ISG Provider Lens™

Future of Work Services

A research report comparing provider strengths, challenges and competitive differentiators

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Table of Contents

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Companies are evolving their working models by using hyperautomation to improve productivity

The future of work is rapidly transforming due to exponential technological advances, shifting expectations of leaders and workers, economic and social pressures, and significant climate changes. Globally, the labor market has contracts worth approximately US$22.3 billion up for renewal, with the Americas accounting for 47 percent of this figure. The latest ISG research indicates that this market has high economic significance.

Business leaders believe that Generative AI (GenAI) will enhance productivity and innovation in knowledge-intensive industries, including IT, digital communications, finance, professional services, medical and healthcare, retail, manufacturing, engineering, construction, energy and logistics.

By 2030, global digital jobs are expected to reach around 92 million. Generally, according to the World Economic Forum's white paper, The Rise of Digital Jobs, these roles are better paid. These potential benefits are in "sharp contrast to concerns about the risks of automation, job displacement and degradation" the report states.

Companies anticipate a 44 percent change in workers' core competencies due to technological advancements, in contrast to the speed at which companies can absorb and expand their training programs. Investing in industry will require equivalent investment in people.

ISG's study on the future of work highlights a shifting business focus driven by the adoption of hybrid work and the resulting change in employee behavior and business strategies. This evolution has progressed from cost and adaptation challenges in 2021 to a focus on enhancing employee experiences (EX) in 2022, culminating in a new emphasis on hybrid and interconnected work in 2023.

GenAI gains ground and enables new use cases; ROI challenges decision-makers.

The 2024 vendor survey highlights the main drivers of the future of work: GenAI, effective hybrid work models, return-to-office (RTO) demands, workforce engagement and experience, technology beyond IT, budget constraints and sustainability requirements.

In the current scenario, the hybrid worker is a crucial issue. The present study shows that since 2020, around 50 percent of companies have implemented hybrid work policies and invested in supporting technology. Approximately 76 percent have achieved ROI in productivity, cost and employee and customer satisfaction through remote or flexible working policies. Companies are adopting different approaches to address the complexities of hybrid work, considering worker preferences, service delivery-impacted business models and integrating ESG strategies into the customer experience. The demand for RTO has increased, with leadership reinforcing and demanding a return to pre-pandemic norms, causing friction with employees who value remote working benefits.

To ensure a cohesive employee experience, companies must provide workspace flexibility, appropriate technology, instant data access and effective collaboration. Successful implementation of hybrid work requires integrating pre- and post-pandemic infrastructures, presenting significant challenges. This shift toward new ways of working and customer service is shaping the future of work across physical, digital and human environments.

GenAI is enabling new approaches to work

Study participants are heavily investing in GenAI capabilities, combining them with workplace solutions to increase productivity and improve employee or customer experiences. They are forming new partnerships or accelerating existing ones. Market tools such as Copilot, OpenAI and WatsonX, working individually or collaboratively with other office systems or advanced intelligent cognitive chatbots, understand and respond to complex queries. GenAI enables automation in previously human-exclusive areas like creativity and decision-making, extending business solutions beyond traditional office solutions, such as sales and HR.

The benefits of GenAI extend beyond efficiency and creativity. It also promotes mass customization, enabling companies to develop products and services according to consumer preferences.

With high market interest and company demands, we have identified positive use cases for GenAI adoption. Brazilian companies are beginning to use it to improve efficiency and innovation, but challenges remain in investing in technological infrastructure and training professionals. Additionally, companies must address data privacy and security concerns related to data collection and handling.

Demand for effective hybrid working models

Hybrid working provides employees flexibility, higher satisfaction, reduced operating costs and access to a global talent pool, increasing service capillarity for continental countries like Brazil. It requires resources, data and effective collaboration tools to guarantee productivity from anywhere. Employee well-being and mental health are critical factors in the decision-making of 81 percent of respondents in the ISG Future of Work survey, with workplace service solutions addressing relatively low confidence in the human factor compared to digital and physical workplace investments.

In Brazil, many companies have adopted hybrid working during the pandemic and maintain this practice. However, the traditional corporate culture of valuing physical presence still exists, with leaders and managers demanding feedback from teams, which employees may not appreciate. The survey confirms that many companies and their clients operate in the hybrid model and solutions for integration and collaboration remain an essential market practice. Therefore, they need to be available and promote a high-performance environment.

Workforce engagement and experience

Hybrid working, employee choice of how and where to work and access to necessary resources are key elements of employee experience. In the labor market, where attracting and retaining talent is essential, high engagement levels reduce turnover and lead to productive and innovative employees. Several surveyed companies offer consistent professional development and employee well-being programs, including initiatives promoting physical and mental health. In Brazil, where social and economic inequality can affect engagement levels, companies are investing in well-being and professional development programs to improve engagement, establishing differentiated partnerships with universities. Investments in innovation labs involving young people provide training opportunities and facilitate direct and effective hiring.

Demand for RTO

Managers who prefer having their teams nearby to monitor activities are driving the demand for RTO. Although managers' arguments for improved team engagement and communication are valid, employees believe remote working benefits outweigh RTO, potentially causing friction or turnover. To promote a healthy connection and respond to the demands of managers, enterprises are developing and providing platform services to monitor remote workers' activities. This approach will help managers understand how their team members spend their time and guide them effectively, even remotely.

Technology in the workplace beyond IT

The study highlights the expansion of technology beyond IT, with business areas extensively using collaboration tools. We identified use cases of intelligence chatbots in areas such as HR, finance and sales, emphasizing innovation, collaboration and agility. Enterprises are also implementing RPA tools in departments like finance and HR.

According to the ISG Future of Work study, more than two-thirds of surveyed companies prioritize mobile devices, knowledge management tools, self-service options and collaborative portals. Specific industries also show interest in emerging technologies such as conversational AI. In this report, providers claim to deliver integrated and collaborative office solutions, traditional service levels and new experience indicators to better understand and balance the employee experience.

In the local market, while large companies invest in solutions, including GenAI, small and midsize companies still face challenges in adopting new technologies and employee experience metrics. Service providers must navigate this challenge by maintaining their legacy base in the traditional model while supporting clients in their transition toward experience models.

Budget constraints persist

Economic challenges have arisen, with clients demanding optimized operating costs and considering future workplace expenses. As the need to balance investments in technology and other critical areas increases, enterprises seek cost-optimized management offerings to add to their toolbox.

Providers are adopting various strategies to overcome economic challenges, forming partnerships and collaborations to share resources and knowledge, and cocreating shared solutions using automation and AI to reduce long-term costs.

In Brazil, economic instability affects companies' ability to invest in new technologies, leading them to seek creative solutions to maximize limited resources.

Sustainability requirements are no longer secondary

Significant climate changes globally have reinforced the importance of sustainability and environmental responsibility. As a result, companies are under increasing pressure to adopt sustainable practices that align with consumer expectations and favor brands that are committed to sustainability.

The framework of sustainable strategies includes renewable energy, waste reduction, carbon dioxide emissions reduction, transparency through sustainability reports and clear communication with stakeholders. Service providers actively support these practices, offering consultancy services and monitoring and managing related indices for their clients.

In Brazil, infrastructure and regulation still need to evolve to fully support corporate sustainability. In 2024, many Brazilian companies are adopting sustainable practices, with a greater focus on social issues due to social inequality and socioeconomic problems. Diversity, equity and inclusion (DEI) programs promote fair treatment and full participation of people. DEI is finding applications in corporate training, education and inclusion programs, which are more important than the interests of contracting companies regarding emission rates.

The future of work in 2024

The future of work in 2024 is hybrid, collaborative, connected, autonomous, intelligent, safe and sustainable, enabling work anywhere, anytime. A combination of technological, economic and social factors is shaping this future. GenAI is revolutionizing how we work, although its adoption momentum is still modest and will face challenges. The demand for hybrid models is becoming the norm, balancing the interests of companies and their employees. Employee engagement and democratization of technology are crucial to success, even with persistent budget constraints. Finally, sustainability is a global priority that is gaining ground on local business agendas. Adapting to these changes is essential for companies seeking to thrive in the current and future landscape.

> The automated solutions in the modern future of work models enable a differentiated end-to-end experience and potentially increase employee or customer engagement. GenAI has initially been used to increase agility and productivity by automating tasks, freeing up professionals to focus on creative work.

Provider Positioning

Page 1 of 3

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Algar Tech MSP	Not In	Not In	Not In	Leader	Not In
Accenture	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
Atos	Leader	Leader	Rising Star ★	Leader	Rising Star ★
Capgemini	Product Challenger	Product Challenger	Leader	Product Challenger	Not In
Cognizant	Not In	Not In	Not In	Contender	Not In
ConnectCom	Not In	Not In	Not In	Contender	Not In
Dedalus	Market Challenger	Not In	Market Challenger	Not In	Not In
Deloitte	Rising Star ★	Product Challenger	Not In	Not In	Not In
DXC Technology	Leader	Leader	Leader	Leader	Leader
Getronics	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Leader

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
HCLTech	Product Challenger	Rising Star ★	Product Challenger	Product Challenger	Contender
homeagent	Not In	Not In	Not In	Not In	Contender
ilegra	Not In	Not In	Product Challenger	Not In	Not In
Infosys	Product Challenger	Product Challenger	Contender	Product Challenger	Product Challenger
IPNet	Contender	Not In	Market Challenger	Not In	Not In
Kyndryl	Leader	Market Challenger	Leader	Leader	Leader
Lenovo	Contender	Product Challenger	Contender	Product Challenger	Product Challenger
Logicalis	Not In	Not In	Not In	Product Challenger	Not In
Multiedro	Market Challenger	Not In	Market Challenger	Not In	Not In
NAVA	Not In	Not In	Contender	Contender	Not In

Provider Positioning

Page 3 of 3

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
NTT DATA	Contender	Contender	Contender	Contender	Not In
Processor	Not In	Not In	Not In	Contender	Not In
SONDA	Product Challenger	Product Challenger	Product Challenger	Market Challenger	Market Challenger
Stefanini	Leader	Leader	Leader	Leader	Leader
TCS	Product Challenger	Leader	Product Challenger	Leader	Leader
Tech Mahindra	Product Challenger	Contender	Product Challenger	Contender	Contender
TIVIT	Leader	Product Challenger	Leader	Leader	Product Challenger
Unisys	Leader	Leader	Leader	Leader	Rising Star ★
Venha Pra Nuvem	Contender	Not In	Contender	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Product Challenger

This study evaluates the capabilities of suppliers in providing essential **Future of Work services** in different regions.

- **Workplace Strategy and Enablement Services**
- **Collaboration and Next-gen Experience Services**
- **Managed End-user Technology Services**
- **Continuous Productivity Services (including Next-gen Service Desk)**
- **Smart and Sustainable Workplace Services**

Simplified Illustration Source: ISG 2024

Definition

The future of work is constantly evolving, with companies demanding that employees return to the office or adopt hybrid working models. Advances in generative AI (GenAI) and the need to assimilate new business models to meet dynamic consumer demands also contribute to the evolution of the future of work.

Companies no longer partner with service providers to supply computers, cell phones, Wi-Fi and call centers, allowing employees to work as they please. Instead, they embrace a flexible workplace open to new technological possibilities.

A *continuum* stretches from traditional low-tech approaches to agendas focused on sustainability, incorporating AI, XR and immersive EX experiences. Experience parity becomes a significant differentiator in the market. Workplaces must therefore offer continuous EX, regardless of location or consumer interaction.

Employees are looking for the freedom to select the workspace and technology they need. They need ubiquitous access to devices, applications, data, workflows, documents and processes, regardless of location. These requirements demand security, via an established platform, protocol and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, companies face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

GenAI opens up new ways to increase employee productivity and efficiency.

It allows corporate IT to better manage the *back-end* technologies of the workplace.

Even so, companies need expert help to create strategies, implement and adopt this technology.

This report focuses on the approaches in which the thinking of the next generation changes the future landscape of the workplace.

ISG's Future of Work Framework

- Encapsulates what enterprises are doing to design new ways of working plus the Future of Work / Workplace models and helps connect them to digital solutions
- Represents convergence of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services:

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace Services.

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

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

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

Provider Classifications

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

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

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

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

Workplace Strategy and Enablement Services

Who Should Read This Section

This report is relevant to companies across industries in Brazil for evaluating workplace strategy and implementation services providers.

In this quadrant, ISG presents a comprehensive overview of the competitive landscape in the Brazilian market, highlighting the current positioning of providers of workplace strategy and implementation services and how each of them addresses the main challenges their clients face.

In the Brazilian digital workplace market, enterprises increasingly seek innovative AI-powered tools and solutions to integrate into their internal processes and improve employee experience, detect fraud, conduct predictive analysis and mitigate risks. AI integration into communication channels enables efficient and personalized interaction, which increases employee satisfaction and engagement.

However, implementing the concept of employee experience has encountered cultural and structural challenges in the country. The digital maturity of Brazilian companies and the diversity of professional profiles can hinder the implementation of digital workplace solutions and impact employee experience.

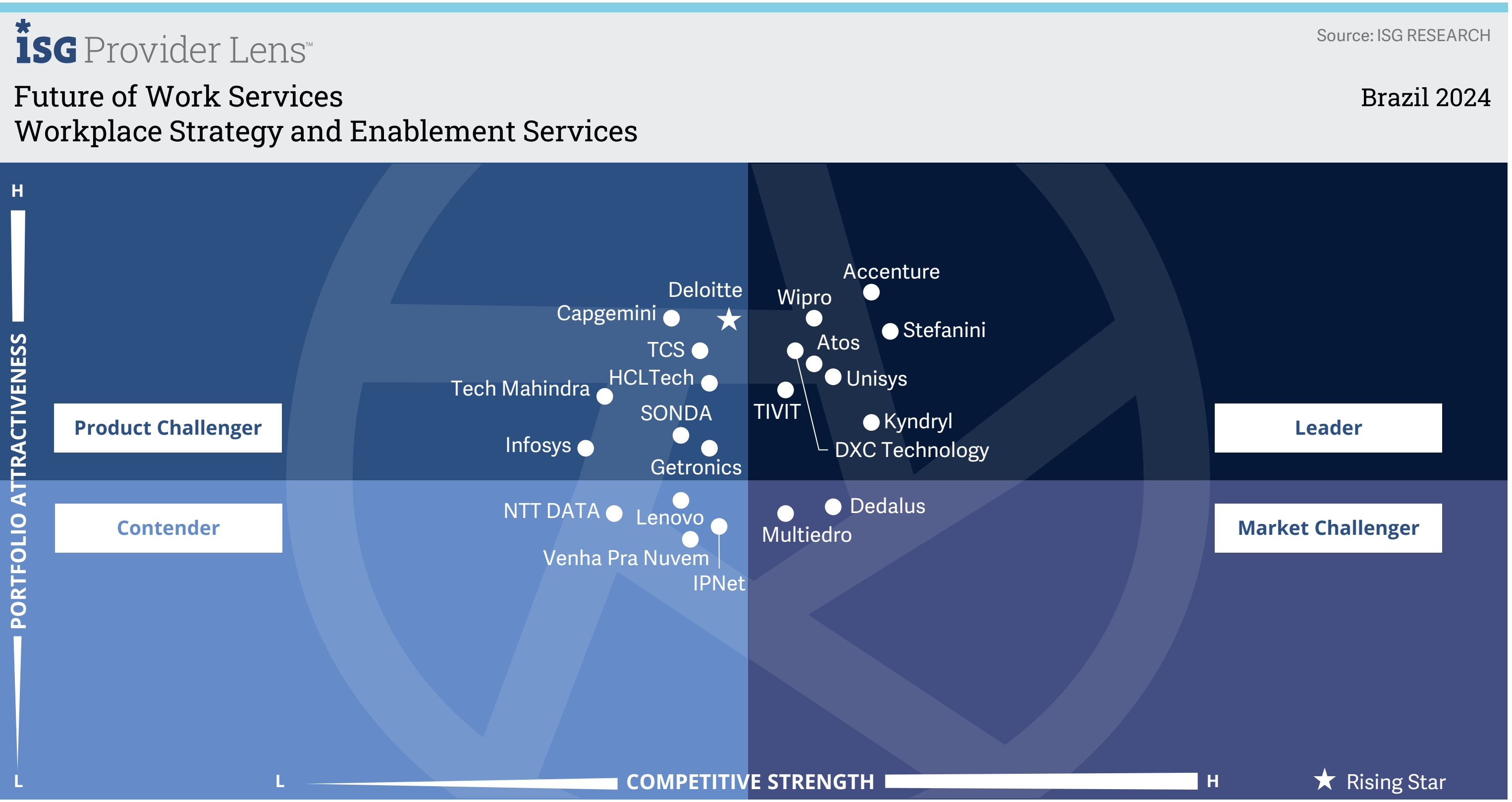
Despite these challenges, many companies remain committed to digitally transforming their work environments. These companies seeking suppliers with expertise in emerging technologies to assist with workplace processes and strategies.

Digital transformation professionals should read this report to understand how suppliers fit into their digital transformation initiatives and how they can compare different providers.

Chief experience officers (CXOs) should read this report to understand how service providers can help their teams for the digital world and new business dynamics.

Technology professionals should read this report to understand the relative positioning and capabilities of suppliers that can help them improve their working environment.

HR leaders should read this report to understand how service providers are addressing employee experience in the context of hybrid working.



This quadrant evaluates providers **offering strategic workplace scenario services, training and implementation**, capable of tailoring advice and strategy by region, market directions and organizational requirements.

Cristiane Tarricone

Definition

This quadrant evaluates providers of strategic workplace services and training services, including sector-wide implementation. The organization that aims to help clients navigate the complex strategy and regulation of the workplace landscape must be able to tailor advice and strategy by region, market direction and organizational responsibility. They must also provide strategic training and services that cover a number of integrated areas related to the workplaces of the organization the whole company.

Workplace service providers must make changes to adjust understanding to consider advanced business models and new talent models. This consideration requires guidance, compliance and strategies appropriate to the human, digital and physical workplace and should be considered collectively rather than in a silo. Latest aspects that should be included as part of workplace services listed below:

- Market change and new business design, including the creation of a circular business delivery model;
- Guidance on digital skills that can impact human workplaces or physical;
- New talent models;
- Integration of physical and remote workplaces;
- Strategy and evaluation of physical assets;
- Workplace-oriented sustainability strategy

Although some suppliers may develop strategies, the key to minimizing possible problems is to work on procurement, project management, change, CX and strategy delivery in the workplace.

Providing these skills in various sectors is crucial, as regulations vary from according to the sector.

Eligibility Criteria

1. Providing **consultancy** and **new business model** projects;
2. Manufacturer-neutral approach to the **business delivery model, led by workplace transformation;**
3. Offering **advice on human, digital or physical workplace strategy;**
4. **Adopt a new talent model that affects the workforce.** The model must integrate diversity, equity and inclusion and eliminate the risk of modern slavery;
5. **Integrate local and remote physical workplaces** and ensure **parity of experience;**
6. Provide **asset** strategy and **evaluation**, including use of property, infrastructure and final performance;
7. Have **experience and reference in workplace sustainability strategy;**
8. Carry out **a case study of the sector for workplace strategy** with a focus on the human, digital and physical aspects.

Observations

Service providers demonstrating strong consultancy skills in offering workforce strategies and increasing digital dexterity stood out in this quadrant. Their specialized consulting practices for improving employee experience and training were evaluated.

Leaders in this quadrant presented technological competence and a deep understanding of future workplace strategies, providing advice for IT operating models that align with next-generation technologies, including AI. Providers with the skills to manage the required changes in the evolving digital work model, incorporating elements of employee experience management, such as empathy and personalization, were noteworthy.

From the 32 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and one Rising Star.

Accenture is a global leader in consulting services. It transforms businesses and redefines the digital workplace, creating human-digital hybrid spaces. Its key business approach combines connected strategies, innovative technologies and employee experience.

Atos is a global leader in technology services and partners with clients for digital transformation solutions. It offers digital workplace consultancy and partners with educational institutions. The company has extensive experience and integrated vision.

DXC Technology helps companies run mission-critical systems. Its Modern Workplace solution enables employees to connect, collaborate and work seamlessly and securely on any device, anywhere.

Kyndryl is a leader in digital workplace services. With a focus on user experience and business results, the company offers intelligent solutions, AI-driven automation and support for GenAI.

Stefanini specializes in the digital workplace. Its differentials include highly collaborative environments, remote work security and customized solutions for a flexible and productive digital workplace.

TIVIT is Brazil's leading digital workplace service provider and offers transformation consultancy. With more than 1 million tickets handled annually, four support centers and 200 certified analysts, the company guarantees security and productivity for 300,000 work devices.

Unisys offers digital workplace consulting, empowering employees with customized and secure tools. It focuses on user experience, with managed services for Microsoft 365® and comprehensive support.

Wipro offers a solution that boosts employee productivity and well-being. Leveraging cognitive intelligence, touchless automation and a comprehensive data structure, the company creates exceptional employee experiences.

Deloitte is a Rising Star in consulting and its study on the future of work highlights transformative trends, such as the evolution of roles, workforce and workplace, focusing on human skills, communication and collaboration.

Leader

"Unisys is developing proprietary GenAI technology as a differentiator, allowing data and processing to be done within the customer's secure environment and providing business insights and personalized analysis."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees in 57 offices in 27 countries. In FY23, the company generated revenues of $2 billion, with the Enterprise Computing Solutions segment being the largest. In Brazil, it 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, which has proved effective recently. Unisys was positioned as a Leader in the Employee Experience (EX) Transformation Services quadrant in 2023 and continues as a leader in the Workplace Strategy and Enablement Services quadrant in 2024.

Strengths

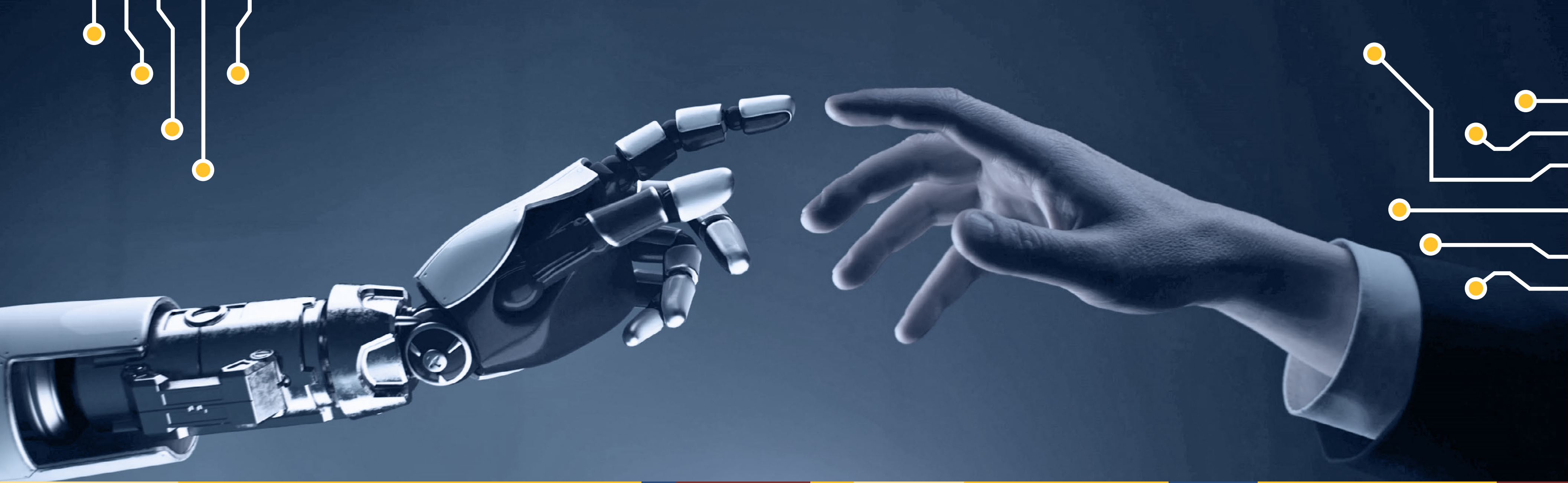
Focus on employee experience: Unisys uses a collection of data sources and proprietary AI to provide customer insights into how the experience their employees have when interacting with digital workplace services to achieve the customer's business objectives.

Knowledge bases: Unisys combines its knowledge bases, process expertise and AI-powered virtual agents to provide end users with contextualized and personalized support. The aim is to improve user experience and productivity rather than reducing support costs.

Investments in AI: Unisys is investing in AI and automation technologies, particularly around Microsoft Office Copilot, to drive productivity improvements for its customers. The key is not just to deploy the technology but to measure the real value it creates. Unisys is advocating a model where it can be compensated for ensuring that customers' employees are using and getting value from technologies like Copilot rather than just selling the licenses. The focus is on creating value, not just deploying technology.

Caution

Unisys can exploit the business opportunities generated by AI to incorporate an employee-centered approach and holistic solutions (XLAs) to its more conservative clients and thus expand its experience services in the already consolidated base.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is relevant to national companies across industries in Brazil for evaluating providers that enhance collaboration and the end-user experience.

In this quadrant, ISG defines the current market positioning of collaboration and next-gen experience service providers operating in Brazil, and how they address the main regional enterprise challenges.

In Brazil, companies recognize the interlink operational efficiency and user satisfaction, understanding that investing in user experience results in increased engagement and productivity. As a result, they are migrating from traditional SLA agreements to XLA metrics, changing the way they measure and manage the performance of IT services, prioritizing end-user and productivity.

Companies are seeking technologies that promote a more efficient, flexible and secure work environment, improving team communication and collaboration.

Organizations adopt AI and virtual assistants to automate repetitive tasks, streamline customer service and provide faster and effective employee support, increasing productivity and efficiency in customer service.

Hybrid working is becoming a reality in Brazil, with companies adopting models that combine face-to-face and remote working to retain talent and reduce operating costs. Videoconferencing platforms, project management tools and virtual workspaces are the main solutions adopted in the country to ensure productivity and team engagement in a hybrid environment.

HR leaders should read this report to understand how suppliers are addressing collaboration, empathy and employee well-being in the era of hybrid working.

Chief experience officers (CXOs) should read this report to understand how service providers can prepare their teams for the digital world and new business dynamics.

Technology professionals should read this report to understand the relative positioning and capabilities of suppliers that can improve employee services.

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

This quadrant evaluates **service providers' capabilities to enhance end-to-end CX and EX,** offer value-added managed services to the workplace technology ecosystem, and improve the end-user experience.

Cristiane Tarricone

Definition

This quadrant evaluates service providers' capabilities to enhance end-to-end CX and EX and offer value-added managed services to enable the workplace technology ecosystem and improve the end-user experience. Typically, vendors deliver services that enable business leaders, line-of-business (LoB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. Their services link experience to results and help align the digital transformation of the workplace with human needs.

The next-generation experience goes beyond technology implementation to include professional services that promote technology adoption. Vendors engage with customers in a results-focused model using an XLA approach. The experience management office (XMO) brings together actionable *insights* from data and analytics, sentiment analysis, ML and change management activities.

These providers enhance collaboration and support comprehensive stacks of communication, collaboration and productivity with AI and GenAI technologies. They also extend their offerings to consulting and advisory services, meeting the requirements of various business functions, such as HR and operations. They provide expert guidance on effective change management and technology adoption, with cutting-edge technologies to ensure seamless transitions. In addition, these providers offer services that promote digital dexterity and thus an environment conducive to learning and the development of essential skills to navigate the evolving workplace landscape.

Eligibility Criteria

1. Provide **XLA-focused delivery approach** to enhance the collaborative experience;
2. **Leverage AI and GenAI technologies** to provide value-added experience transformation services;
3. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage and monitor the analysis of the *hardware* deployed;
4. Support **unified communication, collaboration** and productivity stack;
5. Providing **services to support** the **needs of other business functions**, such as human resources outsourcing (HRT) and operations;
6. Provide services that allow for the proper **management of changes** and the adoption of technology, taking advantage of the latest technologies, such as Copilot;
7. **Support XMO and associated services;**
8. Provide **services to support digital dexterity,** learning and skills development and deploy integrated AR and VR training.

Observations

The human dimension is one of the main challenges companies face when implementing employee experience transformation. Although technological training is essential, it is not enough on its own. People are the real agents of change. The learning companies share in this process is the need to go beyond simply integrating and enabling the technological ecosystem. It is essential to incorporate functionalities that promote engagement and collaboration between teams. In the highlighted quadrant, we find suppliers with employee engagement skills. They add elements of employee experience management, including empathy and personalization.

A standard capability of all the leaders is their partnership with Microsoft and, essentially, the leveraging of Copilot as an essential tool. These companies are also working on implementing XLAs and have worked on improving communication and increasing the engagement of work teams. When transformational capability is absent in the supplier, they look for partnerships in the ecosystem to achieve the desired results on several fronts.

As a result, we can see that Accenture, Atos, DXC, Stefanini, TCS, Unisys and Wipro are in the Leaders in this quadrant. HCLTech is a Rising Star and focuses on enabling technologies for better employee experience and growth.

From the 32 companies assessed for this study, 18 qualified for this quadrant, with seven being Leaders and one Rising Star.

Accenture operates in the Brazilian market through Avanade, a joint venture between Accenture and Microsoft, whose vision is to create an attractive, modern and customer-centric digital experience.

Atos' operations have been split up, with the separation of Eviden's business completed. Collaboration and CX services are maintained at Atos, reinforcing its activities with a new laboratory in the country's southern region.

DXC Technology has strengthened its strategy on the employee and customer experience at the top, feeding back data obtained from the experience metrics in the chain and raising CSAT levels.

Stefanini continues its strategy of geographical expansion, gaining new markets with personalization and cognitive services adapted to service assistants.

TCS shows significant growth in its customer base and has expanded its business with additional delivery centers in the Brazilian market.

Unisys invests in circular economy in its chain and in its partnerships to deliver a collaborative experience to the employee and the customer at the end.

Wipro strengthens its strategy and leverages business using automation accelerators to enable collaboration layers.

HCLTech provides collaboration and experience services based on exclusive intellectual property, which together make up a set of services to elevate the experience of end users, which are monitored by service and experience metrics.

Leader

"Unisys adopts a circular approach to its collaboration services, incorporating Microsoft Copilot as an intelligent tool in the process and making customer service more flexible."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees in 57 offices in 27 countries. In FY23, the company generated revenues of $2 billion, with the Enterprise Computing Solutions segment being the largest. In Brazil, Unisys is based in Campo Grande, with regional offices and two centers in Latin America (Colombia). With a loyal customer base, it seeks scalability through acquisitions, which has proved effective recently. Unisys was positioned as a Leader in the Employee Experience (EX) Transformation Services Quadrant in 2023 and continues as a Leader in the Collaboration and Next-gen Experience Services Quadrant in 2024.

Strengths

Circular approach: One of the key differentiators of Unisys Managed Services for Microsoft Copilot is Unisys' ability to adapt to the evolving expectations of customers and the Copilot platform, ensuring deliveries are always up-to-date with the latest best practices through continuous training, support and optimization. They collect customer feedback and insights into the value creation chain.

Communication and collaboration: Unisys uses Microsoft M365 Full Managed Services to equip its frontline employees and improve its efficiency and customer service capabilities. This is a natural progression from the support worker setup, breaking down the digital divide between different workplace personas.

Employee experience vision: Appspace is an intuitive digital gateway to the smart workplace that provides employees with a single point of access to everything they need and integrates with existing systems.

Methodologies for enhancing collaboration: Unisys uses accelerators to enhance the collaboration framework, which includes *SIAM-X, XLA 3.0* and XaaS integration into other offerings such as UC and Copilot. Its DEX Maturity Model has been adapted from industry best practice recommendations and expanded regarding categories and questions.

Caution

Unisys has added new tools that enable the use of AI to its collaboration services, adding value to its offerings. Unisys must keep an eye on updating PowerSuite, considering the speed with which GenAI is impacting customers.

Managed End-user Technology Services

Who Should Read This Section

This report is relevant to companies across industries in Brazil for evaluating providers of managed workplace services end-user technology.

In this quadrant, ISG highlights the current market positioning of providers that offer managed workplace services in Brazil and how they address the main regional enterprise challenges.

Companies in Brazil are seeking constant technological evolution in their managed services, with the AI and automation becoming increasingly prevalent in technical support. AI solutions are being implemented to proactively predict and solve problems, even before end users notice any faults. Automation, in turn, streamlines repetitive tasks, improving efficiency and user experience through personalized service.

Increasingly aware of the need to integrate sustainable practices into their managed services, Brazilian companies are strengthening their commitment to sustainability by focusing on eco-friendly solutions, efficient energy consumption, device reuse, responsible disposal and minimizing carbon footprint.

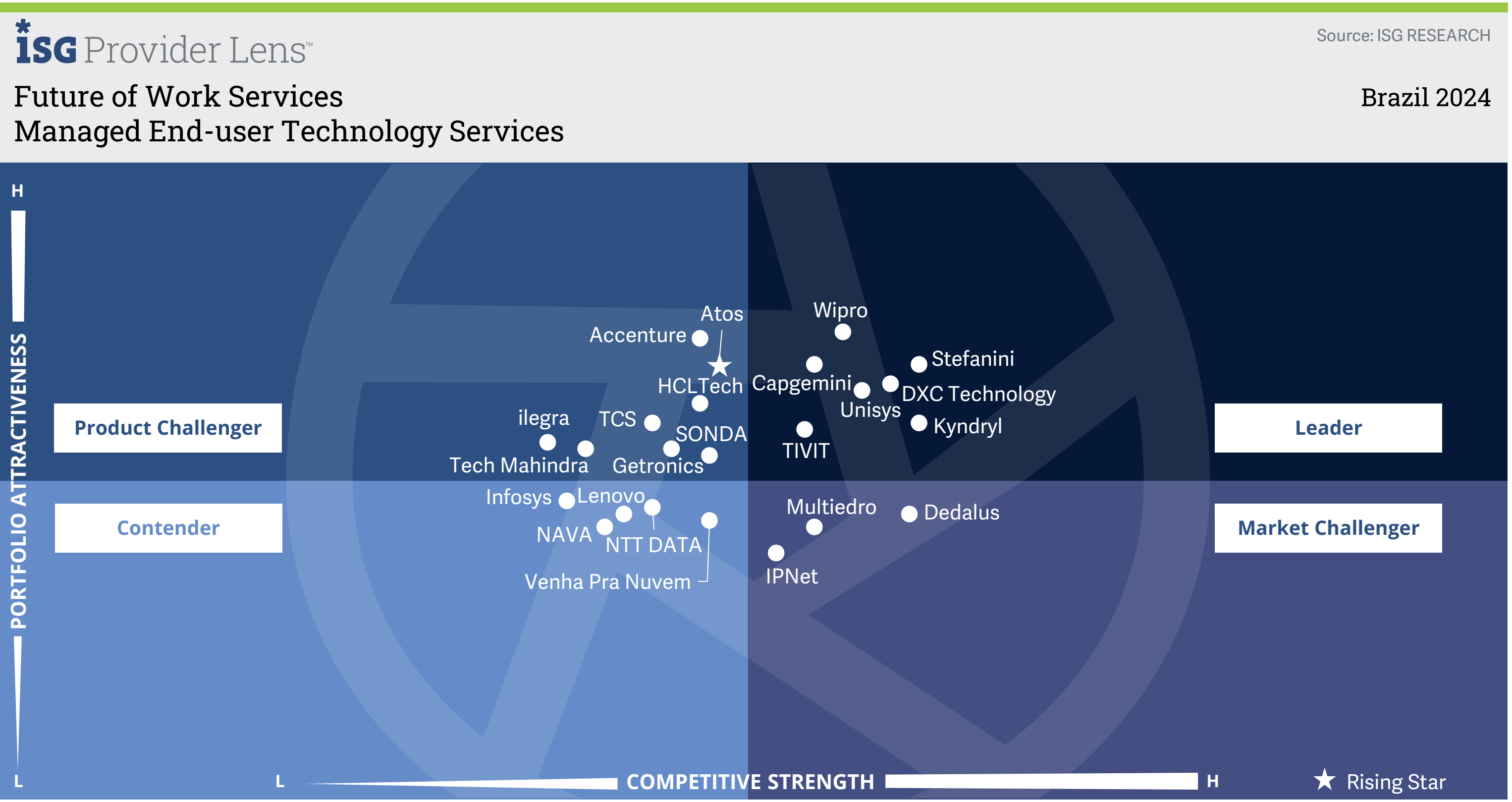
Security and governance have become paramount, with a focus on protecting sensitive personal data. Companies adopt strict security measures, such as data encryption, multifactor authentication and access control. In addition, there has been an increase in implementing governance and compliance policies to guarantee information security and legal compliance.

Technology professionals should read this report to understand the relative positioning and capabilities of providers in managed digital workplace services.

Cybersecurity professionals should read this report to understand how providers address compliance and security challenges without disrupting employee experience.

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

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



The quadrant evaluates providers of **managed infrastructure services** associated with technologies that corporate IT areas deploy, provide and protect, and complete **end-user computing** (EUC) services for employees.

Cristiane Tarricone

Definition

The quadrant evaluates managed service providers associated with technologies that corporate IT departments deploy, provide and protect for end users and employees. Such managed infrastructure services in the digital workplace include end-user empowerment for services related to devices, applications, cloud workspaces and *endpoint* security.

Vendors evaluated in the quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. Services include device and *patch* management, device and application provisioning, access to virtualized desktops and device lifecycle management. The service portfolio supports bring your own device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing and securing devices remains the first step in enabling the digital workplace and providing devices with integrated collaboration and productivity capabilities to employees.

The growing focus on the *endpoint* experience has transformed services and helped suppliers to serve their respective client sectors. Although such services are usually associated with computing devices and tablets its scope can be expanded to include industry-specific scenarios, such as point-of-sale or portable devices for retail and hospitality or medical equipment for healthcare and workplace settings more traditional.

Eligibility Criteria

1. **End-user devices that are always active and up-to-date** for secure collaboration and productivity;
2. **Unified *endpoint* management (UEM),** enterprise mobility, patching and application provisioning;
3. **Complete device lifecycle management services**, acquisition, registration, application provisioning, support, management, disposal and recycling of devices (device as a service), with device *sourcing* and logistics;
4. **DEX solutions for automated problem solving;**
5. Experience in providing on-premise and cloud virtual desktop services **(desktop as a service)**
6. **Related field services,** IMAC and repair services. Remote field support, on-site and face-to-face technical assistance;
7. At least 75% of regional contracts with **end-user** technology **service management**.

Observations

The vendors evaluated in the quadrant focus on optimized integration of the various application layers and infrastructure devices to support the new working models.

Enterprise mobility management (EMM) and the provision of virtual device solutions (VDI) that enable a differentiated digital employee experience are issues that stood out in this assessment, especially when connected to making the solution available anywhere, at any time, with high availability.

Solutions have become more complex and integrated, and it is essential for suppliers to be connected to native and intelligent technologies that enable easy and agile connection for a positive experience, whether for the employee or the customer at the end.

Leading suppliers exploit these technologies.

In addition, managing the life cycle of devices based on sustainability, with an emphasis on the environment (carbon emissions, device lifecycle, remanufacturing), set the Leaders apart.

With hyperautomation, we have identified an increase in the rate of automatically resolved incidents, with the interaction of technologies minimizing the intervention of human agents.

Providers that demonstrated consistent security and compliance practices were evaluated since cybersecurity is a high-priority issue for clients. Leaders in this quadrant stand out for their practices that follow industry standards and are concerned with updating them at the same pace as technological environment updates.

From the 32 companies assessed for this study, 23 qualified for this quadrant, with seven being Leaders and one Rising Star.

Capgemini is known in the Brazilian market for providing customer-focused, industry-based managed solutions with technology and innovation, with one of the highest CX Scores identified in this study.

DXC Technology analyzes data obtained from device-as-a-service offerings to reduce costs and provide customers with measurable reductions in their carbon footprint.

Kyndryl drives market growth with managed solutions that offer security, flexibility, and user experience, as well as a new approach to addressing the cost of virtualization solutions.

Stefanini

Stefanini offers managed services based on scalability, flexibility, customization, economic models and innovation.

TIVIT has developed a managed services environment for the future of work, including digital transformation, GenAI, data, governance and security.

Unisys provides a global and efficient hardware asset management solution that can improve support consistency and simplify IT spending.

Wipro has a dedicated AI engineering function to drive co-innovation with partners and create customized use cases to elevate workplace propositions.

Atos provides a user-centric service, guaranteed by a dedicated, proactive experience center and uses a data-driven and experience-focused approach, managing more than 1.6 million devices.

Leader

"Unisys uses digital platforms to provide solutions in key areas and organizes itself to offer end-to-end devices as a service."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees in 57 offices in 27 countries. In FY23, the company generated revenues of $2 billion, with the Enterprise Computing Solutions segment being the largest. In Brazil, Unisys is based in Campo Grande, with regional offices and two centers in Latin America (Colombia). With a loyal customer base, it seeks scalability through acquisitions, which has proved effective in recent years. Unisys was positioned as a Leader in the Managed Workplace End-user Technology quadrant in 2023 and will continue to be a Leader in this quadrant in 2024.

Strengths

Device lifecycle management: Unisys focuses on device management through its experience management and endpoint operations teams, combined with a two-way partner ecosystem across a range of OEMs, including Dell, Lenovo and HP. They leverage their partners' hardware and lifecycle hub resources to provide a global, efficient solution to improve support consistency while simplifying IT spending.

Personalized adoption plans: The company is implementing adoption plans based on a perennial, persona-driven device catalog. Communication channels are monitored and adjusted based on persona-level success criteria.

Endpoint as a service (EaaS): Unisys is preparing to move devices to as-a-service model, with a unified management solution for all endpoints (desktops, cell phones, virtual desktops, IoT devices, wearables, rugged purpose-built portable devices, etc.), delivered via a cloud-based as-a-service model. This approach promises scalability, continuous updates and managed services, simplifying IT operations and improving security in all sectors.

Caution

Unisys must continue to develop its ability to provide enterprise service management as a service, including solutions with key partners because optimized resource management is a constant priority for customers.

Continuous Productivity Services (including Next-gen Service Desk)

Who Should Read This Section

This report is relevant to enterprises across industries in Brazil for evaluating continuous productivity service (including next-gen service desk) providers.

In this quadrant, ISG highlights the current market positioning of continuous productivity service (including next-gen service desk) providers in Brazil and how they address the main enterprise challenges in the region.

Brazilian companies, recognizing the need for agility and efficiency in problem-solving, have invested in self-service and self-healing solutions. Organizations value empowering employees with tools that enable independent problem-solving and combine this with self-healing solutions for a smoother experience and minimized operational interruptions.

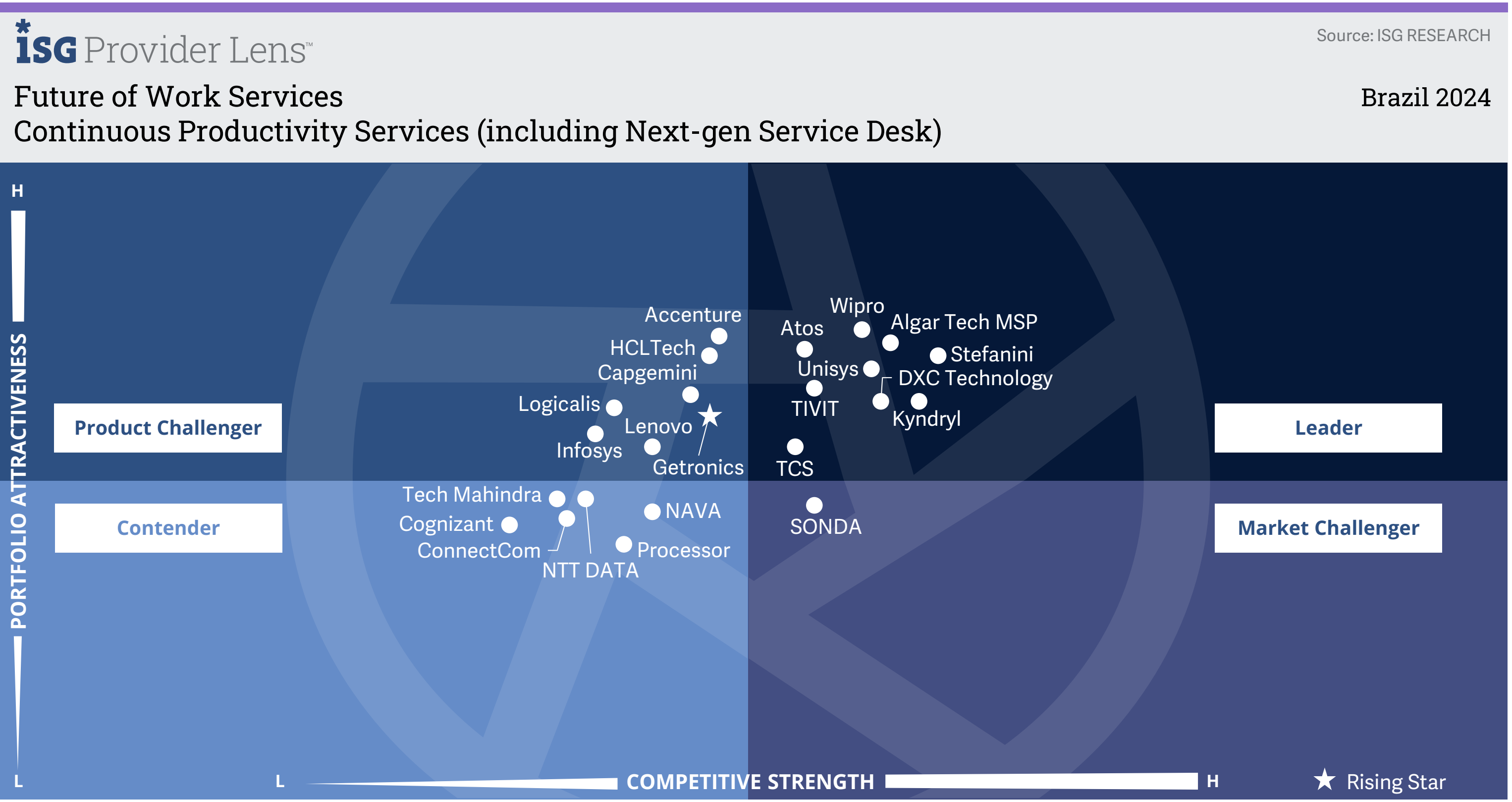
The demand for proactive problem-solving is driving interest in providers using data analytics, AI and automation. This approach identifies patterns and take preventative measures, avoiding negative operational impacts. Companies in Brazil, seeking optimization and efficiency, look for solutions that anticipate and solve problems before proactively, guaranteeing maximum availability and productivity.

Technology professionals should read this report to identify providers that can assist with service desk modernization and desktop support services.

Digital professionals should read this report to understand how suppliers fit into their digital transformation initiatives and how they can be compared with each other.

Field service professionals should read this report to understand how suppliers are expanding the use of workplace services to better manage field service operations.

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



The quadrant evaluates suppliers' capabilities in supporting ongoing needs **productivity of the next generation of workplaces, human and integrated hybrid work**, with sentiment analysis and automated DEX sorting.

Cristiane Tarricone

Definition

The quadrant evaluates supplier capabilities in supporting the ongoing productivity needs of next-generation workplaces, humans and fully integrated hybrid work patterns. For today's workforce, being productive means working anywhere, anytime. Users need a different IT operating model, driven by changes in business models and market channels, which they must operate and support.

This workforce needs autonomy and constant connectivity to be productive, regardless of location, working pattern or device. To this end, suppliers should offer better support capabilities, with typical *service desk* offerings less attractive but available. Next-generation services include sentiment analysis and automated DEX triage to ensure always-on IT is managed, and AI-powered health monitoring for managed services and emerging devices such as AR and VR. Services include automated and proactive technical support and cloud platforms with always-on systems. Providers use AI and cognitive technologies for user-facing tasks, saving significant costs, and success is measured by XLAs linked to business results, not SLAs.

Suppliers can improve business results with advanced productivity support. Previously, services included field and on-site support, requiring technicians to at users' locations. Today, suppliers are taking advantage of automation and use remote and self-service options, such as AR auto-correction, on-site support of work, call centers, technology bars and cafés, DigiLockers, omnichannel chat and voice support.

Eligibility Criteria

1. Provide **autonomous on-site support for delivery anywhere;**
2. Offer **fully integrated analysis and automation** for problem solving;
3. Provide **contextualized AI support** for the workplace;
4. Provide ***service desk* augmentation;**
5. Offer **XLA-based support** instead of SLA-based decisions;
6. **Set up and provide intelligent support** through self-help kiosks, technology bars, IT vending machines and DigiLockers;
7. Provide **automated and contextualized support for end users** based on their roles and work;
8. **Quantify the performance of the support function in the workplace** beyond traditional service metrics;
9. Have a **robust local presence** with the majority of workplace commitments around call center services.

Observations

The present quadrant assesses providers that offer modernized solutions to support future workplace models. They seek to incorporate currently available technologies to enable automation functionalities, reducing the need for human intervention in interactions. A more automated and intelligent service provides agility and speed in service and enables the creation of an analytical database.

This database enables preventive and predictive actions for calls. In addition to virtual assistants, experience metrics are constantly evolving. The new service models require different contracts based on transactions and experience metrics, which requires a cultural change on the part of customers and in negotiations.

In Brazil, many customers still adopt SLAs to the detriment of the current XLAs. Although suppliers are ready with their new models, customer adoption will depend on their maturity and profile. GenAI solutions are in their early stages due to the hype, and we can foresee a phase of investments that will not be justified before evolving into real productivity solutions.

From the 32 companies assessed for this study, 23 qualified for this quadrant, with nine being Leaders and one Rising Star.

AlgarTech MSP

AlgarTech MSP offers a digital and customizable service desk solution based on AI on a multichannel platform and differentiated technical support to the client.

Atos proposes to provide a dedicated squad to offer continuous productivity and redefine the workspace following a model in line with current trends.

DXC Technology's personalized service delivery is based on applying automation and analytical data to reduce manual processes and enable an individualized experience.

Kyndryl offers an approach to orchestrating employee time through a control center that handles XLA/XPI information and manages incidents by exception.

Stefanini

Stefanini offers different automation platforms for a personalized self-service experience and hyperautomated services for contactless automatic correction.

TCS invests in the Near Zero Contact Service Desk, which is a hyperautomated end-to-end approach to solving end-user problems without the active involvement of the call center.

TIVIT is bringing its virtual assistant solution with GenAI to business areas such as sales, HR and IT.

Unisys is architecting a data lake with business insights, data models, as well as intelligent automation for AI (Service Experience Accelerator), as the next workflow generation.

Wipro envisions a comprehensive AI-powered support solution that empowers employees and support agents with preventive, proactive and augmented assistance while maintaining the total experience at the focal point.

Getronics invests in automation, from analytical data for process optimization to connecting AI to integrate experience and put the human being at the center of attention.

Leader

"Unisys differentiates itself by adopting an in-tenant model for AI usage and offering customizable, specialized business solutions."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees in 57 offices in 27 countries. In FY23, the company generated revenues of $2 billion, with the Enterprise Computing Solutions segment being the largest. In Brazil, Unisys is based in Campo Grande, with regional offices and two centers in Latin America (Colombia). With a loyal customer base, it seeks scalability through acquisitions, which has proved effective recently. Unisys was positioned as a Leader in the Digital Service Desk and Workplace Support Services quadrant in 2023 and continues as a Leader in the Continuous Productivity Services Quadrant (including Next-gen Service Desk) in 2024.

Strengths

In-tenant architecture: Unisys' approach to AI technology is a self-developed in-tenant model used for IT support and to provide business insights and customized analysis. It can include building customized business *chatbots*. It aims to provide better control over data privacy and security (since the model can be processed on the client's premises), dynamic knowledge creation capacity and the use of federated machine learning models for feedback.

Augmented and merged reality: Unisys uses Help Lightning to provide remote IT smart hands and facilitate vertically focused activities such as remote supervision, quality control and remote training for customers and frontline employees.

Elements of user enablement: Unisys provides around 60 percent of Dell customers' PC support globally. Its experience management office is a priority for generating proactive experience insights and delivering a better user experience. With robust support that includes 12 global delivery centers and a high volume of services and customers, Unisys has transitioned 65 percent of its customers to XLA experience indicators. In addition, 65 percent of its contracts are priced based on results.

Caution

Unisys' strategic approach of using proprietary AI technology presupposes continuous technological development to keep up with the evolution of market competitors, including physical, human and monetary resources. This is a strategic change in the business model in the long term.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is relevant to enterprises across industries in Brazil for evaluating service providers that support smart workplaces and help clients with sustainability goals.

In this quadrant, ISG highlights the current market positioning of smart and sustainable workplace service providers in Brazil and how they address the main regional enterprise challenges.

The circular economy is gaining prominence in Brazil, especially in device lifecycle management. Companies are focusing on effective device management strategies, from acquisition to responsible disposal. There is increased attentive to material origin, t reuse, recycling and resource optimization. Investment in equipment upgrade and refurbishment programs has grown to reduce the need for new devices and minimize electronic waste.

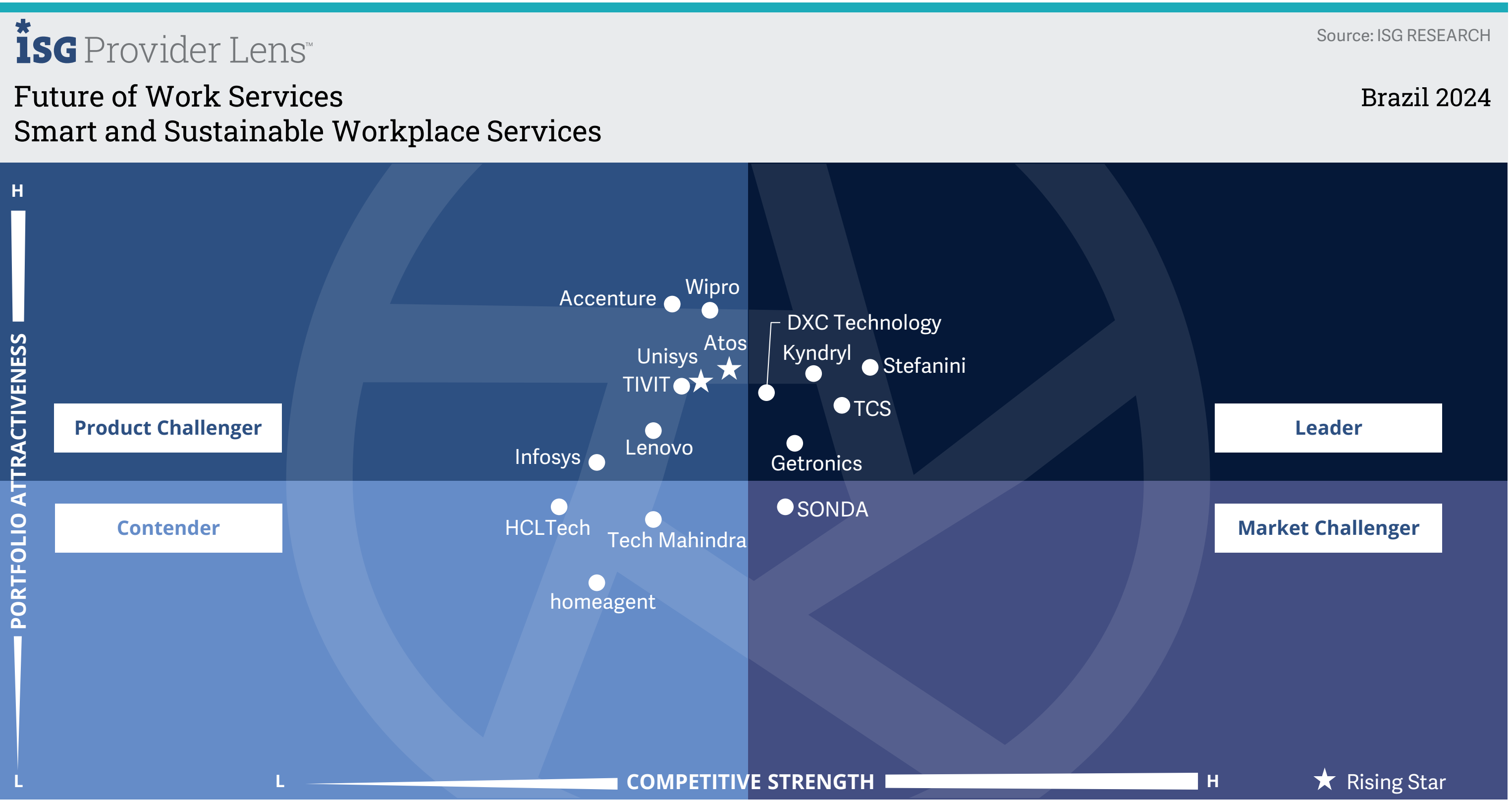
At the same time, reducing carbon emissions is a priority for Brazilian companies, aligning with global commitments to combat climate change. Companies seek to reduce their carbon footprint through digital solutions that promote reduced energy consumption, process optimization and remote working practices.

Technology professionals should read this report to understand the relative positioning and capabilities of providers that can help make their work environment more sustainable.

Sustainability leaders should read this report to understand providers' capabilities in supporting sustainable strategies in the digital workplace.

Procurement professionals should read this report to gain a better understanding of the current landscape of smart and sustainable workplace service providers in Brazil.

Digital professionals should read this report to understand how suppliers contribute to sustainability in their digital transformation initiatives.



The quadrant evaluates suppliers that support **smart physical workplaces, IoT-enabled solutions** and help clients achieve **sustainability goals,** ensuring buildings and spaces integrated, inclusive and sustainable.

Cristiane Tarricone

Definition

The quadrant evaluates suppliers that support smart, IoT-enabled physical workplaces and help customers with sustainability goals. The modern workplace combines human, digital and physical workplaces for remote, hybrid or face-to-face collaboration and productivity. Buildings and spaces must be integrated, inclusive and sustainable, with the purpose of user participation.

With commercial retail facing major occupancy issues, workplace suppliers must collaborate with business leaders and create a holistic office strategy. Suppliers must use technology and sustainability to design, implement and manage workplace environments that improve operational efficiency, employee well-being and environmental responsibilities. As organizations focus on back-to-office strategy, suppliers can help build environment with solutions intelligent meeting and facilities management. In addition to traditional office management, the services include an adaptive, efficient, inclusive and responsible environment, creating spaces that meet the current needs of employees and companies and anticipate future challenges and opportunities in the evolving workplace.

Suppliers must also integrate experience parity capabilities into their offerings, with tangible results, whether they are remote, virtual or hybrid models.

They should incorporate unified communications and collaboration capabilities and offer smart collaborative spaces. Services include IoT-enabled functionality to control the environment, resulting in a smart campus with smart physical space, as it focuses on ESG initiatives.

Eligibility Criteria

1. Support **smart office spaces by leveraging IoT and the latest technologies** to provide workplace analytics, *hot desking*, smart buildings and facilities management;
2. To support **asset efficiency** and meet **energy management requirements;**
3. Provide inclusive, adaptable and **integrated hybrid workspaces** and solutions;
4. Provide **services to reduce carbon emissions** in the workplace;
5. Assist in **aligning the client's strategies and metrics for reporting on ESG aspects,** focusing particularly on the use of workspace in the social and governance dimensions.

Observations

Introduced by ISG this year, this quadrant evaluates providers supporting the growing global focus on sustainability initiatives. Managing digital technology in the workplace is a crucial component of a corporate ESG strategy. Global providers have incorporated carbon footprint monitoring and reduction, which are also significant in Brazil. They offer device-based services, including proper disposal and recycling. RTO movements require controlling and monitoring carbon emissions through IoT devices. Service providers are working on remanufacturing equipment to reduce the carbon footprint and control disposal.

As clients implement their RTO policies, they seek support from technological services to measure the impact of carbon emissions from buildings and facilities. By flexible working, these clients avoid employee travel, reducing carbon emissions. In addition to reducing their carbon footprint, customers are also looking for support to make their physical workplaces smarter and promote more collaboration.

The Product Challengers in this quadrant focus on environmental, social and governance (ESG) and sustainability. They also offer support for diversity, equity and inclusion. Market Challengers in this space have strong portfolios of digital workplace services, but lack a deep focus on sustainability. The Leaders in this space have successful examples of implementing sustainable workplaces and deployment solutions to enable an intelligent RTO strategy and have excelled in offering smart solutions for office facilities management in addition to traditional management. They promote an efficient and effective environment while connecting various devices to control the environment for smart physical spaces.

From the 32 companies assessed for this study, 18 qualified for this quadrant, with five being Leaders and two Rising Stars.

DXC TECHNOLOGY

DXC Technology supports its clients in ESG practices and advises them with its knowledge and certifications. It is committed to working on energy issues.

getronics

Getronics has won a sustainability award and has developed services to help customers with this approach.

kyndryl

Kyndryl's partnership with Microsoft, including the use of Microsoft Copilot, and it's virtualization services are driving its device management capabilities by focusing on an agnostic, automated and personalized approach.

Stefanini

Stefanini applies a circular economy model that prepares and equips its teams to understand the objectives and create sustainable workspaces with associated metrics, reaffirming these concepts with its clients.

tcs TATA CONSULTANCY SERVICES

TCS invests in sustainable infrastructure with TCS Cognix™ for Workspace - Green Workspace and in employee well-being as an integral part of the ESG approach (WeVita and EWC programs).

Atos

Atos focuses on sustainable services and social support, boosting impact on the local community and increasing employee engagement. It plans to move its Proactive Experience Center to the Proactive Operations Center, encompassing sustainability issues.

unisys

Unisys has invested in circular computing by implementing sustainable practices such as refurbishing, remarketing and recycling devices, extending their life cycle and minimizing their environmental impact.

Rising Star

"Unisys is committed to the circular economy and working with its customers sustainably."

Cristiane Tarricone

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees in 57 offices in 27 countries. In FY23, the company generated revenues of $2 billion, with the Enterprise Computing Solutions segment being the largest. In Brazil, Unisys is based in Campo Grande, with regional offices and two centers in Latin America (Colombia). With a loyal customer base, it seeks scalability through acquisitions, which has proved effective recently. Unisys was positioned as a Leader in the Digital Service Desk and Workplace Support Services quadrant in 2023 and continues as a Leader in the Continuous Productivity Services quadrant (including Next-gen Service Desk) in 2024.

Strengths

Circular economy: Unisys' ecosystem of OEM partners (Dell, Lenovo and HP) allows us the support of a sustainable economy through device remarketing and remanufacturing, with product lifecycle extension economic and ecological solutions. Unisys offers the *Intelligent Device Refresh* solution to cascade fit-for-purpose devices by *persona*. Its services include recovering and disposing of IT assets to ensure they are treated responsibly. Unisys integrates Digital Workplace systems with building management and security systems. IoT devices connect physical devices to the internet, enabling the collection and analysis of data in real time, tracking the location of employees, checking the status of equipment and collecting data on customer behavior.

FinOps: Unisys' focus is to support IT cost management and has concentrated on providing field and central services, which it believes it does best in the industry.

Employee well-being: Unisys is also focusing on the physical workspace experience for frontline workers, using IoT sensors and analytics to monitor factors such as indoor air quality, space utilization and energy use, and providing adequate collaboration facilities.

Caution

Unisys can leverage its integrated data collection and monitoring services to evolve its experience metrics by adopting environmental sustainability metrics. Monitoring sustainability metrics together with clients can increase their relevance to the services provided.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till June 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Future of Work Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Region

▲ **Most satisfied**
Western Europe

▼ **Least satisfied**
Eastern Europe

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Insurance

Industry Average CX Score

75.3

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 980

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.7%
Offshore	22.1%

Appendix

The ISG Provider Lens 2024 - Future of Work Services 2024 study analyzes the relevant software vendors/service providers in the Brazil market, based on a multiphased 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Future of Work 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 Author

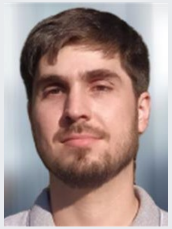
Cristiane Tarricone
Lead Author

At ISG, Cristiane Tarricone is lead analyst for ISG Provider Lens Future of Work, Microsoft Ecosystem and Oracle Cloud Ecossytem. She brings more than 30 years of extensive experience in driving business results and realizing measurable value from IT-enabled transformation. She has held senior IT and business leadership positions in Fortune 100 IT service provider and end-user companies.

She is a hybrid business and IT leader focused on the disciplines of leadership, digital strategy and the generation of business value. investments in technology. She is committed to IT innovation and emerging technologies to reshape the future. She is an independent advisor to the Board of Directors on strategies digital entrepreneur, mentor, speaker and MBA guest lecturer. She is also the founder of a non-profit organization that supports women in IT leadership. She has extensive experience in applying new trends and technologies to guide clients in reshaping their digital strategy and business plans to achieve their goals.

Cristiane was Regional Service Delivery Vice President and Team Manager in the Executive Programs at the Gartner, where he led a team of Senior Executive Partners to guide and advise clients in Brazil and Latin America.

Research Analyst



Gabriel Sobanski
Research Analyst

Gabriel Sobanski is a research analyst at ISG, responsible for supporting and co-authoring the Provider Lens™ ServiceNow studies. 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 leading analysts in the research process and is co-author of the global summary report, with market trends and insights.

Gabriel also develops content from a business perspective. Gabriel has been in his current role since 2021. Previously, he worked as an IT consultant, where he gained experience and technical skills in the collection, analysis and presentation of quantitative and qualitative data. His area of specialization includes industry, logistics and research market.

Study Sponsor

Iain Fisher
Director

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.

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.

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ISG

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