ISG Provider Lens™

Future of Work (Workplace) - Services

A research report comparing provider strengths, challenges and competitive differentiators

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unisys

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Companies are redesigning the digital workplace using immersive experiences and generative AI

Today's work environment is directly influenced by macroeconomic, social, behavioral and technological trends, which, together, present new modus *operandi* of how professional activities are carried out, managed and supported.

After the challenges posed by the pandemic globally, 2023 appears to be a year of stabilization from the future of work's point of view. Global companies have begun adjusting to new realities and recognizing the importance of employee experience (EX). Today, transforming EX is a priority for business leaders, along with adapting to changing consumer demands, evolving technologies and environmental awareness and focus.

The constant evolution of digital work models, together with the growing stabilization of the hybrid model as the preferred choice in the market, requires companies to provide a higher level of service availability, greater access flexibility from different devices and locations and a high degree of integration of existing technological support with productivity tools.

The automation of tasks, the intelligent use of ML, the dynamism of decisions and the need to reduce costs with greater operational efficiency are all important and relevant components. To respond to these demands, providers must continually advance their offerings, adjusting their models to meet new requirements, not just technological but also for adaptability, scalability and personalization needs.

Today's sourcing models must adapt to companies' demands for agility and speed. Their classic indicators and metrics, often disconnected from business aspects, reflect the quality of effective service delivery but not necessarily its efficiency. They are, therefore, being modified to ensure effectiveness and efficiency and reflect the sensitive perception of enterprise clients.

The **Future of Modern Work** involves engagement, co-creation, automation and artificial intelligence.

The Future of Work service landscape becomes broader as companies need assistance implementing and supporting an EX-centric technology model. As new decision-makers get involved in technology investments that empower and engage employees, customers should analyze the capabilities offered by different service providers and their underlying technology offerings, including end-to-end technical support and overall experience transformation. Strategy and consulting become integral to this approach as organizations adopt a holistic approach to EX transformation.

The Future of Work is hybrid, connected, autonomous, intelligent and immersive. It must enable employees to perform their tasks from anywhere, at any time, with agility and productivity. To enable these characteristics, technologies are important, but they are not enough. It is essential to consider the human component. Several trends identified during the interactions for this study are integrated entirely or partially into the providers' approaches and services.

- **Corporate human behaviors noted post-pandemic:**
  - The search for employees skilled in new technologies (quiet hiring) and employees looking for new opportunities (quiet quitting) affects each employee's attraction and retention and demands services that improve their EX and well-being, ideally reducing turnover rates.
  - So-called copycat layoffs, defined by the World Economic Forum in 2023 as "the idea that companies are being influenced by each other as they cut jobs," have caused many layoffs in technology and media companies. As a result, reorganizations and changes in task volumes for the remaining teams can affect service availability and quality.
  - As companies cut back on hiring amid fears of economic recession, silent hiring — focusing on developing internal talent without increasing the number of employees — has emerged as a new workplace term, as it offers internal opportunities to professionals.

In this context, constantly monitoring and improving the performance and the use of digital workplace technologies have become fundamental to delivering quality to customers and bringing the human resources and technology areas significantly closer together. As a result, organizations aware of the movements mentioned above are increasingly prioritizing employees' digital experience as much as that of customers. They are investing in automation, integration among components, collaboration and productivity linked to intelligence and perception of senses in a single environment. In this way, technology becomes the protagonist, enabling the digital transformation of the work environment and the end-customers environment.

- **Aspects identified in providers' offerings:**

  Personalization: To keep up with the dynamism of companies, it is essential to adapt the digital workplace to the organization's own working methods and employees. It is possible to customize the components of the environment, such as applications, documents, tasks, location and devices, depending on the functions performed, offering adaptability and flexibility in carrying out tasks and not the other way around. It is also important to maximize automation with components that can go beyond the "persona."

  Hyperautomation: By deploying automation technologies such as ML, RPA and NLP, companies can automate tasks and processes and make work more efficient and productive.

  Generative AI: The increasingly frequent use of AI for the digital work model demonstrates its relevance. Service offerings through virtual assistants (chatbots) for greater autonomy, automatic issue resolution and calls with self-resolution or automated resolution have also increased compared to previous years. The aim is to reduce the volume of calls handled by humans to the lowest possible, and the figures already show progress.

Cloud environments: These environments continue to be widely explored, as they enable remote working, ease of use, management, scalability, agility and the possibility of transformation.

Cybersecurity: All evaluated providers put high importance on security. Maximum security measures, among other things, help protect confidential information in the digital workplace, prevent cyber threats and comply with global and local data and privacy legislation (see ISG Provider Lens Cybersecurity - Solutions and Services 2023 for more on this important issue). For the Future of Work study, the providers' approach to security was considered one of the evaluation criteria.

ESG/sustainability: With the topic increasingly on the board of directors' agenda, companies are constantly seeking solutions and services that guarantee the sustainability of the corporate environment. They focus on monitoring carbon emissions, reducing them, and safeguarding environmental conditions. Efforts are also being directed at addressing diversity and inclusion in the corporate environment and integrating different work groups, plus social actions to train and qualify professionals.

Virtual, augmented and metaverse reality: Companies are investing in immersive opportunities for collaborative work, business interactions, communication, virtual training sessions and product presentations, wherein team members can use a metaverse environment based on VR applications. These hybrid environments, already available for experimentation, still need to mature to gain market traction with customers. While providers have identified metaverse use in some solutions as a trend, the market itself is awakening to generative AI.

In Brazil, we have identified the aspects mentioned above in the proposals and models presented by providers participating in the Future of Work study. The dissemination of the new model, however, is moving at a different speed in the local market and is more connected to the reality of each client. As a country of continental dimensions, each region of the country has specific characteristics that demand greater priority for a certain aspect of the service provided. Customers that adopted new technologies quickly have already migrated to the newer models, and those that are more conservative are in the process of doing so. The same applies to environmental issues. While we see the international market with important, relevant projects focusing on carbon reduction, in Brazil, projects linked to social actions, diversity opportunities and skilled labor training are prioritized.

ISG has updated its study to address trends increasingly connected to digital technologies, AI and market innovations. Therefore, for this research, we present the practice of Future of Work - Services - 2023 encompassing the following quadrants:

- **Employee Experience (EX) Transformation Services** include EX transformation strategy and consulting services, employee technology adoption management, organizational change management (COM), user experience quantification through XLAs, business outcomes through XLAs and leveraging employees experience enhancement for improved CX and smart physical workspaces.
- **Managed Workplace Services - End-User Technology:** Device management services with predictive analytics, end-user security enablement, device as a service, virtual desktop and cloud support, support for network services in the workplace, software asset management and enterprise mobility management are some of the most relevant end-user technologies.
- **Digital Service Desk and Workplace Support Services:** Modernized support services, including on-site support, call center services, on-site/field support, technology bars and cafés, digital lockers and automation-enabled omnichannel support for chat and voice.

This year's research is dedicated to studying key workplace service providers that bring evolution, innovation and protagonism to the table as business drivers so that they are prepared to engage in projects and partnerships that contracting companies need to take their business to the next level. They were qualified for their individual characteristics, alignment with the trends mentioned, business strategies in the area and execution in the context of their proposals.

In the following pages, we identify the providers that stood out in this study. It is worth noting that, regardless of their position in the quadrants, these providers have a high level of relevance and training in offering and executing what they aim to do in the Brazilian market. The observations made hereafter can have potential business value.

The post-pandemic has led to digital technology adoption in the workplace. With the consolidation of the hybrid model as a point of balance between companies and employees, adopting solutions that provide autonomy and self-service with minimal human intervention has become imperative. Leaders in this study stand out for adopting virtual, automated and intelligent environments using AI and metaverse elements.

Provider Positioning

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	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Accenture	Leader	Product Challenger	Product Challenger
Algar Tech	Not In	Not In	Leader
Atos	Rising Star ★	Product Challenger	Rising Star ★
Capgemini	Leader	Leader	Product Challenger
Connectis	Contender	Contender	Product Challenger
Dedalus	Not In	Market Challenger	Not In
DXC Technology	Product Challenger	Leader	Leader
HCLTech	Product Challenger	Product Challenger	Product Challenger
Ilegra	Not In	Product Challenger	Not In
Infosys	Contender	Contender	Contender

Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
IPNET	Not In	Market Challenger	Not In
Kyndryl	Market Challenger	Leader	Leader
Lenovo	Not In	Not In	Contender
Logicalis	Not In	Leader	Product Challenger
Multiedro	Not In	Market Challenger	Not In
NTT DATA	Contender	Contender	Contender
Processor	Not In	Product Challenger	Product Challenger
SantoDigital	Not In	Market Challenger	Not In
SONDA	Product Challenger	Leader	Leader
Stefanini	Product Challenger	Leader	Leader

Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
TCS	Product Challenger	Product Challenger	Product Challenger
TIVIT	Not In	Rising Star ★	Leader
Unisys	Leader	Leader	Leader
Venha Pra Nuvem	Not In	Contender	Not In
Wipro	Leader	Leader	Leader

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

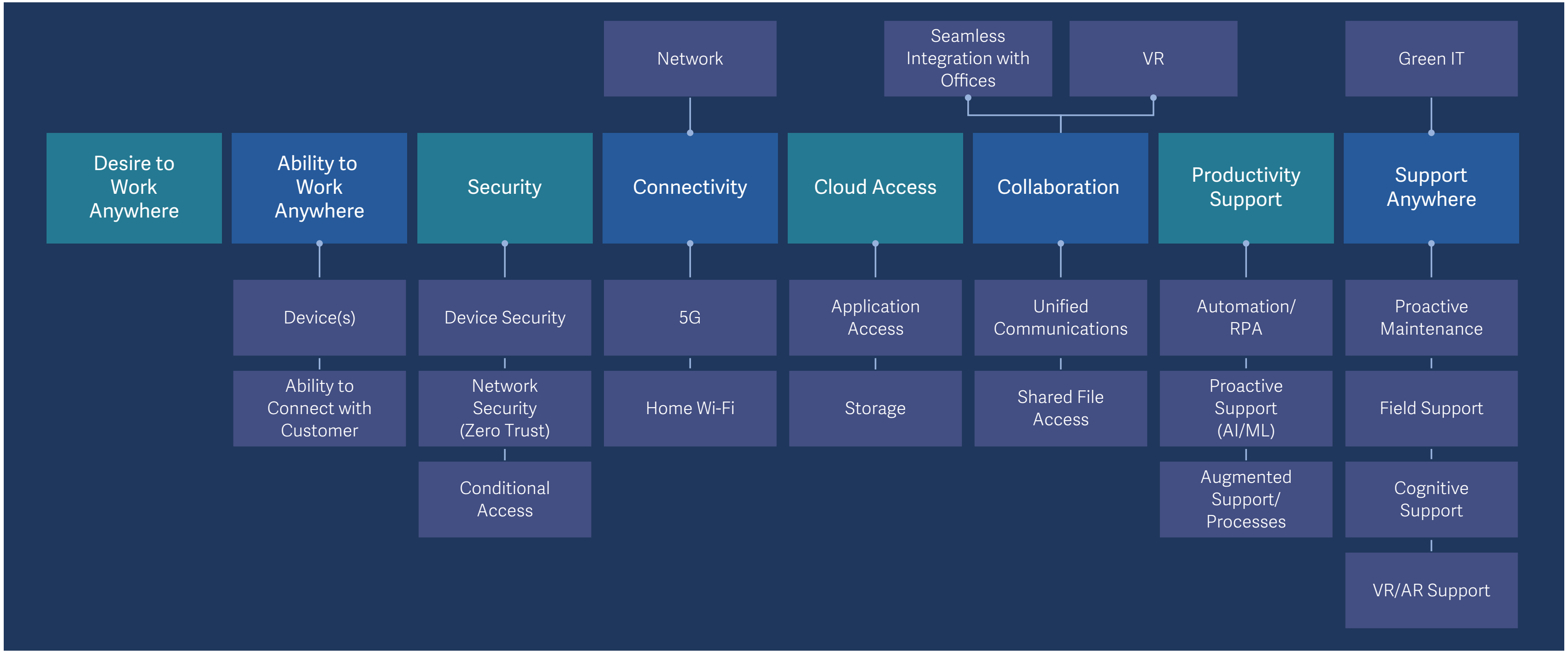
From the future of work perspective, 2023 will be a year of stabilization. After the disruptions and challenges posed by the pandemic world and the "Great Resignation" that followed, global businesses have started adjusting to new realities and acknowledging the importance of employee experience (EX).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

According to the new Future of Work technology landscape, technologies that support work from anywhere are only one of the components shown in the imgae.

While other ISG Provider Lens™ research covers the topics of Connectivity and Security, this research will focus on all the other aspects of the above landscape.

The Future of Work services landscape becomes wider as enterprises need assistance implementing and supporting an EX-centric technology model. As new decision makers get involved in tech investments that enable and engage with employees, clients must analyze the capabilities offered by different service providers in underlying technology enablement and maintenance, workplace tech support and overall experience transformation. As organizations take a holistic approach to EX transformation, strategy and consulting become an integral part of the approach. Hence, ISG has decided to merge this area with other services covered in the research this year. Another accompanying research study on technology providers will cover the solutions part for these services.

Figure: Key Components of the Future of Work Technology Landscape



Scope of the Report

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

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

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

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

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Employee Experience (EX) Transformation Services

Who Should Read This Section

This report is relevant to companies across all sectors in Brazil for evaluating EX transformation service providers in the region.

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

People are any organization's greatest asset, as they bring unique skills, knowledge and experiences and support innovation and productivity, ultimately helping the organization build lasting relationships with clients and partners. Companies in Brazil demand that their users have a good digital experience, and they are therefore looking for complete solutions that integrate with the technological environment. To improve employee productivity and engagement in a collaborative organizational culture, organizations invest in collaboration tools that add value to teamwork because satisfied and engaged employees provide a better CX.

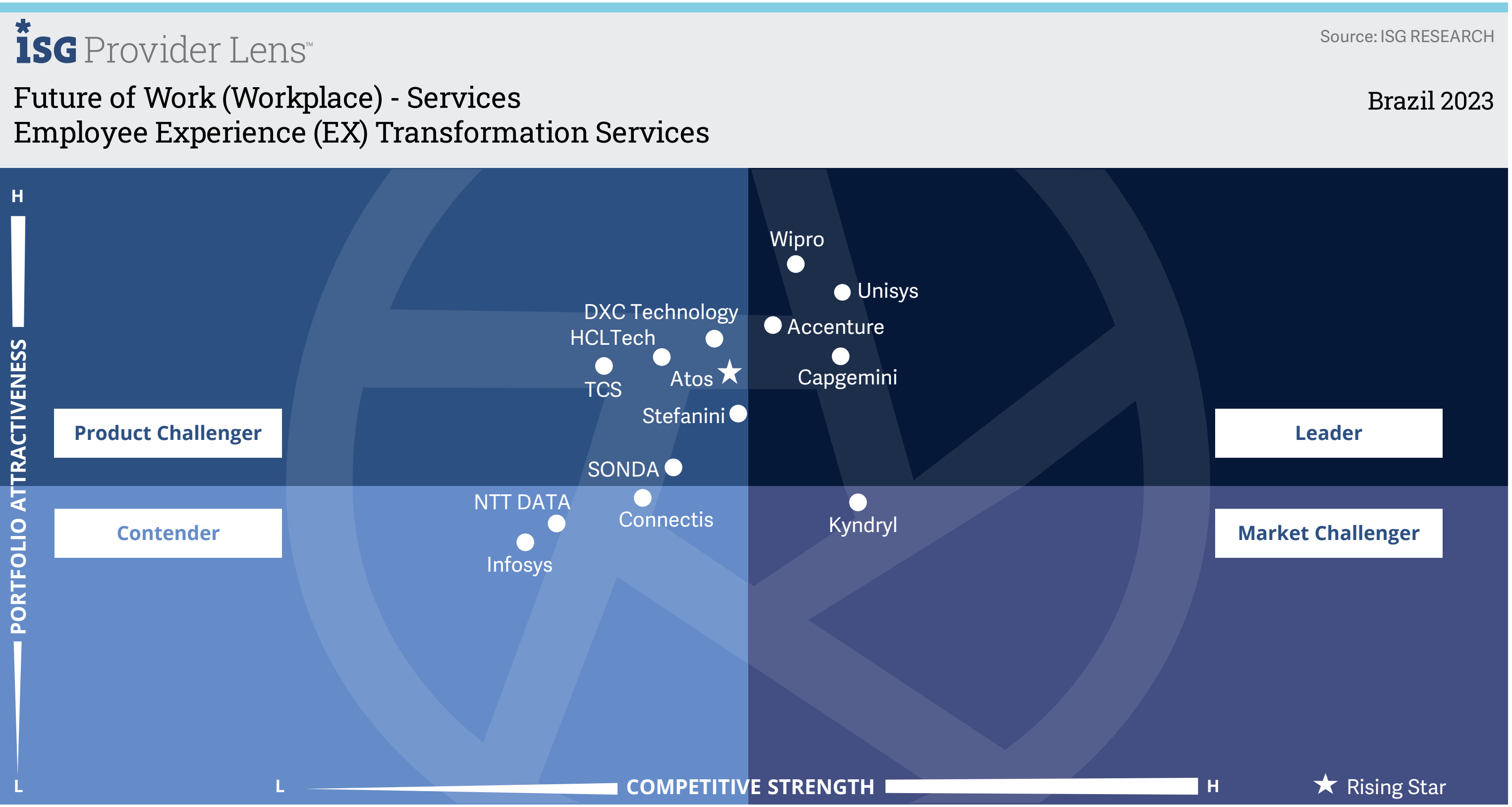
The use of innovative technologies, such as generative AI and large language models (LLMs), raises the level of the EX, but only a few providers in the country deliver such advanced solutions. Issues such as security, privacy and financial budget impact companies' decision to contract these services.

CXO leaders should read this report to understand how service providers can help them prepare their teams for the post-pandemic world and new business dynamics.

Digital transformation professionals should read this report to understand how providers fit into their digital transformation initiatives and how they compare with each other.

HR leaders should read this report to understand how providers address employee empathy and well-being in this new era of hybrid working.

Technology professionals should read this report to understand providers' relative positioning and capabilities that can help them improve employee services.



This quadrant evaluates providers offering value-added managed services to **enhance the employee experience**. Along with capabilities to implement transformational models, providers use **intelligent technologies, engagement and personalization**.

Cristiane Tarricone

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, line-of-business (LoB) representatives and chief information officers (CIOs). They offer services that associate EX with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

As global organizations realise the increasing importance of managing and enhancing EX, they partner with service providers offering EX transformation services that leverage workplace technologies. EX transformation goes beyond technology enablement and includes professional services promoting and enhancing technology adoption. Service providers providing EX transformation services engage with their clients in an outcome-focused model and follow an XLA approach.

These models leverage the analytics and data from workplace technology usage and technologies such as digital employee experience (DEX) to collect information and focus on actionable insights.

The use of collaboration and productivity solution stack highly influences EX transformation. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication collaboration (UCC) and productivity applications are key to EX transformation.

EX transformation also extends to services supporting return-to-office initiatives with a smart campus and intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. **Ability to define and visualise EX transformation** models with technology transformation, technology adoption and organizational change/behaviour management services, employee engagement, productivity and associating CX with EX
2. **Address employee empathy and well-being**
3. Have considerable percent clients **leveraging XLAs** in the respective geography
4. **Support UCC, productivity stack and extend smart workplace services** to other business functions such as HRO and operations
5. **Offer smart facilities and physical on-premises services** that support intuitive capabilities such as hot desking, health assessment and **a customised and contextualised experience** with smart device-supported workplace
6. **Have strong local presence** and partnerships

Observations

A key challenge companies face in transforming EX in their digital work model is the human aspect. People are the driving force behind change; although technological enablement is important, it is not enough. Companies have learned to go beyond integrating and enabling the technological ecosystem. Incorporating functionalities associated with team engagement and collaboration is part of the process. Providers with a consultative capability to manage the changes required in the digital work model's evolution and have added EX management elements, such as empathy and personalization, stand out in this quadrant. These companies have implemented XLAs and worked on collaboration and better communication, increasing engagement among work teams. Transformational training, even when lacking by the provider, has been acquired through partnerships established in the ecosystem to achieve the desired result on various fronts. As a result, we see that market leaders Capgemini, Unisys and Wipro continue to lead in 2023. Accenture, a Product Challenger in 2022, joins the team of Leaders in 2023, extending services through Accenture/Avanade. We highlight Atos as a Rising Star in 2023, as it aligns its strategy with the industry and makes heavy investments in this area.

From the 25 companies assessed for this study, 14 qualified for this quadrant, with four being Leaders and one a Rising Star.

Accenture is one of the largest global IT service companies and has a strong partner ecosystem, expanding its capacity and reach. It has more than 100 innovation centers for experimenting and delivering new services and strategic consulting.

Capgemini employs an end-to-end platform focused on EX. The company offers analytical and AI solutions and immersive individual experience scenarios to increase the quality of service delivery and connect CX and EX.

With an acquisition strategy focused on end-user experience (EUX) for market expansion, **Unisys** emphasizes aligning clients' business objectives and goals to the right persona for the best employee and customer experience with individualized XLAs.

Wipro recently changed its business model, adopting strategic global business lines to deepen alignment with customers' growing business needs and capitalize on emerging opportunities in high-growth market segments.

Atos (Rising Star) was split into two companies in 2023, Atos and Eviden, with the process completion planned for mid-2023. The 'new' Atos positions itself as a local leader in managed infrastructure services, digital workplace and professional services.

Leader

"Unisys places employees at the center of its solutions, providing digital, analytical and training experiences that empower them in service execution and delivery and increase their productivity and customer satisfaction."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees in 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. In Brazil, Unisys has regional offices in Campo Grande. It adopts acquisitions as its growth strategy, which has proved to be beneficial and led to an increase in its customer base. With the employee at the center of its solutions, its vision for the future of work has evolved. The company identifies personas and modifies the appropriate XLA measurements, the workplace and the support model based on the clients' objectives and goals.

Strengths

EX education and communication: Unisys strives to raise awareness of EX best practices among customers, strengthening the alignment of XLAs with business goals, CIOs, chief HR officers (CHROs) and business leaders.

Intelligent PC refresh: Unisys performs device refresh based on experience, with data-driven decision-making on what to automate for the best ROI. It supports organizational change management with targeted user adoption campaigns based on actual usage and experience. Each service has specific XLAs (such as front-line employees, hybrid working, meeting rooms and carbon consumption collection).

Experience lifecycle: The company contractually includes the eXperience Governance Board (XGB), which uniquely manages the XLA lifecycle with each client.

Unified Experience Management (UXM): This unified service solution provides digital experiences for employees that monitor XLAs from an experience management office. It uses the PowerSuite software platform as an automation tool to analyze and generate insights and define improvement plans. The use of AI and ML in this management automates workflows to prevent the recurrence of problems with both corrective and predictive actions.

Caution

Unisys is recognized in the local market for its consolidated structure and leadership in managed services, with the capability to grow in EX services. Keep focus on continuously updating its PowerSuite platform, which forms the intelligence base of services.

Managed Workplace Services – End-user Technology

Who Should Read This Section

This report is relevant to companies across all sectors in Brazil for evaluating managed workplace service providers of end-user technologies.

In this quadrant, ISG defines the current market positioning of managed workplace service providers operating in Brazil and how each deals with the key regional challenges.

Organizations seek managed workplace service providers that can deliver agile service and efficient problem resolution, ensure environment-based availability and secure the use of devices and applications. Cybercriminals increasingly exploit system vulnerabilities and rely on the human factor to access organizations' environments through phishing attacks. Companies, therefore, look for offerings that allow them to manage providers' or third-party access to their work environments, detect anomalies in user behavior and rapidly respond to possible attacks.

Companies also seek customized services that align with their business model and the sector's challenges. Thus, using new technologies in customer service enables highly personalized communication with users.

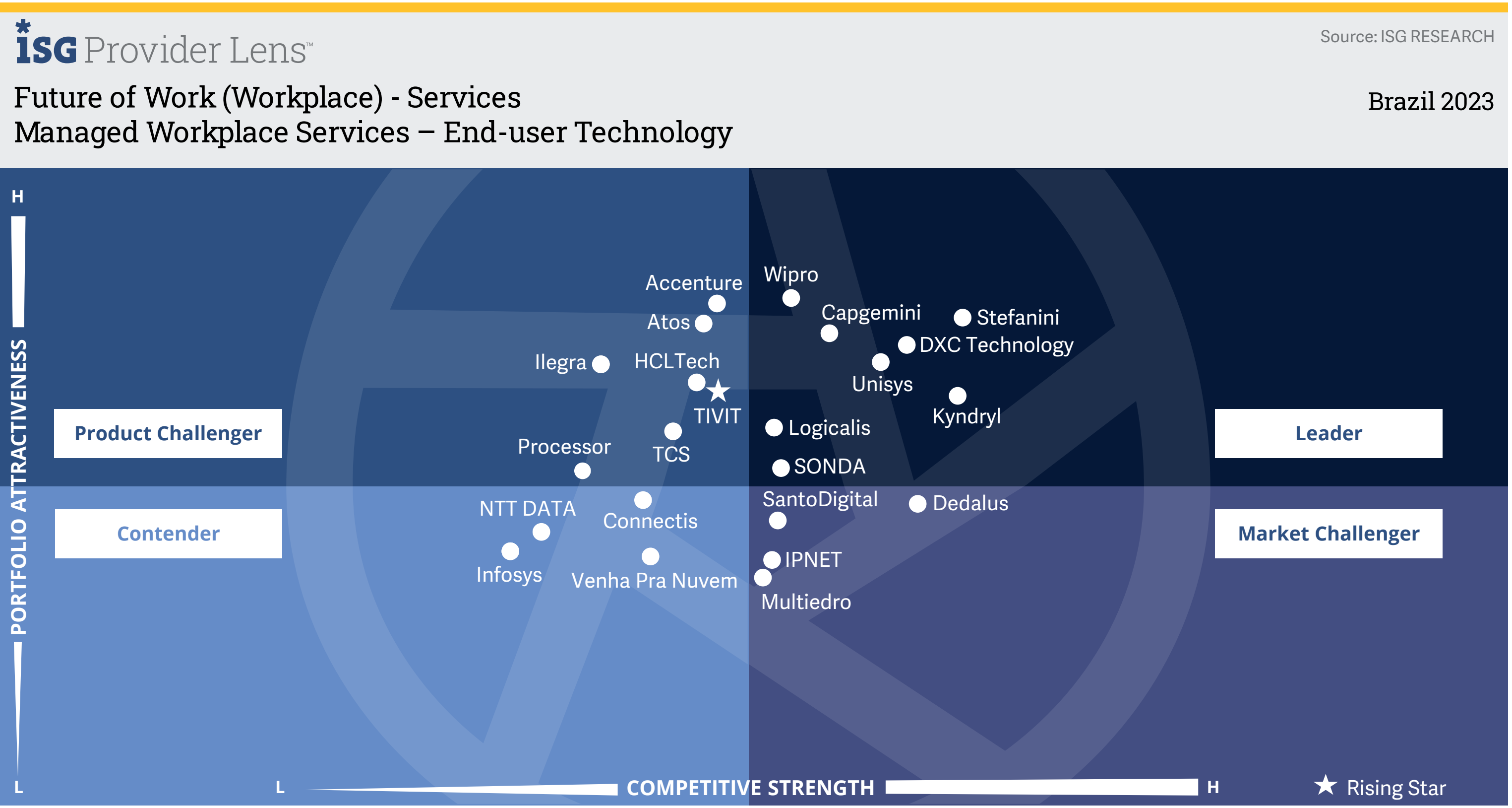
Some providers also use previous projects in which they integrated industry-specific applications to segment their CX offerings by specific sectors or different company sizes.

Technology professionals should read this report to understand providers' relative positioning and capabilities in helping them with managed digital workplace services.

Cybersecurity professionals should read this report to learn how providers address compliance and security challenges without disrupting EX.

Procurement professionals should read this report to better understand the current landscape of managed workplace service providers in Brazil.

Digital transformation professionals should read this report to understand how managed workplace service providers fit into their digital transformation initiatives.



This quadrant evaluates providers offering **managed services** and **infrastructure**, including their enablement through devices, applications and cloud workspaces **associated with end users** and deployed technologies.

Cristiane Tarricone

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in the managed services space offer complete end-user computing (EUC) technology services that form the core of the digital workplace. These include device management, patch management, device and application provisioning, virtualised desktops access, device lifecycle management, support for bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and managing the entire IT infrastructure behind an EX-centric workplace design. Provisioning, managing and securing the devices remain the first basic step to enabling a digital workplace and enhancing EX.

The increasing focus on EX is transforming these services to be more focused on enhancing the experience and catering to the client's respective industry. While these services are typically associated with traditional computing devices and tablets, their scope can be extended to include some industry-specific devices such as point-of-sale devices for retail and medical equipment devices for healthcare.

Eligibility Criteria

1. **Provide support for unified endpoint management** (**UEM**) and mobility management. Also, support application provisioning, patch management and enterprise mobility management (b)
2. **Provide complete device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling **(Device-as-a-Service)**. Services should cover device sourcing and logistics and Device as a Service for security
3. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud (**Desktop-as-a-Service**)
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. **Strong local presence** with a majority of workplace engagements around **EUC services**

Observations

The providers evaluated in this quadrant invest in the optimized integration of various application layers and infrastructure devices to support the new hybrid working model while guaranteeing a positive user experience. Leaders in the 2022 study have maintained their leadership in 2023 by investing in developing offerings that guide, support and sustain digital transformation and integration with different business units maintaining the connection with clients' business objectives. Customer retention is an important indicator in this quadrant, as it was mentioned as a focus area by most CEOs that took part in the study. The CEOs also highlighted the market's volatility, especially in the Brazilian market, given its size and the presence of clients with different characteristics and sizes in different industries with varying maturity levels. This range and differentiation allow providers to invest in specializations to scale up easily.

From the 25 companies assessed for this study, 23 qualified for this quadrant, with eight being Leaders and one a Rising Star.

Capgemini has a comprehensive service portfolio that includes persona- and employee-based journey design for hybrid work to deliver business outcomes. The company uses proprietary automation solutions to provide immersive team collaboration experiences.

With high maturity in advisory processes and global accounts, **DXC Technology** has evolved its positioning and offerings by transitioning legacy clients to digital work offices.

Kyndryl is confident that recent partnerships will help evolve and sustain digital transformation and a modern workplace based on its strong infrastructure management.

With market-leading experience in the digital world, **Logicalis** has revamped services globally to help clients achieve scalability.

SONDA

SONDA's widespread presence in Brazil allows it to deliver modern workplace services at the edge with an extensive reach.

Stefanini

Stefanini's performance and support in the American and European markets strengthen its position to expand into Asian markets.

Along with its acquisition strategy focused on end-user experience (EUX) in deployment, **Unisys** is evolving its portfolio to include automation and migration for legacy clients.

With a strong approach toward integrating standardized cloud solutions and automation tools, **Wipro** is working on the EX metrics evolution.

Tivit (Rising Star) has adopted an industrialization strategy as part of a new management structure and split up its data server infrastructure operations. It is projecting investments worth R$1.2 billion over the next five years to meet its planning goals.

Unisys

Leader

"Unisys places employees at the center of its solutions, providing digital, analytical and training experiences that empower them in service execution and delivery and increase employee productivity and customer satisfaction."

Cristiane Tarricone

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees in 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. In Brazil, Unisys is based in Campo Grande, with regional offices in the country and two centers in Latin America (Colombia). With a loyal customer base, it seeks scalability through acquisitions, a practice that has proved effective in recent years. Unisys has retained its position in the Leaders quadrant.

Strengths

Sustainability initiatives: Unisys has developed many initiatives to calculate carbon emissions and their environmental impact. One of these was the ESG Dashboard to track carbon reduction by clients and their respective service providers. The company also evaluates PC and Other device lifecycles by methods such as monitoring remote meetings. It has also developed a digital bill of materials (DBOM) based on blockchain technology to track carbon consumption and indisputable statements from PC manufacturers regarding the carbon consumed during device manufacturing, shipping and use over a given period.

Devices on the edge: The company proactively monitors devices for performance and user experience to reduce device management costs.

Change management: The company promotes the opportunity to drive changes in corporate culture and clients' employee behavior for inclusion in hybrid work backed by analytical data.

Scalability through acquisitions: Company acquisitions, partner channels and consultancy engagement have driven Unisys' growth in recent months.

Caution

Unisys has an opportunity to expand its managed endpoint base in Brazil, which is currently focused on existing global and local customers. The company should also expand its cloud and integration offerings in Brazil; using partner offerings that are already established within the ecosystem could be an innovative component in this process.

Digital Service Desk and Workplace Support Services

Who Should Read This Section

This report is relevant to companies across all sectors in Brazil for evaluating digital service desk and workplace support service providers.

In this quadrant, ISG highlights the current market positioning of providers of digital service desk and workplace support services for companies in Brazil and how each provider addresses the key regional challenges.

The rapid and constant evolution of technologies creates an expectation for developing innovative and disruptive support services. Companies are looking for rapid, efficient and intuitive services to increase their call resolution. Generative AI has stood out in the Brazilian market as a way of automating, accelerating and personalizing customer service. These tools can partially solve problems without human intervention, allowing IT professionals to focus on other service levels. AI can also identify recurring problems, helping the support team continuously improve the work environment.

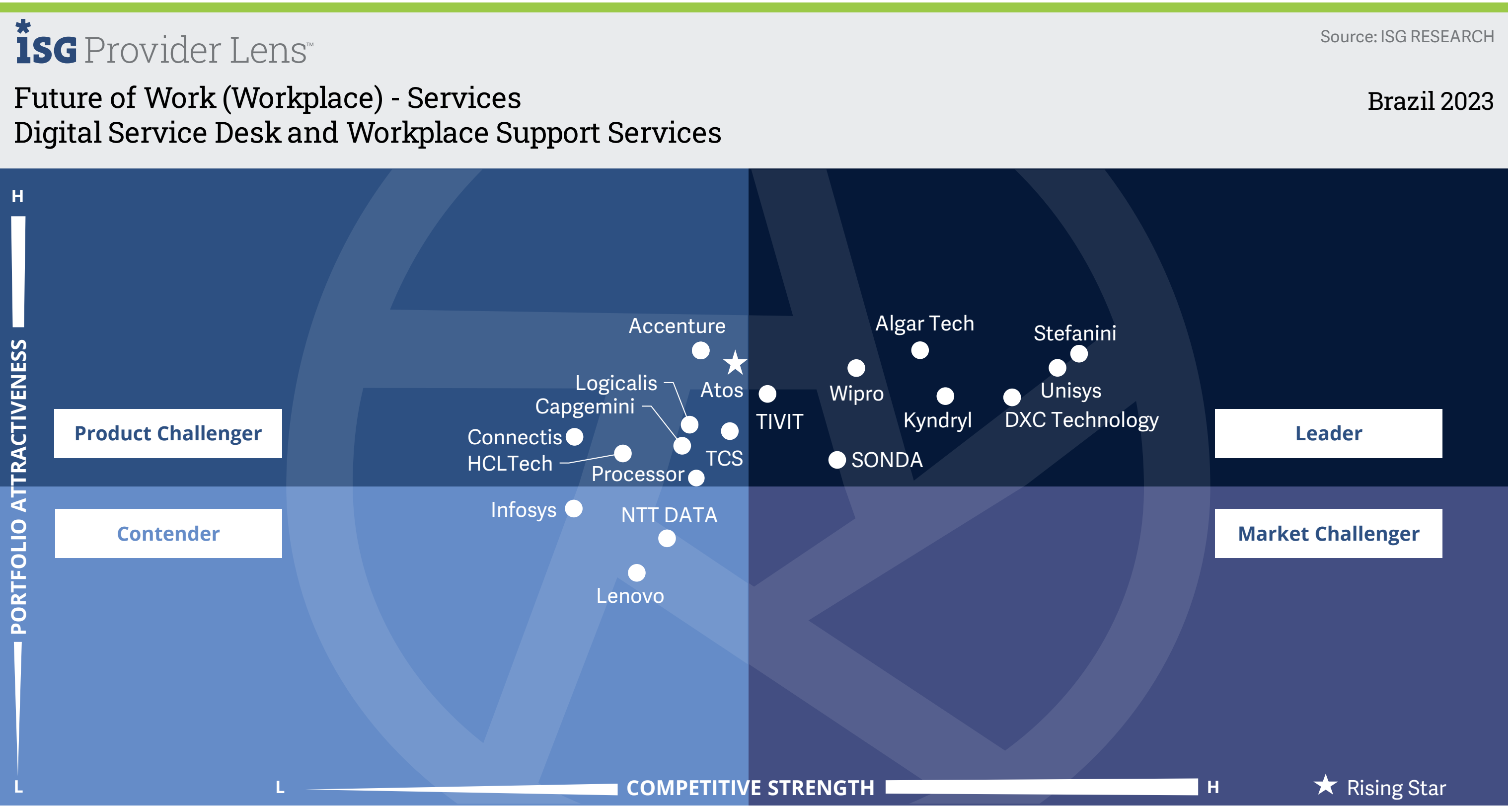
The metaverse is another topic that has received attention from providers that see immersive training as the future of technology. Contracting models based on XLAs have yet to gain traction in Brazil, highlighting that the local market is not yet mature in this area.

Digital transformation professionals should read this report to understand how providers fit into their digital transformation initiatives and how they compare with each other.

Procurement professionals should read this report to gain a better understanding of the current landscape of providers of digital service desk and workplace support services in Brazil.

Technology professionals should read this report to identify the providers that can help them with service desk modernization and workplace support services.

Field service professionals should read this report to understand how providers can expand the use of workplace services to better manage field service operations.



This quadrant evaluates providers offering **modernized technical support services for the digital office,** with call centers, tech bars and cafés, digital lockers, automation, **and AI-enabled multichannel support**.

Cristiane Tarricone

Definition

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

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

Eligibility Criteria

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

Observations

The providers evaluated in this quadrant invest in offering modernized solutions to support the future of work and seek to incorporate the latest technologies to enable automation functionalities, minimizing human intervention in interactions. Increased automation and intelligence add agility, speed to services, and allow an analytical database creation, which can facilitate preventive and predictive actions.

In addition to virtual assistants, experience metrics are evolving. The new service models demand contractual models based on transactions and experience metrics, which require a cultural change among clients and during negotiations. In Brazil, we have identified that a significant customer base is traditional in adopting SLAs to the detriment of the current XLAs. Although providers are prepared with their new models, customer adoption will depend on their maturity and profiles.

Immersive solutions are attractive, but they will not be consolidated in the market by 2023 and will have to evolve in the coming years.

When several providers are betting on metaverse as hype, the market is awakening to generative AI.

In the 2023 study, we see changes within quadrants. In the Product Challengers quadrant, we find Connectis, Processor and TCS updated their solution portfolios. In the Leaders quadrant, TIVIT joins Leaders Algar Tech, DXC Technology, Kyndryl, SONDA, Stefanini, Unisys and Wipro. Atos has been highlighted as a Rising Star in 2023 for its advanced portfolio, restructuring and new investments.

From the 25 companies assessed for this study, 14 qualified for this quadrant, with eight being Leaders and one a Rising Star.

Algar Tech

Algar Tech focuses on CX, EX and infrastructure service management to deliver automated solutions through virtual assistant.

DXC Technology

DXC Technology offers global solutions to its legacy clients and works on personal computer as a service as part of its sustainability initiative.

kyndryl

Kyndryl has established strategic partnerships to offer customized digital transformation solutions to its customers.

SONDA

SONDA invests in a strong startup ecosystem as part of its strategy to maintain and advance innovation.

Stefanini

Stefanini has expanded its future of work services to American and European markets with automated and flexible solutions.

TIVIT

TIVIT has restructured itself by verticalizing its solutions and investing in intelligent managed service solutions for work.

Unisys

Unisys uses an AI platform to develop future-of-work services for its customer base.

wipro

Wipro strengthens its customer base through consistency in digital tool integration.

Atos

Atos (Rising Star) has evolved its automation and virtual assistants by adopting experience metrics and offers holistic decarbonization solutions to customers.

Leader

"Unisys gives a change management direction to clients with its transformational future of work services."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees in 71 global offices. In FY22 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. In Brazil, Unisys is based in Campo Grande, with regional offices in the country and two centers in Latin America (Colombia). With a loyal customer base, it seeks to expand through acquisitions, a practice that has proved effective in recent years. Unisys has retained its position in the Leaders quadrant.

Strengths

Platforms: The Unisys support service model uses the company's InteliServe™ Platform. It offers AI features, analytics and multichannel access, such as chat, self-service, virtual tech café, smart cabinet, smart vending machine or virtual support through VR. The platform is a single point of contact for all areas and field support for IoT solutions.

Experience in execution: Its services show high resolution rates for tickets resolved on first contact and average rates for tickets resolved automatically (without opening a ticket) and through auto-resolution. It has a 100 percent certified team, a major differentiator in this area. While Unisys is in the process of transitioning customers from traditional SLA models to XLAs globally, in Brazil, the predominant model is SLA.

Data-driven change management: Unisys' methodology contemplates applying data-driven change management to all future office processes to minimize technology adoption gaps.

Caution

In Brazil, Unisys can use its expertise gained in other regions to bring customers the opportunity and challenge of transitioning from their traditional SLA metrics to more modern XLA models connected to experience.

Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

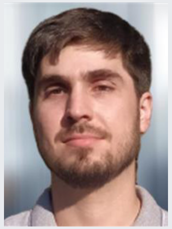
1. Definition of Future of Work (Workplace) - Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience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

Lead Analyst

Cristiane Tarricone
Lead Analyst

At ISG, Cristiane Tarricone is a lead analyst to ISG Provider Lens Future of Work and Oracle Cloud Ecossytem. She brings more than 30 years of extensive experience in driving business results and achieving measurable value from IT-enabled transformation. She has held both Senior IT and business leadership positions within Fortune 100 end-user and IT service provider companies. She is a hybrid business-IT leader focused in the disciplines of leadership, digital strategy and driving value from technology investments. She is committed to IT innovation and emergent technologies to reshape the future. She is and Independent advisor on Board of Directors on digital strategies, mentor, speaker, and MBA invited professor. She is also a founder and board of director´s member of a non-profit organization that supports Women in IT Leadership in Brazil. Extensive experience in applying new trends and technologies to guide clients reshaping their digital strategy and business plans to achieve company goals. Cristiane was a Regional Vice President & Team Manager in Gartner's Executive Programs, where she led a team of Senior Executive Partners to mentor and advise clients in Brazil and Latin America.

She is and Independent advisor on Board of Directors on digital strategies, mentor, speaker, and MBA invited professor.



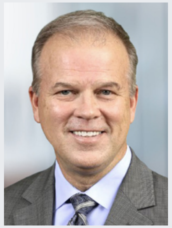
Research Analyst

Gabriel Sobanski
Research Analyst

Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on ServiceNow Ecosystem, Salesforce Ecosystem, Microsoft Ecosystem, Cybersecurity Solutions and Services, SAP Ecosystem, Public Cloud, Private Hybrid Cloud Data Center Services, Future of Work, AWS Ecosystem and Oracle Ecosystem. He supports the lead analysts in the research process and co-authors the global summary report with market trends and insights.

Gabriel also develops content from an enterprise perspective. Gabriel has helmed his current role since 2021. Prior to this role, he has worked as an IT consultant, where he acquired experience and technical capabilities in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise includes industry, logistics and market research.

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.

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For more information, visit isg-one.com.

ISG Provider Lens™

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REPORT: FUTURE OF WORK (WORKPLACE) - SERVICES