

Public Sector Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators



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Australia is advancing citizen-centric, technology-enabled services while adopting AI and strengthening trust

Australia's public sector is currently undergoing a significant and multifaceted transformation, primarily motivated by the imperatives of embracing digital modernisation, delivering services that are centred around the citizen experience and achieving enhanced operational efficiency. This large-scale change is driven by the evolving expectations of Australian citizens, who increasingly demand straightforward, reliable and digitally enabled government services, and complex socio-economic issues that necessitate agile and integrated responses from public institutions. Consequently, Australia's public sector organisations are facing several enduring challenges, including outdated legacy IT infrastructure, fragmented and siloed data environments, critical workforce skills deficiencies and cultural resistance to change. However, there is a prevailing

commitment within government entities to leverage technology advancements and establish strategic partnerships, most notably with service providers, to bridge these gaps and accelerate the modernisation agenda.

This digital shift within Australia's public administration landscape is not simply about adopting the latest technologies; it represents a thorough reimagining of how government services are conceptualised, designed, delivered and ultimately experienced by citizens. The official 2030 Data and Digital Government Strategy embodies this vision, articulating clear objectives to make public services simple, secure and connected for all Australians through enhanced data and digital capabilities. While Australia maintains a strong position on global digital government performance indices, there remain substantial discrepancies between citizen demand for fully digital, user-friendly interactions and the extent to which online public service engagement is facilitated. Research indicates that over 90 percent of Australians prefer digital interactions with government services. However, only approximately 79 percent of service contacts

Australia prioritises
digital trust, agile
procurement,
local expertise
and the
promotion of
innovation.



Executive Summary

currently occur via digital channels. Addressing this service delivery gap is critical for increasing citizen satisfaction and convenience and generating significant government cost savings and efficiency improvements, which industry estimates suggest could translate into billions of dollars saved and millions of citizen-hours reclaimed each year.

Among the central obstacles to this transformation are the persistent reliance on legacy IT systems that are both outdated and siloed, fundamentally restricting interoperability and hindering secure information sharing across multiple government departments and agencies. These fragmented data ecosystems contribute to inefficiencies and weaken the ability of policymakers and frontline staff to base decisions on comprehensive and integrated evidence. According to feedback from the public sector workforce, the challenge of accessing cohesive data on time severely compromises the capacity to deliver effective, responsive citizen services. Furthermore, many employees lack the digital skills and competencies to fully engage with modern technology platforms.

At the same time, resistance to change at both leadership and operational levels slows the pace of ongoing transformation initiatives. The simultaneous need for procurement reform and workforce realignment exacerbates the broader complexity. For example, shifting away from contractor-heavy resourcing models to building stronger internal, permanent capabilities compounds constraints on progress.

In this challenging environment, service providers have become indispensable collaborators in the public sector's transformation journey. These providers deliver comprehensive services and solutions addressing foundational challenges impeding modernisation efforts. For instance, providers facilitate the accelerated decommissioning of legacy systems through dedicated investment frameworks and structured programmatic support. They also enable cloud migration using multicloud and hybrid cloud deployment strategies that enhance scalability, flexibility and service continuity. On the cybersecurity front, providers offer robust, scalable security frameworks that align with stringent Australian government standards, thereby protecting

sensitive citizen data and maintaining system integrity. Additionally, managed service providers (MSPs) supply flexible workforce augmentation solutions, effectively bridging talent gaps by supplementing internal teams with specialised skills and expertise, while supporting the strategic transition toward permanent staffing structures.

Engaging these providers' partnerships, public sector organisations gain the agility to adopt robust procurement approaches. This agility allows governments to circumvent the traditionally lengthy and rigid contracting cycles through managed services and time-and-materials vendor panels. Such contracts improve project delivery times and allow better cost control, while ensuring that intellectual property generated during service development remains under government ownership. Furthermore, MSPs bring valuable experience in integrating siloed data environments by instituting cross-agency digital cells, which are collaborative working groups that promote efficient data sharing, standardise privacy protocols and enable seamless provision of personalised, citizen-centric services.

Operational efficiencies emerge from deploying new technologies and service providers' enabled service enhancements. Examples include AI-driven customer engagement platforms that improve interaction quality and responsiveness, sophisticated fraud detection systems that protect government revenue streams and citizen information, and workflow automation tools that streamline routine processes and free staff for more strategic tasks. Such innovations allow governments to reallocate resources toward value-added activities, while enhancing service accessibility and user satisfaction. Additionally, service providers offer critical support in navigating the complex regulatory and compliance environments surrounding data privacy and security in the public sector, as the landscape is evolving rapidly with increasing expectations from citizens and regulators alike, which is fundamental to sustaining public trust amid expanded digital service delivery.

Simultaneously, the public sector workforce is transforming with demographic shifts and changing work preferences. Younger generations within the public sector place



Executive Summary

a high value on flexible working conditions and digital fluency, prompting calls for reforms incorporating hybrid and remote work modalities, supported by resilient and secure digital infrastructure. Service providers contribute significantly to this workforce evolution by managing outsourced functions that alleviate pressure on internal teams, enabling staff to focus on strategic priorities. These providers also offer training and change management services that ease the adoption of new technologies and foster a digital-first mindset among government employees, which is essential for successful transformation.

Cross-jurisdictional and interdepartmental collaboration represents another imperative trend within Australia's public sector transformation, necessary to address wide-ranging social and environmental challenges such as climate change, public health and cyberthreats. With their comprehensive technology expertise and project management capabilities, service providers facilitate such multifaceted collaboration by harmonising technology platforms, standardising data exchange protocols and enabling integrated

whole-of-government service delivery models. This approach aligns closely with increasing citizen expectations for personalised, flexible public services, moving beyond traditional one-size-fits-all models toward tailored engagement options that respect individual preferences and needs.

Australia's public sector transformation is anticipated to deepen its reliance on data-driven decision-making and leverage cutting-edge technologies, such as AI and ML, to anticipate citizen requirements proactively and optimise governance processes. Service providers will continue to play a crucial enabling role in this evolution by mitigating structural inertia and skill shortfalls, ensuring scalability and security and fostering continuous innovation. This partnership supports a collective vision of more responsive, efficient, citizen-focused public services, consistent with Australia's democratic values and socio-economic development aspirations.

In conclusion, the modernisation of Australia's public sector is defined by the need to overcome entrenched legacy system dependencies, workforce challenges and

cultural resistance to change. Service providers are pivotal in addressing these multifaceted barriers by delivering specialised technical expertise, enabling procurement flexibility, supporting workforce transformation and driving the development of integrated, data-enabled and citizen-centric service frameworks. Their contribution is instrumental in converting public sector digital modernisation efforts into tangible operational efficiency improvements and delivering enhanced value to citizens nationwide.

Australia's public sector is redefining service delivery by harnessing AI, data-driven insights and strategic collaborations. With a heightened focus on climate resilience, ethical digital transformation and inclusive policy, governments are fostering real-time, transparent and citizen-centric experiences. Rising social and environmental challenges are driving innovation, trust-building and agile, adaptive governance across all essential services.





Provider Positioning

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	Strategy and Consulting Services	Managed IT Services	Business Process and Other Outsourcing Services	Digital Transformation and Innovation Services
AC3	Leader	Leader	Not In	Leader
Accenture	Leader	Leader	Leader	Leader
Atos	Contender	Market Challenger	Product Challenger	Product Challenger
Bentley Systems	Contender	Not In	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader
Coforge	Not In	Not In	Not In	Product Challenger
Cognizant	Market Challenger	Product Challenger	Product Challenger	Product Challenger
Concentrix	Not In	Not In	Leader	Not In
Data#3	Not In	Not In	Not In	Leader
Datacom	Contender	Contender	Contender	Contender





Provider Positioning

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	Strategy and Consulting Services	Managed IT Services	Business Process and Other Outsourcing Services	Digital Transformation and Innovation Services
Deloitte	Leader	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Market Challenger	Market Challenger	Market Challenger	Market Challenger
EY	Product Challenger	Not In	Product Challenger	Product Challenger
Fujitsu	Leader	Market Challenger	Product Challenger	Market Challenger
IBM	Leader	Leader	Product Challenger	Leader
Infosys	Leader	Leader	Leader	Rising Star ★
Kinetic IT	Product Challenger	Product Challenger	Not In	Not In
KPMG	Leader	Product Challenger	Market Challenger	Product Challenger
Leidos	Not In	Contender	Not In	Contender
Mastek	Not In	Not In	Not In	Leader





Provider Positioning

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	Strategy and Consulting Services	Managed IT Services	Business Process and Other Outsourcing Services	Digital Transformation and Innovation Services
NEC	Product Challenger	Contender	Contender	Contender
NRI	Leader	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Market Challenger	Market Challenger	Not In	Market Challenger
Optus	Not In	Not In	Leader	Not In
Probe Group	Not In	Not In	Leader	Leader
Scyne	Product Challenger	Not In	Not In	Not In
Serco	Product Challenger	Not In	Leader	Not In
TCS	Product Challenger	Product Challenger	Leader	Product Challenger
Telstra	Not In	Leader	Not In	Not In
TSA	Not In	Not In	Product Challenger	Not In





Provider Positioning

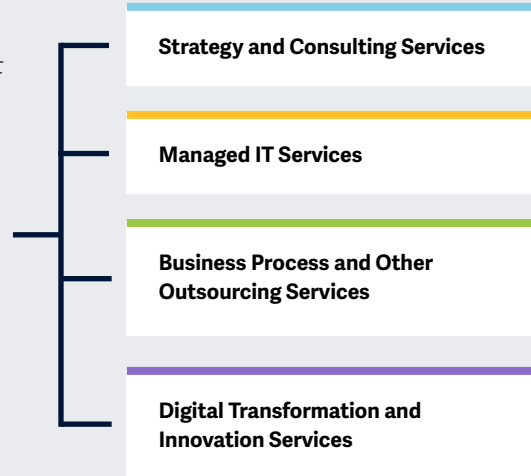
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	Strategy and Consulting Services	Managed IT Services	Business Process and Other Outsourcing Services	Digital Transformation and Innovation Services
Unisys	Product Challenger	Contender	Not In	Leader
UST	Not In	Not In	Not In	Contender
Vocus	Not In	Product Challenger	Not In	Not In
Wipro	Not In	Leader	Not In	Not In



Key focus areas of the **Public Sector Services and Solutions 2025** study

Simplified Illustration Source: ISG2025



Definition

The public sector is a cornerstone of economic stability, encompassing government-owned and operated entities that provide essential services and goods to citizens. Unlike the profit-driven private sector, the public sector prioritises citizens' well-being, offering services such as education, healthcare, infrastructure, law enforcement and social services. It is funded primarily through taxes and public financing and its role extends to redistributing resources to reduce disparities and safeguard vulnerable populations. This sector ensures access to fundamental needs, promotes social justice and fosters economic growth.

Historically, the public sector has been pivotal in developing infrastructure and fostering regional balance, particularly in countries such as India during its post-independence era. It has been instrumental in creating employment opportunities, advancing R&D and driving socioeconomic growth across underserved regions. Investing in utilities, transportation networks and industrial projects, the public

sector has bridged gaps left by private enterprises unwilling to venture into non-profitable areas.

The sector improves citizens' lives by safeguarding public properties such as national parks and libraries while maintaining internal security through law enforcement agencies. Public-private partnerships further illustrate their adaptability in leveraging private efficiencies for public benefit.

The study aims to understand the need and importance of public sector services and solutions while understanding providers' capabilities in this rapidly evolving space.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: Strategy and Consulting Services, Managed IT Services, Business Process and Other Outsourcing Services, and Digital Transformation and Innovation Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- Focus on the Australian market

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

Provider Classifications

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

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

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

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

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





Provider Classifications: Quadrant Key

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

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Strategy and Consulting Services

Who Should Read This Section

This report is valuable for providers offering strategy and consulting services in Australia 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.

Contracting Officer's Technical Representatives (COTRs)

Should read this report to evaluate IT providers' technical capabilities and compliance, ensuring contracts meet agency requirements, expected outcomes are delivered and strengthens oversight and accountability, ultimately enhancing the success and integrity of public sector projects.

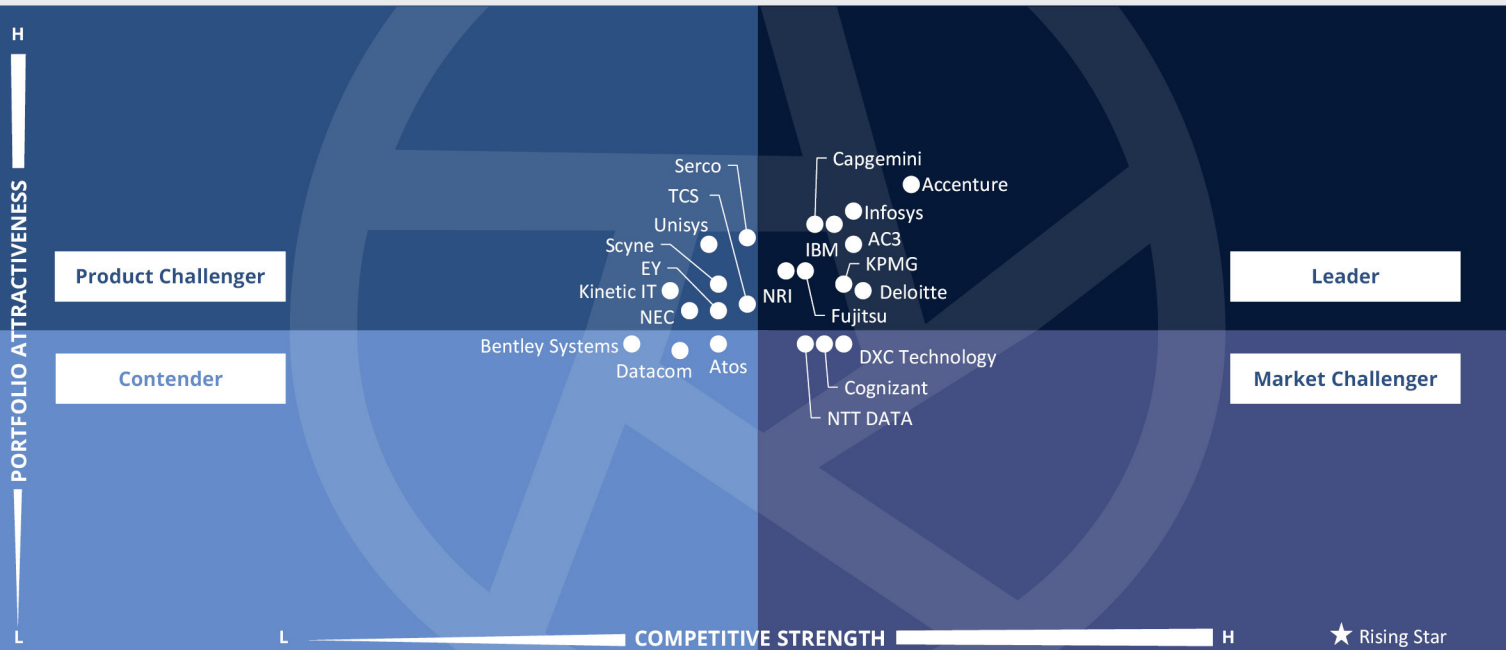
Chief Procurement Officers (CPOs)

Should read this report to gain actionable market insights and supplier benchmarks, enabling them to drive strategic sourcing, negotiate stronger contracts and align procurement with evolving technology trends. This approach supports cost savings, improved supplier value, and advances the agency's strategic objectives.

Category Acquisition Managers (CAMs)

Should read this report to identify top-performing IT service providers, track evolving market conditions, and shape data-driven sourcing strategies. This enables optimized spending, encourages innovation, and reduces category-specific risks, directly supporting effective IT procurement and value creation for their organization.





The quadrant assesses providers that offer services and solutions to help public sector entities **navigate complex challenges** and **enhance performance, security and operational efficiency**, leveraging strategic planning and a systems approach.

Harish B, Varsha Sengar

Strategy and Consulting Services

Definition

Strategy and consulting services in the public sector are vital for governments and entities serving the public sector to navigate complex challenges. These services include specialised expertise, innovative strategies and actionable insights to improve governance, optimise operations and enhance service delivery. By leveraging cutting-edge technologies, strategic planning and a systems approach, consultants help governments streamline processes, reduce inefficiencies and respond effectively to evolving citizen demands and global disruptions such as climate change and economic instability.

Consultants offering strategic management services in the public sector enable organisations to set measurable goals, analyse internal and external factors and adopt frameworks that align with long-term objectives. This structured approach enables organisations to improve decision-making and resource allocation, while allowing accountability and transparency.

The consultants also support organisations in adopting emerging technologies such as AI and blockchain to build agile organisations.



Eligibility Criteria

1. Have **experience providing strategy and consulting services to public sector industry clients** in the relevant region covered in the study
2. Have successfully **engaged with at least three public sector entities** on strategy and consulting services, both past and present
3. Have at least three of the following capabilities related to public sector strategy and consulting:
 - * Proven **track record of delivering government digital strategies**
 - * Familiarity with **public sector regulations and frameworks** such as Protective Security Policy Framework (PSPF) and Information Security Manual (ISM)
 - * Ability to **integrate digital solutions with legacy systems**
 - * **Cost optimisation and efficiency planning** expertise
 - * Capability to **provide vendor-agnostic recommendations**
 - * Strong **data governance and security advisory** services
 - * Experience in **designing AI and automation** road maps
4. Demonstrate **strong partnerships** with industry associations, regulatory bodies, technology firms and startups specialising in the public sector
5. Offer **referenceable public sector use cases** across the value chain
 - * Capacity for **enterprise architecture and IT service redesign**
 - * **Cybersecurity and risk assessment** expertise



Observations

Strategy and consulting services are at the heart of transformation in Australia's public sector in 2025, as government agencies respond to complex policy, economic and societal pressures. Public sector clients are actively seeking expert guidance to prioritise digital transformation, enhance service delivery and address challenges such as fiscal sustainability and evolving citizen needs. Agencies are embracing structured, data-driven frameworks, investing in innovation and streamlining operational processes for greater agility and impact. There is a marked shift toward integrating advanced digital technologies, including AI, cloud and analytics, while embedding cybersecurity and ESG objectives within strategic road maps.

Service providers are increasingly offering customised strategy and consulting solutions to meet public sector needs, advising on reforms, digital adoption, change management and workforce upskilling. They are collaborating closely with agencies, cocreating citizen-focussed initiatives and aligning with policy

and regulatory standards. To boost capabilities, providers are investing in AI, cloud and analytics via acquisitions, securing long-term contracts and forging strategic partnerships. Joint initiatives, digital transformation support and ethical compliance frameworks are coupled with capacity-building programmes to strengthen in-house expertise and reduce external dependency.

From the 34 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.



AC3's end-to-end solutions for cloud migration, data analytics and cybersecurity help government entities improve service delivery, while meeting compliance and security standards. The firm also shows growth through strategic investments, such as the acquisition of JDS Australia in 2024.



Accenture's approach to the public sector integrates digital transformation, technology consulting and strategic partnerships, empowering clients to optimise their IT infrastructure while focusing on core business priorities.



Capgemini distinguishes itself in technology consulting and transformation through a robust approach that enables government clients to embrace cutting-edge technologies aligned with public sector principles.



Deloitte's strong focus on technology and operational consulting supports the public sector's digital transformation by integrating advanced technologies such as AI, IoT, cloud and analytics, enabling increased efficiency, data-driven governance and citizen-centric services.



Fujitsu uses its local presence, market insights and government ties to drive digital transformation in the Australian public sector. Its consulting services focus on sustainability, citizen-centric innovation and long-term value through strategic partnerships.



IBM leverages its Watson AI platform and consulting expertise to provide intelligent solutions for the public sector, enabling predictive maintenance, anomaly detection and intelligent automation for data-driven decision-making and operational efficiency.



Infosys accelerates digital transformation for Australia's public sector through strategic consulting, offering tailored solutions that enhance operational efficiency and citizen engagement, as well as resilience and agility through modern methodologies.



Strategy and Consulting Services



KPMG has a strong legacy in Australia's public sector, offering financial, governance and digital advisory services. Its end-to-end transformation capabilities, including cybersecurity and smart infrastructure, enhance transport, urban mobility and citizen services.



NRI drives secure, policy-driven digital transformation across Australia's public sector by combining global innovation with local insights. Its consulting services cover future-ready architectures, GenAI identity governance, agile delivery and strong partnerships.





Managed IT Services

Who Should Read This Section

This report is valuable for providers offering managed IT services in Australia 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.

Buyer/Senior Buyers

Should read this report to evaluate IT providers' capabilities, pricing, and performance, enabling informed sourcing decisions and effective risk management. This approach ensures cost-efficient procurement, promotes supplier accountability, and aligns purchases with the agency's technology and service objectives.

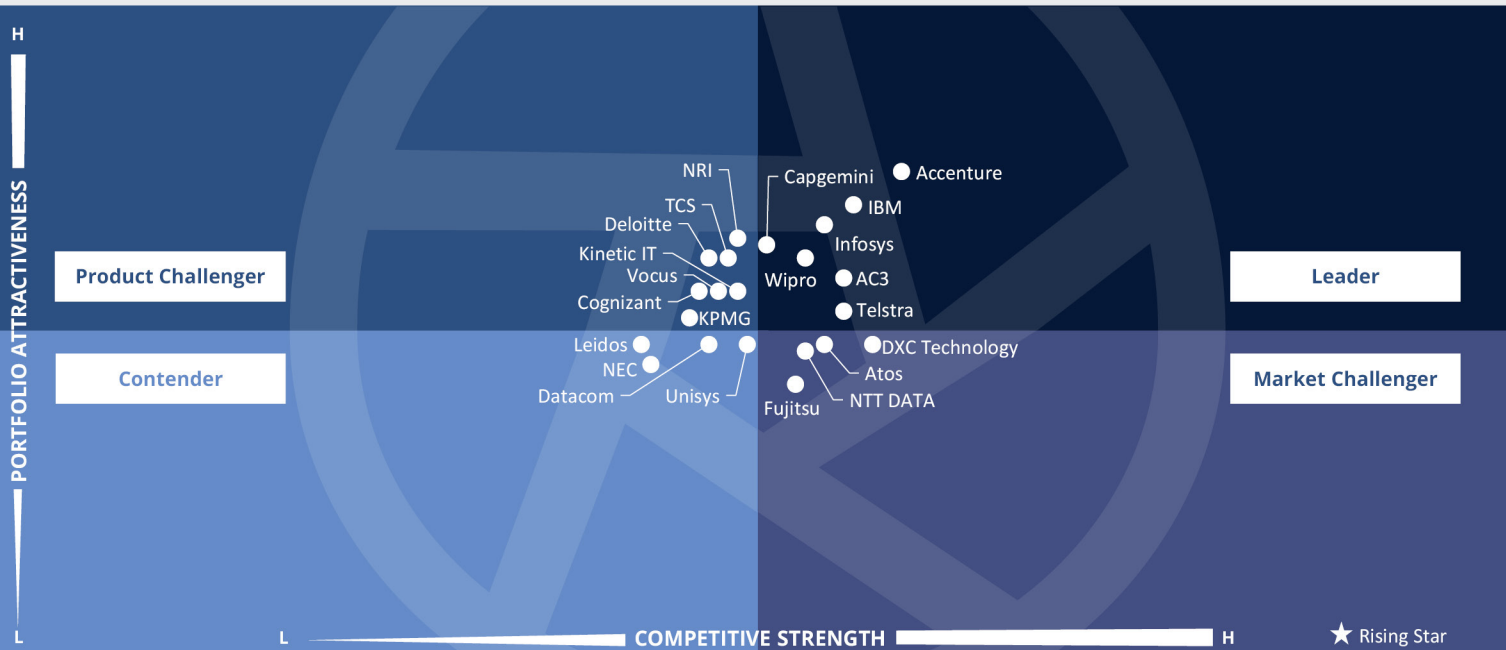
Chief Procurement Officers (CPOs)

Should read this report to gain actionable market insights and supplier benchmarks, enabling them to drive strategic sourcing, negotiate stronger contracts and align procurement with evolving technology trends. This approach supports cost savings, improved supplier value, and advances the agency's strategic objectives.

Category Acquisition Managers (CAMs)

Should read this report to identify top-performing IT service providers, track evolving market conditions, and shape data-driven sourcing strategies. This enables optimized spending, encourages innovation, and reduces category-specific risks, directly supporting effective IT procurement and value creation for their organization.





The quadrant assesses providers that offer services and solutions to help public sector entities **focus** on their **core responsibilities**, ensuring **efficient and secure IT operations** through managed IT services.

Harish B, Varsha Sengar

Definition

Managed IT services play a crucial role in the public sector, offering numerous benefits to government agencies and organisations. These services enable public institutions to focus on their core responsibilities by ensuring efficient and secure IT operations. Public sector entities can control costs, improve service delivery and enhance cybersecurity by outsourcing IT service management.

By offering managed IT services, service providers help public sector organisations adapt to the rapidly evolving digital landscape. These services ensure access to advanced technologies, expertise and resources that could be challenging to maintain in-house due to budget constraints. Service providers enable the modernisation of IT infrastructure, supporting digital transformation initiatives and smart city development. They offer services such as proactive monitoring, maintenance and support to improve organisations' operational efficiency and productivity, while reducing downtime and ensuring the stability of critical systems.

Eligibility Criteria

1. Have **experience providing managed IT services** to public sector industry clients in the relevant region covered in the study
2. Have successfully **engaged with at least three public sector entities** on managed IT services, both past and present
3. Have at least three of the following capabilities related to public sector managed IT services:
 - * Ability to **provide end-to-end IT infrastructure** management (Systems integration, App development and maintenance, data centre, network operations centre and cloud)
 - * Region-specific **service delivery capability** for government security requirements
 - * **Compliance with Australian public-sector specific security standards** such as Protective Security Policy Framework (PSPF) and Information Security Manual (ISM)
 - * Experience in **managing cloud and hybrid IT environments**
 - * **Around-the-clock service desk** and support capabilities
 - * Proven ability to **handle secure data hosting** for government services
 - * **Network and connectivity expertise** for government operations
 - * **Identity and access management** expertise
 - * Experience in **disaster recovery and resilience planning**
 - * Proven capability in **handling large-scale IT operations**
4. **Demonstrate strong partnerships** with industry associations, regulatory bodies, technology firms and startups specialising in the public sector
5. Offer referenceable **public sector industry use cases across the value chain**



Managed IT Services

Observations

Managed IT services in Australia's public sector are undergoing dynamic change in 2025, with government agencies prioritising IT modernisation, secure infrastructure and operational agility to meet evolving policy and citizen demands. Agencies are actively replacing legacy systems, accelerating the adoption of cloud platforms and leveraging AI-driven automation for improved service delivery and efficiency. Cybersecurity continues to be a central concern; agencies are embedding zero trust architectures, conducting regular audits and increasing cyber budgets in response to an uptick in sophisticated threats and regulatory pressure. There is a widespread push for data modernisation and collaboration, as agencies break down information silos to enable seamless data sharing and evidence-based decision-making.

Service providers are responding with scalable, cost-effective solutions, ranging from multicloud management, 24/7 monitoring

and predictive analytics to disaster recovery and robust compliance support. They are also investing in automation, AI-powered threat detection and proactive incident response to deliver continuous improvement and resilience. With workforce and procurement reforms, providers are helping bridge skills gaps in the public sector through specialised expertise and training initiatives, while also facilitating hybrid and remote work models to maximise flexibility and national coverage. This collaborative, innovation-driven environment is empowering government agencies to achieve secure, citizen-centric digital transformation and future-ready operations across all tiers of public services.

From the 34 companies assessed for this study, 22 qualified for this quadrant, with seven being Leaders.

AC3

AC3 has high-value partnerships with AWS, Microsoft and ServiceNow and a team of over 350 certified professionals. Its government-grade security is a core pillar of its managed IT approach.

accenture

Accenture offers robust managed IT services for the public sector, covering cloud, cybersecurity, AI and infrastructure modernisation. Its strong local presence and global network help agencies drive critical digital transformation.

Capgemini

Capgemini drives public sector transformation with application services, blending automation, expertise and strategic alliances. Its innovation focus, along with a robust cybersecurity portfolio and secure infrastructure, strengthens its managed IT service offerings.

IBM

IBM has established a strong presence by delivering managed IT services powered by advanced technologies and AI. Its end-to-end transformation capabilities are supported by a multidisciplinary approach, helping agencies align IT goals while securing digital assets.

Infosys

Infosys delivers transformative managed IT services to Australia's public sector, combining innovation, security and sustainability. Its offerings span ERP, infrastructure and DevSecOps, with a focus on automation and cost-efficiency.



Managed IT Services



Telstra leads in this quadrant with a focus on sustainability, data sovereignty and cybersecurity. Backed by a skilled talent pool, it offers a robust portfolio across application management, cloud, AI and ML, ensuring compliance and innovation in every solution.



Wipro delivers end-to-end tailored managed IT services, backed by a deep understanding of local governance, policies and operational challenges. Through innovation labs and partnerships, Wipro codevelops sector-specific pilot solutions and accelerates digital transformation.





Business Process and Other Outsourcing Services

Who Should Read This Section

This report is valuable for providers offering business processes and other outsourced services in Australia 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.

Buyer/Senior Buyers

Should read this report to evaluate IT providers' capabilities, pricing, and performance, enabling informed sourcing decisions and effective risk management. This approach ensures cost-efficient procurement, promotes supplier accountability, and aligns purchases with the agency's technology and service objectives.

Chief Procurement Officers (CPOs)

Should read this report to gain actionable market insights and supplier benchmarks, enabling them to drive strategic sourcing, negotiate stronger contracts and align procurement with evolving technology trends. This approach supports cost savings, improved supplier value, and advances the agency's strategic objectives.

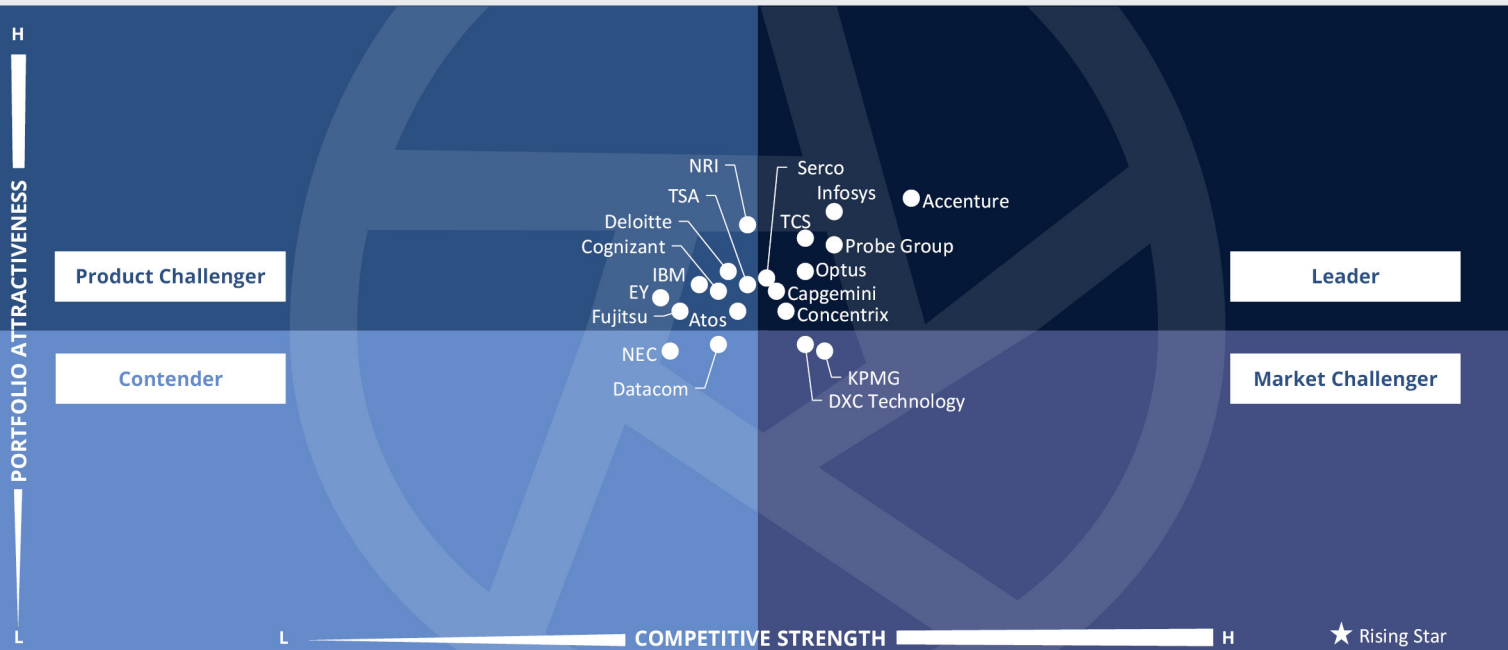
Category Acquisition Managers (CAMs)

Should read this report to identify top-performing IT service providers, track evolving market conditions, and shape data-driven sourcing strategies. This enables optimized spending, encourages innovation, and reduces category-specific risks, directly supporting effective IT procurement and value creation for their organization.



Public Sector Services and Solutions
Business Process and Other Outsourcing Services

Australia 2025



The quadrant assesses providers that offer services and solutions to help public sector entities **enhance efficiency**, reduce costs and **access specialised expertise** by **outsourcing noncore functions**.

Harish B, Varsha Sengar



Business Process and Other Outsourcing Services

Definition

Public sector increasingly relies on business process outsourcing (BPO) and other outsourcing services to enhance efficiency, reduce costs and access specialised expertise. Public sector organisations can focus on their primary objectives, leveraging advanced technologies such as AI and cloud computing, by delegating noncore functions like contact centre, payroll and customer support to external providers. This approach optimises resource allocation and addresses challenges in recruiting highly skilled professionals, especially in areas like data management.

Service providers offer outsourcing services, which fosters competition and innovation among them, often resulting in improved service delivery quality. However, careful management is required to mitigate risks such as contracting failures or reduced service quality in critical areas like healthcare or education.

By assisting public sector organisations in establishing robust SLAs, service providers enable successful outsourcing while ensuring accountability and performance. Public sector outsourcing typically requires successful providers to build capability and delivery centres on shore (rather than offshore) to reskill and upskill local capability and capacity, particularly in regional areas that may attract government incentives to do so.



Eligibility Criteria

1. Have experience **providing business process and other outsourcing services** to public sector industry clients in the relevant region covered in the study
2. Have **successfully engaged with at least three public sector entities** on BPO and outsourced services, both past and present
3. Have at least three of the following capabilities related to public sector BPO and outsourced services:
 - * Experience in **delivering outsourced services** to the region's government organisations
 - * Strong **compliance with data protection and security** regulations
 - * Proven **expertise in handling high-volume citizen services**
 - * **Cost-effective service delivery** with proven efficiency gains
 - * **Robust business continuity** and risk management processes
 - * Secure **handling of sensitive government data**
 - * Experience with **AI and RPA for process automation**
 - * Strong track record in benefits, welfare and HR services
 - * Multichannel citizen engagement solutions (phone, web and mobile)
 - * Capability to **provide scalable workforce solutions**
4. Demonstrate **strong partnerships with industry associations**, regulatory bodies, technology firms and startups specialising in the public sector
5. Offer **referenceable public sector industry use cases** across the value chain



Business Process and Other Outsourcing Services

Observations

BPO services in Australia's public sector are transforming rapidly, driven by the rising demand for digital efficiency, operational agility and enhanced citizen experiences. Public sector organisations are increasingly outsourcing noncore processes, such as customer service, finance and HR, to specialist providers, allowing agencies to focus on policy development and essential services. These organisations are seeking solutions that integrate advanced automation, AI and cloud technologies to improve responsiveness and accuracy.

Service providers are offering end-to-end digital solutions with strong data security, AI-powered tools, predictive analytics and multichannel platforms for personalised, citizen-centric engagement and scalable remote models to support diverse population needs across Australia. Providers are also investing in upskilling their workforce and cocreating

tailored solutions with agencies, ensuring alignment with evolving policy objectives and regulatory requirements.

Key trends include a shift toward performance-based contracts, a heightened focus on cybersecurity and an increasing role for outcome-driven and sustainable BPO models. Embracing innovation and forging strategic partnerships, BPO providers are instrumental in enabling public sector modernisation, operational resilience and improved public trust in essential government services.

A growing emphasis on transparency, accessibility and digital inclusion is shaping BPO strategies. Agencies and providers are collaborating to ensure services are equitable, resilient and aligned with evolving policy and regulatory frameworks, reinforcing trust and long-term value in public service delivery.

From the 34 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders.



Accenture combines domain expertise, intelligent automation and strong local delivery to help public sector agencies modernise citizen services and procurement. Through strategic deal wins and regional investments, it drives efficiency, cost reduction and transformation.



Capgemini supports Australian public sector transformation through citizen-centric BPO services, combining digital platforms, AI and local delivery. Through its public sector labs and design-led delivery models, it codevelops digital solutions with government clients.



Concentrix drives digital transformation across Australia through AI-powered citizen engagement, cloud-native platforms and inclusive service design to enable smarter, more accessible government experiences.



Infosys blends localised delivery, intelligent automation and strategic alliances to support complex government operations. Integrating global best practices with local talent development, Infosys drives future-ready public service ecosystems.



Business Process and Other Outsourcing Services

Optus

Optus drives digital transformation in Australia's BPO landscape through AI-powered platforms, cloud-native solutions and strategic partnerships. Its innovation-led approach enhances citizen services, operational agility and data-driven decision-making.



Probe Group delivers AI- and GenAI-enabled BPO services to Australia's public sector, specialising in citizen engagement and automation-driven contact centres. Backed by a strong local workforce and a digital-first approach, the firm ensures secure, scalable and compliant service delivery.

Serco

Serco, with over 30 years of experience in Australia, delivers BPO services across healthcare, defence, corrections, immigration and citizen engagement. It adopts outcome-based pricing and embeds ESG goals into contracts, targeting net zero operations and science-based emissions reductions.



TCS delivers consulting-led, end-to-end BPO services to state and federal agencies with domain-rich and technology-enabled service models. Through local partnerships and long-term transformation deals, TCS delivers tailored, secure, agile and scalable operations.





"With a strong footprint in Australia and a strategic focus on public sector transformation, Probe Group exemplifies innovation, agility and impact in the BPO landscape, leveraging GenAI, automation and scalable delivery to modernise citizen services."

Harish B, Varsha Sengar

Probe Group

Overview

Probe Group is headquartered in Melbourne, Australia. It has over 2,000 employees dedicated to public sector CX/BPO services, with a majority of its revenue derived from this segment. The company has made strategic investments in platforms such as Genesys Cloud, intelligent automation and CRM technologies to deliver seamless omnichannel citizen experiences. Its delivery model combines onshore, nearshore and offshore capabilities, leveraging local expertise to enhance engagement and responsiveness. Through its Technology and Transformation Services unit, Probe Group supports clients in modernising legacy systems and implementing lean, digitally enabled operations.

Strengths

Citizen-centric solutions: Probe Group, through Probe CX, delivers specialised contact centre services for Australia's public sector, covering citizen engagement, service desk support and multichannel communication. Its domain expertise and scalable infrastructure ensure responsive, compliant service delivery, making it a trusted partner for governments seeking efficient, citizen-centric BPO solutions.

Localised talent strategy: With mergers such as Stellar and acquisitions such as MicroSourcing, Probe Group has become Australia's key homegrown BPO employer, with over 5,800 staff locally and more than 19,000 globally. Its flexible delivery models support evolving public sector needs while ensuring compliance with Australian

data regulations. It invests in workforce engagement, inclusion and upskilling and builds diverse teams with strong domain expertise.

Automated citizen support: Probe Group advances public sector BPO with AI, automation and analytics, enabling smart routing, virtual agents and real-time insights. With enduring partnerships across federal and state agencies, it delivers managed contact centres, debt recovery support, field services and digital platforms. Trusted by entities such as the ATO and Department of Human Services (DHS), the company offers scalable, reliable support for essential citizen services and evolving government needs.

Caution

Probe Group should continue to strengthen its approach to change management and stakeholder enablement to accelerate transformation in traditional government environments. This will enable the company to consolidate its market position in Australia.





Digital Transformation and Innovation Services

Who Should Read This Section

This report is valuable for providers offering digital transformation and innovation services in Australia 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.

Contracting Officer's Technical Representatives (COTRs)

Should read this report to evaluate IT providers' technical capabilities and compliance, ensuring contracts meet agency requirements expected outcomes are delivered and strengthens oversight and accountability, ultimately enhancing the success and integrity of public sector projects.

Chief Procurement Officers (CPOs)

Should read this report to gain actionable market insights and supplier benchmarks, enabling them to drive strategic sourcing, negotiate stronger contracts and align procurement with evolving technology trends. This approach supports cost savings, improved supplier value, and advances the agency's strategic objectives.

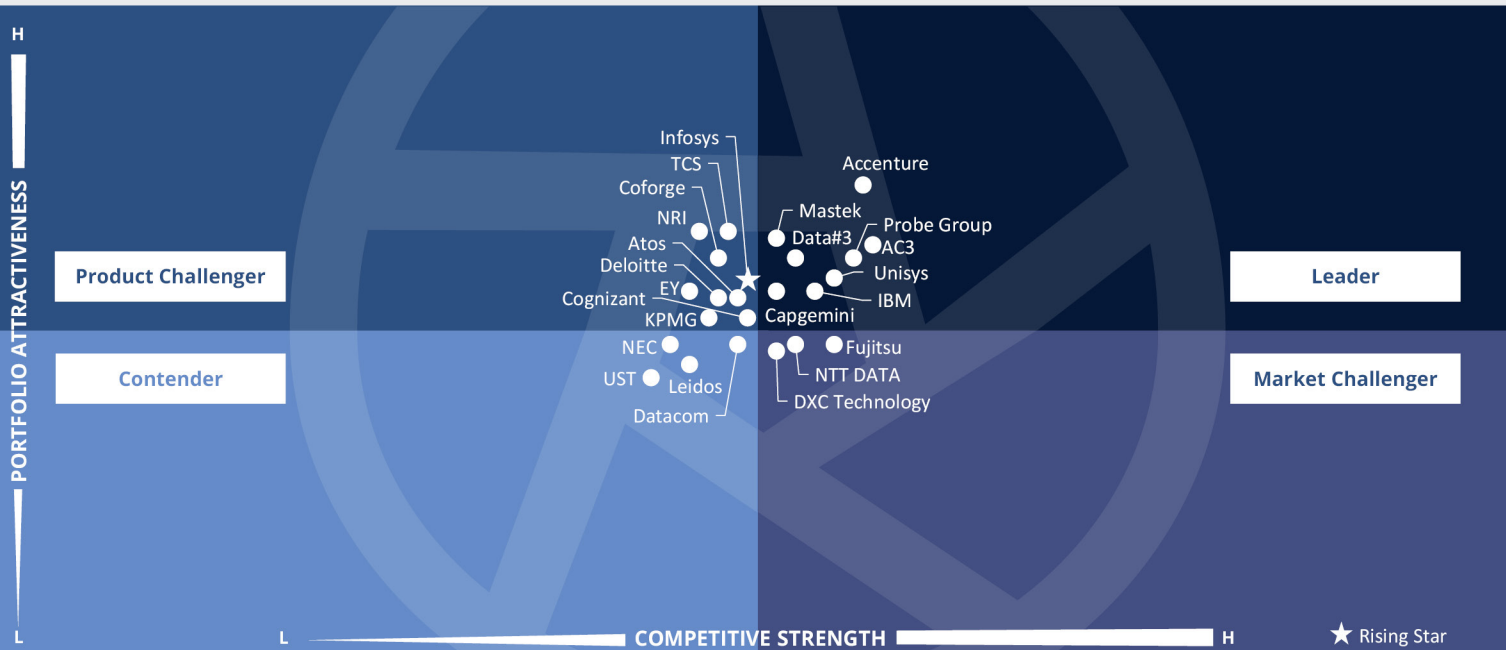
Category Acquisition Managers (CAMs)

Should read this report to identify top-performing IT service providers, track evolving market conditions, and shape data-driven sourcing strategies. This enables optimized spending, encourages innovation, and reduces category-specific risks, directly supporting effective IT procurement and value creation for their organization.



Public Sector Services and Solutions
Digital Transformation and Innovation Services

Australia 2025



The quadrant assesses providers focussed on **modernising** government **operations** and enhancing citizen service delivery through **digital technologies**. This approach allows public sector employees to provide responsive services to constituents.

Harish B, Varsha Sengar



Definition

Digital transformation and innovation in the public sector are crucial for modernising government operations and enhancing service delivery to citizens. By leveraging digital technologies, governments can streamline processes, reduce operational costs and improve efficiency across various departments. This transformation enables the automation of manual tasks, allowing public sector employees to focus on high-priority work and deliver fast, responsive services to constituents.

Service providers implement digital solutions such as self-service e-portals, electronic document management and open data platforms to help governments empower citizens to access government services and information easily. These innovations foster transparency, increase public trust and promote citizen engagement in governance. Service providers facilitate data-driven decision-making enabled by digital transformation to help governments allocate resources effectively and develop innovative policies that address societal challenges.

Eligibility Criteria

1. Have experience **providing digital transformation and innovation services** to public sector industry clients in the relevant region covered in the study
2. Have successfully **engaged with at least three public sector entities** on digital transformation and innovation services, both past and present
3. Have at least three of the following capabilities related to public sector digital transformation and innovation services
 - * Proven experience **delivering digital transformation** for government organisations
 - * **Expertise in emerging technologies** such as AI, blockchain and IoT
 - * **Capability to integrate legacy systems** with modern digital solutions
 - * **Cloud-native** and API-first approach
 - * **Cybersecurity expertise** for digital government services
 - * Experience in **data-driven decision-making** and analytics
 - * Adoption of **Agile and DevOps methodologies**
 - * **Citizen-centric service design** experience
 - * **Expertise in workforce upskilling** and digital technology adoption
 - * Ability to **scale innovation** across government departments
4. **Demonstrate strong partnerships** with industry associations, regulatory bodies and technology firms and startups specialising in the public sector
5. Offer **referenceable public sector industry use cases** across the value chain that address societal challenges



Observations

Public sector organisations in Australia are accelerating digital transformation to modernise legacy systems, improve citizen services and enhance operational efficiency. Challenges such as fragmented data environments, outdated infrastructure and rising citizen expectations are prompting agencies to invest in advanced technologies, including cloud, AI and automation. These technologies are being used to streamline service delivery, enable real-time decision-making and foster greater transparency and accessibility than its current operational ways. Service providers are supporting this shift by offering end-to-end digital transformation solutions that span strategy, implementation and ongoing innovation. These solutions include cloud migration, digital experience platforms, data analytics and cybersecurity frameworks tailored to government needs. Providers are also helping agencies adopt agile methodologies and human-centred design to build more responsive and inclusive digital services.

Providers are forming strategic partnerships and acquiring niche firms specialising in emerging technologies and public sector compliance to expand their capabilities. These strategic partnerships enable them to deliver integrated solutions that address complex regulatory and operational requirements.

A growing emphasis on digital inclusion, sustainability and resilience is shaping transformation strategies. Agencies are embedding ESG principles into digital initiatives and leveraging innovation to improve service equity and long-term impact.

From the 34 companies assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one a Rising Star.

AC3

AC3's strong presence in government and highly regulated sectors underscores its credibility and commitment to meeting rigorous compliance standards. With a proven track record in cloud services, the company further strengthens its capabilities through strategic

alliances with leading hyperscalers and technology providers, such as AWS, Microsoft and Palo Alto Networks.

accenture

Accenture delivers innovative, customised solutions to enhance service delivery through strategic alliances, cutting-edge technologies and a strong commitment to sustainability. Its innovation hubs in Australia act as centres for exploring, developing and testing emerging technologies, while the company continuously prioritises upskilling and reskilling its workforce.

Capgemini

Capgemini has a strong public sector advisory portfolio, including AI-powered solutions. The company further leverages the expertise of its subsidiaries, such as Capgemini Invent and Sogeti, to deliver digital transformation and technology solutions.

Data#3

Data#3 offers consulting, project and managed services and is a member of Western Australia's Technology and ICT Solutions panel. It supports Australia's 2030 digital vision and holds top-tier accreditations with global technology leaders, including Microsoft, Cisco, HPE and Dell Technologies.

IBM

IBM delivers a holistic digital transformation ecosystem tailored for the Australian public sector, integrating AI, automation and citizen-centric platforms. Its strategic road map and specialised subsidiaries support scalable, secure and efficient service modernisation across federal, state and local agencies.



Digital Transformation and Innovation Services

Mastek

Mastek achieved carbon neutrality in 2023 through a robust carbon offsetting programme. It offers flexible partnerships, over 20 prebuilt public sector assets and deep domain expertise to deliver comprehensive digital transformation solutions.



Probe Group is committed to expanding its in-house expertise, strengthening security frameworks and building strategic partnerships. The company also offers clients a fixed pricing model, ensuring cost predictability and transparency in service delivery.



Unisys combines strategic consulting, cloud migration and intelligent application modernisation to help government agencies streamline operations. Enhancing data security and eliminating inefficiencies, it enables transparent service delivery, workforce support and high-performing IT infrastructure tailored for resilient public sector transformation.



Infosys (Rising Star) has established multiple CoEs in Sydney, Melbourne and Parramatta, specialising in cloud, AI, cybersecurity and business analysis. Through its innovation and Living Labs, along with its collaboration with GovHack, Infosys plays an active role in Australia's digital public ecosystem, supporting initiatives from concept development to full-scale deployment.



Probe Group



Leader

“Probe Group’s strategic acquisitions, strong digital capabilities and public sector focus make it a key enabler of government transformation in Australia with notable investments in AI, automation and citizen-centric platforms.”

Harish B, Varsha Sengar

Overview

Probe Group is headquartered in Melbourne, Australia. It specialises in CX, BPO and advanced technology integration. With a public sector-focused workforce of over 2,000 professionals, the company supports numerous government agencies in modernising operations and enhancing service delivery. Probe Group has one of the largest onshore digital transformation workforces for CX providers in the ANZ region. Leveraging proprietary digital tools and deep sector expertise, Probe Group ensures resilience, regulatory compliance and improved citizen outcomes. The company leverages platforms such as Salesforce and Microsoft Power Platform to deliver personalised digital services.

Strengths

Strong AI and cloud capabilities: Probe Group has pursued an inorganic growth strategy through strategic acquisitions, including Innovior and Stellar, significantly enhancing its digital and analytics consulting capabilities. These acquisitions have expanded its offerings in automation, AI-driven analytics and customer journey mapping, positioning the firm as Australia’s key locally owned CX and BPO provider with a strong public sector focus.

Advanced technology capabilities: Probe Group delivers a full stack of technologies, including real-time speech analytics, conversational AI, CRM and automation and industrialised service management to government and enterprise clients. Its cloud-first architecture supports work-from-home

scalability, omnichannel engagement, robust data integration and AI-powered insights for enhanced public service delivery.

Technology infrastructure investments:

Probe Group continues to make substantial investments in technology infrastructure, encompassing cloud-native platforms, strategic alliances with leading AI and automation providers and robust security frameworks. These efforts are complemented by structured change management practices to ensure smooth adoption of digital solutions across the public sector, effectively mitigating risks and enhancing value realisation.

Caution

Probe Group must strengthen internal digital skills and agile work models, particularly in automation and AI, to enhance resilience, consistently meet evolving client expectations and stay ahead in digital transformation.





Appendix

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

Study Sponsor:

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

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



Author & Editor Biographies



Lead Author

Harish B
Manager and Principal Analyst

Harish brings more than 18 years of technology, business and market research experience and expertise to ISG clients. He has rich experience in executing market/competitive intelligence (MI/CI) and strategy/management consulting projects for Asset Heavy industries (Aerospace & Defense, Oil & Gas, Energy & Utilities, Automotive, Public Sector, and Manufacturing). Prior to ISG, Harish has worked with leading market research/analytics and consulting firms including Frost & Sullivan and Genpact. At ISG, He is focused on ISG Provider Lens™. His research and analysis for ISG clients is focused on Energy & Resources markets development, disruption and change.

He currently contributes to ISG's Provider Lens global research studies as a principal analyst.



Research Analyst and Co-author

Varsha Sengar
Research Specialist

Varsha Sengar is a Research Specialist at ISG, responsible for supporting and co-authoring ISG Provider Lens™ studies on Retail and CPG, Manufacturing, Chemicals, and Public Sector. She has over 8 years of experience in technology research and consulting. At ISG, she is responsible for delivering the enterprise perspective for IPL and collaborates with analysts, advisors, and enterprise clients on various research requests, which include primary and secondary research. She supports the lead analysts across multiple regions in the research process and authors the global summary report.

Prior to this role, she has carried out multiple ad-hoc projects, including competitive benchmarking reports, market sizing and forecasting, vendor profiles and newsletters delivering industry-level actionable insights and recommendations.



Author & Editor Biographies

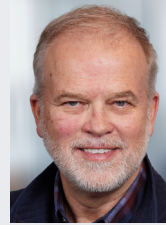


Study Sponsor

Iain Fisher
Director, Research

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.



IPL Product Owner

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

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

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



Provider Lens®

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

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

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

For more information, visit isg-one.com.





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REPORT: PUBLIC SECTOR SERVICES AND SOLUTIONS