IDC MarketScape

IDC MarketScape: Worldwide Digital Workplace Services 2026 Vendor Assessment

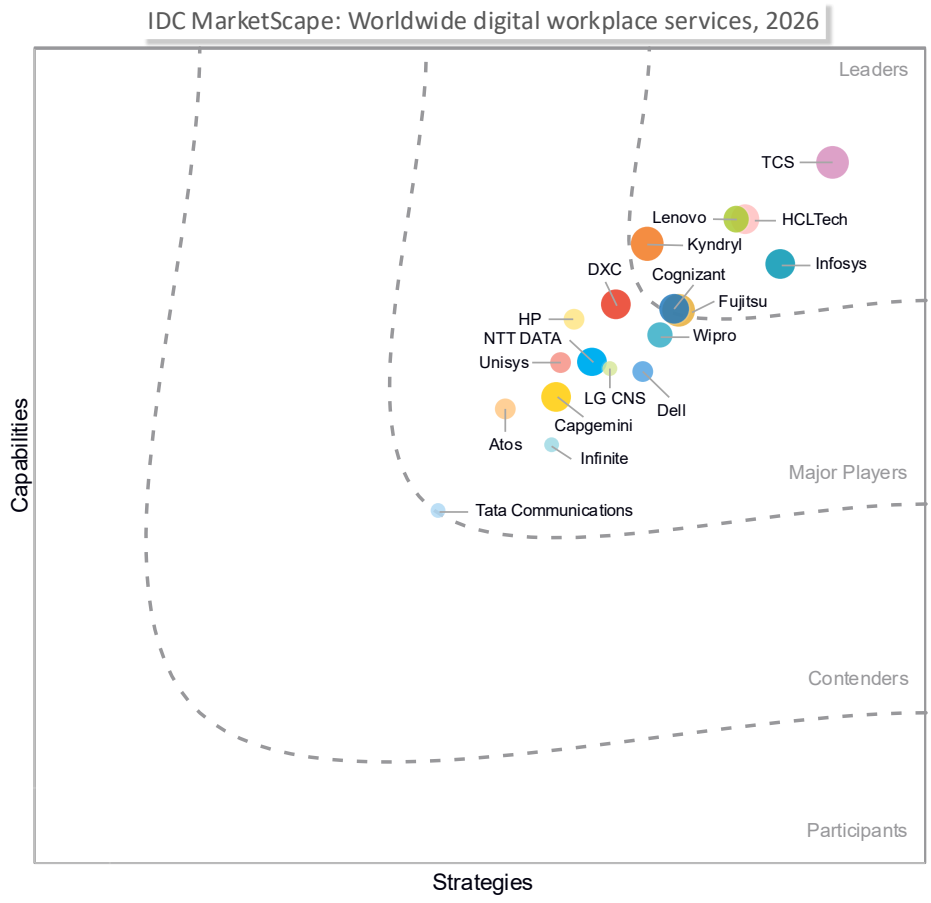
Pushkaraksh Shanbhag

THIS EXCERPT FEATURES KYNDRYL AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide digital workplace services 2026 vendor assessment



Source: IDC, 2026

September 2026, IDC #US54119026e

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Digital Workplace Services 2026 Vendor Assessment (Doc # US54119026).

IDC OPINION

Using the IDC MarketScape model, IDC assessed 18 vendors providing digital workplace services (DWS). The assessment reveals a market at a critical turning point. Agentic AI has moved from pilot to production for a meaningful share of providers, experience-level agreements (XLAs) are edging into contract language, and buyers increasingly judge providers on outcomes rather than head count. Even so, this shift is uneven. Of the vendors assessed, just about half carry contractual XLA deployment beyond a moderate level, and only a small subset backs their agentic AI capability with a fully codified, production-grade responsible-AI governance framework. The market is moving toward outcome-led, AI-enabled delivery, but it has not yet arrived there.

Interim data from IDC's *Worldwide Leading Indicators Survey* (September 2026) of 200 enterprises that currently procure external digital workplace services reinforces this picture from the buyer side. Nearly all respondents report their provider using GenAI or agentic AI in delivery to some degree, but only 46.5% describe that use as extensive across most delivery functions, with the rest confined to specific functions such as the service desk. On experience commitments, 65.5% of current DWS contracts still carry no XLA elements at all, even though demonstrated AI and agentic delivery capability and the availability of XLA and outcome-based commercial terms now rank among the top 3 criteria buyers use when selecting or renewing a provider. Buyer demand has outpaced what most contracts currently reflect, and IDC expects an imminent shift in contracting for DWS.

IDC's assessment of aggregated feedback from verified customer references submitted as part of this study suggests that vendors generally executed well on the following:

- Delivering on committed service strategy and following through on execution
- Day-to-day effectiveness of DWS project and service delivery
- Overall satisfaction with the vendor relationship and service delivered

In contrast, on pricing and cost management, average customer feedback was lowest and most variable across vendors. This was one area in the customer-reference data where feedback ranged from adequate to excellent depending on the vendor, making it the clearest area of client-perceived differentiation among referenced providers. Customer confidence in a vendor's broader portfolio strategy and perception of its innovation and

thought leadership were also comparatively softer, though more consistent across vendors than pricing.

Two further findings stand out from this assessment cycle, both pointing to the same broader theme: vendors are further along in building AI and experience capability than they are in operationalizing it at depth. First, personalization across the market still runs primarily on predefined persona templates rather than continuously learning, AI-driven models. Among vendors reporting a personalization approach, template-based personalization accounts for roughly 70% of the mix on average, against roughly a quarter for AI-driven adaptive personalization, and even the vendors furthest along still lean more on defined templates than on adaptive models. Second, AI governance has not kept pace with AI capability. Fewer than a third of assessed vendors back their AI and agentic tooling with a fully codified, production-grade responsible-AI governance framework, and most have a governance model that is less formally developed than the AI capability it is meant to oversee. Both findings point to a market still converting AI ambition into a fully operationalized, at-scale practice, and buyers should expect to see this gap when they assess vendors.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The inclusion of vendors in this IDC MarketScape is determined by their ability to meet the following conditions:

- **Revenue scale:** Minimum $200 million in annual DWS revenue globally, or at least $100 million with strong regional market presence and enterprise client relevance
- **Geographic coverage:** Delivery capabilities in at least two global regions (Asia/Pacific including Japan [APJ]), Europe, the Middle East, and Africa (EMEA), and the Americas (AMS]), or strong leadership in a single global region with demonstrated support for multinational enterprise clients
- **Capability breadth:** Demonstrated capabilities across multiple DWS domains, including a combination of consulting, transformation, managed services, field services and support, communication and collaboration, employee experience, and AI-enabled workplace services

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC offers the following recommendations to buyers evaluating providers of DWS:

- **Push for contractual experience commitments.** Most providers can describe an experience-level framework, but only about half of the vendors in this assessment have moved that framework into broad contractual deployment, and most live buyer contracts today carry no XLA elements at all. Ask providers for the share of their active books under contractually binding XLAs with financial consequences, not just the existence of a framework.
- **Treat AI governance as a selection criterion.** AI and agentic capability is now close to universal at some level, but a codified, production-grade responsible-AI governance framework is not, as this study found. With AI-specific risk management now a top 3 selection factor for over a quarter of buyers surveyed, ask providers how agent behavior is monitored, escalated, and audited in live operations, not just how it is designed.
- **Expect hybrid and outcome-based commercial models to keep gaining ground.** Buyers surveyed expect subscription models blended with consumption or outcome elements to grow from 18% to 30% of primary DWS pricing over the next two years, with outcome-based and gainshare models also rising. Fixed-price and per-seat models are both expected to shrink over the same period. Providers still anchored to legacy pricing constructs may be less prepared for where buyer preference is heading.
- **Match AI-enablement priorities to your own operational pain points.** Buyers surveyed rank software asset and license optimization, service desk and L1/L2 support, and virtual desktop and DaaS operations as the areas where they most want GenAI or agentic AI enablement. Evaluate a provider's AI-enabled coverage specifically in the functions that matter most to your environment, rather than on general AI messaging.
- **Use this evaluation in your vendor selection process.** Use this IDC MarketScape as a tool not only to short-list vendors for DWS engagements but also to evaluate vendor proposals and presentations. Each vendor profile in this study details strengths and challenges identified through the assessment, along with guidance on when to consider that provider, and should be read alongside this Opinion to understand where a given vendor sits relative to the field.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Kyndryl

According to IDC analysis and buyer perception, Kyndryl is positioned in the Leaders category in the IDC MarketScape: Worldwide Digital Workplace Services 2026 Vendor Assessment.

Kyndryl Holdings Inc. (Kyndryl) approaches DWS through its Connected Experience proposition, built on three themes of experience, security, and sustainability, and delivered through a combination of Kyndryl Consult for design and strategy and Kyndryl Bridge, its AIOps platform, for operations. The vendor's central point of view is that workplace outcomes should start with employees rather than technology, framing employee experience as a chain that runs from devices and networks through security, applications, and cloud to the end customer. This experience-first, security-by-design posture reflects Kyndryl's heritage in managing large, complex, mission-critical IT environments.

Kyndryl organizes its portfolio around a Connected Experience Framework spanning three domains: Access (devices and workspaces, including virtual and cloud PCs), Productivity (platforms, collaboration, workflows, and data), and Support (self-help and contact through AI agents, assistants, and live channels). The framework is anchored by a central Digital Twin and delivered through a model that combines AI-enabled colleague productivity, an AI-powered digital front door, and tailored in-person support such as concierge services, IT bars, and branch engineering. Kyndryl Bridge sits at the center of delivery, with the vendor reporting that the vast majority of its workplace customers are onboarded to the platform.

AI, automation, and governance are core to Kyndryl's model. The vendor has built an agentic AI capability through an agentic workflow orchestration layer and an LLM orchestrator, supported by an intelligent employee console and a people-and-agent workforce model. Kyndryl delivers automation of service requests and incidents through a combination of DEX, Agentic Workflow Orchestration, Virtual Assistants, and Kyndryl Bridge AIOps. Its responsible AI approach is a particular strength, combining AI-native security, policy-as-code, regulator-ready audit trails, HITL controls, and data sovereignty, reflecting a security-and-governance posture designed for regulated environments.

Experience management is mature and contractually embedded. Kyndryl operates a foundational, multidimensional XLA measurement model spanning joiner-mover-leaver, colleague productivity, and support experience tailored to industry (e.g., Branch

Experience), and it has structured engagements in which experience outcomes are tied to commercial risk/reward. The vendor supports flexible, AI-era commercial models, including resource-unit-based, consumption, and outcome- and XLA-linked pricing, and maintains a broad partner ecosystem across Microsoft, ServiceNow, AWS, and Google, including early alignment with Microsoft's agentic workplace initiatives.

Strengths

Security, governance, and experience leadership. Kyndryl pairs an AI-native security and responsible AI framework, with policy-as-code, regulator-ready audit, and data sovereignty, with a mature, contractually embedded XLA model. This combination of governance rigor and quantified experience management suits regulated enterprises running large, mission-critical estates.

Platform-anchored delivery with Kyndryl Bridge. Kyndryl Bridge provides an AIOps and orchestration backbone that the vast majority of the vendor's workplace customers are onboarded to, supporting substantial automation of requests and incidents, as well as a coherent Connected Experience Framework across access, productivity, and support.

Partnership, accountability, and single-partner breadth (customer-validated). Reference clients consistently valued Kyndryl as a collaborative, accountable partner that behaves as an extension of their own IT organization, citing responsiveness, flexibility, and the ability to consolidate a wide array of services under one provider. This points to durable, relationship-led delivery on complex, multi-service engagements.

Challenges

Revenue and growth trajectory. Kyndryl's overall revenue has been in decline, even as its consulting and modern-work practices grow. Converting its experience-led, security-anchored proposition and Kyndryl Bridge momentum into sustained top-line growth will be a top business priority.

Proactive innovation and depth of automation in delivery (customer-validated). Reference clients opined that Kyndryl could be more proactive in suggesting innovations and build more automation and AI into its service offerings, including AI-empowering its own delivery teams, and one noted that XLA discipline could be applied more consistently. Turning its agentic and automation capabilities into consistently proactive, self-driven service improvement will help Kyndryl deepen the value clients realize.

Consider Kyndryl when

Consider Kyndryl when you are a large or regulated enterprise running complex, mission-critical estates and seeking an experience-led, security-by-design workplace partner with a mature XLA model, a strong AIOps and orchestration platform, and consulting-plus-managed-services delivery under end-to-end accountability.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

This IDC MarketScape exercise is a result of detailed vendor assessment with information gathered from vendor responses to IDC's request for information (RFI) questionnaire, vendor briefings and sharing sessions, customer references, and IDC's internal research on the subject.

Although the 18 vendors evaluated and profiled in this study are important participants in the Worldwide Digital Workplace Services market, the list is not exhaustive and there are other significant vendors that might merit consideration based on your specific needs.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

Market definition

IDC defines DWS as the set of business and IT services that are focused on the planning, building, running, and/or supporting of digital workplace technology solutions, including personal computing devices, smart office devices, and UC&C tools. They are aimed at simplifying the management of the enterprise workplace technology environment, improving productivity through the extensive use of automation, analytics, GenAI, and increasingly agentic capabilities.

This includes the use of GenAI and agentic capabilities to enable conversational support, knowledge discovery, digital adoption, proactive issue prevention, workflow orchestration, personalization of employee interactions, and autonomous or semi-autonomous resolution of workplace tasks.

The following is a representative list of DWS domains covered in this study. These domains are not necessarily exclusive.

- Workplace strategy, consulting, and transformation
- Modern endpoint and workplace engineering
- Collaboration, communications, and smart workplace services
- Workplace and device life-cycle services (service management, support, field services)
- Employee experience, adoption, analytics, and continuous improvement
- AI-enabled and agentic workplace services, governance, and orchestration
- Workplace security, sustainability, and inclusivity
- Frontline and deskless work environments

LEARN MORE

Related research

- *IDC Survey: Worldwide Future of Work Trends for 2026* (IDC #US54338426, March 2026)
- *IDC MarketScape: European Human-First Digital Workplace Services 2025 Vendor Assessment* (IDC #EUR153005325, November 2025)
- *IDC FutureScape: Worldwide Future of Work 2026 Predictions* (IDC #US53859325, October 2025)
- *IDC Survey: Digital Workplace Services Trends* (IDC #US53380225, July 2025)
- *IDC MarketScape: Worldwide Digital Workplace Services 2024 Vendor Assessment* (IDC #US51812324, November 2024)

Synopsis

This IDC study represents a vendor assessment of providers offering digital workplace services (DWS) through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demand and expected buyer needs across the DWS market. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to defined criteria. The framework highlights the key factors expected to matter most for success in the DWS market, both in the short and long term.

"Digital workplace vendors have moved agentic AI from pilot to production faster than they have moved AI governance from concept to codified practice. Buyers should treat a provider's ability to govern AI in live operation as seriously as its ability to deploy it," says Pushkaraksh Shanbhag, senior research director, Worldwide Services, IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

Copyright and trademark notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit idc.com/about/offices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2026 IDC. Reproduction is forbidden unless authorized. All rights reserved.