

# Workday Ecosystem

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

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### Europe's Workday market enters a new phase of maturity, focused on AI and continuous value

The ISG Provider Lens® Workday Ecosystem 2026 Europe report evaluates how service providers help enterprises navigate Workday-led transformation in a region characterized by diverse regulatory requirements, workforce frameworks and localization needs. The study examines providers' ability to align Workday investments with compliance management, finance modernization, workforce transformation, governance-led AI adoption and multi-region operating models. Providers are assessed across four stages of the Workday lifecycle: transformation services for planning; deployment and integration; ongoing optimization and application management services (AMS); and innovation services. Together, these segments represent the end-to-end lifecycle of Workday adoption, regulatory

alignment and business value realization across Europe.

The Workday ecosystem in Europe is entering a new phase of maturity. Enterprises are increasingly moving beyond the initial objective of migrating HR and finance processes to the cloud and are focusing on how Workday can support continuous transformation, productivity improvement and better business outcomes.

This reflects the market's progression since the previous year, when enterprises began shifting their focus from cloud adoption toward optimization, innovation and AI-enabled transformation. In 2026, this transition has become more evident. Workday programs are increasingly viewed as ongoing transformation journeys rather than technology implementations with a defined endpoint.

#### Market Context

#### AI moves from experimentation toward practical adoption

AI has become the most significant technology shaping the Workday ecosystem. The conversation, however, is changing.

Europe's Workday  
**market** is **shifting**  
from successful  
deployment to  
continuous **value**  
**creation.**



## Executive Summary

Enterprises are moving beyond experimentation and are increasingly seeking avenues to operationalize AI responsibly.

Workday's expanding AI portfolio across areas such as recruitment, talent intelligence, EX, enterprise knowledge, document intelligence and agents is creating new opportunities. Meanwhile, the rapid pace of innovation presents enterprises with a challenge: they have access to new functionality but lack a clear strategy for prioritizing capabilities, adapting processes and measuring benefits.

As a result, enterprises demand advisory services that connect AI investments with business processes and outcomes. Rather than starting with the technology, more mature approaches begin by identifying friction points, repetitive activity or poor EX and then determine areas where automation or AI can improve the process.

This represents an important change in the market. Developing copilots, assistants, or individual AI use cases is no longer sufficient to demonstrate leadership in innovation.

The focus is shifting to whether AI can eliminate unnecessary work, improve decision-making, simplify employee interactions and deliver measurable operational benefits.

AI is also beginning to reshape Workday service delivery. Providers are embedding AI into requirements gathering, configuration, testing, data conversion, documentation and application management. This shift could reduce implementation efforts and improve quality. However, it also raises expectations around implementation speed and cost.

### **Agentic AI begins to reshape the operating model**

Agentic AI is emerging as the next stage of this evolution. Enterprises are exploring environments where multiple specialized agents can execute activities across Workday and other enterprise applications.

This shift changes the nature of Workday transformation. Historically, organizations primarily focused on configuring processes within an application. The emerging challenge

is to determine how people, applications and AI agents should work together across an end-to-end process.

Workday's Agent System of Record (ASOR) is becoming relevant in this context as enterprises consider how first-party, partner-developed and third-party agents can operate within governed enterprise environments. The development of agentic capabilities is also encouraging ecosystem partners to rethink their own solutions and intellectual property.

The implications extend beyond HR. Agentic environments require closer collaboration among HR, finance, IT, security, legal and risk functions. This shift broadens stakeholder involvement in Workday transformation and increases the importance of capabilities such as enterprise architecture, integration, AI governance and change management.

These considerations are particularly important in Europe. Organizations remain sensitive to how employee and enterprise data is used, where it is processed and how automated decisions are governed. AI adoption, therefore,

must progress alongside strong governance, transparency and security.

### **Workday Financial Management broadens the transformation opportunity**

Workday's European ecosystem has historically centered around HCM. However, Financial Management is emerging as an important growth opportunity.

Providers report rising interest in finance transformation, particularly among organizations seeking tighter integration of HR, finance, planning and analytics. This opportunity is increasingly evident in the public sector, higher education and services-based industries.

This development has strategic implications for the ecosystem. Workday transformation increasingly involves both the chief human resources officer (CHRO) and the chief financial officer (CFO) priorities, creating opportunities to connect workforce decisions with financial planning and enterprise performance. It also changes the capabilities enterprises expect



from providers. Technical Workday expertise must increasingly be combined with finance transformation knowledge, operating model experience, data expertise and industry understanding. The result is a gradual shift from Workday implementation capability toward broader enterprise transformation capability.

### **European regulation creates opportunities for innovation**

Europe's regulatory environment continues to shape the regional market. However, regulation increasingly drives innovation rather than being a constraint that needs to be addressed during implementation.

For instance, under the EU Pay Transparency Directive, requirements around identifying, explaining and addressing pay gaps are creating demand for new analytics, reporting and remediation capabilities. Similar opportunities are emerging around AI governance, employee data and country-specific workforce requirements.

Such European regulations create an opportunity for the ecosystem to translate

regulatory requirements into reusable solutions rather than addressing them repeatedly through custom development.

Workday Extend, Built on Workday and the expanding AI environment provide mechanisms through which partners can develop applications, accelerators and agents addressing regional requirements.

European regulatory expertise can, therefore, become a source of intellectual property and differentiation. Providers that combine regulatory knowledge with Workday engineering capabilities can help clients respond more quickly while reducing the complexity associated with country-specific requirements.

### **Enterprise Priorities**

#### **Enterprise expectations shift toward continuous value**

The shift in Workday ecosystem is changing enterprise expectations from their Workday partners. Implementation quality, certified talent and technical expertise remain important; however, these capabilities have

become the baseline. Enterprises now seek partners that can help them determine what to transform, simplify existing processes, accelerate adoption of new capabilities and demonstrate measurable value from their Workday investments.

Across Europe, three themes stand out: AI is approaching mainstream adoption, continuous optimization is becoming integral to the Workday lifecycle and industry- and region-specific innovation is emerging as a prominent differentiator.

### **Transformation becomes broader and more business-led**

Workday transformation is increasingly extending beyond HR technology implementation. Enterprises are viewing operating models, process redesign, workforce strategy, finance transformation, data and AI as interconnected priorities.

This is moving advisory capabilities further upstream. Transformation engagements increasingly begin with questions around

business outcomes and operating models before detailed technology decisions are made.

As a result, implementation methodologies are evolving. Traditional requirements-heavy approaches are gradually being complemented with pre-configured environments, industry templates, process libraries and automation. This approach allows enterprises to see working configurations earlier and spend more time discussing business decisions rather than documenting basic requirements.

The emphasis on standardization is also growing. Enterprises increasingly recognize that excessive customization can increase complexity and make it harder to adopt future Workday innovations. Providers, therefore, encourage clients to adopt leading practices and simplify processes wherever possible.

For European organizations, however, standardization must coexist with localization. Multinational enterprises need common processes while accommodating country-specific requirements related to payroll, employment practices, language, regulation



and works councils. The ability to balance these requirements remains an important characteristic of the European Workday market.

### **Continuous optimization becomes part of the Workday lifecycle**

The role of post-production services is also changing. Traditional application management focused primarily on maintaining the platform, resolving tickets and supporting Workday releases. Enterprises are increasingly expecting more.

Organizations prefer partners that identify underused functionalities, simplify processes, improve adoption, introduce new modules and continuously evaluate new Workday capabilities. As the pace of platform innovation increases, the ability to absorb change becomes almost as important as maintaining the existing environment. This is creating a closer relationship between deployment and managed services. Workday implementation is increasingly followed by stabilization, optimization, expansion and subsequent transformation initiatives.

The objective is therefore shifting from maintaining Workday to continuously improving the value generated from it.

This evolution also changes how enterprises should evaluate optimization partners. Scale, service coverage and technical expertise remain relevant, but proactive advisory, automation, innovation adoption and the ability to measure improvement are becoming more significant differentiators.

### **Provider Dynamics**

#### **Innovation moves from accelerators toward reusable solutions**

Innovation within the Workday ecosystem is becoming more sophisticated. Historically, many providers differentiated through implementation accelerators, templates and integration libraries. Although these still remain valuable, the market is increasingly moving toward reusable applications, industry solutions and AI agents.

Workday Extend and Built on Workday are central to this change. Providers are using

these capabilities to address functionality gaps, create industry-specific applications and develop solutions that can be deployed across multiple customers.

Industry specialization is consequently becoming more visible. Providers are investing in approaches tailored to sectors such as financial services, healthcare, professional services, retail, manufacturing, government and higher education.

This represents a shift in competitive differentiation. Consulting expertise, certifications and delivery scale remain important. However, intellectual property is becoming another measure of ecosystem maturity.

The strongest innovation propositions increasingly combine industry expertise, reusable assets and Workday technology to address a clearly defined business issue. The ability to commercialize these innovations and demonstrate repeatable customer adoption will become increasingly important.

### **European ecosystem becomes more interconnected**

Europe continues to have a diverse provider ecosystem comprising global system integrators, consulting organizations and specialist Workday providers. Each brings different strengths and the distinction between these groups is becoming less rigid.

Large providers are developing more specialized industry and regional propositions, while specialist firms are expanding their lifecycle capabilities, delivery capacity and intellectual property. Partnerships, acquisitions and combinations of global scale with specialist Workday expertise are also reshaping parts of the competitive landscape.

Meanwhile, Workday transformation is increasingly extending beyond the Workday environment. Enterprises operate complex technology landscapes involving payroll, workforce management, hyperscalers, productivity platforms, CRM systems and other enterprise applications.



## Executive Summary

AI will make these connections even more critical. Agents are unlikely to operate within a single enterprise application. Providers will therefore need to demonstrate how Workday integrates into a broader enterprise architecture without compromising governance and security.

### Outlook

#### Next phase is about continuous value

The European Workday ecosystem is moving beyond a market defined primarily by implementation. The next phase will increasingly be defined by how effectively enterprises can extract continuous value from the platform.

AI and agentic capabilities will accelerate this transition, but technology alone will not determine success. Enterprises will need to redesign processes, simplify operating models, establish governance, improve adoption and continuously measure outcomes.

The role of providers will change accordingly. Enterprises will increasingly expect partners to combine transformation advisory, industry

knowledge, regional and regulatory expertise, implementation capabilities, continuous optimization and innovation.

Commercial models may evolve as well. As AI agents become embedded in business processes, traditional effort-based models may gradually be complemented by consumption-, outcome- or value-oriented constructs.

For European enterprises, selecting a Workday partner will increasingly depend on the value that a provider can deliver throughout the lifecycle, not solely on its implementation abilities.

The market is shifting from a focus on deploying Workday successfully toward making the platform continuously more useful, intelligent and valuable. The providers that can connect technology innovation with measurable business outcomes, while addressing Europe's regulatory and organizational complexities, will be best positioned for the next phase of growth.

Implementation quality and certified Workday talent remain essential. However, they are becoming less differentiating. Leading practices increasingly integrate transformation advisory, industry expertise, reusable intellectual property, AI-enabled delivery and continuous optimization to create value throughout the Workday lifecycle.





## Provider Positioning

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|                | 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                           | Contender                             | Rising Star ★         |
| 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                             | Contender             |
| Hexaware       | Product Challenger      | Product Challenger                  | Product Challenger                    | Product Challenger    |
| HR Path        | Leader                  | Leader                              | Leader                                | Product Challenger    |
| IBM            | Market Challenger       | Market Challenger                   | Market Challenger                     | Market Challenger     |





## Provider Positioning

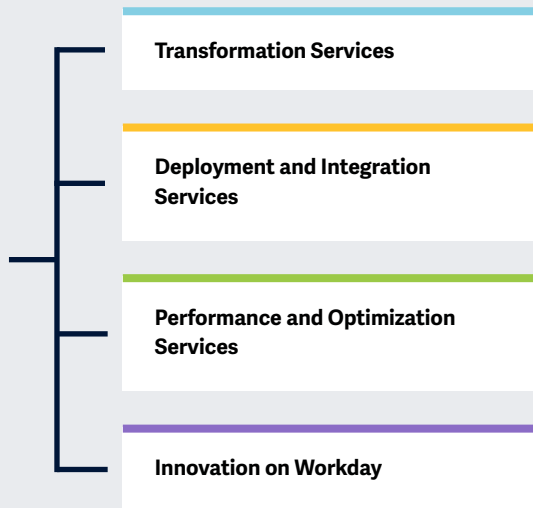
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|          | Transformation Services | Deployment and Integration Services | Performance and Optimization Services | Innovation on Workday |
|----------|-------------------------|-------------------------------------|---------------------------------------|-----------------------|
| Infosys  | Product Challenger      | Product Challenger                  | Product Challenger                    | Product Challenger    |
| Invisors | Rising Star ★           | 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                                | Contender             |
| PwC      | Leader                  | Leader                              | Leader                                | Leader                |
| Strada   | Leader                  | Leader                              | Leader                                | Leader                |
| TCS      | Product Challenger      | Product Challenger                  | Leader                                | Product Challenger    |
| UST      | Product Challenger      | Product Challenger                  | Product Challenger                    | Product Challenger    |
| Vivicta  | Product Challenger      | Product Challenger                  | Market Challenger                     | Contender             |



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, HR and finance decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the European 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 **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 transformation leaders

Strategy and transformation leaders should read this report to understand how Workday focused transformation services are evolving in Europe. 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.

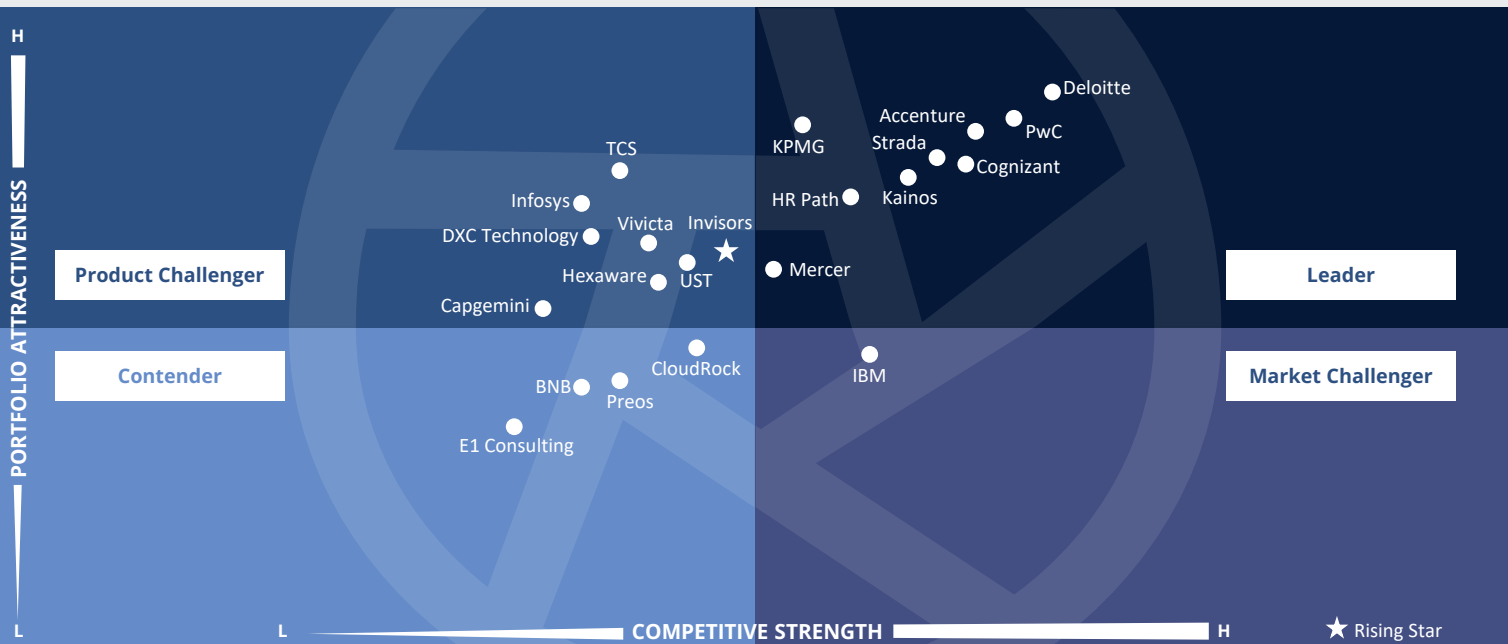
### Business and functional leaders

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 evaluates providers delivering Workday **transformation** services, focusing on business-led advisory, **AI readiness**, operating model redesign and industry expertise to drive **measurable value** and sustained adoption.

Gaurang Pagdi



### 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 organizational change management expertise** to support stakeholder alignment, determine workforce readiness and foster adoption enablement
5. **Demonstrate experience in driving Workday adoption and value realization**, including use optimization 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**



## Transformation Services

### Observations

Workday transformation services in Europe are moving beyond technology modernization toward business-led, continuous transformation. Enterprises expect providers to connect Workday investments with operating model redesign, process simplification and measurable outcomes across HR and finance.

Advisory engagements increasingly use diagnostics, benchmarking and value frameworks to establish priorities before deployment. Industry expertise is also gaining importance as enterprises seek solutions reflecting sector-specific processes, regulations and operating models rather than generic platform transformation.

AI is becoming central to transformation roadmaps, with the focus shifting from experimentation to practical adoption. Providers are helping clients identify high-value use cases, assess AI readiness and redesign processes around Workday AI, Sana and emerging agentic capabilities. As agents

span Workday and other enterprise platforms, governance, data security and responsible AI are becoming key priorities in Europe.

Change management is evolving as AI changes roles, workflows and employee interactions. Adoption, skills development and organizational readiness are being embedded earlier in the lifecycle rather than being treated as deployment activities.

Transformation services are also becoming lifecycle-oriented. Providers increasingly connect strategy, deployment, optimization and innovation through multi-year roadmaps, with value measurement extending beyond go-live. Leading approaches combine business advisory, industry knowledge, AI strategy and continuous value realization, positioning Workday as an evolving enterprise platform rather than a one-time implementation.

From the 23 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and one a Rising Star.

### accenture

**Accenture** blends strategy, organizational change and agentic AI to deliver Workday-led transformations for European enterprises, sustaining value well beyond go-live.



**Cognizant** integrates outcome-driven advisory and whole-landscape transformation expertise, embedding AI readiness into HR and finance change programs to help European enterprises realize sustained Workday value.

### Deloitte.

**Deloitte's** business-led transformation model connects Workday change to tax, legal and finance advisory, blending AI-infused delivery with deep industry accelerators to drive lasting outcomes across Europe.

### HR Path

**HR Path** combines Eaton Square's advisory depth with acquisition-fueled scale to deliver Workday-led HR and finance transformations, recently proven by a landmark multi-country enterprise win in a competitive process.

### KAINOS &CO

**Kainos** anchors every Workday engagement across Europe in mandatory readiness programs and a dedicated advisory team, pairing verticalized accelerators with change enablement to drive sustainable transformation.



**KPMG** blends its Velocity methodology with the Powered Enterprise model to connect strategy, industry operating models and Workday-driven cloud transformation, helping regulated European enterprises modernize HR and finance with measurable outcomes.



## Transformation Services

### Mercer

**Mercer** integrates human-centric transformation with Workday-native tools such as Mercer Assure to align HR strategy, organization design and EX from the outset of every engagement.



**PwC** drives agentic-first transformation with a right-to-left, outcome-led methodology, combining industry depth, finance heritage and Workday's AI capabilities to reimagine operating models across Europe.

### Strada

**Strada** anchors transformation in business value realization, combining UX vision and rigorous diagnostics to translate HR and finance strategies into measurable outcomes for clients across Europe.



**Invisors (Rising Star)** takes a consultative, challenge-first approach to Workday transformation in Europe, guiding clients toward full-platform strategies that align HR, finance and project operations with long-term business value.



# PwC



"PwC's outcome-driven, right-to-left approach to agentic transformation enables European enterprises to redesign HR and finance operating models, creating value beyond traditional Workday deployments."

*Gaurang Pagdi*

## Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue, with Advisory as its largest segment. PwC's core differentiator is its One Firm approach, providing a full range of services across the entire firm to maximize client value from its Workday investment. This approach extends beyond system configuration and integration to incorporate its Future of HR vision, leveraging AI and agentic AI to support HR in evolving toward more strategic roles.

## Strengths

### Managed services-led transformation:

PwC increasingly integrates transformation initiatives with long-term managed services by embedding finance, HR, tax and payroll specialists with Workday consultants. This approach enables midmarket clients to move rapidly from a minimum viable product (MVP) deployment into continuous operations backed by gain-share commercial models that align PwC's incentives with long-term outcomes.

**Regional delivery expansion:** PwC continues to expand across DACH, Benelux, the Nordics, Ireland, Poland, the Middle East and South Africa, supported by delivery hubs, including its South African Technology Acceleration Centre. This footprint allows PwC to pair mature market expertise with emerging market delivery capacity, giving

clients access to both deep local regulatory knowledge and cost-efficient execution.

**Industry-anchored playbooks:** PwC builds on model tenants developed for professional and business services, insurance and financial services, including pension funds. It packages sector-specific content and agentic capabilities into repeatable transformation playbooks.

**Outcome-first transformation:** PwC's right-to-left approach begins with targeted business outcomes and works backward to deconstruct operating-model decisions into discrete components. It applies maturity, reversibility and risk-based criteria to determine which decisions can be managed by agents and which require human oversight, enabling workflow redesign rather than simply overlaying automation on top of existing processes.

## Caution

As PwC's right-to-left methodology extends from early anchor accounts to a wider client base, converting the agentic operating model philosophy into a scalable commercial framework will be key to securing transformation mandates across the market.





# Deployment and Integration Services

## Who Should Read This Section

This report is valuable for 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 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.

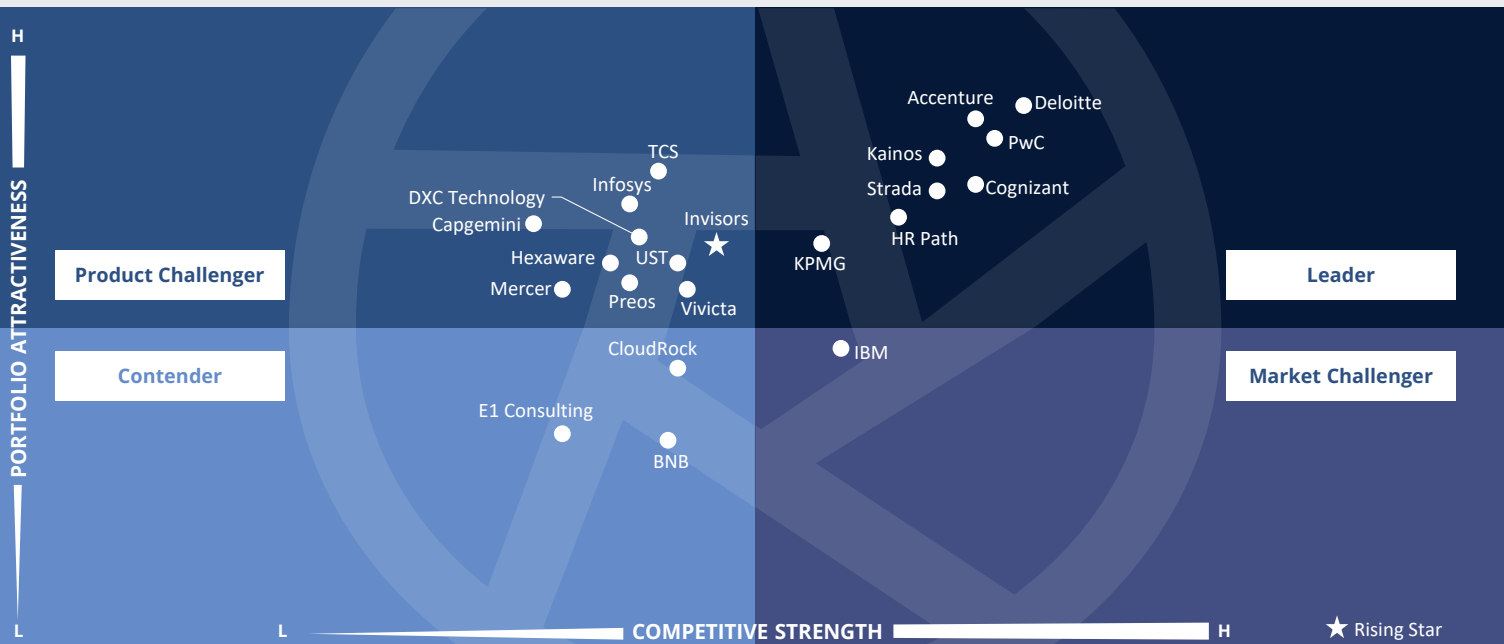
### Business leaders

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 delivering Workday **deployment and integration** services, focusing on **AI-enabled delivery**, industry accelerators and integration expertise to enable **rapid, scalable deployments** and accelerate time-to-value.

Gaurang Pagdi



## 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, optimize 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

Workday deployment and integration services in Europe are evolving toward rapid and increasingly standardized and automation-led delivery. Enterprises increasingly expect providers to reduce implementation complexity and time-to-value while maintaining the quality, governance and localization required for multi-country environments.

Pre-configured solutions, industry templates and reusable integration libraries are becoming central to deployment strategies. Providers are encouraging greater adoption of Workday standard processes, limiting unnecessary customization and enabling clients to interact with configured environments earlier. Workday GO platform is also strengthening the focus on more standardized, lower-complexity deployments for midmarket organizations.

AI is beginning to reshape delivery itself. Providers are applying GenAI and automation across requirements, configuration, documentation, data conversion and testing. Automated test creation and validation are reducing manual effort, while AI-assisted

delivery tools are creating opportunities to improve productivity, consistency and deployment speed.

Integration requirements are also becoming broader as Workday connects with payroll, ERP, CRM, workforce management and enterprise AI ecosystems. This increases the importance of scalable architectures, orchestration and reliable data flows across platforms.

European deployments continue to require a balance between global standardization and local requirements across payroll, regulation, language and employment practices. Leading approaches integrate reusable assets, AI-enabled delivery, integration depth and local expertise to accelerate deployments without compromising control or long-term scalability.

From the 23 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and one a Rising Star.

### **accenture**

**Accenture** delivers fast, AI-enabled Workday rollouts with clean data migration and deep integrations into ERP, payroll and HR systems, tailored to European compliance through certified talent at scale.



**Cognizant's** Platinum Workday partnership, early access to emerging Workday technologies and multi-system integration environment help European clients deploy connected, AI-enabled Workday landscapes at scale.

### **Deloitte.**

**Deloitte's** Ascend platform embeds AI across configuration, integration and testing, significantly compressing Workday tenant build times while Accelerate industry tenants' speed complex, compliant deployments across Europe.

### HR Path

**HR Path** combines its new First Light rapid deployment methodology with an expanding pan-European delivery footprint and new Workday reseller status to accelerate rollouts for enterprises of varying scale and complexity.



**Kainos** combines its Spark Hub build accelerator with a bundled Kainos Live delivery channel and an expanding delivery footprint across Europe, APAC and LATAM to deploy Workday HCM, finance and planning services at scale.



**KPMG** delivers scalable, repeatable Workday deployments across HR and finance by combining Velocity-driven methodology, local regulatory knowledge, global templates and deep industry experience across European markets.



## Deployment and Integration Services



**PwC** accelerates Workday deployments across Europe through phase-zero blueprinting, AI-enabled delivery and regional hubs, combining finance-led rigor with agentic tooling to accelerate time-to-value.

### Strada

**Strada** combines a global delivery network with industry verticalization and an 80-20 point of view, giving European clients rapid, predictable Workday deployments.



**Invisors (Rising Star)** offers competitive, full-platform Workday deployments in Europe by combining delivery-led client engagement with deep functional expertise across HR, finance and project-based operations.



# PwC



"PwC's phase-zero blueprinting and AI-enabled delivery model provide European clients with a clear, de-risked path from vendor selection to go-live, backed by strong regional delivery hub capabilities."

*Gaurang Pagdi*

## Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue, with Advisory as its largest segment. PwC is at the forefront of leveraging GenAI to revolutionize Workday's implementations and enhance its Application Evolution Services (AES). Using GenAI, the company automates document generation for workbooks, integration design documents and test cases, significantly reducing project ramp-up time. PwC continually invests in accelerators and tools that enhance the quality of Workday deployments and reduce risk.

## Strengths

**Phase-zero blueprint discipline:** PwC's phase-zero approach emphasizes early discovery by converting client pain points into a costed blueprint outlining team structure, timelines and expected effort before deployment starts. This gives clients across Europe greater clarity into staffing requirements and investment decisions ahead of go-live.

**AI-enabled delivery acceleration:** PwC integrates GenAI and agentic tooling throughout its delivery lifecycle, from automated documentation to testing activities. This helps shorten delivery timelines while allowing consultants to focus on configuration decisions and change readiness.

**Regional delivery hub scale:** Through a network of delivery centers spanning multiple European markets, PwC blends cost efficiency with local regulatory and language expertise across multi-country rollouts. This distributed model allows PwC to scale project teams up or down based on program complexity, without compromising on local compliance knowledge or client-facing continuity.

**Vendor-partner alignment:** PwC positions itself alongside Workday as a single, unified voice throughout vendor selection and delivery. This helps reduce ambiguity around responsibility boundaries between the platform and implementation partner for enterprises across Europe.

## Caution

As agentic delivery reshapes deployment economics, PwC has an opportunity to define how phase-zero blueprinting and AI-enabled acceleration serve as a differentiated commercial model as it expands this approach across its regional delivery hubs in Europe.





# Performance and Optimization Services

## Who Should Read This Section

This report is valuable for 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 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.





This quadrant evaluates providers delivering Workday **performance and optimization** services, focusing on **proactive AMS**, continuous innovation, AI-enabled automation and value realization to improve **adoption, performance** and long-term platform value.

Gaurang Pagdi



## Performance and Optimization Services

### Definition

The Performance and Optimization Services quadrant evaluates Workday service partners on their ability to operate, optimize 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, personalization, 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

Workday performance and optimization services in Europe are evolving from traditional application support toward continuous value realization. Enterprises increasingly expect providers to proactively improve their Workday environments, accelerate adoption of new capabilities and ensure the platform evolves alongside changing business priorities.

The scope of AMS engagements is expanding beyond ticket resolution, release management and configuration support. Providers are using health checks, benchmarking and utilization assessments to identify process inefficiencies, underused functionalities and opportunities for module expansion. This approach is driving a more advisory-led model in which providers regularly refresh optimization roadmaps and link them to business outcomes.

AI and automation are reshaping service delivery through automated testing, intelligent ticket resolution, release impact assessment and proactive monitoring. At the same time, Workday's expanding AI and agentic capabilities are creating a new optimization

priority as enterprises seek guidance on which innovations to activate and how to integrate them into existing processes.

The boundaries among AMS, optimization and transformation are blurring. Providers increasingly use post-go-live relationships to support process redesign, innovation adoption and subsequent transformation initiatives.

Leading approaches combine operational reliability with proactive advisory, automation, adoption and measurable value improvement. The focus is shifting from keeping Workday operational to continuously improving how effectively enterprises use the platform and realize ROI.

From the 23 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders.

### **accenture**

**Accenture** sustains Workday performance through analytics, governance and AI-driven automation beyond go-live, applying deep finance and HR expertise to optimize processes for European clients.



**Cognizant** delivers a composable range of AMS models, from dedicated teams to shared services and staff augmentation, backed by AI-enabled support and its experience servicing Workday's internal tenant.

### **Deloitte.**

**Deloitte's** Workday Operate blends AI-driven automation with functional depth, helping clients extract sustained value from Workday, including turning around and expanding sub-par implementations across Europe.

### HR Path

**HR Path** complements its growing implementation footprint with expanding post-go-live support and a dedicated AI team exploring agentic capabilities in Workday, backed by a fast-scaling Workday practice.

### **KAINOS &CO**

**Kainos** sustains Workday performance through a dedicated, service-manager-led AMS model and its patented Smart Suite of Test, Audit and Shield tools, driving measurably higher client satisfaction across Europe.



**PwC** extends Workday value through Application Evolution Services and its Workday Tomorrow community, combining AI-enabled managed services with continuous platform evolution across Europe.



## Performance and Optimization Services

### Strada

**Strada's** holistic cloud support model spans transformation, application support, optimization and enablement, helping European clients continuously extend Workday value.



**TCS** brings years of Workday application management experience, delivered through staff augmentation and shared delivery models, reinforced by a direct Workday partnership that broadens its post-go-live support capabilities.





"PwC's Application Evolution Services and Workday Tomorrow community help clients realize value beyond go-live by embedding agentic managed services and fostering peer learning to sustain long-term Workday outcomes."

*Gaurang Pagdi*

## Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue, with Advisory as its largest segment. PwC's AES Digital Worker, an industry-leading GenAI-powered solution, acts as a digital assistant for managed services. The solution supports incident resolution and knowledge management and offers skills comparable to a support analyst with 5 to 7 years of experience. It aims to shift efforts from reactive support to the proactive evolution of the application to drive value.

## Strengths

**Structured post-deployment engagement:** PwC's Application Evolution Services offering addresses the common challenge of limited value realization after go-live. This service delivers continuous improvement, adaptation and scaling of the Workday platform through structured post-deployment engagement across Europe.

**Agentic managed services:** PwC integrates AI agents into managed services delivery across finance and HR. The firm works with blended human-agent teams under joint IP arrangements with clients and increasingly uses gain-share models that tie PwC's returns to measured outcomes rather than time and materials.

**Peer learning and support:** PwC's Workday Tomorrow event series brings European clients together to discuss adoption challenges and platform functionalities. This initiative extends PwC's value proposition through peer learning and community-driven guidance.

**Integrated multi-platform support:** PwC recognizes that clients operate multiple enterprise platforms alongside Workday. Therefore, its optimization approach extends beyond Workday AI to deliver value across a client's broader technology estate.

## Caution

As gain-share pricing becomes central to PwC's managed services strategy, a clearer value-attribution framework across human and agent contributions could support more consistent scaling across Europe.





# Innovation on Workday

## Who Should Read This Section

This report is valuable for 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

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.

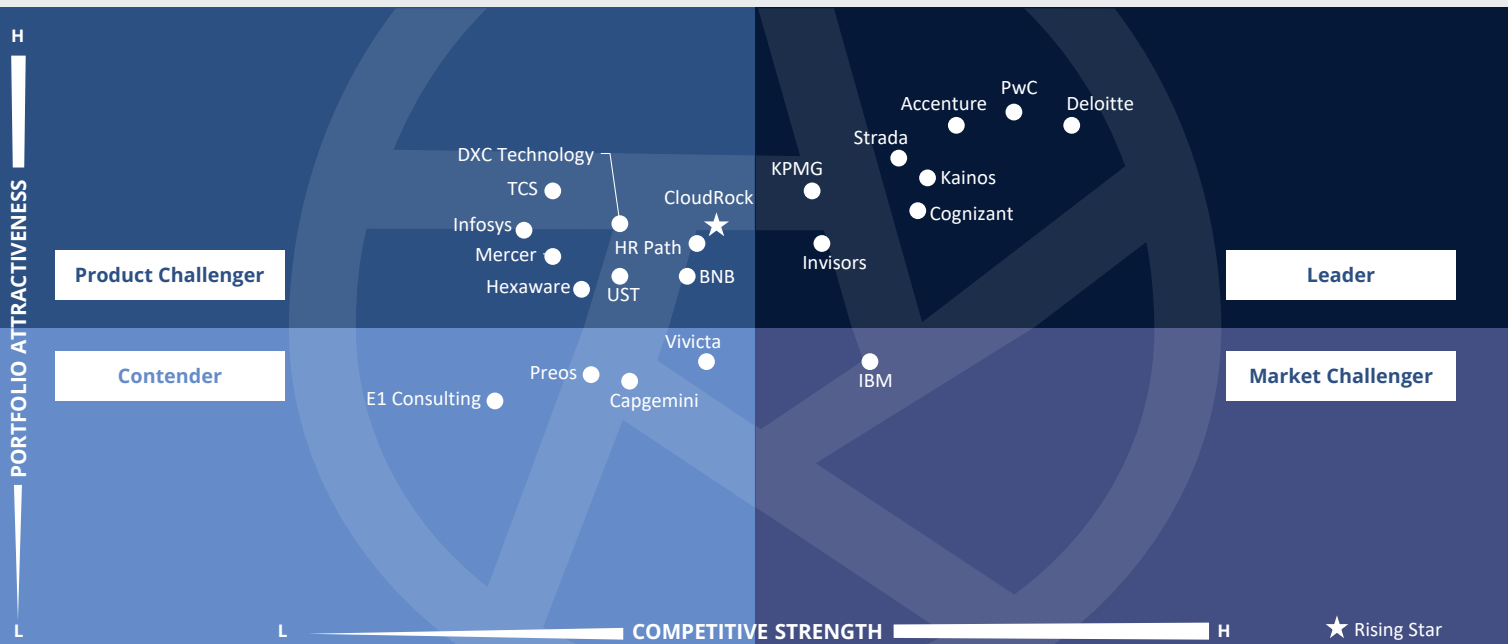
### Architecture and engineering teams

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 delivering **innovations on Workday**, focusing on **AI and agentic solutions**, reusable applications and industry-specific intellectual property that extend platform capabilities and deliver **measurable business value**.

Gaurang Pagdi



## 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

In Europe, innovations on Workday are expanding beyond accelerators and custom applications toward reusable solutions, AI-enabled experiences and agentic workflows. Providers are increasingly using Workday Extend, Built on Workday, Prism and emerging AI capabilities to address functional, industry and regional requirements while creating repeatable intellectual property.

Agentic AI is becoming a major innovation theme. Providers are developing agents that automate multi-step activities, surface insights and initiate actions across HR and finance processes. Innovation is also extending beyond Workday as enterprises explore how Workday agents can interact with agents and applications across their broader technology environments, thereby increasing the importance of orchestration and governance.

Industry specialization is gaining ground. Providers are developing solutions for sectors such as financial services, healthcare, professional services, higher education and the public sector. In Europe, regulatory

requirements such as pay transparency, data privacy and AI governance are also creating opportunities for region-specific applications and agents.

Co-creation with Workday and clients is helping providers identify platform gaps and convert successful client solutions into reusable offerings. However, the market is increasingly moving beyond measuring innovation through the number of applications or accelerators developed.

Providers demonstrate strong innovation through solution adoption, repeatability and measurable outcomes. Increasingly, this requires combining Workday-native technology, AI, industry knowledge and reusable intellectual property to solve business problems and extend the platform's value.

From the 23 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and one a Rising Star.

### accenture

**Accenture** drives Workday innovation via Extend, custom applications and agentic AI co-developed through Workday's ASOR and AI Marketplace, helping European clients unlock new value.



**Cognizant's** early adoption of Workday innovations, multi-system agent environment and role servicing Workday's own tenant reflects a deep, trusted partnership driving Workday innovation across Europe.

### Deloitte.

**Deloitte** drives Workday innovation through Agent System of Record co-design, a Google triple-play agent marketplace and Extend-based hackathon-winning applications that drive AI capability across HR and finance.

### invisors

**Invisors** pairs early, deep engagement with Workday's newest AI and extensibility tools with a disciplined, industry-specific application strategy, positioning it as a first mover on agentic AI, Extend and Built on Workday innovation.

### KAINOS & CO

**Kainos** leads Workday co-innovation as an early design partner on Prism, Built on Workday and its Agent System of Record, turning its Pay Transparency Analyzer and agentic Smart Suite into ecosystem benchmarks.



**KPMG** combines Workday Extend and Prism innovation with a fast-growing agentic AI portfolio, including its Ignite Financial Close Companion and KPMG Workbench. These capabilities position it among Workday's named global system integrator partners for enterprise AI agent deployment.



## Innovation on Workday



**PwC** drives innovation through agentic operating model design, decision-unbundling methodology and Built on Workday applications, helping European enterprises scale AI beyond isolated pilots.

### Strada

**Strada** pairs deep Workday Extend expertise with reusable design patterns and emerging AI tooling to help European clients close platform gaps and scale innovation.

### CloudRock

**CloudRock (Rising Star)** drives Workday innovation through a growing Extend application portfolio and a proprietary prioritization framework, backed by hackathon recognition and early marketplace traction for its Built on Workday solutions across Europe.



# PwC



Leader

“PwC’s decision-unbundling methodology and growing library of Built on Workday apps position it at the forefront of agentic innovation, helping clients across Europe scale AI beyond isolated pilots.”

Gaurang Pagdi

## Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue, with Advisory as its largest segment. Instead of building a vast library of small, functional apps, PwC focuses on creating hero applications that address complex, board-level issues such as ESG reporting and global tax reform. This strategy aligns perfectly with its brand and allows it to engage with clients on highly strategic, high-margin initiatives. This approach differentiates the company from partners focused on more operational or administrative app development.

## Strengths

**Built on Workday app investment:** PwC continues to invest in its Built on Workday innovation CoE, developing apps tailored to client and industry requirements. These apps connect end-to-end business solutions, including regulatory and compliance use cases relevant to Europe. This investment reflects a long-term commitment to co-developing with Workday rather than relying solely on the core platform.

**Decision-unbundling methodology:** PwC has developed a proprietary approach that segregates an organization’s workflows into discrete decisions, classifies each by reversibility, risk and maturity to determine those that can be handed to AI agents and those requiring human judgment. Rather than layering automation onto existing

human operating models, this approach reconstructs workflows from first principles, enabling clients across Europe to define guardrails suited to their readiness and regulatory context before determining where agents can take on decision-making responsibility.

### Cross-ecosystem agentic orchestration:

Recognizing that clients run Workday alongside other enterprise platforms, PwC is building orchestration capabilities that span multiple agentic ecosystems to design coherent, enterprise-wide operating models. This broader lens helps clients avoid siloed, platform-specific automation and pursue a unified agentic strategy across their full technology estate.

## Caution

As agentic transformation evolves from function-specific proof points toward enterprise-wide redesign, balancing standardization, scalable offerings and the bespoke capabilities that differentiate its work will shape PwC’s value proposition for clients across Europe.





# Appendix

The ISG Provider Lens® 2026 – Workday Ecosystem study analyzes the relevant Workday service providers in the European 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



**Gaurang Pagdi**  
**Lead Analyst**

Gaurang brings over 22 years of experience in the Finance & Accounting (F&A) domain, having led delivery operations for industry leaders in Banking, Telecom, and E-Commerce. He has also served as a Digital Transformation Consultant with an F&A fintech, working with clients across diverse industries.

His expertise spans delivery excellence and business transformation, extending beyond digital transformation to encompass process and people transformation—offering a holistic approach to building future-ready businesses.

At ISG, Gaurang leads multiple research studies, including those on F&A, Workday ecosystem, Human Resources Outsourcing, and Global Capability Centers (GCCs). His research focuses on the intersection of customer experience, digital transformation, analytics, AI, and automation.

### 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](https://isg-one.com).





**OCTOBER, 2026**

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**REPORT: WORKDAY ECOSYSTEM**