ISG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | OCTOBER 2022 | AUSTRALIA

Table of Contents

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Craig Baty and Phil Harpur

Digital workplace is experience led and persona based.

The digital workplace is evolving to become experience led, persona based, and aligned to industry workstyles. This will enable a collaborative hybrid workplace that continuously learns and evolves to deliver a secure mobility experience anytime, anywhere, and on any device.

The workplace of the future is transitioning beyond productivity enhancement and focuses on increased experience and mass personalisation across all areas of work, life, engagement, and collaboration.

Recent advances in consumer technology and recent global events have raised expectations of the enterprise experience. Seamless collaboration services become essential to provide a hybrid workplace without boundaries. The huge disruption to global supply chains during the pandemic demonstrated the shortfall in supply chain management that had not been digitalised.

The acceleration of the trend to embrace large-scale digitalisation during the pandemic has permanently impacted the workplace of the future. This includes an increase in the digitalisation of employee interactions, including remote working, and a rise in the digitalisation of consumer channels and supply chains.

The future of work is transitioning towards an environment where customer experience is directly connected to employee experience. This gives employees the ability to easily access the tools, information, services, and support that they need to be able to

Seamless collaboration services become essential

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adequately serve their customers. This will enable frictionless communication and collaboration between colleagues, partners, and customers. In this world, customer support is no longer a reactive process, but rather, it becomes proactive, because any issues can be automatically anticipated and resolved.

In Australia, jobs in customer service and sales continue to decline due to continuing automation in factories and warehouses. This was exacerbated by employees not going to the office, or out for lunch, or traveling for business during the pandemic. Although some employees are returning to the office, the impact in this regard on the customer service and travel industry is expected to be long-lasting. People in these declining job categories will need to be retrained.

The demand for remote working is stronger in more advanced economies, with better telecommunications infrastructures, such as Australia, . Many large organisations are likely to create opportunities for employees by putting them through upskilling, such as technology training or management training. However, some companies and industries will witness a net loss of employees. In these instances, it is important for educational institutions and governments to provide re-training so that people can move to growing industries.

Australian enterprises increasingly require a flexible, adaptable digital workplace that allows them to change how their employees work, where they work, and how they collaborate with each other.

The continuously evolving digital workplace is leading to the demand for the creation of new job roles for companies reinventing their workplace, leading to new business processes, new operating models, and changes in the organisational structure.

This provides motivation for people to crossskill and upskill for several new roles to identify and improve the flow of interactions between users, IT, machines, and spaces.

Social, creative, and emotional intelligence skills can be partly improved by leveraging AI and simulating conditions that give people exposure to situations they do not typically experience. Video conferencing collaboration is also less hierarchical, with all staff from the bottom to the top of the organisational structure on the call. This change has enabled many companies to break down the cultural barriers amongst senior management and staff and to build closer, stronger-knit executive leadership teams.

Skills that are required in the modern workplace include creativity, critical thinking, social intelligence, and technological skills in such areas as software design and big data analytics.

There is currently a mismatch in the present skills and the skills needed in the future. This will require significant retraining of staff in Australia.

Some key factors influencing service provider strategies in each of the four quadrants we evaluated are as follows:

Workplace strategy transformation services are being driven as a consequence of COVID-19 in Australia, where there has been an increasing trend of people moving from apartments in cities, particularly from inner suburbs, to large homes, with their own land in regional rural areas. The rollout of the national broadband network has assisted this trend, as nearly all Australians now have access to high-speed Internet, enabling them to work from home more effectively.

Some companies are now changing their office model to more distributed

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footprints, with smaller offices closer to where people live, to reduce commute times. This trend is likely to be seen increasingly in Australia as well. Organisations need to transform their workplaces into smart spaces to effectively engage with their customers and empower employees with more flexibility, owing to the accelerated shift in customers' behaviour and the rising adoption of the hybrid work model.

Managed workplace services

A growing number of companies are remotely assessing the potential for making remote working a permanent part of their business model. As the pandemic is receding and more employees are returning to offices, a significant proportion of Australian organisations are adopting this hybrid model. Jobs that are being shifted to the remote model include roles that are linked with performing administrative duties, processing information, updating knowledge and training, or routine communication with clients.

Digital workplace is not considered an IT initiative anymore; it works in tandem with IT, facilities management, human resources, and business stakeholders to envision how advanced technologies, existing processes, and conventional work styles can empower and enable end users, along with enhancing the overall employee experience and enabling them to perform mission-critical work more effectively.

Digital service desk services have also been impacted by COVID-19, which has accelerated the pace of innovation and the uptake of remote learning and telemedicine. Machine learning and AI have accelerated the uptake of virtual assistance and remote operations management. For example, auditors previously were required to travel for in-person visits to clients' sites. When this was not possible during the pandemic, the data was digitalised so that auditors could still inspect the remote data online.

Managed employee experience services are now placing a greater emphasis on human experience. There has been an evolution from making machines easier to use the "user experience" to make tasks more enjoyable. Now, there is a further evolution underway to human experience where there is a greater focus on people rather than focussing onlyon how a business function or transaction is performed.

In conjunction with evolving managed employee experience services, organisational change management (OCM) in Australia is typically used to ensure the success of a digital transformation, but it is now becoming important as a tool to ensure that employees understand and implement secure and compliant practices as they communicate and collaborate with colleagues, partners, and their customers.

Customer experience is directly connected to employee.

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Provider Positioning

Page 1 of 3

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Product Challenger	Product Challenger	Rising Star ★
ASG Group	Market Challenger	Product Challenger	Contender	Product Challenger
Atos	Product Challenger	Leader	Leader	Product Challenger
Brennan IT	Not In	Contender	Product Challenger	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CGI	Contender	Contender	Contender	Not In
Coforge	Not In	Rising Star ★	Product Challenger	Not In
Cognizant	Product Challenger	Product Challenger	Contender	Contender
Data#3	Market Challenger	Product Challenger	Product Challenger	Not In
Datacom	Leader	Leader	Leader	Leader

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Provider Positioning

Page 2 of 3

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
DXC Technology	Leader	Leader	Leader	Leader
Fujitsu	Leader	Leader	Leader	Leader
HCL	Rising Star ★	Product Challenger	Leader	Leader
HPE	Product Challenger	Product Challenger	Not In	Not In
Infosys	Leader	Leader	Leader	Leader
Kinetic IT	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
Kyndryl	Leader	Leader	Leader	Leader
Leidos	Product Challenger	Product Challenger	Not In	Product Challenger
LTI	Contender	Product Challenger	Product Challenger	Product Challenger
Microland	Contender	Contender	Contender	Contender

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Provider Positioning

Page 3 of 3

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Mindtree	Contender	Not In	Not In	Contender
Mphasis	Not In	Not In	Contender	Not In
NTT DATA	Market Challenger	Product Challenger	Product Challenger	Product Challenger
Orange Business Services	Product Challenger	Product Challenger	Product Challenger	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Not In	Leader	Product Challenger	Contender
Telstra Purple	Leader	Leader	Leader	Leader
Unisys	Leader	Leader	Leader	Leader
UST	Contender	Contender	Contender	Contender
Wipro	Leader	Leader	Leader	Product Challenger

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Study on what ISG perceives as most critical in 2022 for **Future of Work**

Simplified Illustration Source: ISG 2022

Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterised by three kinds of workplaces (Figure 1): the Digital Workplace, which includes the underlying technology; Physical Workplace that defines the location or place of work that could be both in-office premises and remote; and the Human Workplace that describes the methods, processes and cultural aspects. This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

The ongoing talent crunch and the "Great Resignation," as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace) — it is now omnipresent, integrated and connected with multiple "spaces" that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments such as metaverse are influencing this trend in their own ways.

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Figure 1: ISG Future Workplace Framework

Source: ISG 2022

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises would need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX-initiatives with CX goals. A combination of remote and in-office workers would enhance the robust and uninterrupted use of technologies to ensure a seamless experience for end users, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers in terms of leveraging a high level of automation and analytics to ensure employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers and are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors' perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises' radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

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The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore & Malaysia, Brazil and U.S. Public sector

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants: Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology, Digital Service Desk and Workplace Support Services, Managed Employee Experience 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
- Focus on regional market

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:

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 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).

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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.

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Workplace Strategy Transformation Services

Who Should Read This

This report is relevant to enterprises across industries in Australia for evaluating the providers of workplace strategy transformation services.

In this quadrant, ISG highlights the current market positioning of workplace strategy transformation service providers in Australia and how each provider addresses the key challenges faced in the region.

Adding to the new workplace realities brought in by pandemic-driven remote working, the expectations of employees who follow hybrid working have increased. Returning to the traditional working model would mean enterprises losing their workers. Some of the major challenges faced by enterprises are providing a seamless and unified experience to the dispersed global workforce, building a more agile workforce through upskilling, dealing with data and application security, and improving communications that drive inclusiveness and engagement among hybrid workforces.

Organisations need to transform their workplaces into smart spaces to effectively engage with their customers and empower employees with more flexibility. Some digital workplace consulting service providers offer flexible ancillary advisory services that help customers avoid having to pay for high-cost advisory services. These providers focus on building hyper-personalised, agile, adaptive, human-centric, and inclusive solutions while continuing to invest in the development of workplace strategy transformation services in Australia.

Enterprises are looking to increase workforce productivity by engaging with trusted vendors that fulfil end-to-end workplace transformation.

Infrastructure, IT, and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select workplace-related services and solutions. The report also shows how the technical and integration capabilities of a provider is compared in the market.

Digital transformation professionals should read this report to understand how the providers of workplace strategy transformation services fit their digital transformation initiatives and how they are compared with each other.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of workplace strategy transformation service providers in Australia.

Security and HR leaders should read this report to understand how service providers address the significant challenges of compliance and security while keeping employee experience seamless for remote workforces.

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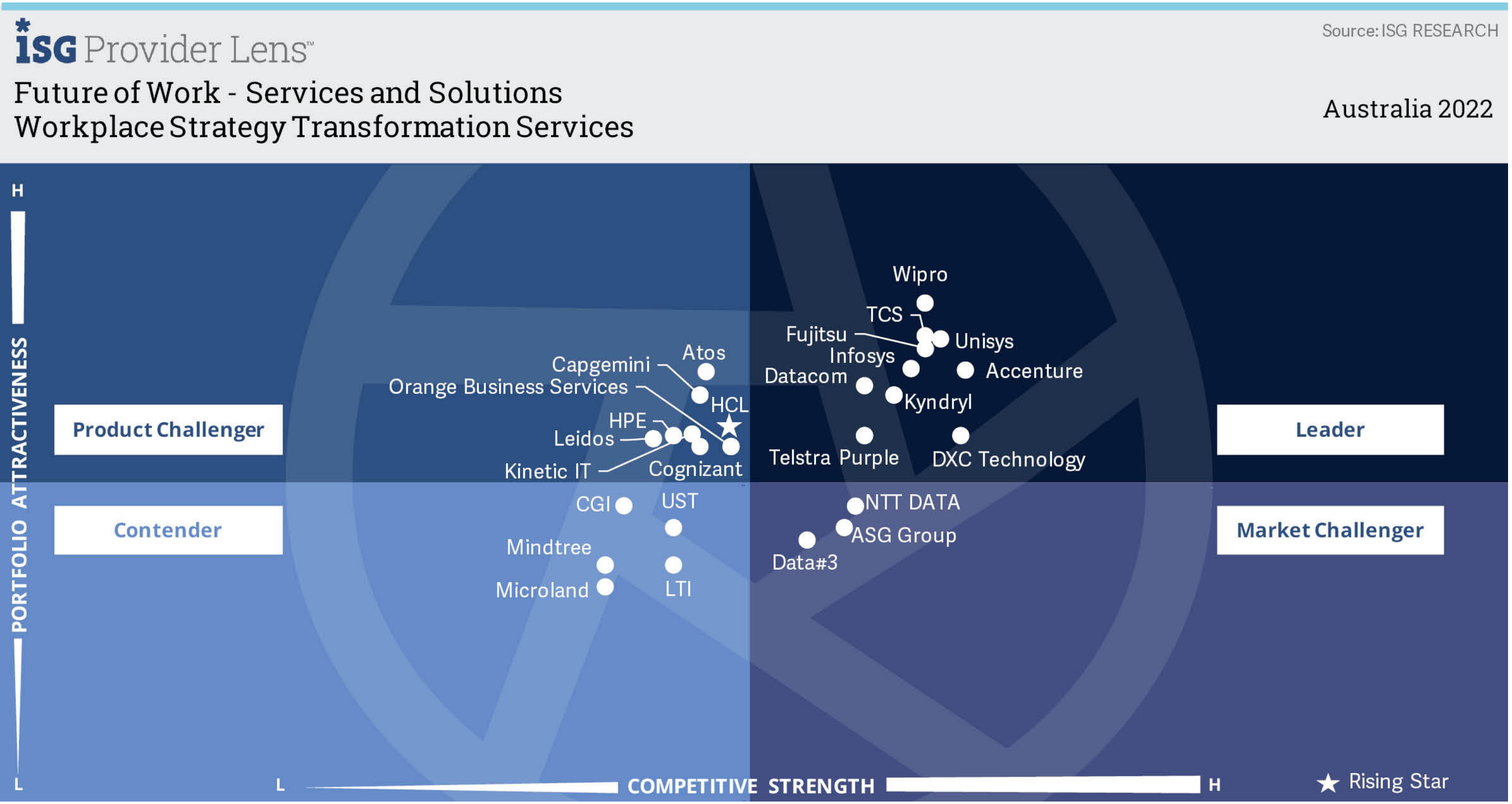

This quadrant evaluates service providers that offer **transformation-oriented consulting for the future of work.** These providers also assist clients in **transforming their business and operating models** and enabling the desired organisational changes.

Craig Baty and Phil Harpur

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Definition

This quadrant evaluates service providers that offer transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture, and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are provided independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating models and enable the desired organisational changes.

Eligibility Criteria

1. Providers should have a **vendor-neutral approach for transformation consulting and workplace** assessment services. The ability to provide associated managed or implementation/integration services can be a value add but is not a requirement
2. Providers should be able to **define and visualise clients' future of work environment,** covering areas such as hybrid working, involving remote and in-office workers, Uberisation of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX), and associating CX with employee experience (EX), while also enhancing end-user experience
3. Provider should **support technology adoption and organisational change/ behaviour** management services through its consulting portfolio
4. Provider should offer **solutions to address employee empathy and well-being**

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Observations

The Workplace Strategy Transformation Services quadrant evaluates service providers that offer transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture, and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are offered independently of the associated technology and managed services. The providers of these services also assist clients in transforming their business and operating model and enable desired organisational changes. Through automation and AI, companies are increasingly utilising technology to adapt, become more efficient, grow, and more effectively compete in the modern workforce era.

From the 397 global companies assessed for this study, 26 have qualified for this quadrant, with ten Leaders and one Rising Star:

accenture

Accenture provides technology and strategies for enabling innovative remote working, with more than 25 years of experience in infrastructure and workplace services. Accenture has a comprehensive range of Australian digital workplace partnerships.

DATACOM

Datacom is one of Australasia's largest professional IT services companies and has deep expertise across a wide range of industries. Datacom has a highly developed workplace strategy and strong business automation capabilities.

DXC Technology

DXC Technology is an IT services company that operates across 70 countries, with more than 134,000 employees. It has a strong and growing presence in Australia. It has a comprehensive, end-to-end workforce consulting process and strong advisory services.

Fujitsu

Fujitsu has a strong presence in Australia and New Zealand and has been operating there for 40 years. With 3,500 employees in over 30 locations, it offers significant workplace transformation services in both countries.

Infosys

Infosys operates in 50 countries including Australia, providing business consulting, IT, and outsourcing services. Headquartered in India, Infosys has a comprehensive workplace transformation strategy and a fast-evolving ESG strategy.

Kyndryl

Kyndryl is the world's largest IT infrastructure provider. IBM completed the separation of its managed infrastructure services business to Kyndryl in 2021. Kyndryl offers Australian clients a comprehensive portfolio of Workplace Collaboration Services.

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TCS is one of the world's leading global IT services, consulting, and business solutions company, headquartered in India. TCS has more than 35 workplace services clients in Australia, a cloud presence in Sydney and Melbourne, and an innovation lab in Sydney.

Telstra Purple is the consulting arm of Telstra, Australia's largest telecommunications provider. With its presence in several overseas markets, Telstra Purple ensures personalised, consistent, secure, and end-to-end user experience.

Unisys is a global systems and services company with more than 17,000 employees, including 900 in Australia. With operations in more than 40 countries, including Australia and New Zealand, Unisys is increasingly offering workplace strategy transformation services.

Wipro is a leading global IT, consulting, and business process services provider, headquartered in India. With a strong and growing presence in Australia, Wipro provides cognition- and analytics-driven hyperautomation and AR-based support.

HCL Technologies, a Rising Star, is an Indian multinational IT services and consulting technology company with a growing presence in Australia. HCL Technologies has a fast-growing workplace consulting practice with a strong focus on employee development.

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Managed Workplace Services – End User Technology

Who Should Read This

This report is relevant to large enterprises across industries in Australia for evaluating the providers of managed digital workplace services.

In this quadrant report, ISG highlights the current market positioning of managed digital workplace service providers in Australia and how each provider addresses the key challenges faced in the region.

Since the government-enforced work-from-home directions were lifted, more companies have assessed the potential of making remote work a permanent part of their business models. A significant proportion of Australian employees were doing hybrid work, splitting their week between days in the office and working remotely. As this model becomes increasingly normal, Australian companies turn to process automation to resolve the issues faced by remote employees and improve their virtual work experience.

Managed workplace service providers offer support services that use a combination of analytics, cognitive technology, and automation to provide end-to-end application distribution and collaboration services. The objectives include eliminating manual and repetitive employee tasks and providing seamless collaboration through integrated workplace operations.

Infrastructure, IT, and workplace technology leaders should read this report to understand the relative positioning and capabilities of managed workplace service providers to help them in planning and vendor selection. The report also shows how the technical and integration capabilities of a provider differ from the rest in the market.

Digital transformation professionals should read this report to understand how the providers of managed digital workplace services fit their digital transformation initiatives and how they are compared with each other.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed digital workplace service providers in Australia.

Security and HR leaders should read this report to understand how service providers address the significant challenges of compliance and security, while providing seamless employee experience to remote workforces.

Admin and field services managers should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.

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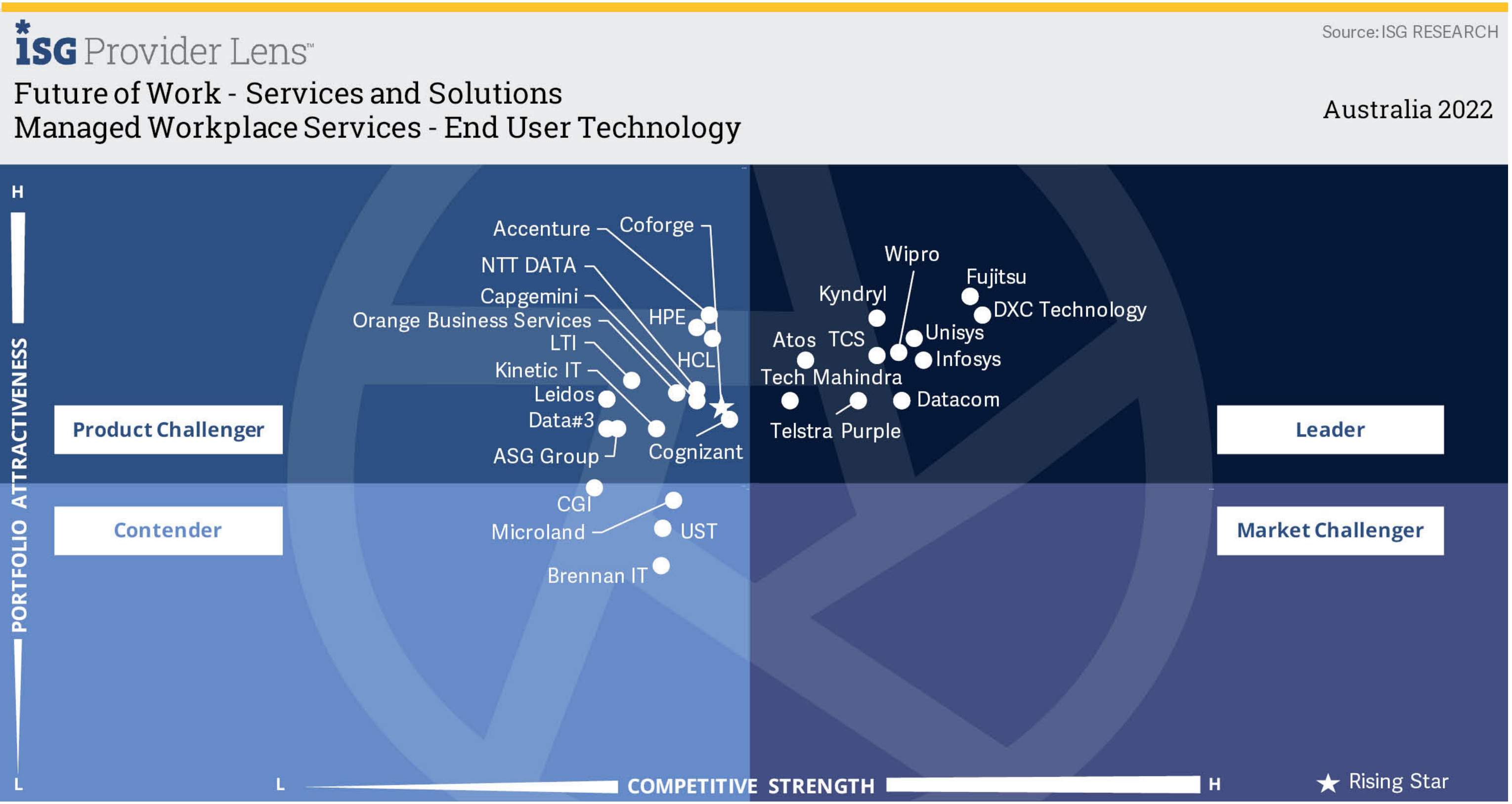

This quadrant assesses service providers that **offer managed services associated with end-user technologies**, that are deployed, provisioned, and typically secured by enterprise IT departments for end users/employees.

Craig Baty and Phil Harpur

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Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies, that are deployed, provisioned and secured typically by enterprise IT department for end users/ employees.

These services include end user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide endpoint management and security services supporting a wide variety of solutions to assist clients with **device policies related to bring-your-own-device (BYOD),** mobility, and expense management
2. Provide **complete device lifecycle management services,** including support for device procurement, enrollment, app provisioning, support, management, disposal, and recycling. Services should cover device sourcing and logistics, device as a service for device security, support for unified endpoint management (UEM), and mobility program management
3. Demonstrate experience in providing **remote virtual desktop services,** both on-premises and in the cloud
4. Manage devices in the respective countries in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support **endpoint security services** by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support **modern network and unified communication** as a foundation for a digital workplace

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Observations

This quadrant covers managed services associated with end-user technologies that are deployed, provisioned, and secured, typically by the enterprise IT department for end users/employees. These services include end-user enablement through services related to devices/applications, cloud workspaces, and workplace security. Their services provide the ability to work from anywhere, anytime by offering device support, including automated proactive technical support. Providers assessed in this quadrant offer complete end-user computing (EUC) technology services that form the core of the digital workplace. They leverage AI/cognitive technologies for end user-facing tasks and help achieve significant cost savings.

From the 397 global companies assessed for this study, 27 have qualified for this quadrant, with 11 Leaders and one Rising Star.

Atos

Atos is a French multinational information technology service and consulting company that specialises in high-tech transactional services. It is a global leader in digital transformation. Atos offers Australian clients a highly comprehensive end-to-end digital hybrid workplace platform.

DATACOM

Datacom is one of Australasia's largest professional IT services firms; it also operates across Asia, Europe, and the Americas. It has a comprehensive managed digital workplace solution and an innovate workplace roadmap.

DXC Technology

DXC Technology is an IT services company that operates across 70 countries, with over 134,000 employees. It has a fast-evolving modern workplace business strategy and a large security practice.

Fujitsu

Fujitsu has a strong presence in Australia and New Zealand and has been operating there for 40 years. With 3,500 employees in over 30 locations, it has a strong presence in the managed workplace services market and a powerful managed service offering.

Infosys

Infosys operates in 50 countries, including Australia, providing business consulting, IT, and outsourcing services. Headquartered in India, Infosys has an innovative digital workplace service offering and a growing partnership ecosystem.

Kyndryl

Kyndryl is the world's largest IT infrastructure provider. IBM completed the separation of its managed infrastructure services business to Kyndryl in 2021. Kyndryl has a broad range of workplace support services and a strong device management offering.

TCS

TCS is one of the world's leading global IT services, consulting, and business solutions companies, and is headquartered in India. TCS has had a presence in the Australian IT market for over 30 years and employs over 17,000 consultants and associates.

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Tech Mahindra is a leading provider of digital transformation and business reengineering services across 92 countries, including Australia. Tech Mahindra is working towards a carbon-neutrality target by 2030, through a range of initiatives.

Telstra Purple is the consulting arm of Telstra, Australia's largest telecommunications provider, and has a presence in several overseas markets. Telstra Purple's approach to managed workplace services is powered by its advanced network capabilities.

Unisys is a global systems and services company with over 17,000 employees, including 900 in Australia. Unisys has highly differentiated security and compliance capabilities and advanced AI capabilities.

Wipro is a leading global IT, consulting, and business process services provider, headquartered in India. With a strong and growing presence in Australia, Wipro ensures employee well-being and engagement by addressing the health of hybrid workforces.

Coforge

Coforge, a Rising Star, is a global digital services and solutions provider with a strong product engineering approach. Headquartered in Sydney, it offers cloud, data, integration, and automation technologies. It has a fast-growing presence in the managed workplace services market in Australia.

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Unisys

Leader

"Unisys has highly differentiated security and compliance and advanced AI capabilities."

Craig Baty and Phil Harpur

Overview

Unisys is headquartered in Pennsylvania, U.S. As a service provider, it has over 17,200 employees across 80+ global offices. In FY21, the company generated $2.0 billion (-8.8 percent YoY) in revenue, with services as its largest segment. Unisys has a strong presence in Australia, with 900 staff, and has offices that offer managed workforce solutions in Sydney and Melbourne.

Strengths

Comprehensive modern device management strategy: Unisys utilises a broad range of modern device management techniques to enable seamless digital workplaces. The techniques include asset tracking, data management, productivity tools, IoT devices, kiosks, and virtual desktops. The company also provides proactive workplace monitoring and advisory services to help clients identify relevant personas, BYOD policies, remote work configurations, smart conference rooms, and smart buildings.

Highly differentiated security and compliance capabilities: Unisys advises clients on what is unique about remote work and hybrid work and highlights the data that can be collected (from their unified communications platforms) and analysed. It provides clients with a link between transformation and how it can impact enterprise security and compliance.

Advanced AI and analytics capabilities: Through its InteliServe platform, Unisys is building on its core capabilities in AI, analytics, and automation, including remote and in-person support to deliver a proactive support experience.

Caution

Entering this new quadrant as a Leader, Unisys provides a broad range of managed workplace services. However, for many other offerings, Unisys is still perceived to be focussed on public-sector clients and may need to take initiatives to change this perception.

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Digital Service Desk and Workplace Support Services

Who Should Read This

This report is relevant to the large enterprises across industries in Australia for evaluating providers of digital service desk and workplace support services.

In this quadrant, ISG highlights the current market positioning of digital service desk and workplace support service providers in Australia and how each provider addresses the key challenges faced in the region.

With the hybrid working model in place and in-person IT support becoming relatively rare, the IT workers of large enterprises are under increasing pressure to support end-users (employees) and endpoint devices remotely. The need for support from anywhere for any device becomes crucial. Australian enterprises turn to digital service desk and workplace support vendors to improve their operational efficiency.

Service providers in Australia utilise machine learning and analytical tools to provide intuitive, multi-channel digital support services with digital and live agents focused on elevating user experience and resolving issues at the first contact. Companies are paying attention to quickly enhance and customise not only the experiences of their employees but also the way they are utilised to drive organisational efficiency.

Infrastructure, IT, and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers to help them plan and select digital service desk and workplace support services. The report also shows how the technical and integration capabilities of a provider differ in the market.

Digital transformation professionals should read this report to understand how the providers of digital service desk and workplace support services fit their digital transformation initiatives and how they are compared with each other.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of digital service desk and workplace support service providers in Australia.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while providing seamless employee experience to remote workforces.

CXO leaders should read this report to know the leading providers offering services that can help them better prepare the workforce for the changing business models and dynamics in the post-pandemic world.

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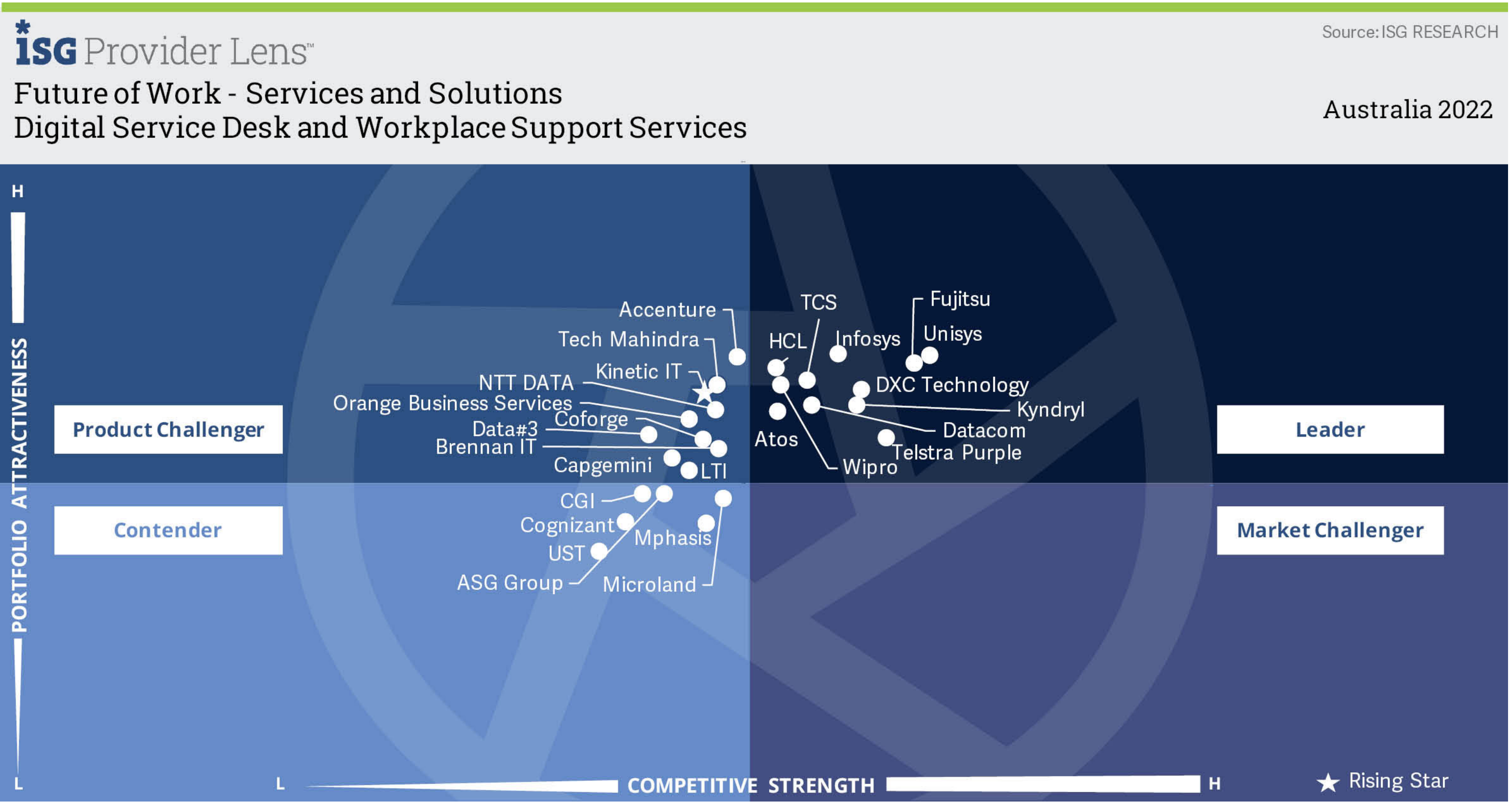

This quadrant assesses service providers that offer **modernised support services, including workplace support,** service desk services, onsite/field support, tech bars and cafés, digital lockers, field support, and automation-enabled omnichannel support for chat and voice.

Craig Baty and Phil Harpur

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Definition

This quadrant assesses service providers that offer modernised support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digital lockers, Uber-style field support and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere/anytime and include device support that encompasses automated proactive technical support and cloud platforms to provision 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.

Eligibility Criteria

1. Ability to provide **managed service desk and workplace support** services through a hybrid workforce, including virtual agents
2. Offer **remote and onsite field support** plus in-person technical assistance, leveraging augmented reality and/or virtual reality (AR/VR)
3. Capability to **set up and support self-help kiosks,** tech-bars, IT vending machines and digital lockers
4. Data-driven enriched **analytics to support self-service**, automatically resolve tickets and generate actionable insights among users
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

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Observations

This quadrant assesses service providers that offer modernised support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digital lockers, Uber-style field support, and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere, any time, and include device support that encompasses automated proactive technical support and cloud platforms to provision 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.

From the 397 global companies assessed for this study, 27 have qualified for this quadrant, with 11 Leaders and one Rising Star.

Atos

Atos is a French multinational information technology service and consulting company that specialises in high-tech transactional services. It is a global leader in digital transformation. Atos is a leader in hybrid workforce automation, with significant investments in the future of work.

DATACOM

Datacom is one of Australasia's largest professional IT services companies and has deep expertise across a wide range of industries. It has onsite teams, including remote and specialist teams, for its Intelligent Workspace offering.

DXC Technology

DXC Technology is an IT services company that operates across 70 countries, with more than 134,000 employees. It has a comprehensive digital support services offering, with extensive site support services.

Fujitsu

Fujitsu has a strong presence in Australia and New Zealand and has been operating there for 40 years. With 3,500 employees in more than 30 locations, Fujitsu has a fast-growing presence in the managed digital workplace solutions market in both countries.

HCL

HCL Technologies is an Indian multinational IT services and consulting technology company with a growing presence in Australia. It offers an advanced service desk offering and has a strong sustainability framework.

Infosys

Infosys operates in 50 countries, including Australia, providing business consulting, information technology, and outsourcing services. Headquartered in India, Infosys has substantial digital service desk operations and a highly evolved global delivery mode.

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Kyndryl

Kyndryl is the world's largest IT infrastructure provider. IBM completed the separation of its managed infrastructure services business to Kyndryl in 2021. Kyndryl offers comprehensive managed workplace services, with advanced scale, security, and expertise.

TCS is one of the world's leading global IT services, consulting, and business solutions companies, headquartered in India. TCS has recently won major clients in the digital workplace segment in Australia.

Telstra Purple is the consulting arm of Telstra, Australia's largest telecommunications provider, and has a presence in several overseas markets. Telstra Purple has a comprehensive digital service desk offering across Australia and other regions.

Unisys is a global systems and services company with over 17,000 employees, including 900 in Australia. It has a fast-evolving digital service desk and modern device management strategy.

Wipro is a leading global IT, consulting, and business process services provider. It is headquartered in India. With a strong, growing presence in Australia, Wipro has a comprehensive digital service desk offering and advanced endpoint security options.

Kinetic IT

Kinetic IT, a Rising Star, is an Australian managed ICT provider that has been in operation since 1995. Its managed service offerings include service desk, application support, infrastructure management, hybrid and native cloud, and network management.

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Unisys

Leader

"Unisys has a fast-evolving digital service desk and a modern device management strategy."

Craig Baty and Phil Harpur

Overview

Unisys is headquartered in Pennsylvania, U.S., and operates in ., As a service provider, it has over 17,200 employees across 80+ global offices. In FY21, the company generated $2.0 billion (-8.8 percent YoY) in revenue, with services as its largest segment. Unisys has a strong presence in Australia, with a staff of around 900 employees. It has regional service desk locations in Sydney and Wellington.

Strengths

Fast-evolving digital service desk strategy: Unisys continues to innovate with its InteliServe platform, with AI, automation, analytics, merged reality, and remote diagnostics and repair to significantly reduce the carbon impact of its services clients. It is also expanding the scope of support services by providing holistic help desks that go beyond IT to cover HR, travel, and finance. It supports all aspects of a remote worker's home office, smart buildings, and smart conference rooms.

Strong managed security and compliance offering: Unisys' organisational change management (OCM) practice provides modern change agent methods to address the human side of security. It simulates phishing attacks. AI-based phishing detection provides ongoing training to employees. Its secure data recovery services provide ransomware recovery solutions. It taps into operational data to identify and resolve security risks and leverages AI to monitor rapidly changing security threats, combining the data from data centre/cloud activities with end-user activities.

Caution

Unisys enters this new quadrant as a Leader. It has very strong offerings in the public sector. However, its capability to offer a wide range of desktop services is largely under-acknowledged in other verticals. Further work promoting this capability is required to penetrate outside its traditional markets.

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Managed Employee Experience Services

Who Should Read This

This report is relevant to the enterprises across industries in Australia for evaluating the providers of managed employee experience services.

In this quadrant, ISG highlights the current market positioning of managed employee experience service providers in Australia and how each provider addresses the key challenges faced in the region.

Technology was reshaping the world of work well before the pandemic. The emergence of AI has already made some roles redundant, and more will follow. Companies have initiated skill-building programs for employees to develop new skills, while curating innovative methods and motivational strategies in the process of upskilling workforces requires significant consideration. On the other hand, enterprises need to rethink employee workplace experiences as the hybrid working model becomes a norm. Employee connections, workplace complexities, and dispersed workforces can hinder employee productivity.

Providers of managed employee experience services focus on offering solutions that are designed to enable seamless employee communication and collaboration, and they leverage AI technologies to drive employee empowerment and help companies create insights on employee experience.

Infrastructure, IT, and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select managed employee experience services. The report also shows how the technical and integration capabilities of a provider differ in the market.

Digital transformation professionals should read this report to understand how the providers of managed employee experience services fit their digital transformation initiatives and how they are compared with each other.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed employee experience service providers in Australia.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while providing seamless employee experience to a remote workforce.

CXO leaders should read this report to know the leading providers offering services that can help them better prepare the workforce for the changing business models and dynamics in the post-pandemic world.

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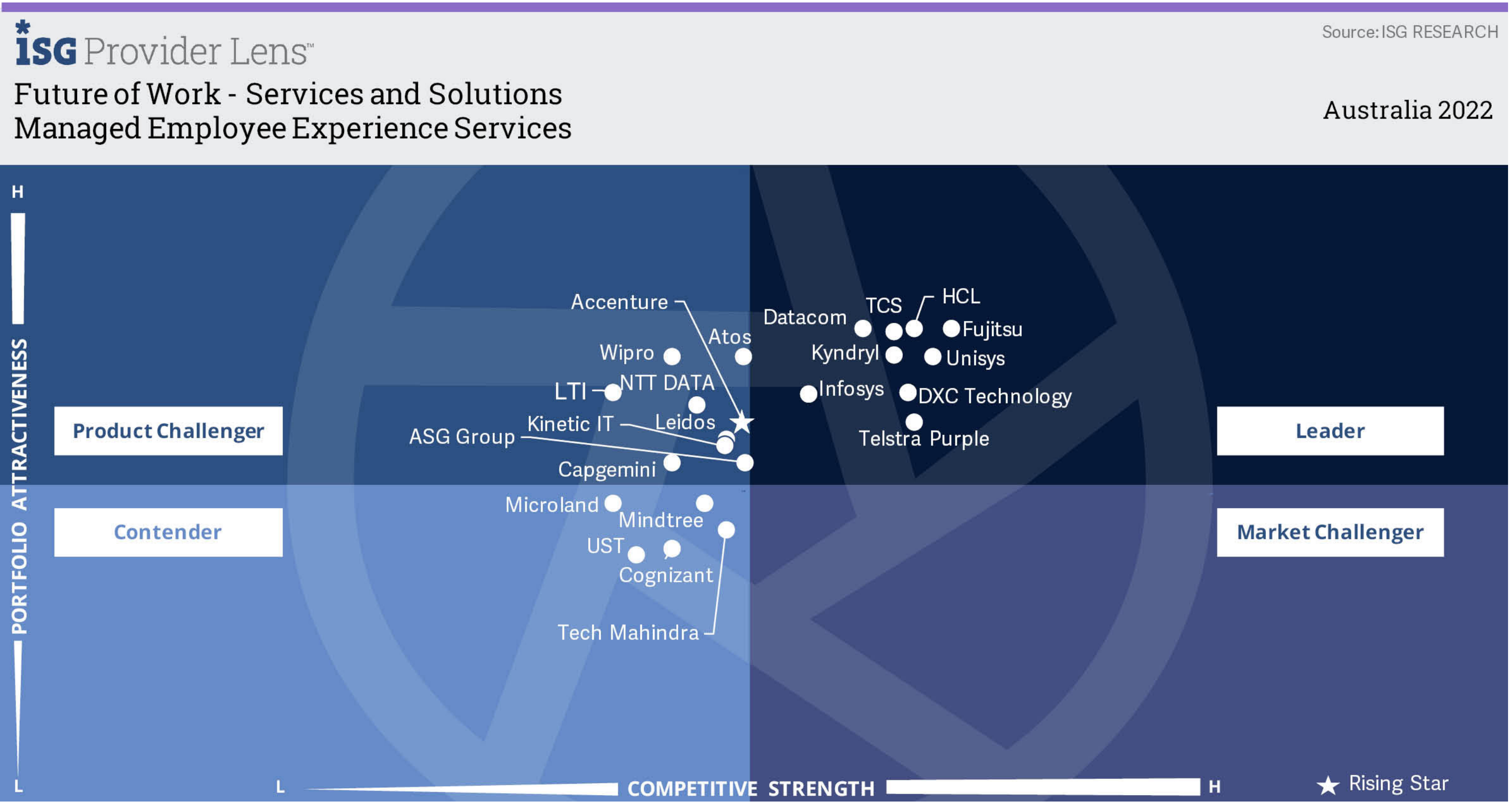

This quadrant assesses providers that offer **value-added managed services** not only for enabling the **workplace technology ecosystem** but also for enhancing end-user experience. They offer services that **associate employee experience with measurable business results.**

Craig Baty and Phil Harpur

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Definition

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience. These providers typically deal with business leaders and line-of-business (LoB) representatives, in addition to CIOs. They offer services that associate employee experience with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

Eligibility Criteria

1. Ability to provide **services that directly correspond to user experience** associated with **device and app access,** plus team collaboration, human augmentation to a digital workforce; such as virtual agents, line of business (LoB) employee experience, user productivity, and digital dexterity
2. Offer a seamless **experience for remote-working employees and part-time workers** that includes innovative engagement services/solutions for the respective country or region
3. Should have at least 50 percent of clients **leveraging experience level agreements (XLAs) related key performance indicators (KPIs)** and at least 10 percent of clients, globally, with XLA-based actual pricing (risk and reward) engagements
4. Provide **managed unified communications and collaboration (UCC),** user behaviour analysis and user experience measurement beyond workplace technology, thus extending smart workplace services to other business functions, such as HRO and operations
5. Offer **workplace services that permeate businesses,** including smart user and context-specific access through virtualised workspaces
6. Offer **smart facilities and physical on-premises services** that support intuitive capabilities including hot desking, health assessment, and a customised, contextualised experience with a smart devices-supported workplace
7. Offer **services to enhance employee digital dexterity and support technology democratisation** initiatives such as low code/no code development

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Observations

This quadrant assesses providers that offer value-added managed services not only for enabling the workplace technology ecosystem but also for enhancing the end-user experience. These providers typically deal with business leaders and line-of-business (LoB) representatives, in addition to CIOs' offices. They offer services that associate employee experience with measurable business results. Their services help align the digital and physical facets of the future workplace with the human aspect.

From the 397 global companies assessed for this study, 22 have qualified for this quadrant, with nine Leaders and one Rising Star.

DATACOM

Datacom is one of Australasia's largest professional IT services that also operates across Asia, Europe, and the Americas. Its customer experience strategy provides a complete digital experience regardless of the task.

DXC Technology

DXC Technology is an IT services company that operates across 70 countries, with more than 134,000 employees. It has a strong, growing presence in Australia. It has a fast-evolving workplace employee experience offering, with a strong user sentiment analysis.

Fujitsu

Fujitsu has a strong presence in Australia and New Zealand and has been operating in these countries for 40 years. With 3,500 staff in over 30 locations, it offers innovative managed employee experience applications and has broad coverage in Australia.

HCL

HCL Technologies is an Indian multinational IT services and consulting technology company with a growing presence in Australia. It has an innovative workplace experience offering and a growing partner ecosystem.

Infosys

Infosys operates in 50 countries, including Australia, providing business consulting, information technology, and outsourcing services. Headquartered in India, Infosys offers a broad range of employee experience platforms and transformation tools.

Kyndryl

Kyndryl is the world's largest IT infrastructure provider. IBM completed the separation of its managed infrastructure services business to Kyndryl in 2021. Kyndryl offers innovative digital workplace platform features and seamless managed user experience.

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TCS is one of the world's leading global IT services, consulting, and business solutions companies. It is headquartered in India. TCS continues to make strong investments in cloud infrastructure in Australia (in Sydney and Melbourne).

Telstra Purple is the consulting arm of Telstra, Australia's largest telecommunications provider, and has a presence in several overseas markets. A key differentiator of Telstra Purple's workplace experience practice is its focus on business outcomes.

Unisys is a global systems and services company with over 17,000 employees, including 900 in Australia. It provides a strong, proven thought leadership in managed employee experience services.

Accenture, a Rising Star, provides technology and strategies for enabling innovative remote working and has over 25 years of experience in infrastructure and workplace services. Accenture has strong capabilities for delivering, transforming, and running innovative end-to-end solutions.

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Unisys

Leader

"Unisys has strong, proven thought leadership in managed employee experience services."

Craig Baty and Phil Harpur

Overview

Unisys is headquartered in Pennsylvania, U.S. As a service provider, it has over 17,200 employees across 80+ global offices. In FY21, the company generated $2.0 billion (-8.8 percent YoY) in revenue, with services as its largest segment. Unisys has a growing presence in the workplace strategy transformation services market, with clients in over 90 countries and operations in over 40 countries, including Australia and New Zealand.

Strengths

Demonstrated thought leadership in managed employee experience services: Unisys is driving thought leadership in proactive experience management and delivering XLA 2.0 to its clients, where it measures experience based on personas and employee journeys. It is now developing XLA 3.0 that makes use of additional data sources, hyper-personalisation, and advanced organisational change management (OCM) experience techniques. It guides organisations through the process of defining experience-level agreements (XLAs), determining the desired outcomes and setting up tooling to monitor and improve employee experience.

Rapidly advancing managed employee experience strategy: Unisys acquired Unify Square and partnered with OCM and service integration and management (SIAM) organisations to develop an advanced set of employee experience management services that are winning high-value clients. It is pioneering the use of hyper-personalisation and is developing a patent-pending engine that integrates OCM activities with the data it collects from its experience management service.

Caution

Unisys has improved significantly in the penetration of the Australian managed employee services market and has moved into a Leader position. This position will only be maintained if it can continue to remain focussed over the next 12 months.

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Appendix

The ISG Provider Lens™ 2022 – Future of Work - 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.

Lead Authors:
Craig Baty and Phil Harpur

Editors:
Dona George, Mark Browstein

Research Analyst:
Angie Kho

Data Analyst:
Anirban Choudhury

Consultant Advisor:
Jason McAuliffe

Project Manager:
Ridam Bhattacharjee

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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 September 2022, 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 - Services and Solutions 2022 market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases & 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

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Lead Author

Craig Baty
Lead Analyst

Craig Baty has extensive research and thought leadership experience across the Asia Pacific and Japanese ICT markets. Craig is principal of DataDriven, an Asia Pacific-based research and advisory firm that is an ISG Research partner. Working seamlessly with ISG's global research team, DataDriven delivers all ISG Provider Lens™ research in APAC. Craig has over 30 years of executive and board-level experience in the industry, including experience as group vice president and head of Gartner Research Asia Pacific and Japan; CEO of Gartner Japan; global vice president of Frost & Sullivan; executive general manager for marketing and CTO of Fujitsu Australia New Zealand & Asia; and general manager for marketing, strategy and alliances at BT Syntegra. More recently he was vice president of global strategy and vice president of digital services at Fujitsu's Tokyo headquarters.

As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces, has presented at over 1,500 events globally, and is regularly quoted in regional media. Craig is actively involved in the ICT community as board member of the Australian Information Industry Association (AIIA). He is currently pursuing a Doctor of Business Administration degree on the national culture impact on IT strategy/investment (Japan compared to Australia).

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/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 nine 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.

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Research Analyst

Angie Kho
Regional Support Analyst

Angie Kho is a 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 seven IPL reports.

Her areas of expertise lie in IT services management and enterprise planning services. Angie develops content from an enterprise perspective and writes the global summary report. Along with this, she 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 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.

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About Our Company & Research

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit https://research.isg-one.com/.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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OCTOBER 2022

REPORT: FUTURE OF WORK - SERVICES AND SOLUTIONS

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