

Workday Ecosystem

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

Customized report courtesy of:



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Report Author: Megha Dodke

Workday has evolved as an intelligence platform for connected and secure HCM Finance

The Workday partner ecosystem is shifting from standard cloud implementation to platform-led business transformation. Configuration and data migration are now foundational, while differentiation increasingly comes from platform expertise, industry innovation and continuous value realisation. Workday AI, Sana and Paradox are extending Workday beyond a system of record into an active platform for people, money and digital agents, governed through the Agent System of Record (ASOR). In APAC, the expanding partner ecosystem is accelerating midmarket adoption, regional localisation and integrated HR-finance transformations.

Market context

The modern enterprise technology market is shaped by a confluence of acute

macroeconomic pressures, complex regulatory changes and revolutionary technological breakthroughs. Globally, organisations face severe talent shortages, complex regulations and digital-native workforce expectations. In the APAC region, talent competitiveness is particularly acute in mature markets such as Australia and Japan, prompting businesses to seek unified, consumer-grade technology systems to attract and retain skilled professionals.

Workday's aggressive product roadmap, catalysed by billions of dollars in AI-focused acquisitions, including Sana, Paradox and Evisort, has redefined the platform's core capabilities. Workday Sana is rapidly emerging as the conversational, AI-native experience layer that converges enterprise training, learning and cross-application workflows into a unified conversational experience. However, this shift toward autonomous digital workers has introduced a brand-new commercial complexity known as *AI Economics*.

The rollout of Workday's consumption-based Flex Credits pricing model represents a massive shift from traditional,

Workday is **shifting**
from standard
cloud configuration
to active **business**
orchestration.



predictable SaaS subscriptions. As consumption-based billing is tied directly to platform transactions and agent executions, enterprise buyers are experiencing significant anxiety regarding budget predictability. There is a looming threat of rapid, unmonitored credit burn caused by inefficient workflows, prompting a critical market demand for robust usage guardrails, procurement scaling gates and ethical AI governance.

This complex landscape is highly partner-led, with approximately 80-85 percent of APAC deployments delivered through certified partners that act as the essential bridge for hyperlocalisation and regional compliance.

Enterprise priorities

To navigate this shifting landscape, enterprise investments are characterised by the following priorities:

- **HCM-to-finance transformation unification:** Standalone HCM modernisations are increasingly seen as insufficient. APAC buyers are moving beyond standalone HCM and using Workday to unify human resources, financial management, workforce

planning and operational data. This unified digital core eliminates fragmented legacy systems, removes data silos and provides executive leaders with real-time operational close visibility and predictive planning capabilities.

- **Operating model and workflow redesign:** Organisations are recognising that simply automating legacy, inefficient processes with AI leads to severe *AI sprawl* and operational bottlenecks. Attempting to deploy digital agents on obsolete workflows results in an unmanageable army of disconnected bots executing micro-work. Consequently, enterprise priority has shifted toward thorough operating model redesign. Pre-implementation *Phase 0* readiness workshops have expanded in scope, focusing on process standardisation, data quality and future-state role designs long before software configuration begins.
- **Bridging data readiness gap for agentic finance:** While modern CFOs and finance leaders are eager to adopt autonomous finance agents and real-time predictive reporting, they are hitting a major operational

barrier: a critical data-readiness and process maturity gap. Fragmented historical data structures and legacy manual workflows are currently incapable of feeding intelligent, automated finance models. To unlock faster close cycles, predictive forecasting and real-time risk detection, enterprises must first execute deep close-to-report process redesigns, implement strict finance data governance, audit risk controls and carefully sequence AI use cases before deployment.

- **Consumption economics and spend control:** With the introduction of Flex Credits, establishing strict ROI and usage guardrails has become a top priority. Enterprises require real-time monitoring frameworks to track credit-triggering events, govern agentic transactions and prevent runaway AI expenditures.
- **Localisation and multi-country payroll integration:** Operating across diverse, multi-jurisdictional regions such as APAC requires deep localisation. Enterprises must navigate highly complex tax, labour and compliance laws in diverse markets such as Japan, Australia, Singapore, Malaysia and emerging

territories such as Vietnam. Integrating core HR with localised payroll and regional banking systems is critical to maintaining regulatory resilience.

- **Accelerated midmarket time-to-value:** Midmarket and SMB firms, particularly in ANZ and Southeast Asia, are prioritising rapid deployment. As these firms face fewer legacy technical debt constraints, they are adopting cloud-first, pre-packaged suites such as Workday GO in ANZ to secure faster deployment timelines, standard playbooks and accelerated value realisation.

Provider dynamics

In response to these enterprise demands, service providers are completely rewriting their go-to-market (GTM) strategies, delivery methodologies and alliance models:

- **From configuration to business orchestration:** Top-tier SIs are positioning themselves as agent orchestrators. Rather than executing simple technical configurations, providers are leading with business-led transformation advisory, designing agent-first operating models,



Executive Summary

rewriting job descriptions for human-agent collaboration and constructing comprehensive GRC (governance, risk and compliance) scaling gates.

- **AI-powered delivery:** Providers are embedding proprietary GenAI tools directly into their deployment methodologies to collapse traditional implementation timelines. Key innovations include PwC's Configuration Workbook Copilot that compresses weeks of manual configuration into a single day and UST's QE360 platform that delivers scriptless, self-healing automated testing to reduce manual validation efforts by up to 75.
- **The Customer Zero reference engine:** To build market credibility, leading partners utilise their own massive internal organisations as live blueprints for Workday's emerging AI technologies. Accenture is actively proving this model by testing and validating Sana internally across its global employees before commercialising the solution, while Genpact embeds its own HCM and financials consolidation learnings directly into customer playbooks.

- **Extend IP productisation:** To offset the downward pressure on traditional labour-based implementation revenues, SIs are productising functional gaps using Workday Extend. By publishing proprietary, certified applications on the Workday Marketplace, partners build high-margin recurring software revenues while de-risking client technical debt. Examples include Huron's physician compensation application, Strada's more than 132 custom Extend apps and Cognizant's Integration Inventory and Contingent Worker applications.
- **Re-orientation of managed services (AMS):** Legacy break-fix ticketing is giving way to continuous platform adoption, commonly termed *Run, Optimise and Evolve*. AMS has evolved into agent management services (AgentOps), where providers actively manage, secure and optimise the lifecycle of autonomous digital workers natively within client tenants. Furthermore, rigid SLAs are being replaced by flexible, multi-disciplinary SQUAD capacity models and outcome-based pricing structures tied directly to KPI outcomes.

- **Orchestrating Workday across the enterprise application stack:** Deploying Workday is now a broader exercise in multi-platform orchestration. Rather than configuring the platform in a silo, partners are expected to seamlessly integrate Workday with external payroll providers, legacy ERPs, CRM systems, ITSM tools, identity platforms, collaboration suites and regional banking architectures. This elevates the deployment role from simple software configuration to a comprehensive enterprise architecture and security orchestration exercise.
- **Strategic M&A for capability scaling:** The Workday ecosystem is consolidating rapidly as global SIs execute targeted acquisitions to secure regional footprints or upstream consulting capabilities. Key moves include UST's strategic merger with Intecrowd to inherit the ecosystem's largest Workday Extend practice and Kainos' acquisition of Davis Pier to significantly strengthen its upstream strategy and operating model design team.



Outlook

The Workday services market is on a trajectory towards total platform autonomy. Over the next 18 to 24 months, standard human-to-system interactions will be largely replaced by conversational experience layers, positioning Sana as the primary interface for enterprise operations. This evolution will force a complete restructuring of commercial contracts; traditional time-and-materials bids will decline, replaced by outcome-based contracts and human + agent pricing structures where services are funded via Flex Credit monetisation.

For enterprises, the path forward requires establishing a zero trust approach to agent identity and access within ASOR. Organisations must prioritise data fabric readiness, ensuring data cleanups and semantic structures are mature enough to fuel autonomous agents. Service providers that fail to verticalise their offerings, build proprietary Extend IP or deliver localised compliance frameworks will face rapid commoditisation. Conversely, those that successfully combine technical integration,

regional payroll expertise and upstream operating model advisory will lead the market, enabling modern enterprises to achieve the full potential of an autonomous, intelligent digital core.

The APAC region has moved from being an emerging market for Workday to a hub for platform innovation and delivery expansion. Enterprise adoption is no longer just about moving HR to the cloud; it is about establishing a unified, AI-driven digital workforce platform. The partners thriving in this region are those moving beyond simple tenant configuration to deliver localised Extend IP, proactive optimisation AMS and agentic AI governance.





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Accenture	Leader	Leader	Leader	Leader
Amaris	Product Challenger	Contender	Contender	Contender
Capgemini	Not In	Not In	Product Challenger	Contender
CloudRock	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
Datacom	Product Challenger	Contender	Product Challenger	Product Challenger
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
E1 consulting	Contender	Contender	Contender	Not In
ECHO	Contender	Contender	Product Challenger	Not In





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
EZE Cloud	Product Challenger	Rising Star ★	Product Challenger	Product Challenger
G-able	Contender	Contender	Not In	Not In
Hexaware	Not In	Not In	Not In	Product Challenger
HR Path	Contender	Not In	Not In	Not In
Huron	Product Challenger	Product Challenger	Contender	Leader
IBM	Leader	Market Challenger	Market Challenger	Market Challenger
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kainos	Leader	Leader	Leader	Leader
KPMG	Leader	Leader	Leader	Leader
Mercer	Leader	Product Challenger	Product Challenger	Market Challenger





Provider Positioning

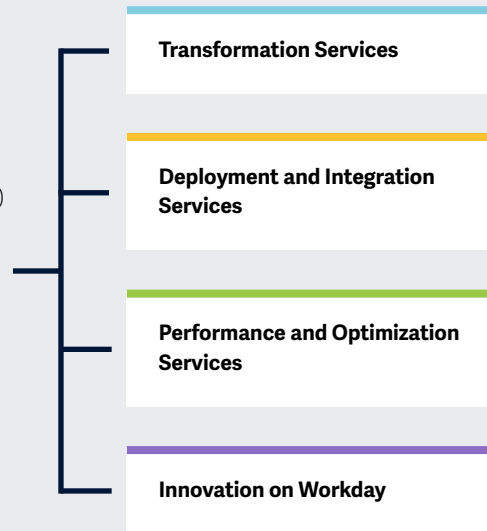
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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Mivada	Contender	Product Challenger	Rising Star ★	Contender
PwC	Leader	Leader	Leader	Leader
SamsungSDS	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Strada	Leader	Leader	Leader	Leader
TCS	Product Challenger	Product Challenger	Leader	Product Challenger
UST	Rising Star ★	Leader	Leader	Rising Star ★



The **Workday Ecosystem** study focuses on the platform roadmap and the service partners offering intelligent HCM and financial management.

Simplified Illustration Source: ISG 2026



Definition

The Workday service partner ecosystem is evolving; once focused on large-scale ERP and standard cloud implementations, it is rapidly transforming into a platform-centric, intelligence-led services market. Announcements and indications from recent Workday Rising events, combined with broad enterprise technology trends, underscore a clear shift: Workday is no longer positioned as just a system of record for people and money, but as a system powered by AI, agents and extensibility.

Workday's increasing emphasis on enhancing platform capabilities with Extend, Illuminate and SANA, along with the emerging concept of Agent System of Record (ASOR). Together, they are redefining the way work is designed, executed and governed. For providers and SIs, this shift represents both an opportunity and a structural challenge. Traditional implementation-centric value propositions, focused on configuration, data migration and integrations, are necessary but now insufficient.

Differentiation is now focused on platform fluency, domain-specific innovation, and sustained post-go-live value realization.

Recent developments in the Workday ecosystem reflect a deep integration of intelligence, extensibility and ecosystem-driven value creation. Capabilities such as Workday Illuminate, Workday Extend and the Workday Marketplace continue to shape how enterprises configure workflows, enhance decision-making and develop industry- and function-specific solutions natively on the platform. A growing focus on agent-aware configurations, platform integration and AI-enabled interactions indicates Workday's move toward scalable, experience-led enterprise operations, while remaining aligned to architectural and governance standards.



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 service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the APAC 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 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 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 and transformation leaders

Strategy and transformation leaders should read this report to understand how Workday focused transformation services are evolving in the APAC. The report helps these leaders assess how service partners support enterprise wide transformation initiatives, including operating model redesign, platform adoption and long term value realization, enabling informed decisions in the selection of partners aligned with their transformation roadmaps.

IT and digital technology leaders

IT and digital technology leaders should review this report to gain insights into how providers support Workday-led transformations beyond core implementations. The report provides a view on providers' consulting and advisory capabilities, change enablement approaches and experience-driven transformation support, helping these leaders find partners that can align Workday programs with a firm's architecture and governance needs.

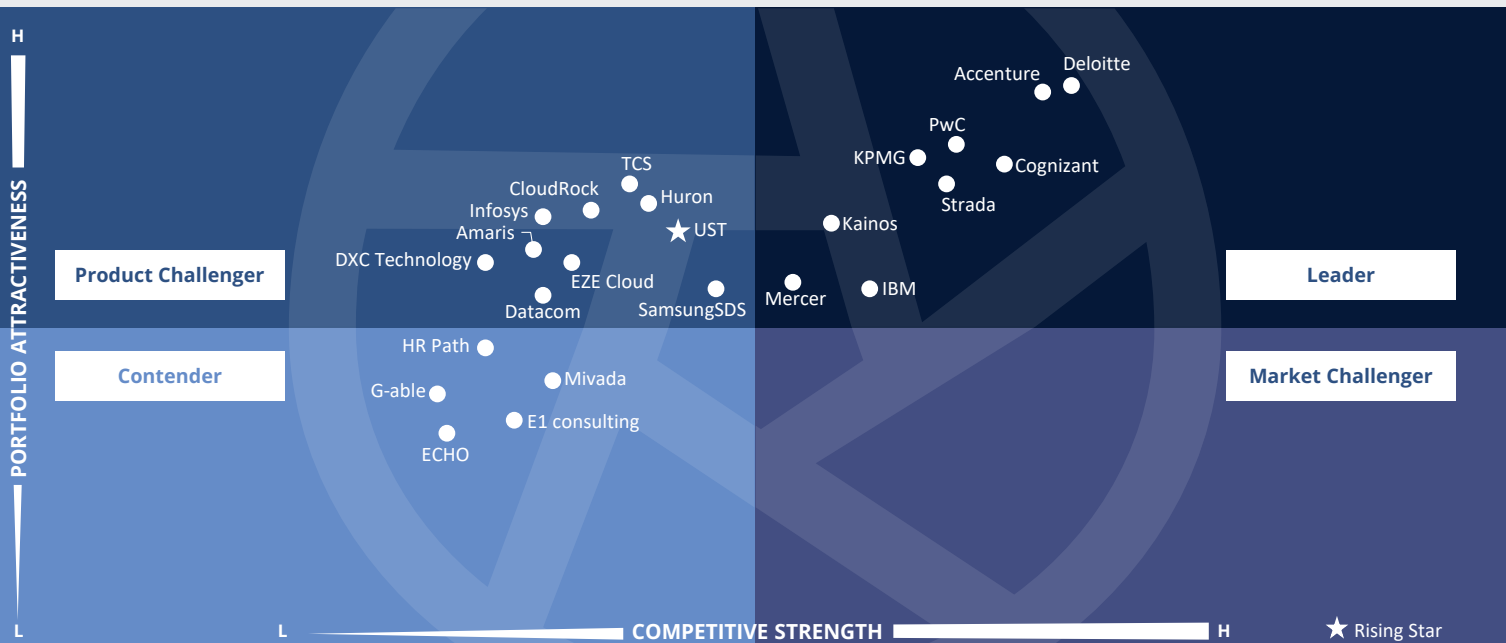
Business and functional leaders

Business and functional leaders including HR and finance executives, should read this report to understand how providers of Workday transformation services can translate their investments into measurable business outcomes. The report highlights how these partners support adoption, experience alignment and value realization across business functions, enabling leaders to identify providers that can support sustained transformation and post go live optimization.

Enterprise change and HR transformation leaders

Enterprise change and HR transformation leaders should read this report to understand how providers support large scale Workday transformation programs that impact workforce structures, operating models and EX. The report helps these leaders evaluate partners that can align organizational change initiatives with Workday adoption efforts to sustain transformation outcomes.





This quadrant assesses providers' ability to deliver **Workday-aligned consulting and advisory**, including architecture, transformation roadmaps, operating model redesign, change enablement, AI governance and measurable value realisation.

Megha Dodke



Definition

The Transformation Services quadrant evaluates service partners based on their ability to deliver enterprise-wide business and digital transformation on the Workday platform. They are assessed on their consulting and advisory services aligned with Workday SKUs and solutions, including architecture definition, roadmap design and operating model transformation that support scalable and sustainable change.

With the growing adoption of agentic AI, partners must help enterprise clients avoid surprise expenditures and prove the value of Flex credits. They are assessed for consumption forecasting, ROI tracking dashboards, scaling gates and procurement/financial governance for AI use.

The quadrant emphasizes organizational change management and business value realization across employee, business and developer experiences.

Providers are also evaluated on their Workday led transformation programs and ability to support experience driven change, including AI based value discovery and governance.

Eligibility Criteria

1. **Have the ability to deliver Workday aligned consulting and advisory services** to support enterprise transformation initiatives mapped to Workday SKUs and solution portfolio
2. Can evaluate the HR **management landscape to design service transformation strategies, set up roadmaps** and provide in-depth, industry-specific knowledge of the Workday product portfolio
3. **Can establish enterprise transformation roadmaps and operating model designs** that guide Workday led business change initiatives
4. **Have organisational change management expertise** to support stakeholder alignment, determine workforce readiness and foster adoption enablement
5. **Demonstrate experience in driving Workday adoption and value realisation**, including use optimisation and measurable business outcomes
6. Focus on **digital business transformation competencies and have expertise in industry-specific functions and strategic consulting**, including ESG and GRC
7. **Can support AI enabled value discovery and governance** grounded in officially supported Workday constructs
8. Possess Workday platform certifications to **predict long-term technology developments** and adoption to ensure **timely delivery of solutions** using **expertise and partnerships**



Observations

The Workday Transformation Services market is shifting from implementation advisory to business and operating model redesign. Strategic consulting is no longer centred only on HCM modernisation; it is expanding towards an integrated HR, finance, workforce, data and agent-enabled operating model. In this context, talent, digital workers, data and workflows are increasingly treated as connected enterprise assets that need common governance, security and value measurement.

In APAC, this shift is shaped by fragmented legacy environments, country-specific compliance needs and rising demand for finance-led transformation. Buyers are asking partners to provide integrated HR-finance advisory, localised process templates, payroll and regulatory guidance and architectures that can support scalable digital operations. The focus is moving away from siloed HCM consulting towards enterprise-wide operating model design. Upstream advisory is also expanding to include AI economics and agent readiness. Partners are being assessed on their ability to forecast Flex Credit usage,

define AI adoption gates, establish responsible AI controls and prepare clients for agentic workflows. Phase 0 advisory is becoming more detailed, with greater focus on data quality, process rationalisation and alignment with the Agent System of Record for managing digital workers.

Leading partners are helping clients redesign foundational structures before implementation. Examples include education and non-profit transformation, public sector modernisation and complex job architecture redesign for M&A scenarios. The market is also seeing provider consolidation, where large integrators acquire or partner with specialist Workday boutiques to combine strategic consulting depth with engineering scale and deployment capacity.

From the 26 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

accenture

Accenture integrates its customer zero practices into business strategy consulting. Its GTM strategy targets high-value sectors such as US public service and health, emphasising AI-first operating models and comprehensive OCM frameworks.

cognizant

Cognizant's Workday buying center now extends beyond CHROs and CFOs to CIOs, CTOs and legal teams due to agentic AI complexities. It backs its advisory with AI readiness and policy governance frameworks to minimise the friction in adopting digital workers.

Deloitte.

Deloitte combines human-centred design, multi-alliance orchestration and robust industry accelerators to seamlessly guide organisations through complex, outcome-driven transformation roadmaps that realise significant value far beyond basic system deployments.

IBM.

IBM adopts an AI-first approach to Workday, using Watson AI frameworks, cloud management capabilities and structured methodologies to reinvent HR and finance. By guiding operating-model redesign and AI-driven value discovery, IBM turns vision into a measurable digital transformation.



Transformation Services

KAINOS &CO

Kainos has grown to around 150 team members in APAC, with ANZ as its hub. It is strengthening verticalised advisory capabilities, particularly in financial services, professional services, manufacturing, retail and public sector/municipalities.



KPMG connects Workday modernisation directly to C-suite priorities across HR, finance, operations and IT. Through its Powered Enterprise service suite, it aligns cloud transformation with broader goals such as workforce agility, cost reduction and enterprise data governance.

Mercer

Mercer delivers end-to-end, people-centric consulting backed by over 10 years of certified experience. It embeds strategy, change management and future-state alignment to transform HR and finance systems so they keep pace with evolving business goals.



PwC combines business-led advisory with governance and risk management expertise to deliver strategic Workday transformations that align finance, tax and workforce operations with broader enterprise goals.

Strada

Strada combines decades of HR heritage with proven advisory frameworks to deliver specialised consulting that helps simplify complex multi-country workforce management and transform global payroll into a strategic operational engine.



UST (Rising Star) applies its REST principles — Reduce Risk, Enhance Experience, Improve Speed, Promote Transparency — to advisory engagements, aligning executive, functional and technical teams to maximise ongoing Workday ROI.



PwC



"PwC drives enterprise-wide alignment and clean-core execution by leveraging pre-configured industry models, proprietary digital assets and data-driven organisational change platforms."

Megha Dodke

Overview

PwC is headquartered in London, UK. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC is a leader in HR transformation, change management and strategy, with an outcome-led approach to enterprise consulting. Its advisory practice bridges technology and human experience to design future ways of working that maximise hybrid workforce productivity. This strategy mitigates implementation risk and establishes the process, governance and control baselines required to confidently scale intelligent operations post-deployment.

Strengths

Outcome-led transformation strategy:

PwC starts with business challenges and target KPIs rather than Workday features. Consultants work backwards to identify priority use cases, prerequisites and operating-model changes, reducing feature sprawl, focusing execution on measurable outcomes, and aligning the Workday transformation to enterprise objectives.

Pre-configured industry models:

PwC applies industry-specific model systems, leading practices and digital assets during advisory and design. These assets provide a starting point for future-state processes and prototypes, reduce blank-slate design effort and limit unnecessary customisation. The approach supports cleaner architecture and faster alignment to industry-specific workflows.

Data-driven change management:

PwC delivers people-centric change management supported by adoption insights and analytics. The approach establishes process baselines, data governance and control frameworks; plans for adoption; and monitors user behaviour. This helps identify adoption risks early, refine change interventions, and support smoother transitions to Workday-enabled operating models.

Caution

PwC has a leading position in finance-led, experience-focused transformation integrated with risk and tax governance. However, to elevate its human capital advisory in APAC, PwC should highlight more region-specific HCM transformation narratives that reflect the local workforce context and measurable impact.





Deployment and Integration Services

Who Should Read This Section

This report is valuable for 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 and IT leaders

Technology and IT leaders should read this report to understand how providers support the deployment and integration of Workday solutions in complex enterprise environments. The report helps these leaders evaluate provider capabilities in terms of implementation approaches, system integration and data readiness, enabling informed decisions when selecting partners that can support scalable and secure Workday rollouts.

Enterprise architects and implementation professionals

Enterprise architects and implementation professionals should review this report for insights on provider practices for deploying and integrating Workday across enterprise application landscapes. The report provides visibility into how providers manage integrations with ERP, CRM and collaboration platforms, as well as data migration and configuration activities that are critical for successful Workday implementations.

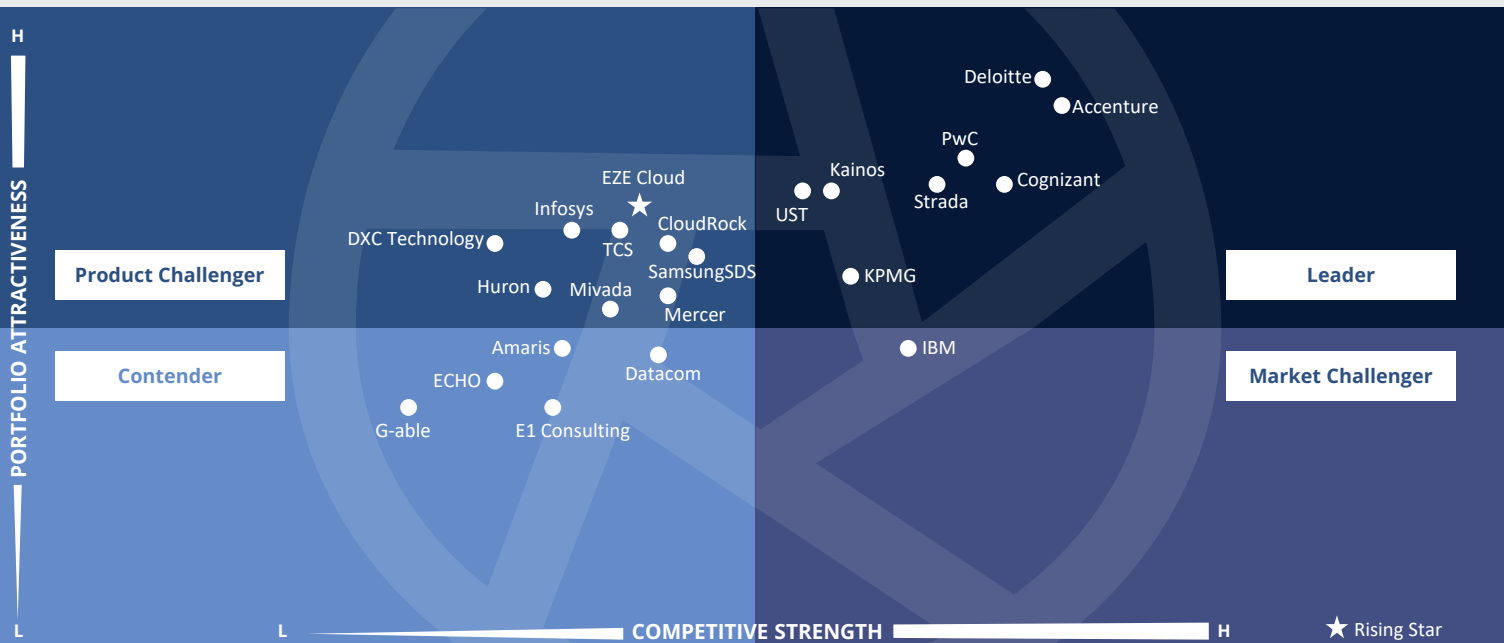
Business leaders

Business leaders overseeing Workday implementation initiatives should read this report to better assess providers' ability to undertake reliable and efficient deployments. The report supports decision making by highlighting how providers manage implementation complexities, coordination across systems and post deployment readiness, helping enterprises select partners aligned with their business objectives and timelines.

Program management and delivery assurance leaders

Program management and delivery assurance leaders should read this report to gain visibility into how providers manage complex Workday deployment and integration initiatives. The report helps these leaders assess provider approaches to deliver governance, coordination across systems and risk management, thus supporting informed partner selection for large or multi phase Workday programs.





This quadrant evaluates providers' expertise in **Core and Phase X deployments**, data migration and grounding, AI-assisted delivery, Workday Data Cloud and secure integration with ERP, CRM, payroll and collaboration ecosystems.

Megha Dodke

Deployment and Integration Services

Definition

The Deployment and Integration Services quadrant evaluates Workday service partners based on their ability to design, deploy and integrate Workday solutions at enterprise scale. The providers demonstrate capabilities in Core and Phase X implementations, supported by established methodologies, frameworks and accelerators that enable consistent, secure and efficient outcomes.

Workday has positioned Workday Data Cloud in a way to eliminate exports/stale duplicates and enable real-time insights, making strong data engineering and governance skills a necessity for partners. The quadrant also assesses partner expertise in data readiness, grounding, migration and conversion, along with capability in integrating Workday with enterprise applications such as ERP, CRM and collaboration platforms. Providers are evaluated on their ability to deliver scalable integration architectures and AI-assisted deployment approaches explicitly aligned with Workday standards and ecosystem practices.

Eligibility Criteria

1. Have proven experience in **delivering Core and Phase X Workday implementations** across enterprise environments
2. Can apply **established methodologies, frameworks and accelerators** aligned with best practices in Workday implementation
3. Have the ability to **integrate, align, develop, optimise and test** Workday products across various modules
4. Offer expertise in **diverse system integrations and migrations with ERP, SAP, CRM (ServiceNow and Salesforce) and internal collaborative systems**
5. Provide **maintenance support and installation services, offer upgrades** and handle patch and lifecycle management
6. Use **emerging technologies** such as **automation, data science, AI, ML and cognitive computing** to enable digital transformations and drive implementations
7. Can **adhere to Workday security, governance and ecosystem requirements** throughout deployment and integration engagements
8. Can deploy **Workday Data Cloud connectivity** with Databricks/Salesforce/Snowflake, access controls and **showcase real-time analytical use cases**



Deployment and Integration Services

Observations

The deployment and integration services market is shifting from basic tenant configuration to the deployment of localised, multi-module Workday platforms. In APAC, standalone HCM programmes are increasingly giving way to integrated rollouts across HCM, payroll, financials, adaptive planning and Prism Analytics as enterprises try to address fragmented legacy systems, limited operational visibility and inconsistent data foundations.

Regional delivery strength is increasingly being defined by localisation depth. Providers are expected to bring country rollout playbooks, statutory compliance patterns, payroll integration experience and region-specific testing approaches for markets such as Australia, Japan and Vietnam. As Workday expands through a partner-led delivery model in the region, local execution capability has become a core differentiator.

Midmarket demand is developing as a separate deployment segment, particularly through accelerated deployment models such as Workday GO in ANZ. These models

rely on pre-configured tenants, localised workbooks, fit-to-standard design and rapid testing cycles to reduce entry barriers and implementation complexities.

Deployments are becoming more data- and integration-led. Data readiness, access controls, integration lineage, reconciliation logic and reporting foundations are now central deliverables. Providers are also expected to orchestrate Workday with legacy databases, ERPs, CRMs, ITSM platforms, identity systems and collaboration tools. AI and automation are reducing manual configuration, as well as testing and documentation efforts, which is pushing providers towards more outcome-aligned commercials and value-based deployment models.

From the 26 companies assessed for this study, 23 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture accelerates global implementations utilising an extensive library of industry-tailored assets. With over 4,000 certified practitioners, it seamlessly integrates Workday into multicloud architectures, orchestrating complex cross-platform connectivity.



Cognizant leverages standardised global delivery frameworks to expertly navigate complex multi-module rollouts across over 125 countries. It embeds GenAI into the deployment lifecycle to accelerate testing and ensure culturally and regionally aligned architectures.

Deloitte.

Deloitte leverages robust pre-built accelerators and strategic partnerships to seamlessly integrate Workday into broad enterprise ecosystems, executing highly secure digital transformations for complex and stringently regulated organisations.

KAINOS &CO

Kainos leverages deep executive alignment and industry-specific architectures to kickstart stalled implementations and drive highly secure, scalable Workday transformations, rapidly delivering continuous business value for large global enterprises.



KPMG combines pre-configured functional assets with iterative delivery techniques to minimise operational disruption and accelerate time-to-value. Its delivery teams scale efficiently across global delivery centres and specialised capability hubs, ensuring consistent execution across local and multinational implementations.



Deployment and Integration Services



PwC leverages pre-built industry blueprints and GenAI-driven deployment automation to deliver seamless, enterprise-scale Workday implementations that de-risk complex integrations and accelerate time-to-value.

Strada

Strada de-risks and speeds up deployments using its Project Hub, Data Conversion Accelerator (with over 4,000 automated integrity checks) and more than 300 reusable integrations. Its dedicated midmarket business delivers tailored, fixed-scope Workday deployments.

U - S T

UST has significantly enhanced its position in the Workday ecosystem following the acquisition of Intecrowd (the first authorised partner of Workday Extend) in April 2026, transitioning from a managed services provider into a tier 1 deployment expert capable of handling large enterprise rollouts.

EZE Cloud Consulting

EZE Cloud Consulting (Rising Star) supports Fortune 500 companies across eight distinct industries despite being a boutique provider. It has expanded its delivery footprint with hubs in Singapore, Malaysia, India, the US and the Philippines.





"PwC's technologically advanced approach ensures risk-free, rapid deployments that seamlessly connect Workday capabilities with the broad enterprise digital landscape, driving immediate and considerable operational value."

Megha Dodke

Overview

PwC is headquartered in London, UK. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC has a track record of zero failed transformation engagements. Leveraging extensive global reach, PwC seamlessly deploys Core and Phase X modules, while focusing on outcome-based implementation architectures. It finds a competitive edge by leveraging advanced, proprietary GenAI deployment tooling to automate the repetitive implementation tasks considerably.

Strengths

Unblemished implementation record: PwC distinguishes its deployment capabilities by claiming zero failed Workday transformation projects across more than 730 HCM and 160 financial management engagements. The company's successful delivery of Workday solutions in over 35 countries for 18 years provides large global enterprises with confidence in its ability to execute complex, high-stakes Core and Phase X digital transformations across their architectures.

GenAI deployment tooling: PwC modernises deployment by engineering powerful GenAI solutions, most notably the Configuration Workbook Copilot. This proprietary tool automates the Workday deployment process, replacing a consultant's most repetitive administrative work. Using this

advanced technology, PwC has successfully demonstrated its ability to compress three weeks of manual configuration effort into a single day, driving fast, risk-mitigated implementations.

Pre-configured Model Tenants: PwC uses proprietary Model Tenants during the early implementation phase to provide pre-built workflows, leading-practice processes and a working prototype for future-state design. This approach accelerates deployment, reduces technical debt and establishes Workday environments on standardised foundations.

Caution

PwC leverages GenAI and industry blueprints to accelerate deployment and documentation cycles. Enhancing and communicating its hands-on technical depth for complex, non-standard integrations will further bolster client confidence during enterprise-scale rollouts.





Performance and Optimization Services

Who Should Read This Section

This report is valuable for providers offering **performance and optimization 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 service delivery leaders

Operations and service delivery leaders responsible for the stability and continued performance of Workday environments should read this report to understand how providers support run state operations. The report provides insights on providers' application management, optimization and operational support capabilities, helping leaders assess partners that can ensure reliability, efficiency and continuity across business critical Workday systems.

Functional and service line leaders

Functional and service line leaders overseeing HR, finance and related business functions should review this report to evaluate how providers optimize Workday usage post go live. The report helps these leaders understand how providers support continuous improvement, enhancements and personalization, enabling more effective use of Workday capabilities across functions and aligning platform performance with evolving business requirements.

IT leaders and platform reliability owners

IT leaders and platform reliability owners should read this report to gain clarity on how providers manage Workday environments at scale. The report highlights provider approaches to platform monitoring, testing, release management and cloud operations, helping technology owners identify partners that can support stable, secure and well governed Workday operations over time.

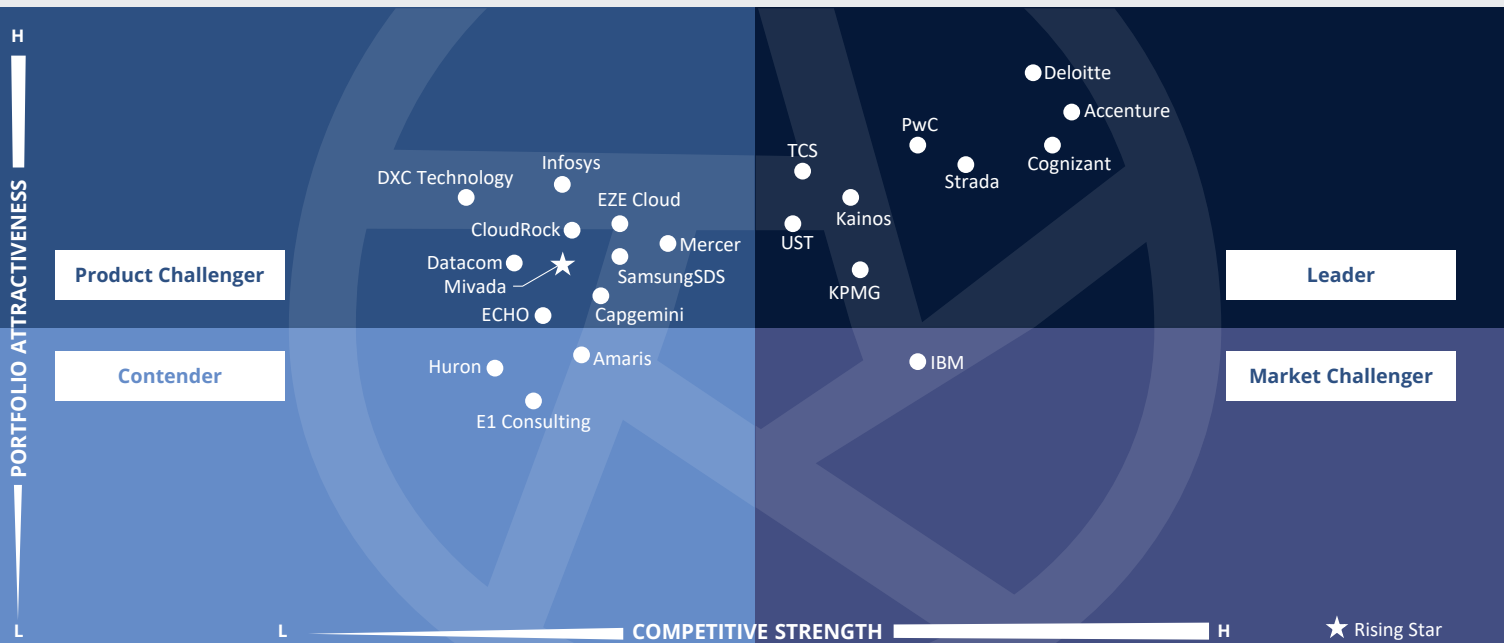
Enterprise application operations managers

Enterprise application operations managers should read this report to understand how providers support the ongoing operation and optimization of Workday environments. The report provides insight into providers' approaches to application management, performance monitoring, and continuous improvement, helping operations teams identify partners that can support stable and efficient run state Workday operations.



Workday Ecosystem Performance and Optimization Services

APAC 2026



This quadrant assesses providers' ability to **operate, optimise and continuously evolve Workday** through reliable AMS, release management, testing, automation, enhancements, BPaaS and repeatable adoption of new AI capabilities.

Megha Dodke



Definition

The Performance and Optimization Services quadrant evaluates Workday service partners on their ability to operate, optimise and continuously enhance Workday environments. They deliver application management services (AMS) that support platform performance in terms of stability and reliability, while enabling continuous improvement through change and release management, testing, and automation.

The quadrant also covers optimization services, including enhancements, personalisation, and business process as a service (BPaaS) delivery models that combine Workday software and services. Providers are assessed on their ability to improve operational efficiency, platform performance and business outcomes, including support for Workday environments deployed on cloud platforms such as AWS and Google Cloud.

For this quadrant, providers are assessed on the transparency, flexibility and scalability of their offerings, as well as their commitment to innovation and continuous improvement.

Eligibility Criteria

1. Demonstrate proven **ability in delivering reliable AMS for Workday environments**, including support and maintenance
2. Have the **capability to manage Workday updates, releases and changes** with minimal business disruption
3. Show experience in **optimizing Workday performance** through enhancements, and continuous improvement initiatives
4. Use **testing frameworks and automation** to ensure platform quality, stability and scalability
5. Can deliver **functional enhancements and personalized solutions** within the Workday ecosystem
6. Have the **ability to deliver BPaaS offerings that operationalize Workday platform capabilities**, combining application management, performance optimization, enhancements and continuous improvement services to drive measurable business value
7. Show proven support for **Workday environments operating on cloud platforms**, ensuring performance, resilience and efficiency
8. Demonstrate the capability to **industrialize the ongoing adoption** of new Workday AI capabilities, such as new agents/features, AI-driven workflows and experience changes, through a repeatable **release-to-adoption operating model**



Performance and Optimization Services

Observations

The performance and optimisation services market is shifting from reactive AMS to continuous Workday adoption and optimisation. Clients increasingly expect providers to support release impact assessment, regression testing, feature activation, enhancement backlogs and measurable value realisation, rather than only Level 1/Level 2 ticket resolution. In APAC, demand is shaped by multi-country payroll, local compliance and fragmented integration landscapes. Organisations need support across markets such as India, Australia, Singapore, Malaysia and the Philippines, where Workday often connects with local payroll providers, banks, regulators and legacy systems. This makes regional compliance knowledge, payroll optimisation and integration monitoring central to AMS maturity.

AI is also changing the AMS model. Providers are embedding automation into ticket triage, issue resolution, regression testing, anomaly detection and release analysis. As Workday agents and Sana adoption grow, AMS is expanding into AgentOps, where providers monitor agent behaviour, permissions,

exceptions, audit trails and usage patterns alongside standard tenant configurations. Large enterprises are also looking for more flexible delivery models, including GCC-aligned support, squad-based capacity and outcome-linked commercial constructs. Integration observability is becoming a baseline requirement, with clients expecting dashboards for failed integrations, release-related API impacts and reconciliation gaps.

Overall, APAC Workday AMS is moving toward a run-optimize-evolve model, where providers combine platform health checks, compliance support, release adoption, AI-enabled support and continuous improvement to sustain value beyond go-live.

From the 26 companies assessed for this study, 23 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture elevates post-production support through continuous value realisation. Its optimisation services move beyond basic maintenance to proactively enhance capabilities, leveraging deep ecosystem integration and AI tools to drive measurable business outcomes.



As Workday's internal AMS provider, **Cognizant** holds an unmatched ecosystem advantage. Its optimisation practice shifts clients from reactive fixes to continuous improvement, utilising flexible squad-based models and the Cognizant Neuro platform to automate core tasks.

Deloitte.

Deloitte differentiates its Operate services by moving beyond routine maintenance and SLA management to focus on value realisation, driving continuous improvement, innovation and outcome-based operations through adaptive service models.

KAINOS &CO

With Kainos Live, a Workday-native AMS hub, **Kainos** brings service requests, support activity and case visibility within the Workday workspace. It connects post-go-live support with Extend, Smart Suite products and continuous improvement initiatives.



Performance and Optimization Services



KPMG's optimisation services extend into complex system remediation and post-go-live enhancements. Beyond standard maintenance, it actively supports Workday ERP corrections and optimisation.



PwC's Workday Application Evolution Services (AES) uses a run-optimize-innovate model that combines managed services with industry-specific optimisation. The model offers 26 solutions across technology, operational risk and tax, with AI and agent capabilities embedded across its entire portfolio.

Strada

Strada supports over 400 Workday AMS customers globally using tailored support models, ranging from flexible resource allocation (filling internal skill gaps) to full-scale enterprise management, release management and continuous feature enablement.



TCS uses Workday digital workers to autonomously resolve user queries, auto-direct users to relevant standard operating procedures and remediate recurring workflow issues. This agentic approach to L1/L2 support is projected to drive 30–40 percent in total cost savings, lower the MTTR and proactively predict data issues.



UST differentiates its optimisation services through a customer-first delivery methodology and a global network of certified Workday professionals, driving long-term client retention and high CSAT.

Mivada

Mivada (Rising Star) has experienced rapid growth in ANZ, doubling in size and expanding across key enterprise sectors such as aviation, education and transport. This growth is fuelled by its hybrid onshore-offshore model, localised Workday Extend compliance applications and Workday GO launch-partner recognition.





"PwC elevates Workday application management through its FlexOps model and GenAI-powered AES Digital Worker, turning post-go-live support into a continuous engine for performance optimisation and growth."

Megha Dodke

Overview

PwC is headquartered in London, UK. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. To continuously capture value, PwC leverages an innovation engine that aggregates and analyses data to pinpoint opportunities. This includes a client innovation pipeline that scores and prioritises transformation ideas based on revenue impact, cost reduction, risk mitigation and EX. The company's AES practice uses scheduled innovation workshops, a constant AI-led lens to improve business processes and quarterly business reviews (QBRs) that pull in multi-disciplinary teams (such as tax and risk) to add ongoing value.

Strengths

Agentic application evolution: PwC embeds AI and digital agents into its Application Evolution Services to move managed services beyond traditional ticket management. Its Agent Powered Performance engine automates recurring tasks, issue detection and operational improvements. This approach helps clients continuously optimise Workday environments while addressing inefficiencies through structured, AI-enabled support rather than purely manual intervention.

Continuous improvement capabilities: PwC uses Sustain to Evolve Labs and QBRs to identify optimisation opportunities after go-live. These forums analyse client patterns, operational issues, adoption barriers and enhancement needs. The output informs

future application roadmaps, process improvements and support priorities, helping clients move from basic stabilisation towards continuous improvement across Workday functions.

Outcome-based commercial constructs: PwC links managed services delivery to measurable business outcomes through outcome-based commercial models. These arrangements are designed to connect provider performance with client goals such as cost reduction, adoption improvement, process efficiency and operational stability. This approach creates clearer accountability for post-production value realisation while helping clients manage ongoing Workday spend more predictably.

Caution

PwC delivers continuous post-go-live evolution through its FlexOps model and GenAI-powered Digital Worker. To scale its AMS delivery in APAC, PwC should continue embedding certified Workday technical specialists directly into its regional HR and finance operational teams.





Innovation on Workday

Who Should Read This Section

This report is valuable for 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

Strategy and innovation leaders should read this report to understand how providers are enabling innovations on the Workday platform. The report helps these leaders assess how providers support business modernization initiatives, platform extensibility and experience driven innovation, enabling informed decisions on selecting partners that align with long term digital and innovation strategies.

Application development and platform leaders

Application development and platform leaders should read this report to gain insight into how providers design and build custom solutions on Workday. The report provides visibility into provider capabilities related to platform extensions, Marketplace based offerings and domain-specific innovation, helping technology teams identify partners that can support scalable and governed innovations on Workday.

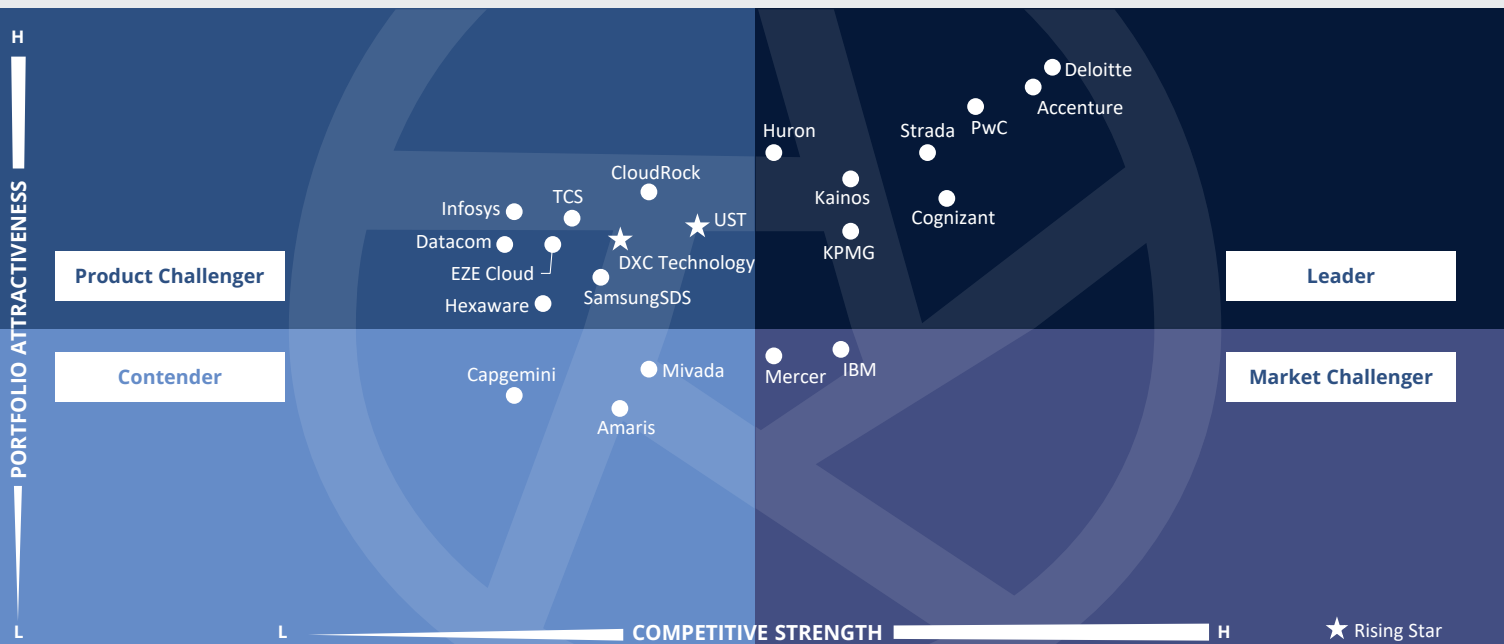
Architecture and engineering teams

Architecture and engineering teams including solution architects and technical leads, should read this report to understand how providers deliver innovation within the Workday ecosystem. The report highlights how providers support platform native development, integration and sustained value realization, enabling engineering teams to evaluate partners that can build secure, compliant and extensible solutions aligned with enterprise standards.

Digital platform governance and enablement leaders

Digital platform governance and enablement leaders should read this report to understand how providers support AI-based and agent-powered innovations on Workday while maintaining platform governance and control. The report helps these leaders evaluate partners that balance extensibility and innovation with security, compliance and architectural standards across intelligent enterprise environments.





This quadrant evaluates providers' ability to **build and scale Workday-native innovation** using Extend, Built on Workday, Marketplace, Illuminate and Sana, while securely governing agent identities and actions through ASOR.

Megha Dodke



Innovation on Workday

Definition

The Innovations on Workday quadrant evaluates Workday service partners on their ability to design, build and scale AI-based intuitive solutions natively on the Workday platform. They focus on developing custom and industry-specific solutions using Workday Extend and on delivering validated offerings through the Workday Marketplace.

This quadrant also assesses the capabilities of Workday Illuminate, including prebuilt AI assets, to enable intelligent experiences, agent-aware workflows and business modernization initiatives.

Providers are evaluated on their ability to deliver secure, scalable and compliant innovations within the Workday ecosystem, supporting long-term platform extensibility and value creation.

Providers are assessed on their ability to provide centralized visibility/oversight for agent identities, roles, permissions and business context in Workday Agent System of Record (ASOR).

An important development this year is SANA which is an experience layer that converges knowledge, data, action and learning. Workday Partners are assessed on their capability to build differentiated offerings around it.

Eligibility Criteria

1. Show proven expertise in **building custom applications and extensions** using Workday Extend
2. Have experience in **publishing, validating and maintaining solutions** on the Workday Marketplace
3. Demonstrate capabilities in the deployment of **Workday Illuminate**, including prebuilt AI assets, within solutions
4. Have the ability to **deliver innovations native to the Workday platform** without dependence on external frameworks
5. Can develop **industry-specific or functional solutions** aligned with Workday use cases
6. Show an ability to design **intelligent workflows and experiences** using Workday supported agentic constructs
7. Can adhere to **Workday security, compliance and scalability standards** for Workday Extend-based applications, Marketplace offerings and AI enabled configurations built on Workday (BoW) platform
8. Have an appetite for **joint innovation programs with Workday**, in early adopter participation (preview features and beta programs), and in **collaborations with hyperscalers and ISVs**, as well as contribution to Workday's product feedback loop
9. **Manage trust, governance and identity** for AI agents via its ASOR and partner integrations and demonstrate tangible business value



Innovation on Workday

Observations

The Innovation on Workday quadrant reflects Workday's shift from a system of record to an intelligent platform where apps, workflows, agents and data-driven actions operate inside the Workday environment. Innovation is increasingly centred on Workday Extend, Built on Workday, Workday Marketplace, Sana, Illuminate and ASOR, with providers building native applications and agents that address functional gaps, industry needs and regional compliance requirements.

For providers, the strongest differentiation is moving away from broad AI claims towards deployed, repeatable, production-grade assets. They are using Extend and Marketplace to publish solutions for areas such as payroll compliance, employee documentation, security reviews, finance close support, staffing pay-bill workflows, benefits administration, higher education processes and industry-specific supply chain or workforce needs. In APAC, localised innovation is especially important as clients need country-specific workflows, statutory compliance, payroll rules, language support and regional integration patterns.

Sana is emerging as the experience layer that brings knowledge, action, learning and automation into a single interface, while ASOR introduces a governance layer for agent identity, permissions, auditability and performance oversight. This creates new requirements for providers around agent design, security, monitoring and responsible AI controls. Leading providers are also using internal deployments and innovation labs to test AI capabilities before scaling them to clients. Commercially, the market is shifting toward Human + Agent operating models, consumption-aware pricing and co-innovation models that prove measurable business outcomes rather than simply delivering new features.

From the 26 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and two Rising Stars.

accenture

Accenture is a pioneer in Workday innovation, co-creating the Agent System of Record (ASOR) for clients. Its forward-deployed model undertakes testing of Workday AI on 700,000 internal employees, validating enterprise use cases before general market availability.



Cognizant's innovation strategy emphasises the deployment of high-volume extensibility solutions and early adoption of intelligent applications. Through dedicated AI Labs, it actively undertakes testing and deployment of next-gen tools such as SANA and Paradox for intelligent cross-platform orchestration.

Deloitte.

Deloitte uses proprietary agentic frameworks and extensive industry accelerators to seamlessly translate AI concepts into measurable business value, empowering enterprises to navigate an AI-first, human-centric future with robust governance and scalable digital worker orchestration.

HURON

Huron has a strong innovation position in the Workday ecosystem, combining advisory depth with technical execution. Its capabilities are supported by Workday Partner Innovation Awards, a sizable Built on Workday and Extend portfolio and sector-specific applications for regulated industries.



Innovation on Workday

KAINOS &CO

Kainos differentiates itself in the Workday ecosystem through its software product heritage. Its involvement in Workday's Clear Skies programme enables it to build products in areas not addressed natively by Workday. Its portfolio combines automated testing, compliance tools, AI capabilities and agentic workflow development.



KPMG demonstrates leadership through production-ready assets on the Workday marketplace, moving beyond internal accelerators to deliver verifiable client solutions. Notable examples include the Industry Accelerator for Healthcare and the award-winning Industry Accelerator for Banking.



PwC invests heavily in a Workday Extend CoE, comprising over 70 personnel dedicated entirely to application development and innovation. The team has developed over 200 custom Workday Extend applications for clients, addressing specific needs such as ESG/carbon ledgers, unified incentive compensation and security/segregation of duties.

Strada

Strada claims an industry-leading footprint in native Workday Extensibility, having designed and built over 132 custom Workday Extend applications. With significant annual investments in Workday innovation, Strada operates a prolific development engine that quickly turns operational challenges into scalable solutions.



DXC Technology (Rising Star) drives platform innovation by combining deep Prism Analytics expertise with proprietary deployment accelerators, enabling real-time data insights and accelerated value delivery. Its cross-platform engineering capabilities seamlessly connect Workday with broad AI and digital workplace ecosystems.

U S T

UST (Rising Star) demonstrates an agility in developing commercial Workday solutions. This includes its proprietary AI Translation Generator, engineered during a 24-hour hackathon and approved swiftly for the Workday marketplace.



PwC



Leader

“As an award-winning Workday Extend partner and leading DevCon sponsor, PwC drives platform innovation with high-impact marketplace solutions that address strategic enterprise challenges such as ESG and global tax compliance.”

Megha Dodke

Overview

PwC is headquartered in London, UK. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC holds a leading position in Workday innovation, driven by scale, proprietary GenAI capabilities and repeated Workday Partner Innovation awards. It differentiates through native extensibility, high-volume custom application development and dedicated global innovation labs. PwC's outcome-led design approach embeds agentic AI across managed services, combining deployment automation with post-production governance to turn AI concepts into practical, risk-controlled business outcomes and sustained operational improvement.

Strengths

Dedicated Built on Workday and Extend

CoE: PwC has a dedicated Workday Extend CoE with more than 70 specialists focused on designing, certifying and scaling native Workday applications. This CoE supports faster development of secure, Workday-aligned solutions that extend platform functionality without relying heavily on external frameworks.

Marketplace application footprint: PwC has published 28 Workday marketplace applications and developed over 200 custom Extend solutions. These assets address cross-industry needs such as carbon accounting, internal communications and security audits, helping clients close functional gaps and reduce manual work within Workday.

GenAI delivery tools:

PwC uses proprietary GenAI tools to accelerate Workday delivery, including Configuration Workbook Copilot, Testing Genie and Design Agent. These tools support requirement translation, test scenario generation and process visualisation, reducing manual effort across configuration, testing and validation.

Agent-powered performance engine:

PwC's Agent Powered Performance engine supports the design, governance and deployment of AI agents within Workday's ASOR, providing verified identities, audit controls, ROI tracking and alignment with tenant-specific rules. PwC embeds these agentic capabilities into Application Evolution Services to support continuous post-production optimisation.

Caution

PwC can pair its cybersecurity and assurance strengths with Workday Extend to build native security audit tools for APAC clients, while making regional proof, local case studies, outcomes and market-specific differentiation more visible.





Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Workday Ecosystem study analyzes the relevant Workday 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.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of August 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies

Author



Megha Dodke
Lead Analyst

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, Salesforce 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.

Research Analyst



Arnab Das
Research Analyst

Arnab is a Research Analyst at ISG, supporting and co-authoring Provider Lens studies such as ServiceNow, Workday, Enterprise Service Management (ESM), and NVIDIA. He works closely with lead analysts throughout the research lifecycle, contributing to study development, market analysis and the creation of enterprise context and global summary reports that highlight industry trends and insights. Arnab supports both primary and secondary research initiatives, ensuring the delivery of high-quality and data-driven research outcomes. He brings over three years of

experience spanning business, technology, and academic research, with a strong background in analysis, writing, and content development.



Author and Editor Biographies

Study Sponsor



Namratha Dharshan
Chief Business Leader – India Research

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence.

As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services.

She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical-focused reports for insurance.

IPL Product Owner



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

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

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



Provider Lens®

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

For more information about ISG Provider Lens® research, please visit this [webpage](#).

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

For more information, visit isg-one.com.





OCTOBER, 2026

REPORT: WORKDAY ECOSYSTEM