

# Future of Work – Services

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



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

Enterprises no longer partner with service providers to just provide laptops, mobiles, Wi-Fi and service desks. Instead, they embrace flexible working styles and workplaces 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 their workspace and 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.

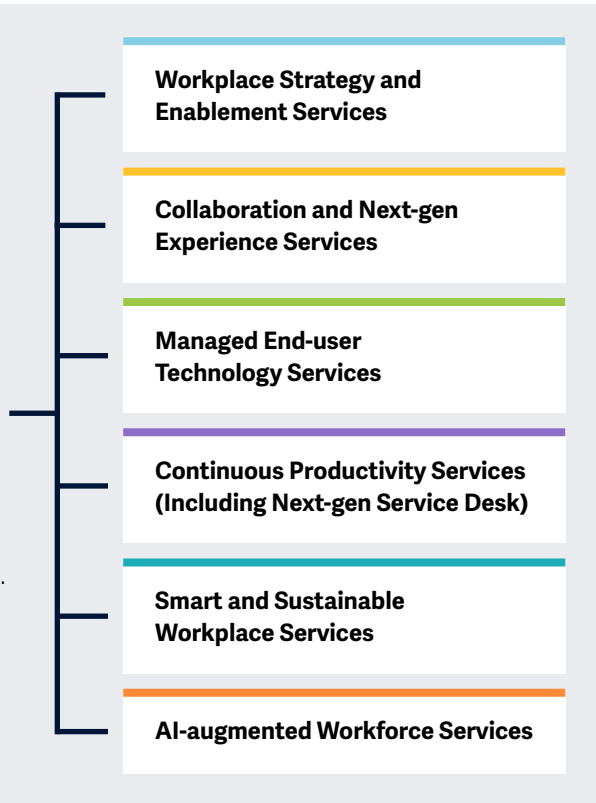
With autonomous enhancements, GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to manage back-end workplace technologies without requiring extensive manual interventions. Still, enterprises need expert help strategizing, implementing and adopting this technology.

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



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

Simplified Illustration Source: ISG 2025



**The ISG Provider Lens™ Future of Work – Services 2025 study offers the following to business and IT decision-makers:**

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets, including the U.S., U.K., Germany, Switzerland, Brazil and Australia

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



## Workplace Strategy and Enablement Services

### Definition

This quadrant evaluates providers offering workplace strategy and enablement services across industries. Organizations tailor their advice and strategy by region, market direction and organizational responsibility, offering strategic capabilities for enterprise-wide workplaces.

Providers consider modern business models and talent approaches while offering guidance, compliance and strategies suited to human, digital and physical workplaces collectively. Their services include:

- Market changes and new business models
- Digital capabilities impacting workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategies

While some providers develop strategies, minimizing potential issues needs work on procurement and CX, project and change management, and effective workplace strategy delivery. Tailoring these capabilities by industries is crucial, as regulations vary by industry.

### Eligibility Criteria

1. Provide **advisory services** and **new business model designs**
2. Have a vendor-neutral approach for **workplace transformation-led business delivery models**
3. Offer **advisory services for human, digital or physical workplace strategy**
4. **Adopt new talent models** that should integrate diversity, equity and inclusion and eliminate modern slavery risks
5. **Integrate local and remote physical workplaces** to ensure experience parity
6. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom line performance
7. Have **experience and references in delivering workplace-driven sustainability strategy**
8. Have **industrywide case studies for workplace strategy** leading to human, digital and physical workplace benefits



## Collaboration and Next-gen Experience Services

### Definition

This quadrant assesses service providers that enhance end-to-end CX and EX and offer managed services for workplace technology ecosystems. Providers enable business leaders, line-of-business representatives and CXOs to enhance collaboration and improve experience. They align digital workplace transformation with human needs and measurable business results.

Next-generation experience services promote technology adoption. Providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data, sentiment analysis, ML and change management

Providers enhance and support communication, collaboration and productivity stacks using AI and GenAI for enterprises. They offer consulting and advisory services for HR and operations, guiding change management and technology adoption. They also promote digital dexterity, fostering an environment conducive to learning and skill development for the evolving workplace.

### Eligibility Criteria

1. Adopt an **XLA-focused delivery approach** to enhance collaborative experiences
2. **Leverage AI and GenAI** to provide value-added experience transformation services
3. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage them by monitoring analytics from deployed hardware
4. **Support unified communication, collaboration and productivity stacks**
5. **Provide services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
6. **Provide services that enable proper change management and technology adoption**, leveraging the latest technologies such as Copilot
7. **Support XMO and associated services**
8. **Provide services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**



## Managed End-user Technology Services

### Definition

This quadrant evaluates service providers that manage technology for enterprise IT departments to support end users. These managed infrastructure services in the digital workplace include end-user enablement through devices, applications, cloud workspaces and endpoint security. Providers offer complete end-user computing (EUC) services, including device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. They support BYOD initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX). Provisioning, managing and securing devices are the primary steps to enabling a digital workplace, providing devices with integrated collaboration and productivity capabilities. These services can also be tailored for specific industries, such as retail, hospitality and healthcare.

### 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, enrollment, 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-premises and on the cloud** (desktop as a service)
6. Offer **related field services**, IMAC (Install, Move, Add and Change/Configure) and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **Include end-user technology services management in at least 75 percent of regional contracts**



## Continuous Productivity Services (Including Next-gen Service Desk)

### Definition

This quadrant assesses service providers supporting the productivity needs of next-generation, human and hybrid workplaces.

Today's workforce prefers the ability to work from anywhere and anytime, leading to the need for a different IT operating model driven by changes in business models and market channels. Providers must offer enhanced support capabilities, making typical service desk offerings less appealing yet available. Next-generation services include sentiment analysis, automated DEX triage, AI-powered health monitoring and emerging technologies such as AR and VR. Providers must also leverage AI and cognitive technologies for user-facing tasks to achieve cost savings.

Providers measure success through XLAs linked to business outcomes rather than SLAs. They enhance business outcomes by leveraging automation and offering remote and self-service options like AR self-fix, workplace support, service desk, tech bars, DigiLockers and omnichannel chat and voice support.

### Eligibility Criteria

1. Provide **deliver-anywhere autonomous workplace support**
2. Offer **fully integrated analytics and automation** for issue resolution
3. Deliver **contextualized AI support** for workplaces
4. Provide **service desk augmentation**
5. Offer **XLA-driven support** instead of SLA-driven decisions
6. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
7. Provide **automated and contextualized support for end users** based on their roles and work
8. **Quantify workplace support function performance** beyond traditional service metrics
9. Have a **robust local presence** with most workplace engagements around service desk services





## Smart and Sustainable Workplace Services

### Definition

This quadrant assesses service providers supporting smart, IoT-enabled workplaces and helping clients achieve sustainability goals. Modern workplaces combine human, digital and physical elements for remote, hybrid or in-person collaboration and productivity. Office buildings must also be integrated, inclusive and sustainable.

With commercial retail facing occupancy issues, providers must collaborate with enterprise leaders to create holistic office strategies. They must leverage technology and sustainability to design, implement and manage environments that enhance operational efficiency, employee well-being and environmental responsibility. Providers must build environments with smart meeting and facility management solutions, creating adaptive, efficient, inclusive and responsible spaces. They must also integrate experience parity capabilities, unified communications and smart collaborative workspaces. Their services must include IoT-enabled functionality for smart campuses, focusing on ESG initiatives.

### Eligibility Criteria

1. Support **smart office spaces** and provide workplace analytics, hot desking, smart building and facility management **by leveraging IoT and the latest technologies**
2. Support **asset efficiency** and address energy management requirements
3. Provide **inclusive, adaptable and integrated hybrid working solutions** and spaces
4. Provide **services to reduce carbon emissions** from workplaces
5. Assist in aligning client **strategies and metrics for ESG reporting**, particularly focusing on workspace utilization within the social and governance dimensions



## AI-augmented Workforce Services

### Definition

This quadrant evaluates providers of advanced agentic solutions using AI and ML as autonomous digital agents. These agents enable proactive decision-making, contextual learning and seamless enterprise interaction. They act as active participants in the workplace ecosystem and autonomously manage workflows, optimize processes and provide personalized support to boost productivity and efficiency. AI-driven agents reshape job roles, decision-making and organizational culture, requiring robust change management and adoption frameworks.

Providers must present region-specific evidence of their solution's impact, including successful deployment, measurable business outcomes, robust integration with enterprise systems and workforce empowerment through change management and adoption.

The study places agentic solution providers in a dedicated quadrant, enabling enterprises to evaluate them based on the measurable business value delivered by their intelligent, self-governing agents.

### Eligibility Criteria

1. Offer services with **autonomous functionalities** that comprise proactive, context-aware and continuously self-improving actions **beyond scripted routines and traditional automation**, differentiating them from traditional managed services or broader workplace strategies
2. Ensure **deep integration with existing digital workplace ecosystems** for seamless operations
3. Have achieved **outcome-driven impact** with **verifiable** gains (e.g., productivity gains, cost reductions and enhanced user experience for targeted job roles or personas)
4. Support **workforce transition** by offering comprehensive **training and upskilling** to drive adoption and enable effective collaboration with digital agents
5. Adhere to **ethical governance** standards, ensuring fairness, accountability and transparency in AI deployment
6. Provide services incorporating robust **feedback mechanisms for continuous evaluation and adjustment**
7. Offer **region-specific case studies** that demonstrate **scalability, relevance** and adaptability to local market demands



## Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Future of Work – Services 2025:

Quadrant	U.S.	U.K.	Germany	Switzerland	Brazil	Australia
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	✓	✓	✓	✓	✓	✓
AI-augmented Workforce Services	✓	✓	✓	✓	✓	✓

\*Quadrant to be split into two accounts; one covering large accounts and the other local specialists as applicable in the respective regions.



## ISG's Future of Work Framework

### Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Future of Work market and helps connect them to digital solutions
- Represents the entire value chain of supply and demand within the market
- Highlights themes of enterprise objectives in the inner tiles
- Showcases initiatives in the outer tiles
- Beneath each outer tile lies a specific set of capabilities with unique market-leading providers and solutions
- Indicates where ISG Software Research will produce a Buyers Guide in 2025 with green tiles



The research phase falls in the period between March and September 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2025.

Milestones	Beginning	End
Survey Launch	March 24, 2025	
Survey Phase	March 24, 2025	April 14, 2025
Sneak Preview	August, 2025	
Press Release & Publication	October, 2025	

The collection of client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) as CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

**Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

**Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Future of Work-Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

**Research Production Disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens 2025 – Future of Work – Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Study Sponsor:**

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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.



## Contacts For This Study

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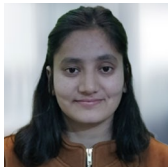
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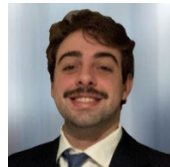
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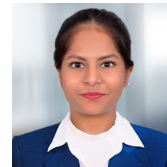
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### ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

## ISG Advisors to this study



**Jim  
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**U.S and Global**



**Jason  
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## Invited Companies

**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

Algar Tech

Abraxas

Accenture

ACP Group

Adesso SE

All for One Group

Allied Digital

Arvato Systems

ASG Group

Atos

Avaso Technology

Aveniq

Axians

BCG

Bechtle

Bell Techlogix

Birlasoft

Blackbox

Brennan IT

Brillio

Campana Schott

CANCOM

Capgemini

Capita

CDRU

CDW

CGI

Coforge

Cognizant

CompuCom

Computacenter

ConnectCom

Convotivis

Data#3

Datacom

DATAGROUP

Dedalus

Deloitte

Deutsche Telekom

Dexian

DWG

DXC Technology

ELCA/EveryWare

EY

Fujitsu

GAVS

Gensler

Getronics

HCLTech

Hexaware

Homeagent

HPE

Ilegra

Infosys

Insight

IPNet

Isolutions AG

ITC Infotech

ITConcepts Schweiz

IT-HAUS GmbH



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ITRIS One	Multiedro	Sopra Steria	Venha Pra Nuvem
Kinetic IT	NAVA	SS&C	Vodafone
KPMG	netgo	Stefanini	Wipro
Kyndryl	Netrics	SVA	WWT
Leidos	NTT DATA	Swisscom	XMA
Lenovo	Orange Business	TCS	YASH Technologies
Logicalis	Pomeroy	Tech Mahindra	Zensar Technologies
Long View Systems	Processor	TEKsystems	Zones
LTIMindtree	PwC	Telstra	
McKinsey & Company	Red River	TET	
Microland	Ricoh	TIVIT	
Milestone Technologies	SCC	UMB	
Movate™	SHI	UNICO	
Mphasis	SoftwareOne	Unisys	
MTF	SONDA	UST	



## ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

## ISG Research™

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

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

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](http://isg-one.com).



**MARCH, 2025**

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**REPORT: FUTURE OF WORK – SERVICES**