ISG Provider Lens™

Future of Work Services

Managed End-user Technology Services

A research guide to evaluate providers' strengths, challenges and differentiators in the modern workplace

Customized report courtesy of:

Lenovo

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Technology is driving fundamental changes for Australian workers, with innovative employers driving productivity improvements

The workplace landscape is becoming increasingly human-centric and must support the constantly changing working methods. A cloud-first approach is key to benefit from future-of-work advancements. Additionally, replacing legacy applications can also unlock new levels of productivity and flexibility.

The future of work is moving towards an AI-driven, hyperpersonalised workplace that enables organisations and individuals to be productive, creative and purposeful. Service providers are developing new products and services to help humanise workplace experiences. They aim to build resilient and sentient enterprises that foster sustainability and amplify human potential using AI.

A generative workplace refers to a dynamic and collaborative work environment. It is a digital workplace wherein the modern workforce, comprising human and non-human actors, collectively harnesses their capabilities to drive innovation, adaptability and value creation using generative platforms. Traditional workplaces must not only transition toward smarter and more efficient operations but also become more sustainable, foster inclusion and diversity, ensure device circularity and help meet organisational environment, social and governance (ESG) goals.

AI and analytics are critical to designing and operating digital workplace solutions that enable optimal performance and people engagement. An increased number of Australian enterprises now use AI for predictive analytics, risk assessment and supply chain optimisation. AI is also gaining importance in decision-making, process automation and customer engagement. Enterprises are leveraging the technology to enhance productivity and gain competitive advantage.

The future of work strategy should move away from persona profiling and advance towards optimising individual journeys. Businesses

An integrated strategy is essential to maximise employee value through technology.

today require a clear vision for future-of-work plans that must align with business objectives and industry contexts. The evolving future of work requires a platform-centric mindset, allowing businesses to leverage best-of-breed technologies and integrate them seamlessly into existing systems and processes.

Generative AI (GenAI) is significantly impacting the business landscape. Early adoption of GenAI tools such as Microsoft Copilot can give businesses a competitive edge by establishing an AI foundation, setting up responsible AI, assessing the work efficiency powered by assistants, and enhancing experiences and business outcomes.

Ergonomic and flexible workspaces are gaining importance. Enterprises are investing in modern office layouts that leverage cutting-edge technologies to enhance collaboration and employee well-being. Owing to the accelerated shift in customer behaviour and the rise of hybrid work, organisations must transform their workplaces into smart spaces to flexibly and effectively engage with customers and empower employees.

Next-generation collaboration platforms are becoming increasingly flexible and provide significant omnichannel support. There has been an increase in unified communication as a service (UCaaS) providers offering access to integrated contact centre tools and vice versa. Additionally, many businesses are partnering with IT service providers to ensure teams can connect all their essential tools in a single ecosystem.

Massive changes in managed workplace solutions and services are likely in the next few years due to various factors, including advancements in technologies (such as AI, ML, GenAI, advanced connectivity, and cloud and edge computing), rising geopolitical and economic pressures, and increasing work choices. Also, massive investments in ESG technologies will further accelerate technological disruptions in workplaces and workplace solutions and services. GenAI advancements in workplace solutions will include exploring the use of large language models (LLMs) in the service desk environment to improve agent onboarding and productivity, and ticket resolution through AI recommendations, including zero-touch resolution.

Collaboration and next-generation experience services are now being driven by an AI-led future, where the primary focus remains on AR- and MR-led collaboration services, human-holographic presences, and AI-based personalised copilots and chatbots. This functionality is dramatically changing the way workplaces have been functioning thus far and is a definitive step ahead towards predictive analytics-driven tailored offerings.

Businesses seek seamless integration across various platforms and tools to allow employees to collaborate effortlessly and access business services in a seamless, unified user experience fashion. Such an integration fosters an ecosystem where different applications and services can work together, providing a cohesive user experience and enabling new forms of teamwork and communication.

In Australia, customer service and sales jobs continue to decline due to continued automation in factories and warehouses. Thus, people in these declining job categories must be retrained. In the past, the jobs most impacted by technological innovation and automation were low-skilled office workers and manufacturing jobs. However, the impact will move onto other industries in developed countries, including Australia.

The shift towards hybrid work models has led to a greater focus on enabling seamless collaboration and experiences for remote and on-site employees. Enterprises are investing in tools and technologies that facilitate intelligent hybrid meetings, digital collaboration and flexible work arrangements, ensuring productivity and connectivity regardless of location.

Due to the ageing population, healthcare jobs continue growing in Australia and globally. Another growing category is science, technology, engineering and mathematics (STEM). Technology jobs in transportation, especially autonomous vehicles and the delivery and fulfilment aspects of e-commerce, are expected to grow strongly over the next five years.

Executive Summary

GenAI is rapidly beginning to transform the traditional workplace. It can automate routine and complex tasks, speed up processes and generate output in seconds to increase productivity. Early adoption of GenAI tools such as Microsoft 365 Copilot and Google Gemini can give businesses a competitive advantage. Companies should adopt a streamlined and accelerated approach to harness the GenAI tools' full potential.

The emergence of Gen-AI tools has opened an increasing number of possibilities to enhance collaboration experiences in the modern workplace. Leaders recognise the importance of maximising employee well-being, engagement and satisfaction. Personalised services, customised learning paths and adaptive environments based on individual needs are also becoming increasingly common.

Traditional workspace solutions are unable to scale to the demands of hybrid working. Workspace transformation is needed now, more than ever, to deliver superior business outcomes while providing employees with a better work experience. With the increasing adoption of remote and hybrid work models, businesses seek collaboration solutions that enable seamless communication across dispersed teams. Therefore, virtual meeting rooms, asynchronous communication and mobile-first experiences are in high demand.

The growth of the end-user computing market in Australia is driven by cloud computing's ability to provide a flexible and scalable infrastructure for users to access their applications and data anytime and anywhere. Australian organisations are shifting towards collaborative hybrid workplaces that are experience-led and persona-based. GenAI and intelligent automation technologies are transforming digital workplace services. These workplaces can cater to specific industries and enable collaborative hybrid work environments.

Practical experience, device and application monitoring and management solutions that seamlessly integrate with existing organisation ecosystems continue to be crucial for Australian organisations. Companies are embracing the paradigm shift in workspace design, focusing on flexible, adaptable and mobile environments that leverage extended, virtual and AR for unique roles.

Concerns regarding data security persist for end-user computer services. Organisations are focusing on the need for robust, full-proof holistic security measures to protect sensitive information and ensure compliance.

Enterprises are experiencing a paradigm shift in employee expectations from a modern workplace. The transition towards a single, unified platform for interdepartmental communication is gaining momentum. It streamlines collaboration and enhances help desk metric control to have a cohesive view of operations.

With the evolving technology landscape, there has been a significant shift in client and end-user expectations from workplace services and service desks. Focus has shifted from pure cost reduction and service delivery to improving user productivity and providing a consumer-grade experience that is intuitive, proactive and personalised, with a range of support channels driving user empowerment and expertise.

To improve workforce productivity, organisations must face new challenges, including dealing with the large amount of end-user computing data generated by endpoint devices in enterprises. Organisations can leverage this data via workplace analytics tools to improve worker productivity and reduce inadvertent setbacks.

Businesses leverage advanced analytics to monitor collective human performance and real-time service desk efficiency. This approach helps organisations proactively address issues, optimise workflows and ensure continuous productivity, thus improving operational efficiency and employee experience (EX).

Automation is becoming the cornerstone of service desk operations. Adopting AI-led automation to streamline routine tasks, accelerate response times and free up service desk agents to focus on more sophisticated issues is gaining traction. Data provides deep insights into remote working and employee productivity and can be used by various organisational stakeholders. It also helps employees align their personal goals with the organisation's, including how an employee can manage work-life balance.

While Australia has lagged behind many developed nations before, the country has recently focused strongly on renewable energy and sustainability. Companies are investing in solar power, energy-efficient buildings and sustainable design principles to reduce carbon footprints and minimise environmental impact. These initiatives include smart workplace solutions incorporating energy management systems, smart lighting and IoT devices to support sustainable practices and lower operating costs.

Companies are tackling sustainability challenges from both environmental and social perspectives, and they recognise their role in addressing global issues such as climate change and social inequality. Flexible work arrangements continue to drive demand for tools and services that enhance collaborative work, including online meetings, AR/VR and co-created solutions. Analytics and AI remain essential for clients to fast-track automation benefits and user adoption.

Categories that will significantly impact innovation over the next five years include jobs with high levels of on-site customer interaction, typically low-wage frontline service jobs. These include the retail industry in leisure and travel segments, restaurants and hotels. It also includes indoor production and warehousing jobs such as computer-based office work and factory jobs. Previously, technology minimally impacted these job categories; however, with the rapid evolution of GenAI technologies such as ChatGPT, some white-collar professional jobs will also be affected.

As technology adoption and innovations accelerate, along with fundamental shifts in employee and enterprise behaviour, workplaces will transform regardless of industry and organisation size.

Provider Positioning

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	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
Accenture	Leader	Leader	Product Challenger	Product Challenger	Leader
ASG Group	Not In	Contender	Contender	Not In	Contender
Atos	Contender	Contender	Product Challenger	Contender	Product Challenger
Brennan IT	Contender	Contender	Product Challenger	Contender	Contender
Capgemini	Leader	Leader	Leader	Leader	Leader
CDRU	Not In	Not In	Not In	Contender	Not In
CGI	Contender	Contender	Contender	Not In	Contender
Coforge	Not In	Contender	Contender	Contender	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger	Not In	Market Challenger

Provider Positioning

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	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
Data#3	Contender	Contender	Product Challenger	Not In	Contender
Datacom	Not In	Leader	Leader	Rising Star ★	Market Challenger
Deloitte	Not In	Not In	Not In	Not In	Leader
DXC Technology	Product Challenger	Product Challenger	Leader	Leader	Market Challenger
EY	Leader	Not In	Not In	Not In	Product Challenger
Fujitsu	Market Challenger	Leader	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Not In	Not In	Contender	Not In
HPE	Contender	Contender	Not In	Not In	Not In

Provider Positioning

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	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
Infosys	Leader	Leader	Leader	Leader	Leader
ITC Infotech	Not In	Not In	Not In	Contender	Not In
Kinetic IT	Contender	Not In	Contender	Contender	Contender
KPMG	Product Challenger	Not In	Not In	Not In	Product Challenger
Kyndryl	Market Challenger	Product Challenger	Leader	Product Challenger	Product Challenger
Leidos	Not In	Contender	Product Challenger	Product Challenger	Not In
Lenovo	Contender	Product Challenger	Rising Star ★	Contender	Product Challenger
Logicalis	Not In	Contender	Contender	Contender	Contender
LTIMindtree	Contender	Contender	Contender	Product Challenger	Contender

Provider Positioning

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	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
Microland	Not In	Not In	Contender	Not In	Not In
NTT DATA	Leader	Leader	Leader	Leader	Market Challenger
Orange Business	Not In	Not In	Contender	Not In	Contender
PwC	Product Challenger	Not In	Not In	Not In	Leader
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Telstra	Not In	Contender	Market Challenger	Market Challenger	Not In
Unisys	Market Challenger	Leader	Leader	Leader	Leader
UST	Not In	Not In	Contender	Not In	Not In
Wipro	Rising Star ★	Leader	Leader	Leader	Leader

This study evaluates providers' capabilities in delivering key **Future of Work services** across different regions.

Simplified Illustration Source: ISG 2024

Definition

The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. The advancements in generative AI (GenAI) and the need to assimilate new business models to meet dynamic customer demands also contribute to the evolving future of work.

Enterprises no longer partner with service providers to provide laptops, mobiles, Wi-Fi and service desks and allow employees to work as they want. Instead, they embrace a flexible workplace open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction.

Employees seek the freedom to select both their workspace and the required technology. They need ubiquitous access to devices, applications, data, workflow, documents and processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

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

GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to better manage back-end workplace technologies. Still, enterprises need expert help strategising, implementing and adopting this technology.

This report focuses on the approaches where next-generation thinking changes the future workplace landscape.

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
- 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.

Managed End-user Technology Services

Who Should Read This Section

This report is relevant to enterprises across industries in Australia for evaluating the current market positioning of managed end-user technology service providers and how each provider addresses the key regional challenges.

Australian businesses remain at the forefront of adopting innovative technologies that empower their workforce in a geographically dispersed landscape. The increasing adoption of hybrid and remote working models necessitates shifting from traditional IT management to a future-proof approach. Managed end-user technology services tailored to the Australian context offer a strategic solution for this evolving work environment.

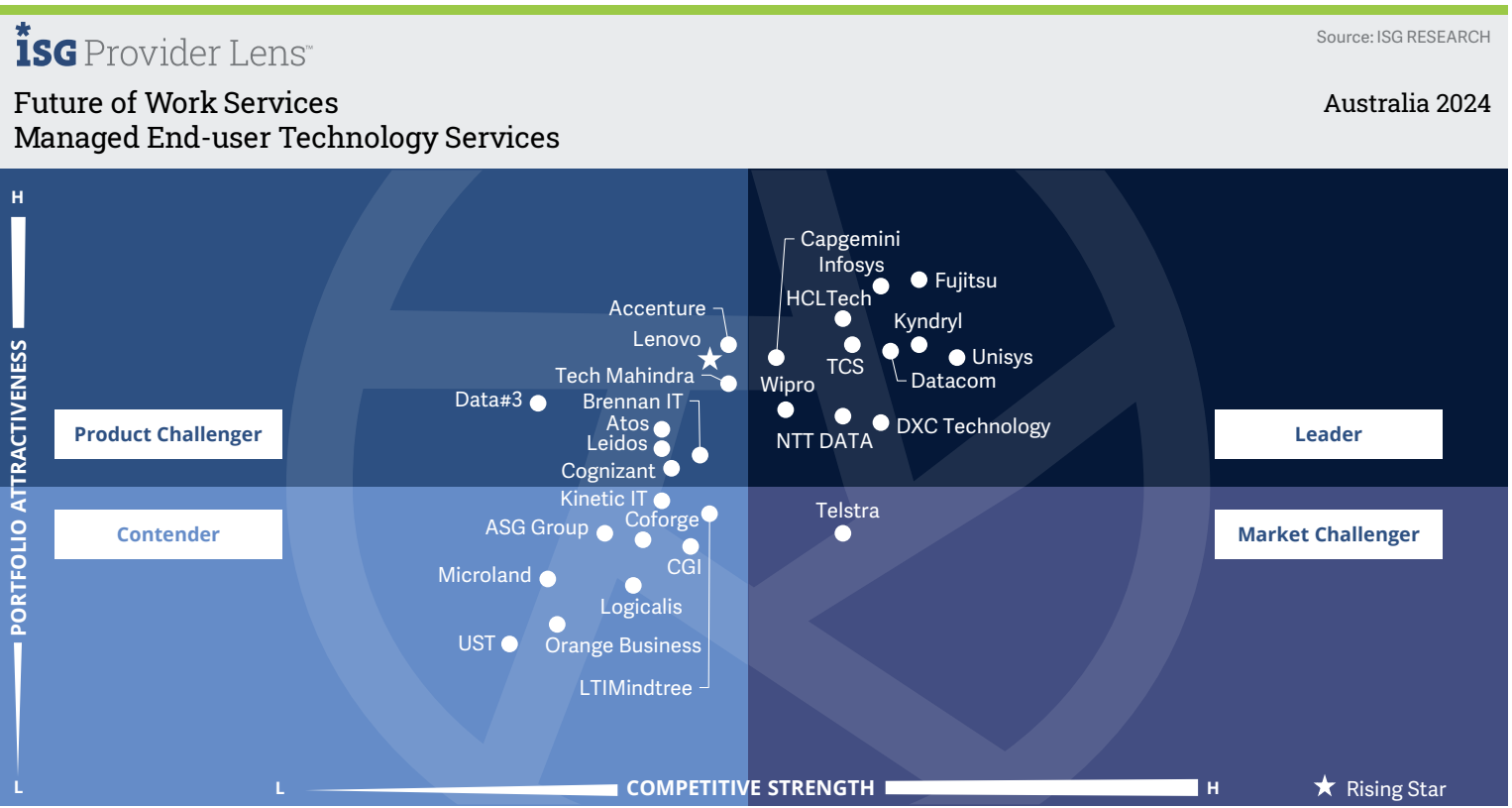
Australian enterprises prioritize a positive UX to foster a productive and engaged workforce. Providers are increasingly adopting XLAs while focusing on measurable outcomes such as user satisfaction and productivity. This user-centric approach uses automation powered by AI and GenAI to automate repetitive tasks, minimize downtime and provide self-service options. It also reduces IT burden, empowers employees and enhances the overall UX.

Furthermore, Australian businesses are increasingly conscious of environmental sustainability. Automation and self-healing technologies reduce energy consumption and downtime, contributing to a more sustainable work environment. Secure edge solutions also optimize network traffic and cloud adoption. This focus on sustainability aligns with Australian businesses' commitment to responsible practices and helps attract a tech-savvy and environmentally conscious workforce.

Strategy professionals should read this report to understand critical trends such as XLA and automation to optimize UX and drive business outcomes for an efficient hybrid workforce.

Digital professionals should read this report to gain insights into how providers can empower a geographically dispersed workforce and enhance digital transformation initiatives.

Technology professionals should read this report to identify opportunities to leverage automation and self-healing technologies that would improve efficiency and reduce downtime.



Leaders providing managed end-user technology solutions offer **long-term measurable client outcomes** to ensure **employees maximise productivity** and their investment in solutions.

Phil Hassey

Definition

This quadrant assesses service providers offering managed services associated with technologies that enterprise IT departments deploy, provision and secure 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 endpoint security. Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace.

These services include device management, patch management, device and application provisioning, virtualised desktop access and device lifecycle management. Their service portfolio extends to support bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing, and securing the devices remain the first primary step to enabling a digital workplace and providing devices with integrated collaboration and productivity capabilities to employees.

The increasing focus on experience through endpoints has transformed services and helped providers cater to clients' respective industries. While these services are typically associated with traditional computing devices and tablets, their scope can be expanded to include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Eligibility Criteria

1. **Provide connected, always-on and updated end-user devices** for secure collaboration and productivity
2. Support **unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**
3. Offer **complete device lifecycle management services**, such as device procurement, analyses, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Provide **DEX solutions for automated issue resolution**
5. Demonstrate **experience in providing virtual desktop services on-premise and on the cloud** (desktop as a service)
6. **Offer related field services**, IMAC and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **At least 75 percent of regional contracts must include end-user technology services management**

Observations

IT service companies are engaging in the next phase of the future of work, aiding organisations to reimagine their business operations with cutting-edge technologies such as cognitive AI, GenAI, multimodal AI, cognitive detection and resolution, and prescriptive analytics.

Workflow automation leveraging AI and automation tools is becoming increasingly common in the Australian market to automate tasks such as software patching, user provisioning, basic troubleshooting, proactive issue identification and automated remediations. With advancements in AI and automation, companies are also exploring zero-touch solutions for end-user technology services. Over the next few years, the industry will experience an increasing focus on flexible digital solutions that will empower workers to thrive in rapidly changing enterprise landscapes. As more companies seek the optimal balance between in-office, at-home and hybrid work arrangements, tools and services that simplify collaboration, communication and productivity across distributed teams will increase in demand.

Key tools and services that are likely to boost market evolution are AI-powered solutions, sustainable IT and XLAs. These will align with enterprise outcomes to help free up workers to focus more on strategic work and increase engagement and retention. This will require a shift in how companies approach training and development, emphasising upskilling and reskilling employees to adapt to new technologies and roles.

From the 45 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

Capgemini

Capgemini, driven by its strength in AI, cybersecurity and partnerships, provides a portfolio of end-to-end client solutions for various end-user requirements.

DATACOM

Datacom employs over 2,000 people in customer care hubs across Australia and New Zealand. Its AI-driven, advanced and cloud-based platform strengthens contact centre operations.

DXC TECHNOLOGY

DXC Technology provides seamless and efficient device management solutions that improve customers' device investment and personalise end-user experience to support productivity. It employs robust data analytics to better understand how customers utilise their devices.

Fujitsu uvance

In 2023, **Fujitsu** connected its ecosystem for customer value across the Asia Pacific (APAC) region. Its significant progress in Australia is reflected in the significant increase in local transformation consulting revenue.

HCLTech

HCLTech has a strong and growing presence in Australia . It also operates delivery centres in both countries. Its platinum-level membership with most partners allows it special access to the latest product features well before the market.

Infosys

Infosys has begun its distribution delivery operating model journey by opening seven new delivery centres in the APAC region. It has gained a strong industry reputation as a trusted leader and advisor in managed end-user technology services.

kyndryl

Kyndryl has a strong presence in Australia, including a workforce support service office in Ballarat, that offers managed workplace services. Its advanced desktop virtualisation service portfolio is underpinned by highly differentiated analytics functionality.

NTT DATA offers innovative edge-to-cloud, data centre and network infrastructure, and managed services offerings. Its Experience-as-a-Service (EXPaaS) offering provides a seamless and harmonised customer experience, leading to growth and customer loyalty.

TCS has over 40,000 associates in Asia Pacific, serving over 400 clients through 12 delivery locations in Australia, Hong Kong and Singapore. Its local delivery centres strengthen its partnerships with Australian third-party vendors to deliver integrated offerings.

Unisys aims to deliver an endpoint-as-a-service (EaaS) model, moving all endpoints to the service model.

Wipro's investments in smart spaces, such as GenAI Foundry and its Experience Studio, drive the provision of advanced workplace solutions for its customers. The company creates a harmonious digital ecosystem by building platforms that seamlessly integrate with existing tools, applications and frameworks.

Lenovo (Rising Star) focuses on delivering enhanced productivity, EX and cost-optimising solutions to its customers. It offers a centralised platform to manage all device types and monitor and automate large-scale firmware updates and system patches.

Rising Star

"Lenovo Care of One delivery platform, developed in collaboration with industry leaders, is powered by GenAI and enables Lenovo to penetrate the market and swiftly provide services."

Phil Hassey

Lenovo

Overview

Lenovo is headquartered in Beijing, China and North Carolina, U.S. It has more than 77,000 employees across 25 offices in seven countries. In FY23 the company generated $61.9 billion in revenue, with Intelligent Devices Group (IDG) as its largest segment. It has a rapidly growing presence in APAC, including Australia. Its service portfolio, which is delivered through GenAI, sets it apart from its competitors. Lenovo's digital workplace solutions are delivered using its Care of One platform, which provides GenAI-powered ongoing management of end-user technology in a persona-based and hyperpersonalised manner.

Strengths

Highly tailored digital workplace solutions: Lenovo offers a robust portfolio of device and software-agnostic digital workplace solutions. It delves deep into understanding each organisation's distinct needs and objectives, tailoring its services to meet their specific demands.

Strong managed end-user expansion plans: Lenovo is committed to expanding its managed end-user technology services and leveraging TruScale Device-as-a-Service portfolio, aiming to offer customers enhanced value through additional services, sustainability and flexibility that align with their evolving challenges. Additionally, it has forged a strategic partnership with Microsoft to introduce a Cyber-Resiliency as a Service (CRaaS) — a unique and adaptable security solution.

Advanced unified endpoint management (UEM) offering: Lenovo's UEM offering is supported by an industry-leading suite of next-generation digital workplace solutions across multiple areas. It collaborates closely with clients, integrates XLAs and prioritises desired outcomes to deliver cutting-edge UEM and other services that boost productivity. Its holistic approach extends to its digital workplace solutions portfolio, enhancing end-user experience and driving overall productivity.

Caution

Lenovo has a unique positioning in the market and has invested heavily in building a market-focused solution set. However, it should actively and visibly collaborate with key partners to increase its influence.

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

▲ 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

Methodology & Team

The ISG Provider Lens 2024 – Future of Work Services research study analyzes the relevant software vendors/service providers in the Australia market, 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 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 Analyst

Phil Hassey

Strategic Advisory Analyst

Phil has an enviable reputation for understanding, assessing and communicating insight into the increasingly diverse and complex technology sector as it attempts to tightly integrate to business requirements. He is constantly "tilting the world view" with unique but grounded perspectives for clients.

He has worked for some of the largest, and smallest enterprises in the world to help them understand the role of the intersection of technology and business. At the same time, he has also worked with technology and business providers to help ensure they place customer requirements at the centre of their business.

He has undertaken research and strategy projects on every continent, and for every possible application of technology and business.

Research Analyst

Ayushi Gupta

Senior Research Analyst

Ayushi is a Senior Research Analyst at ISG. She is responsible for supporting Provider Lens™ studies on the Future of Work. Ayushi has 3 years of experience conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure, and Finance. Along with a rich understanding of various business verticals, she has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape, and evolving needs of the potential target audience.

She is good at collaborating seamlessly with stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualisation, storyboarding, and analysis.

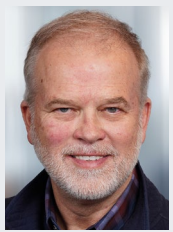
Study Sponsor

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

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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ISG Provider Lens™

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