ISG Provider Lens™

Future of Work (Workplace) - Services

Digital Service Desk and Workplace Support Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: Lenovo

QUADRANT REPORT | SEPTEMBER 2023 | AUSTRALIA

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Report Author: Craig Baty

Digital workplaces have evolved to become experience led and persona based, and are industry specific.

The evolution of digital workplaces to become experience-led and persona-based, and specific to industries will enable collaborative hybrid workplaces that continuously evolve to deliver secure work experiences, anytime, anywhere and on any device. The workplace of the future is transitioning beyond productivity enhancement and is increasingly focussed on experience and personalisation across all areas of work, engagement and collaboration.

Key shifts in the market include the rise of frontline workers, direct impact of the metaverse on the workplace, the continuing shift to hybrid working, integration of AI and automation, and a continued strong focus on sustainability.

Two technologies that will rapidly change digital workplace services in the next 18 months are generative AI and intelligent automation.

The future of work is moving towards an AI-driven, hyperpersonalised workplace that enables both organisations and individuals to be productive, creative and purposeful. IT service providers are targeting organisations across industries that are seeking to transform their work environments and are willing to embrace the power of digital technologies while prioritizing sustainability and enterprise consciousness.

These providers are developing new products and services to humanise workplace experiences and build resilient and sentient enterprises that foster sustainability and amplify human potential through AI. Generative AI is likely to play a major role in the future of work. Environmental, social and governance (ESG) will become increasingly relevant from both an environmental and a social angle.

The realities of flexible work arrangements will continue to put pressure on companies offering tools and services to provide solutions that improve collaborative work involving online meetings, AR/VR and co-created solutions. AI and analytics will continue as key

Australian clients focus on fast-tracking **automation benefits**, RoI and user adoption.

to designing and operating digital workplace solutions that deliver optimal performance and people engagement.

A massive change in managed workplace solutions and services is likely in the next few years due to a broad range of factors, including advances in technology, including AI/ML, generative AI, advanced connectivity, and cloud and Edge computing; rising geopolitical and economic pressures; and increasing work choices. Concurrently, significant investments in ESG technologies will further accelerate the disruption from technologies in workplaces and related solutions and services.

The developments in generative AI, pertaining to workplace solutions, will explore the use of large language models in service desk environments to improve the onboarding of agents, productivity and ticket resolution through AI recommendations, including zero touch resolution. At the same time, seamless collaboration services are now becoming essential to provide a hybrid workplace without boundaries.

Large-scale digitalisation during the pandemic has permanently impacted the workplace of the future. This includes increased digitalisation: employee interactions, including remote work, consumer channels and supply chains.

The future of work is transitioning towards an environment where CX is directly connected to EX. This environment is focussed on giving employees easy access to tools, information and other required support. This, in turn, will allow communication and collaboration between colleagues, partners and customers to be frictionless.

In Australia, jobs in customer services and sales continue to decline due to continued automation in factories and warehouses. People in related job categories need to be re-trained. The trend of remote work is more prevalent in advanced economies such as Australia with better telecommunications infrastructure. COVID-19 has accelerated the trend of remote work and virtual meetings for organisations in Australia. Even though many are returning to their in-office workplaces, many companies are continuing some level or form of work from home for their employees.

While this form of work is prevalent for jobs that can be done on a personal computer, activities involving in-person interactions will continue to be done in office environments. This factor is seeing an increasing number of organisations adopt a hybrid work model.

In the past, the jobs that were most impacted by technological innovation, including automation, were jobs involving low-skill office work and the ones in manufacturing. However, moving forward, the impact will be seen in other industries in developed countries, including Australia.

Categories that will be most impacted in the next five years will be jobs involving high levels of onsite customer interaction, which typically are low-wage frontline service jobs. These include jobs in the retail, travel and hospitality industries. The other professions that will see an impact will include jobs in indoor production and warehousing, which includes factories and computer-based office work — job categories that were minimally impacted by technology. However, the fast evolution of technologies such as generative AI and ChatGPT will impact some white-collar jobs.

Late adopters and clients that are keen on shifting to the digitalised workplace model are expected to make up the bulk of the demand for a digital workforce.

E-commerce activity saw a significant increase during the pandemic. The crisis has accelerated a move towards e-commerce channels, including home shopping, online grocery and restaurant delivery and other digital transactions such as telemedicine.

A consequence of the pandemic in Australia is people moving from apartments in cities, particularly in the inner suburbs, to large homes in the outskirts. The global trend is companies changing their office model to a more distributed workplace, with small offices situated closer to where people live to reduce commute times. This trend is likely to become increasingly prevalent in Australia. Organisations need to transform their workplaces into smart spaces to effectively engage with customers and empower employees with more flexibility in this hybrid work environment.

Key trends in Managed Workplace Services – End-user Technology in Australia

- Over the next few years, there will be an increasing focus on flexible digital solutions that empower workers to thrive in a rapidly changing enterprise landscape. As an increasing number of companies seek an optimal balance between in-office, at-home and hybrid work arrangements, there will be a greater need for tools and services that simplify collaboration and communication and enhance productivity across distributed teams.
- An increasing number of companies are assessing the benefits of making remote work a permanent business model. A significant percentage of Australian organisations are adopting a hybrid model. Jobs that are being shifted to a remote model include the ones linked with administrative duties, information processing, knowledge updates and training and routine communication with clients.
- COVID-19 accelerated the pace of innovation and the uptake of remote learning. ML and AI have also accelerated the uptake of virtual assistance and remote operations management.
- In the future, business management will need to be proactive in assessing the need for reskilling/upskilling workforces due to disruptive innovations such as lean manufacturing and the centralisation of global business services. In this environment, strategic workforce assessments need to be undertaken at a fundamental level for each employee's task to determine if and when each task needs to be automated.

Key Trends in Employee Experience (EX) Transformation Services in Australia

- The digital experience management platform market is becoming more crowded. New vendors are entering the market and existing systems and security management vendors are pivoting their strategy to capitalise on market opportunities.
- Key tools and services that are likely to help evolve the market are AI-powered solutions, sustainable IT and XLAs. These will align with enterprise outcomes to relieve workers of mundane work, enabling them to focus more on strategic work, and thereby increase engagement and ensure retention. This, concurrently, will require a shift in the way companies approach training and development, with much emphasis on upskilling and reskilling employees to adapt to new technologies and roles.
- One of the primary contributors to great CX is great EX, especially involving frontline workers that directly interact with customers and comprise up to 80 percent of the workforce.
- To plan for a workforce of the future, companies in Australia must assess the way they reconfigure their workplace environment to increase agility, raise productivity and empower workers while maintaining company culture. They must also position their organisation to leverage new technologies. Business leaders must also implement strategies to close any skills gaps in their organization, and workers must be supported through this transition. In addition, organisations need to leverage their partner ecosystem to maximise the effectiveness of these changes.
- Consulting firms are now placing much emphasis on human experience rather than just the way a business functions or a transaction takes place.
- Skills required in a modern workplace today and in the future include creativity, critical thinking, social intelligence and technological skills in areas such as software design and big data analytics. There is currently a mismatch between present skills and the needs of the future, which will require significant retraining of staff in Australia.
- Training in social, creative and emotional intelligence can occur by leveraging AI and simulating conditions to expose employees to challenging situations.

- Video conferencing collaboration today is not determined by the hierarchy in a company. This change has enabled many companies to break down the barriers between senior management and staff and build strong-knit teams.

Key Trends in Digital Service Desk & Workplace Support Services in Australia

- There has been a major change in the demands of clients and their customers from the digital service desk and workplace support services perspective in the last few years. Focus is now shifting from just cost reduction to reducing users' effort on IT support and providing a consumer-grade experience to internal IT users, which is proactive, personalised, omnichannel and focussed on user empowerment and experience. Clients are also focussed on measuring automation benefits, ROI, user adoption and first-level resolution. Talent resilience and agility continue to be strong focus areas for organisations and there is an increased focus on not only a distributed but also a connected workforce, hybrid working models, workforce training and re-skilling and employee wellbeing.
- With the increasing use of automation, ML and contextual AI, support services have undergone a complete transformation with less dependence on voice and increasing support from automated chatbots, knowledge articles and peer support, and implementation of the latest technologies such as AR and VR.
- Providers in Australia have the ability to offer managed service desk and workplace support services through a hybrid workforce, including virtual agents, remote and onsite field support and in-person technical assistance by leveraging AR and/or VR. They provide for data-driven enriched analytics to support self-service, automatically resolve tickets and generate actionable insights among users, providing automated and contextualised support for end users, based on their roles and work.
- Digital workplaces are becoming increasingly agile and need to be supported with services that can deliver cloud-based desktops and social collaboration tools as a fully managed package.

Australian providers have the ability to offer managed service desk and workplace support services through a hybrid workforce, including virtual agents, and offer remote and onsite support plus in-person technical assistance, leveraging AR and/or VR. Australian digital workplaces are becoming increasingly agile and need support services that can deliver cloud-based solutions as a fully managed package.

Provider Positioning

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	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Accenture	Product Challenger	Product Challenger	Product Challenger
ASG Group	Product Challenger	Product Challenger	Contender
Atos	Product Challenger	Product Challenger	Product Challenger
Brennan IT	Not In	Contender	Product Challenger
Capgemini	Leader	Product Challenger	Product Challenger
CGI	Contender	Contender	Contender
Coforge	Not In	Product Challenger	Product Challenger
Cognizant	Contender	Product Challenger	Contender
Data#3	Contender	Product Challenger	Product Challenger
Datacom	Leader	Leader	Leader

Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
DXC Technology	Leader	Leader	Leader
Fujitsu	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader
HPE	Product Challenger	Product Challenger	Not In
Infosys	Leader	Leader	Leader
Kinetic IT	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Leader	Leader	Leader
Leidos	Product Challenger	Contender	Not In
Lenovo	Contender	Rising Star ★	Rising Star ★
Logicalis	Contender	Not In	Contender

Provider Positioning

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	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
LTIMindtree	Contender	Contender	Contender
Microland	Contender	Contender	Contender
NTT DATA	Product Challenger	Product Challenger	Product Challenger
Orange Business	Contender	Contender	Contender
TCS	Leader	Leader	Leader
Tech Mahindra	Contender	Leader	Product Challenger
Telstra	Leader	Leader	Leader
Unisys	Leader	Leader	Leader
UST	Contender	Contender	Contender
Wipro	Rising Star ★	Leader	Leader

This study evaluates MSPs' capabilities around the key **Future of Work services** across different regions.

Employee Experience (EX) Transformation Services

Managed Workplace Services – End-user Technology

Digital Service Desk and Workplace Support Services

Simplified Illustration; Source: ISG 2023

Definition

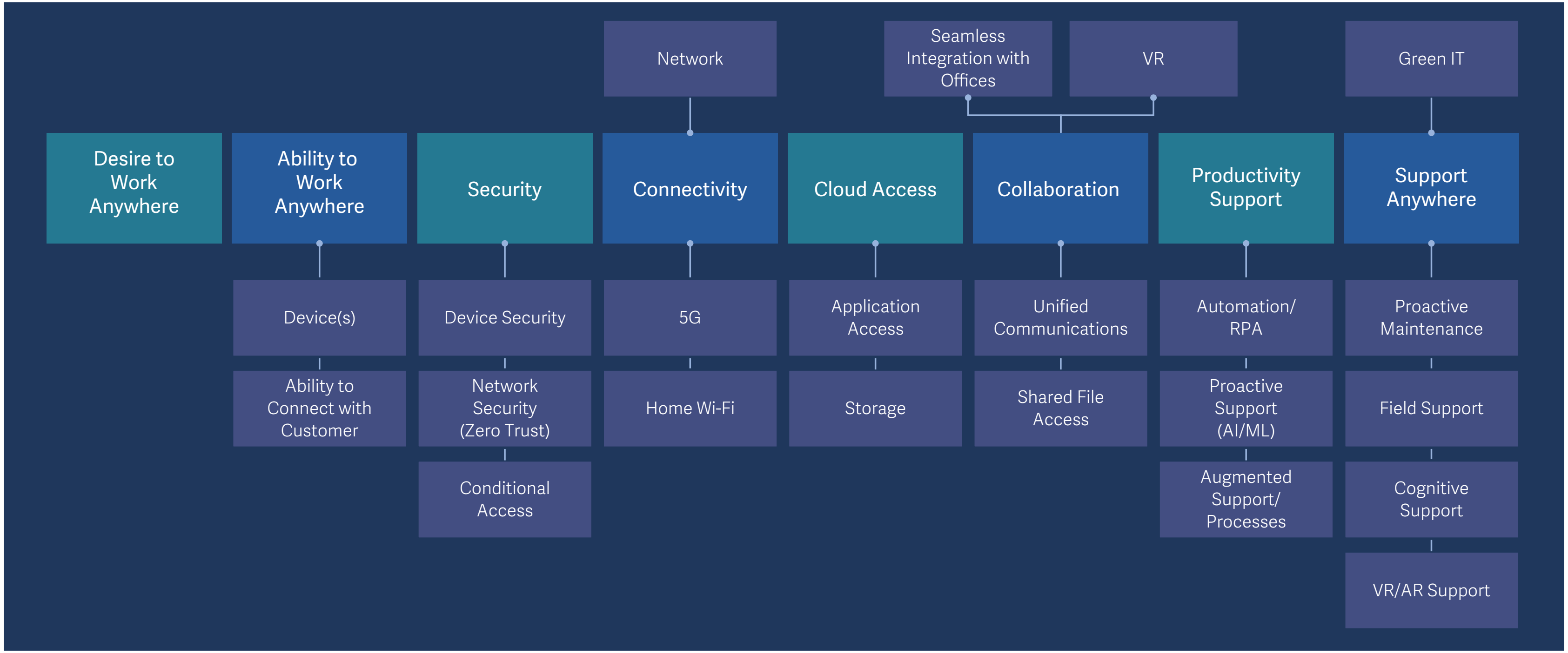
From the future of work perspective, 2023 will be a year of stabilization. After the disruptions and challenges posed by the pandemic and the "Great Resignation" that followed, global businesses have started adjusting to new realities and acknowledging the importance of employee experience (EX). EX transformation is now every business leader's priority, along with adapting to changing customer demands, evolving technologies and becoming more conscientious and environmentally focused.

According to the new Future of Work technology landscape, technologies that support work from anywhere are only one of the components. While other ISG Provider Lens research covers the topics of Connectivity and Security, this research focuses on all the other aspects of the landscape.

The Future of Work services landscape becomes wider as enterprises need assistance implementing and supporting an EX-centric technology model. As new decision makers get involved in tech investments that enable and engage with employees, clients must analyse the capabilities offered by different service providers in underlying technology enablement and maintenance, workplace tech support and overall experience transformation.

As organizations take a holistic approach to EX transformation, strategy and consulting become an integral part of the approach. Hence, ISG has decided to merge this area with other services covered in the research this year. Another accompanying research study on technology providers will cover the solutions part for these services.

Figure: Key Components of the Future of Work Technology Landscape



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services:

- Employee Experience (EX) Transformation Services
- Managed Workplace Services – End-user Technology
- Digital Service Desk & Workplace Support Services

This ISG Provider Lens™ study offers IT decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional markets

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations.

ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Digital Service Desk and Workplace Support Services

Who Should Read This Section

This report is relevant to enterprises across industries in Australia for evaluating providers offering modernised support services that enable work from anywhere/anytime. These services include workplace support, services related to service desks, onsite/field support, tech bars and cafés, digital lockers, uber-style field support and automation-enabled omnichannel support for chat and voice.

In this quadrant, ISG highlights the current market positioning of providers in Australia and the way they address the key challenges enterprises face. Our assessment is based on the depth and breadth of the providers' service offerings and market presence.

Australian enterprises have shifted their focus from pure cost reduction to reducing users' efforts on IT support and providing consumer-level experiences to end-users. They are also focussing on automation benefits, RoI, user adoption and first-level resolution.

With increased use of AI and automation, workplace support services have transformed to provide more assistance through automated chatbots, knowledge articles, peer support and the implementation of latest technologies such as AR and VR.

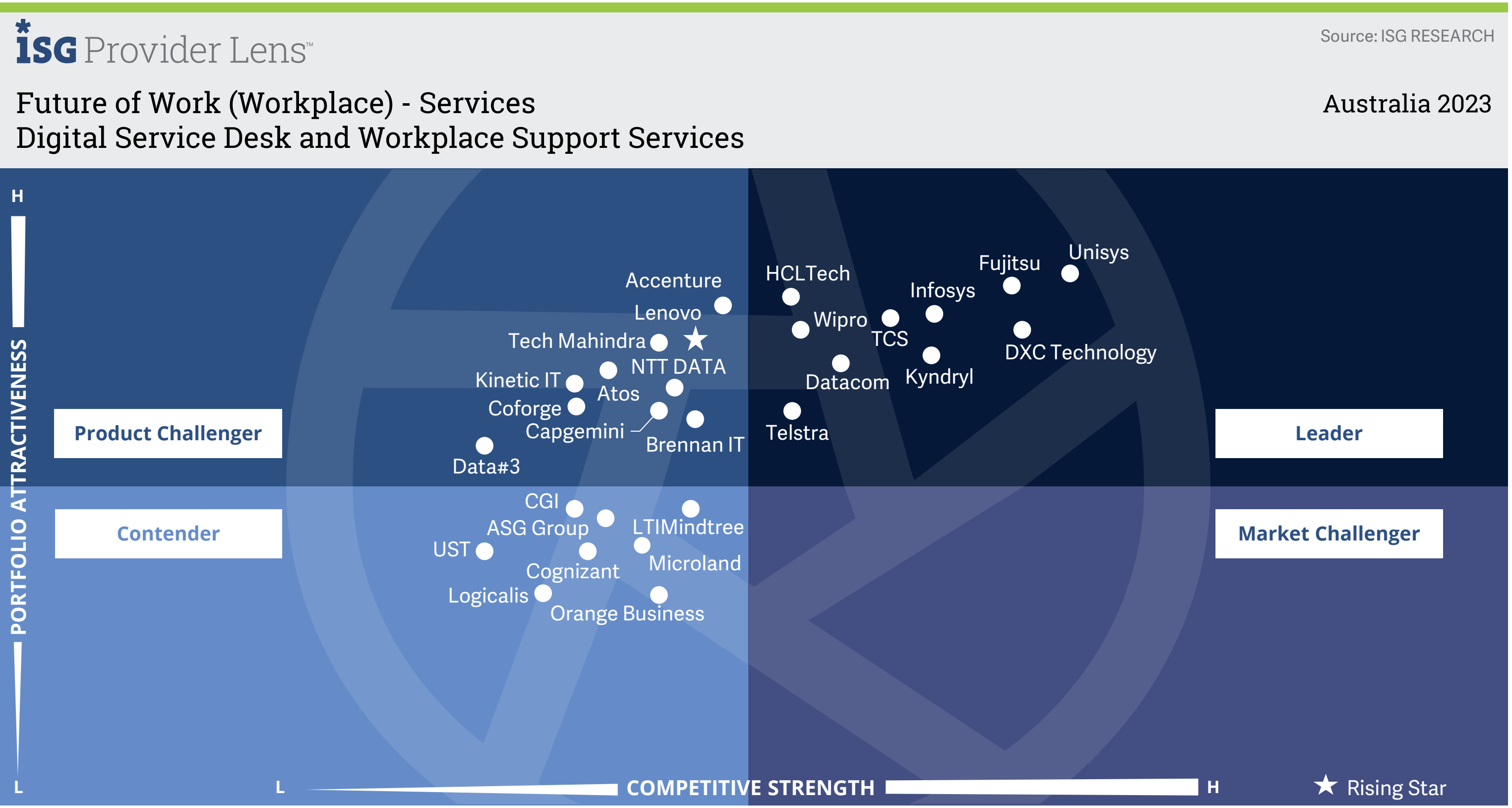
Talent and agility continue to be a strong focus for organisations, providing growth opportunities for workplace support service providers that can deliver cloud-based desktops and social collaboration tools as a fully managed package.

Technology professionals should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select managed workplace services.

Digital professionals should read this report to understand how providers of managed workplace services fit with their digital transformation initiatives and how they compare with one another.

Procurement professionals should read this report to make informed decisions on the relative value and benefits that managed workplace services providers deliver in the market.

Strategy professionals should read this report to know the providers offering managed workplace services to better prepare a workforce for changing business models and dynamics in the post-pandemic era.



Service providers assessed in this quadrant **provide services that enable work from anywhere/ anytime** and include device support, including automated and proactive technical support **and cloud platforms to provision always-on systems**.

Craig Baty

Definition

This quadrant assesses service providers that offer modernised support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, DigiLockers, uber-style field support and automation-enabled omnichannel support for chat and voice. These services encompass automated proactive technical support and cloud platforms to offer always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

Service desk and support services are typically outsourced as part of overall managed workplace services and as standalone services. Traditionally, these services depended solely on the skills of human agents who would take call support requests. The agents' performances were tracked via service level KPIs such as average call handling time. However, with increasing usage of automation, ML and contextual AI, support services have gone through a complete transformation with less dependent on voice and increasing support from automated chatbots, knowledge articles, peer support and implementation of the latest technologies such as augmented and virtual realities. These services also include field and onsite support that require expert technicians to visit the location of the employee to fix the devices and issues. This calls for a strong local presence via own staff or through partnerships to provide the required hands and feet support. Organizations with large office campuses also deploy services such as IT vending machines and tech bars to provide in-person support.

Eligibility Criteria

1. Provide **managed service desk** and **workplace support services** through both human and virtual agents
2. Offer **remote and onsite field support** plus **in-person technical assistance**, leveraging augmented reality **and/or** virtual reality (AR/VR)
3. Ability to set up and support self-help **kiosks, tech bars, IT vending machines** and **DigiLockers**
4. Use **data-driven enriched analytics** to support **self-service, automatically resolve tickets** and generate actionable insights.
5. Provide **automated and contextualised support** for end users based on their roles and work
6. Ability to **quantify workplace support function performance** beyond traditional service metrics
7. Have **strong local presence** with a majority of workplace engagements around support services

Observations

This quadrant assesses service providers offering workplace support services, including service desk services, onsite/field support, tech bars and cafés, digital lockers, advanced field support and automated omnichannel support for both chat and voice. The services enable work from anywhere/anytime and include device support that covers automated and proactive technical support and cloud platforms. The providers offer local, onsite field support and digitally transformed services with the use of AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

The market increased in competitiveness, with some players diminishing in strength. Notable changes include Lenovo's entry into the study for the first time in the position of Rising Star. Logicalis also entered this quadrant for the first time in the position of a Contender.

From the 30 companies assessed for this study, 28 have qualified for this quadrant with 10 being Leaders and one a Rising Star.

DATACOM

Datacom is one of Australasia's largest professional IT services companies that also operates across Asia, Europe and the Americas. Its Intelligent Workspace offering helps businesses gain a competitive edge through collaborative, connected and empowered workspaces.

DXC TECHNOLOGY

DXC Technology is an IT services company that operates across 70 countries, including Australia and has over 130,000 employees. DXC Digital Support Services empower employees with consumer-like, personalised support to optimise work performance.

Fujitsu uvance

Fujitsu has a strong presence in Australia and New Zealand, where it has been operating for 40 years with a staff of 3,500 staff in over 30 locations. It takes a human-centric approach to deliver digital workplace services to organisations.

HCLTech

HCLTech is an Indian multinational IT services and consulting technology company that has had a strong presence in Australia for over 20 years. It continues to make significant investments in AI-related solutions for workplace support services.

Infosys

Infosys, headquartered in India, provides business consulting, ITO services across 50 countries, including Australia. Its Sustainable Human Experiences & Behaviour offering embeds sustainability into processes and systems to drive sustainable behaviour.

kyndryl

Kyndryl became the world's largest IT infrastructure provider after IBM completed the separation of its managed infrastructure services business in 2021. It has an advanced managed workplace strategy that includes innovative desktop virtualisation services.

TCS TATA CONSULTANCY SERVICES

TCS is one of the leading IT services, consulting and business solutions companies in the world and is headquartered in India. It has been present in the Australian IT market for over 30 years and has cloud regions in Sydney and Melbourne and an innovation lab in Sydney.

Telstra is Australia's largest telecommunications provider, with headquarters in Melbourne and a fast-expanding workplace service strategy. It offers a highly innovative digital service desk offering across Australia and the APAC.

unisys

Unisys has a diverse global client base across the government, financial services and commercial markets in over 40 countries, with 900 employees in Australia. Its support model is built on the InteliServe™ platform that brings AI, analytics and automation into the support process.

Wipro is a leading global IT, consulting and business process services provider, headquartered in India, with a strong and growing presence in Australia. Its MetaEX offering provides virtual workspaces to increase collaboration and improve employee onboarding and training.

Lenovo, Rising Star, has built on its success as the world's largest PC company by expanding into key growth areas, including managed workplace services. It drives service-led transformations as customers are looking for value beyond devices.

Lenovo

Rising Star

"Lenovo responds to customer demand for value beyond devices, with future-of-work solutions that take a services-led approach, drawing synergies with its leading position in the areas of PCs, computing and Edge to bring about transformation."

Craig Baty

Overview

Lenovo is a global Fortune 200 company with global headquarters in Beijing and North Carolina. It has operations in over 60 countries, including Australia, and sells its products in over 180 countries, with over 75 percent of its revenue generated from regions outside China. In FY23 Lenovo generated a revenue of $62 billion and employs 75,000 people worldwide. Its solutions and services group, which includes its future of work practice, generates over $6 billion in revenue, showing double-digit growth since its formation three years ago.

Strengths

Highly innovative digital service desk offering: Lenovo's next-gen service desk is built with market-leading technologies and includes automation to provide a seamless and personalised service. It is simple, reliable and easy to use; minimises disruption, available anytime, from anywhere and on any device; and provides a single point of resolution via an omnichannel experience.

Advanced Blockchain Innovation Lab: Lenovo has established a Blockchain Innovation Lab that explores the potential of blockchain technology in various industries, identifying practical use cases. Lenovo has adopted blockchain technology in product development and is working to apply the solutions to internal work processes.

Advanced workplace support functionalities: These include proactive prevention of issues, and speed, convenience and flexibility in resolution. They are completely automated and provide in-depth knowledge, analytics and insights. Also, they leverage leading edge technologies, including generative AI. The typical business outcomes offered to clients include over 20 percent efficiency gains, 85 percent reduced downtime, 15 percent increased revenue retention, 12 reduced attrition and improved EX.

Caution

Lenovo enters the Australian Digital Service Desk and Workplace Support Services quadrant as a Rising Star. This reflects our view that Lenovo could rise to a Leader position in the next 12 months based on its current growth trajectory. As both a hardware vendor and a service provider, it is unique, but the company does not send out a strong message highlighting this as a differentiator.

Appendix

The ISG Provider Lens™ 2023 – Future of Work (Workplace) - Services study analyzes the relevant 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.

Lead Authors:
Craig Baty and Phil Harpur (Co-Author)

Editors:
Ipshita Sengupta and Kondappan S

Research Analyst:
Angie Kho (APAC)

Data Analysts:
Pooja Rani Nayak and Tishya Selvaraj

Consultant Advisor:
Jason McAuliffe

Project Manager:
Swathi Amin

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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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Future of Work (Workplace) - Services 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

Craig Baty
Lead Analyst

Distinguished Lead Analyst and author Craig Baty has extensive research and thought leadership experience in the AP/J ICT markets. Craig is the principal and founder of DataDriven, a research and advisory firm, and ISG Research Partner for AP/J. Craig has over 30 years of executive and board-level experience in the ICT industry, including as Group VP and head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, and more recently as VP Global Strategy and VP Digital services in Fujitsu's Tokyo headquarters.

As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces, and presented at over 1,500 events globally. He is also regularly quoted in regional media. Craig is active in the ICT community as a board member of the Australian Information Industry Association (AIIA) and a past Vice Chair of the Australian Computer Society NSW(ACS).

Co-Author

Phil Harpur
Principal Analyst

Phil Harpur is an Australia-based technology analyst and consultant with over 25 years of experience across telecommunications, the cloud, data centres and digital media. His expertise spans over 35 countries across Asia. He also works as an analyst and writer in the financial services industry, with a focus on the technology sector. Phil is currently part of the DataDriven team, which is the Asia Pacific research partner for ISG, and has contributed to the creation of tens of ISG Provider Lens™ reports. Prior experience includes Gartner, Frost & Sullivan, and BuddeComm.

He has been quoted in multiple global publications and appeared on business TV programs, including Bloomberg, CNBC, Fox Business, and ABC. He has also presented at numerous local and international conferences. Phil has a bachelor of science degree, with majors in computing and statistics from Macquarie University and holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.

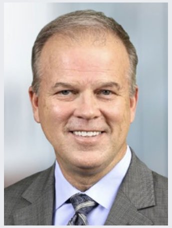
Research Analyst

Angie Kho
Regional Support Analyst

Angie Kho is a Singapore-based regional support analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies for the APAC markets. Angie is part of the DataDriven team, which is the Asia Pacific research partner for ISG and has contributed to tens of IPL reports.Her areas of expertise lie in IT services management and enterprise planning services.

Angie develops content from an enterprise perspective and writes Global Summary reports for Provider Lens studies. She also supports the lead analysts in the research process and ad hoc research assignments.

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.

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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