secure, compliant and context-aware innovations are enabling clients to achieve enhanced agility, operational efficiency and competitive differentiation.

From the 21 companies assessed for this study, 18 qualified for this quadrant, with eight being Leaders.

**Accenture** drives innovation via Workday Extend, developing custom apps, automated workflows and AI integrations through Workday's AI Marketplace to help clients experiment, improve and gain new value.

**Cognizant's** innovation strategy aligns Workday-native development with client-specific maturity needs. Clients benefit from Built on Workday apps, agentic AI pilots and an expanding focus on upskilling and AI orchestration.

**Deloitte** leads in AI and industry-led innovation for Workday by combining real-world accelerators with road map influence to deliver tangible outcomes across clients' HR and finance functions in Europe.

With over 20 demo-ready Extend frameworks and a growing suite of modular applications, **Invisors** brings a practical, client-driven innovation agenda that strengthens Workday's competitive edge in high-growth verticals.

**Kainos** stands out for its AI-driven product suite and as an early adopter of the Built on Workday program. Its incubator-led innovation model and ecosystem partnerships position it as a frontrunner in codeveloping future-ready Workday extensions across Europe.

**KPMG** delivers custom-built apps through the early adoption of Extend and analytics. These apps help meet specific finance, ESG and HR needs while aligning with Workday's native architecture.

**PwC's** early investment in Workday Extend and Workplace Marketplace solutions helps it lead and drive domain-specific, client-validated innovations within the Workday ecosystem.

STRADA

**Strada's** innovation strategy combines customer-driven design with Workday codevelopment, focusing on addressing platform gaps, including cash-based accounting and DEI tracking, through intelligent apps and proprietary tools.

Leader

"Deloitte is shaping Workday innovation through agentic design, vertical-specific accelerators and AI-infused solutions that meet both local needs and global scalability demands."

*Gaurang Pagdi*

# Deloitte

## Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte uses Workday Extend to fill gaps and innovate in areas where Workday's core product might not fully meet specific client needs, especially in complex or industry-specific scenarios. Deloitte has won multiple Workday Hackathon awards for its Extend applications, such as *DiviPay* (2024), *Fe-Fi-Fo-Feedback* (2023), *How YOU Doin'?* (2022) and *Alumni Connect* (2022).

## Strengths

**Agentic AI design partnership:** Deloitte is a codesign partner for Workday's Agent System of Record, helping shape next-gen models for agent-human collaboration. As a result, clients in Europe gain early access to Deloitte-led agent use cases aligned to their industry and functional priorities.

**Built on Workday and Extend solutions:** Deloitte develops modular, Built on Workday apps using Extend and Prism, addressing industry-specific needs such as shop-floor certifications and higher education student processes. These apps deliver faster innovation cycles without compromising compliance.

**AI-powered accelerators:** Deloitte embeds GenAI capabilities into its industry accelerators, enabling more innovative HR, finance and supply chain workflows. Clients benefit from packaged intelligence and automation that continuously evolves with Workday's road map.

**Market expansion and innovation:** Deloitte collaborates with Workday to shape and support new market entries, such as Poland and the Middle East. This partnership aids clients in Europe in navigating Workday expansions with region-specific readiness packs and AI-led deployment tooling.

## Caution

Deloitte has made significant strides in bringing innovation to enterprises across Europe. As its innovation portfolio expands, continuing to tailor AI capabilities and industry accelerators to the needs of midsize organizations will help extend Deloitte's impact and strengthen its relevance across the broader market.

# Appendix

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

**Study Sponsor:**
Aman Munglani

**Lead Author:**
Gaurang Pagdi

**Editor:**
Padma Mohapatra

**Research Analyst:**
Megha Dodke

**Data Analyst:**
Anuj Sharma

**Consultant Advisor:**
Anoop Chawla

**Project Manager:**
Shreemadhu Rai B

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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

*Lead Author*

Gaurang Pagdi
**Lead Analyst**

Gaurang has over 22 years of experience in the Finance & Accounting (F&A) domain with expertise in the Order to Cash vertical; he has worked as a delivery leader with industry leaders in Banking, Telecom & E-Commerce; and as a Digital Transformation Consultant with a prominent F&A SaaS provider, working with clients from across industries. Gaurang's core expertise lies in delivery and business transformation, where the focus is beyond digital transformation, like operations and talent transformation, giving him a holistic view of driving a healthy and future-ready business.

As a lead analyst at ISG, Gaurang is responsible for authoring the F&A studies, taking into consideration the latest market trends and perceived future of the industry in relation to the competitive strength and offerings of the service providers.

*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.

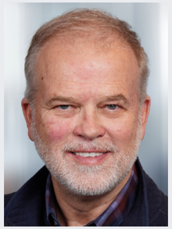
*Study Sponsor*

## 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®**

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.

## 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, 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.

## ISG Research™

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

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

## ISG

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

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

For more information, visit isg-one.com.

ISG Provider Lens®

OCTOBER, 2025

REPORT: WORKDAY ECOSYSTEM