*iSG Provider Lens™

Future of Work (Workplace) - Services

Managed Workplace Services – End-user Technology

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | SEPTEMBER 2023 | U.S. PUBLIC SECTOR

Table of Contents ⌂

Executive Summary

Report Author: Bruce Guptill

Services and providers adapt as public-sector workspaces continue to evolve.

Since 2020, the use of digital workplace services by U.S. state and local governments and educational (SLED) agencies has seen significant changes and advancements. This shift, in large part, is due to pandemic-driven impacts in work environments, widespread staff retirements and shortages, and most recently, the availability of substantial funds from the U.S. federal government to upgrade IT and increase the operational efficiency and effectiveness of associated projects.

Key developments driving SLED digital workplace changes and disruptions include the following:

- **Adoption of disparate capabilities growing from remote work enablement:** With remote work evolving from experiment to necessity to part of the norm, agencies have embraced a widening array of digital services and tools to enable collaboration, communication and information sharing among employees.

- **Cloud as *de facto* infrastructure:** Prior to the COVID-19 pandemic, IT infrastructure challenges, application software costs, and staffing issues were slowly moving agencies away from traditional on-premise infrastructure toward cloud-based platforms and services. The COVID-catalyzed combination of digital citizen demands and remote and hybrid work environments accelerated and expanded this to the point where cloud IT became the norm for new capabilities while legacy IT still requires attention and skills.

- **Mobile enablement and expectation:** Most SLED agencies have embraced mobile applications and related web interfaces that allow employees to access workplace services via smartphones and tablets. However, rapidly achieved and loosely controlled implementations have plagued many agencies with IT security nightmares.

SLED digital workplaces frequently extend directly into citizens' lives.

- **Data security and privacy:** The above changes brought a heightened focus on data security and privacy, resulting in more agencies struggling to implement effective, robust security measures in increasingly complex, hybrid IT and work environments.

- **Automation and AI:** An offshoot of the SLED staffing challenge has been increased interest in using automation and AI to augment and occasionally replace workers, especially within IT and related support organizations. Agencies are experimenting with AI-powered chatbots to automate employee and constituent support, data analytics to aid decision-making, and process automation to streamline repetitive tasks.

- **Virtual training and learning:** Virtual and remote employee training experiments have led to an influx of learning management systems, webinars and online training platforms in SLED agencies, enabling a continuous learning culture in environments formerly built on skill-plus-seniority hierarchies.

- **Digital changes altering citizen service expectations and delivery:** As with most recent digital changes, SLED constituents' digital preferences were growing prior to COVID. Months-long inability to physically interact with many agencies heightened this to a point where online is now the default mode for most citizen-facing SLED interactions and transactions. Agencies still struggle with enabling acceptable levels of interaction, information and transaction, while constituents demand an increase in consistency of interface and service delivery.

SLED IT organizations, already under-resourced and short-staffed, thus struggle to enable adequate digital workplace environments in the face of overwhelming change.

In this ISG Provider Lens™ study, we look at three important sets of capabilities that help overburdened SLED IT teams enable and support digital workplaces – many of which are still evolving. They also facilitate improved worker and constituent capabilities and satisfaction while reducing support costs.

Critical capabilities

Digital workplace advancements in SLED organizations must rapidly and cost-effectively enable and support the digital service expectations of staff and constituents. Critical capabilities enabling this, and which must be delivered by service providers, include the following:

- **Workflow automation:** Routine tasks such as approvals, document processing and data entry should be streamlined and automated using tools such as RPA and workflow management systems.

- **Collaboration and communication tools:** Implementing adequate, adaptable communications and collaboration applications and solutions is critical, but the ability to unify these into a service or set of services (i.e., unified communications as a service (UCaaS)) will greatly improve the ability to use and manage such capabilities while reducing their cost of operation and use.

- **Data analytics and reporting:** The use of advanced analytics tools in every process is a core need. Leading-edge providers use advanced AI (e.g., large language models (LLMs)) to automate, augment and extend analytics and reporting relevancy.

- **Cybersecurity:** Cybersecurity remains a major challenge for SLED organizations. Integrated and readily used security within solutions, especially as part of managed services, enables much broader and more adaptable security capability.

- **Mobile and remote productivity:** Mobile practices and policies should be integrated with remote work solutions and policies. Providers and SLED agencies alike should be able to readily adapt to mobile and remote behavior changes and conditions.

- **Training and change management:** Digital work includes, and differs from, traditional work. Changes in policy, behavior, oversight, interaction and organizational structure and culture must be resolved for digital workplace efficiency and effectiveness.

Unique SLED provider and solution requirements

State and municipal government agencies and educational institutions have several sector-unique needs when contracting digital workplace services. Service providers and their offerings must meet and exceed these to minimize potential disruptions and maximize the agencies' ability to procure services and solutions. These include the following:

- **HR-centric vs. IT-centric approaches.** Digital workplace providers tend to follow one of two approaches when developing and delivering services: HR-centric and IT-centric. HR-centric approaches emphasize client HR/HCM organizations as most responsible for digital workplace strategy and management, using a strategic approach aligned with established and expected workplace strategy and management. IT-centric approaches, also called tech-plus-tools, tend to emphasize the capabilities of solutions and services, including performance and cost improvements. In our experience, both approaches are significant to SLED agencies, but HR organizations are most likely to

dominate digital workplace requirements and provider/solution qualification.

- **Workforce extension into constituencies.** Many agency groups and functions extend well beyond the internal environment into citizen and constituent environments (e.g., taxation, licensing, health and human services). Ideally, digital workplace solutions address and improve the experience of both.

- **Regulatory compliance, including worker roles and data security.** Agencies must comply with the expanding scope of regulations and standards related to data security, privacy, accessibility and transparency, along with function-, departmental- and agency-specific worker roles and rules.

- **Integration with legacy systems.** Even the most advanced SLED digital workplaces will rely on mainframes and other legacy IT types for years to come. When procuring digital workplace services, agencies must consider the compatibility and integration capabilities of the service provider's solution with their incumbent systems and data.

- **Scalability and flexibility.** Contracted digital workplace services should be able to accommodate increasing and decreasing workloads, data requirements and system usage over time. Flexibility is important to adapt to changing requirements and evolving technologies.

- **Accessibility, inclusivity and sustainability.** Government agencies must ensure accessibility and inclusivity for all workers and citizens when workplaces extend into constituent domains (e.g., licensing, revenue and/or taxes). An increasing number of SLED agencies also require commitment to and measurable evidence of ESG improvement.

- **Procurement regulations and processes.** Government procurement processes may involve competitive bidding, evaluation criteria, documentation and contract management. Government agencies may have additional criteria when evaluating potential providers, including transparency and public accountability requirements. Providers with established and extensive SLED procurement and contracting

expertise can help reduce the time consumed and challenges faced during the selection and contracting processes.

- **SLAs and contract terms.** Given the criticality of digital workplace services, government agencies are working to establish clear SLAs that define performance expectations, response times, support availability and penalties for non-compliance. Contract terms should also address issues such as termination, data ownership, liability and dispute resolution.

Planning for future disruption and advancement

Which developments in SLED digital work environments will likely be the most disruptive through 2025?

While it is challenging to predict the future with absolute certainty, based on current trends and emerging technologies, several developments will likely disrupt digital workplaces through 2025. Here are some of the most prominent ones that should be enabled by current digital workplace services and must be included in future offerings:

- **AI advancements.** AI technologies and applications will continue to evolve and transform digital workplaces. ML and LLMs will advance intelligent automation, predictive analytics, NLP and computer vision. Properly implemented and managed through provider services, each should enhance productivity, automate repetitive tasks and provide intelligent insights for decision-making.

- **Remote and hybrid workforce models.** Remote and hybrid workforce models will persist and expand to include more contract workers and freelancers or gig workers in many areas previously considered off-limits to such.

- **Augmented and virtual reality (AR and VR).** AR and VR technologies will enable remote training, virtual meetings, immersive simulations and enhanced collaboration. These technologies can reduce geographical barriers and provide engaging and interactive remote and temporary work environments.

- **Internet of Things (IoT)**. IoT will continue connecting devices, sensors and objects, creating smarter workplaces. IoT data should improve operational efficiency, enable better resource management and enhance employee experiences (EX). For example, smart offices can adjust lighting, temperature and other environmental factors based on occupancy or individual preferences.

- **Blockchain for trust and security.** Blockchain technology will be crucial in enhancing trust, security and transparency in SLED roles and associated digital workplaces. Blockchain-based solutions will provide greater data integrity across and within increasingly complex workplaces, reduce fraud and streamline complex processes.

- **Human-machine collaboration.** As AI and automation evolve, these technologies will augment human capabilities, allowing SLED employees to focus on complex, creative and strategic tasks. Collaboration between humans and intelligent systems will become more seamless and intuitive.

- **Ethical and responsible technology adoption.** Though we have seen early advancement toward this, by 2026, there will be widespread and increased emphasis on ethical and responsible technology adoption. Organizations will prioritize data privacy, fairness in AI algorithms, diversity and inclusion, and responsible AI use. This will lead to the advancement of policies, regulations and guidelines that must be integrated into digital workplace solutions and services.

What makes a leader?

The providers positioned as Leaders in this study are those that demonstrate portfolio and competitive strengths most suitable to ISG client requirements.

Scope of portfolio, company size and market presence all shape perception of provider leadership. But the size, number, range and complexity of technology and services included in provider portfolios are usually secondary to whether and how the provider enables and delivers business value to client organizations in the manner(s) that they require. The number

of resources, revenue amounts and number of locations also shape provider positioning. However, these must be weighed against how and how much these capabilities deliver measurable improvement to clients.

Ideally, Leaders combine key aspects of the above while positioning themselves to compete effectively in satisfying client needs that have yet to develop fully. Those emphasizing innovation in adopting technologies into more effective ways of working, or delivering value through new ways of working, are more likely to be recognized as Leaders.

> The most effective service providers enable and improve SLED agency digital workplaces that **extend beyond the traditional workplace** to include external users citizens, constituents, regulators and more.

Provider Positioning   **Page 1 of 3**

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Accenture	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Contender
BCG	Contender	Not In	Not In
Bell Techlogix	Not In	Not In	Contender
Capgemini	Product Challenger	Product Challenger	Product Challenger
CGI	Leader	Not In	Leader
Cognizant	Not In	Not In	Contender
Computacenter	Contender	Contender	Contender
Deloitte	Leader	Not In	Not In
Digital Workplace Group	Contender	Not In	Not In

Provider Positioning   **Page 2 of 3**

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

Provider Positioning **Page 3 of 3**

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Mphasis	Product Challenger	Contender	Product Challenger
NTT DATA	Market Challenger	Leader	Market Challenger
PwC	Contender	Not In	Not In
TCS	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Leader	Product Challenger	Product Challenger
Unisys	Leader	Leader	Leader
UST	Contender	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger
Zensar Technologies	Product Challenger	Contender	Product Challenger
Zones	Rising Star ★	Not In	Market Challenger

This study evaluates **service providers 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

As new digital business realities emerge that are increasingly disruptive, public sector entities, especially state, local and educational (SLED) organizations, face tremendous pressure to improve the way they operate and modernize their whole environment to reduce costs and staff. Their IT needs and challenges are similar to those of complex commercial enterprises, but typically with more restrictions on acquisition, staffing, management, reporting and operations. SLED organizations need objective insights, assessments and guidance more than ever.

This ISG Provider Lens™ Future of Work 2023 study offers IT buyers and decision-makers objective guidance on providers identified as Leaders, Rising Stars, Market Challengers, Product Challengers, and Contenders, with experience in developing, selling and supporting digital workplace services for public sector entities in the U.S. Their services include managed workplace services to enable and support end users' digital environments, digital service desk and workplace support services for workers and constituents being served, and employee experience transformation services.

ISG clients use these reports to gain market insights and understand provider intelligence that help expand their views about markets, providers and solutions. ISG U.S. public sector advisory and consulting teams use these reports to help clients understand provider types, capabilities and offerings suitable for their requirements. This study also provides competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three services quadrants: Managed Workplace Services – End-user Technology, Digital Service Desk and Workplace Support Services and Employee Experience (EX) Transformation Services.

This ISG Provider Lens™ study offers IT and business decision-makers with:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. public sector

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

Provider Classifications

The provider position reflects the suitability of 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.

★ **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.

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.

Managed Workplace Services – End-user Technology

Managed Workplace Services – End-user Technology

Who Should Read This Section

This report is relevant to public sector organizations in the U.S., including SLED organizations, for evaluating managed workplace service providers.

In this quadrant, ISG highlights the current market positioning of the providers of managed workplace services to the U.S. public sector organizations and how each provider addresses the key challenges they face.

U.S. public sector organizations are continually challenged with optimizing IT and operational costs and boosting workplace productivity and efficiency. Hence, these organizations are focusing on engaging with managed service providers that can help them address remote-work-related challenges and equip them with the right technologies and processes at affordable prices to meet the current dynamic demands of their workforce. SLED agencies also seek to engage with managed service providers that can accelerate their journey toward modern workspaces and take a human-centric approach.

With the increasing trend of BYOD, the need for endpoint management and security services has also heightened in U.S. public sector organizations. It has led to the demand for a device as a service (DaaS) and the Zero Trust security model to enhance workplace security and create a secure environment for employees. These organizations thus prefer providers that offer a complete portfolio of end-to-end managed security services and governance frameworks.

Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers can fit their digital transformation initiatives.

Cybersecurity professionals should read this report to see how providers address the significant compliance and security challenges while maintaining a seamless employee experience.
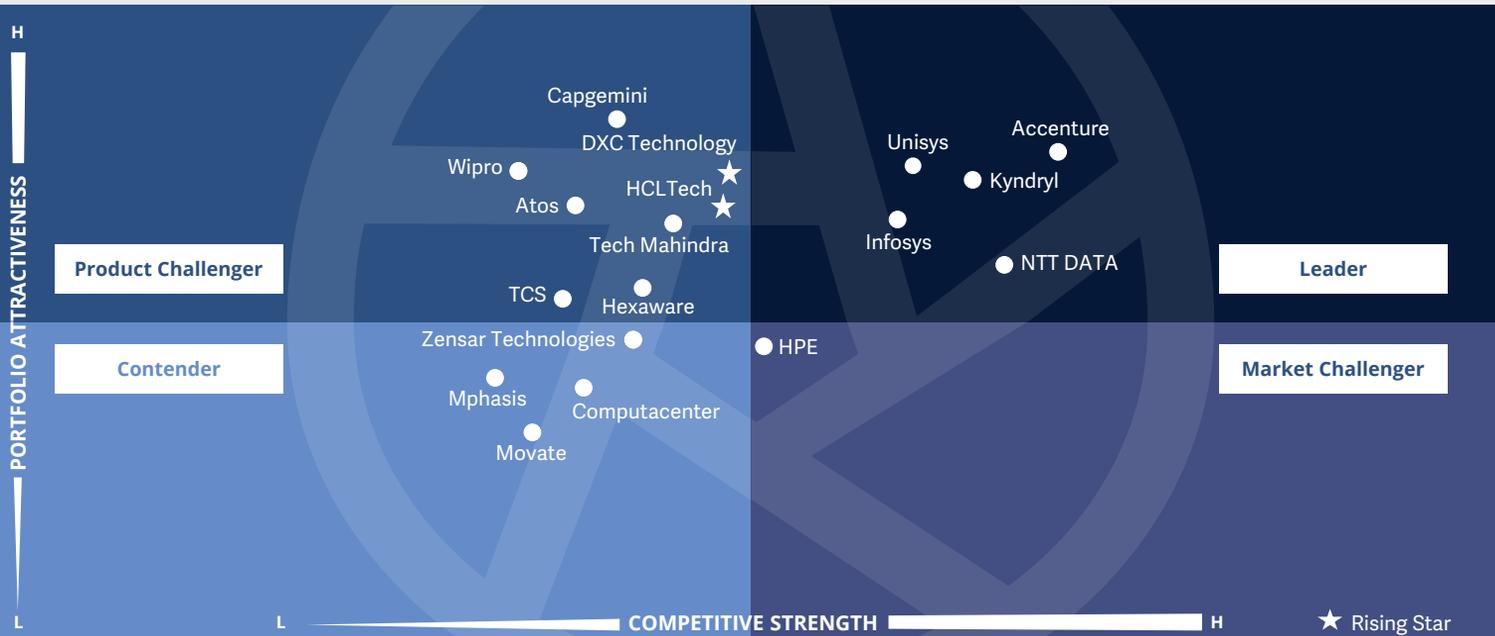
Public sector professionals should read this report to learn the relative provider positioning and capabilities that can help them effectively plan and select digital workplace services.

Procurement professionals should read this report to better understand the current landscape of managed workplace service providers in the U.S. public sector.

Source: ISG RESEARCH

Future of Work (Workplace) - Services
Managed Workplace Services – End-user Technology

U.S. Public Sector 2023

H

PORTFOLIO ATTRACTIVENESS

Capgemini

DXC Technology

Wipro

HCLTech ★

Atos

Accenture

Unisys

Kyndryl

Tech Mahindra

Infosys

Product Challenger

NTT DATA

Leader

TCS

Hexaware

Zensar Technologies

HPE

Contender

Market Challenger

Mphasis

Computacenter

Movate

L

L

COMPETITIVE STRENGTH

H

★ Rising Star

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

Bruce Guptill

Managed Workplace Services – End-user Technology

Definition

Most digital work environments involve many potentially costly and complex end-user devices, software, data resources, networking and support needs across changing remote and centralized work environments. All these need to be organized and managed effectively to achieve the least costly and most sustainable digital work environments.

SLED organizations lack the ability to achieve this objective. The number of IT staff is scarce and continues to decline. SLED's ability to acquire and support an essential mix of leading-edge digital end-user work solutions is very limited. Outsourcing IT-related tasks to managed service providers is key to affordable, efficient and sustainable management of such devices in changing and sometimes uncertain work environments.

Providers assessed in this space offer comprehensive end-user computing (EUC) technology services that form the core of the digital workplace. This quadrant assesses providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by IT departments for end users/employees. Portfolios vary, but such services typically provide and support end-user enablement through endpoint management, application packaging, provisioning and deployment; mobility support; cloud workspaces; virtual desktop environments; device lifecycle management; and increasingly end-user identity and access management (IAM).

Eligibility Criteria

1. **Established presence and experience** in public sector entities

2. **Providing endpoint management and security services** with device policies related to bring-your-own-device (BYOD), mobility and expense management

3. **Providing complete device lifecycle management services**, including support for procurement, enrollment, app provisioning, device support, and support for unified endpoint management (UEM) and mobility program management

4. **Demonstrating experience in providing remote virtual desktop services**, both on-premises and in the cloud

5. Managing devices in **multiple, widespread locations**

6. **Supporting endpoint security services** with technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach

7. **Supporting modern networking and unified communication as a foundation** for a digital workplace

Observations

U.S. public sector agencies are dealing with massive and still-evolving digital worker and workplace changes. Managed service providers delivering measurable value in digital workplace enablement and management are among the prime beneficiaries of this.

The core factors driving demand for managed workplace services are the same as those driving demand for most IT-related services in the U.S. public sector: rapidly diminishing numbers of qualified staff combined with accelerating use of remote, mobile and hybrid environments, all supporting an expanding digital services reality of systems, processes, users, constituents, and supplier/partner participants. SLED agencies, in particular, are increasingly challenged to enable, let alone improve or manage, the scope of digital workplace capabilities needed or expected by workers and group leaders.

This widespread growth in demand for relevant services is attracting more providers from year to year. Our 2022 study found 14 total qualified providers, including five considered to be Leaders. This year, we identified 18 qualified providers in total, with five recognized as Leaders and two as Rising Stars.

As we have noted in multiple U.S. Public Sector studies, this growth in scope and number of providers makes provider differentiation and selection more challenging and will continue to do so through at least year-end 2025. Given SLED agencies' ongoing IT staffing and budget trends, we expect those challenges to accelerate as more providers enter the marketplace and attempt to replicate leading providers' portfolios, pricing, and contracting.

From the 30 companies assessed for this study, 18 qualified for this quadrant, with six being Leaders and two Rising Stars.

accenture

Accenture's digital workplace services strategy for the U.S. public sector includes expanding its holistic digital business vision and offerings that include and exceed measurable improvement of changing hybrid workforces.

Infosys

Infosys' dedicated U.S. public sector business unit and strong regional presence complement one of the broadest and deepest portfolios of managed end-user technology services.

kyndryl

Kyndryl's legacy in device management, virtualization and end-user computing (EUC) services complements its substantial U.S. public sector IT service presence, expertise and contracting knowledge.

NTT DaTa

NTT DATA has one of the more robust U.S. public sector presences in this study and offers strong device lifecycle management and analytics-driven device monitoring services.

UNISYS

Unisys offers some of the most comprehensive end-user technology management and support services aimed at U.S. public sector organizations – including advanced user and usage analytics and its PowerSuite DEX management-focused platform.

DXC TECHNOLOGY

DXC Technology (Rising Star) stands out for its modern management-focused device management services. It emphasizes automation and analytics-led device refresh management services.

HCLTech

HCLTech (Rising Star) has one of the strongest portfolios for device management services, including device-as-a-service (DaaS). The firm extends vertical-optimized services to improve its public sector presence and value.

NTT DATA

Leader

"NTT DATA's extensive capabilities, public sector presence in the U.S. and AI-driven efficiencies augmenting its device lifecycle management services position it as a Leader in this quadrant for the U.S. public sector."

Bruce Guptill

Overview

NTT DATA is headquartered in Tokyo, Japan and operates in 56 countries. It has more than 152,700 employees across 208 global offices. In FY23 the company generated JPY 3,490.2 billion in revenue, with Financial as its largest segment. It provides managed end-user technology services, including device and mobility management, as part of its digital workplace services, which is part of its broader Digital Operations service practice. NTT DATA serves more than 50 U.S. SLED clients and dozens of federal-level agency clients. The company maintains multiple U.S. federal, state and municipal contracting vehicles.

Strengths

AI-driven, automated device monitoring and management: NTT DATA's Nucleus Intelligent Enterprise Platform automation platform enables AI-powered device usage monitoring and analytics capabilities, including proactive fault detection and self-healing, automated persona-based app distribution, UX/EX monitoring and DEX scoring.

Substantial U.S. public sector presence, domain expertise and contracting: NTT DATA has one of the more robust U.S. public sector presences in this study, with 35 U.S. state government agencies, at least 17 U.S. municipalities and more than 90 federal agencies as of 2022. Its core SLED domains include law enforcement and criminal justice; labor, commerce and workforce development; finance and administration; and health and

human services. NTT DATA also has many federal, state and municipal contracting vehicles to ease sourcing, contracting and acquisition.

Device-as-a-Service and virtual desktop infrastructure (VDI): NTT DATA's device lifecycle management includes persona-based readiness and design, device procurement, automated provisioning, complete asset management and device refresh or recycling services. Support services include unified endpoint management, digital experience management, endpoint security, software asset management and end-user support. It also provides advisory, build and managed services for virtual workspaces, integrating multiple virtual desktop systems.

Caution

Despite the strong sector presence, solid portfolio and outstanding performance, ineffective marketing and promotion often prevent clients from considering NTT DATA. ISG advises clients not to overlook NTT DATA as a viable provider for managed digital workplace end-user technology services.

Appendix

Methodology & Team

The ISG Provider Lens™ 2023 – Future of Work (Workplace) - Services study analyzes the relevant software vendors/service providers in the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

Lead Author:
Bruce Guptill

Editor:
Upasana Hembram

Research Analyst:
Sonam Chawla

Data Analysts:
Pooja Rani Nayak and Tishya Selvaraj

Consultant Advisor:
Randy Meek

Project Manager:
Swathi Amin

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 & Editor Biographies

Lead Analyst

Bruce Guptill
Distinguished Analyst and Executive Advisor

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients.

Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. Public Sector research for ISG's Provider Lens global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Masters' degree in Marketing and Finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.

Research Analyst

Sonam Chawla
Senior Analyst

Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions, Cybersecurity Solutions and Services. Sonam comes with an experience of over 5 years in market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights.

In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting research projects.

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™

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit 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 900 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 1,600 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 isg-one.com.

ISG Provider Lens™

SEPTEMBER, 2023

REPORT: FUTURE OF WORK (WORKPLACE) - SERVICES