ISG Provider Lens®

Future of Work — Solutions



A report assessing capabilities of technology vendors to help decision-makers in vendor evaluation

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TANIUM

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Report Author: Bruce Guptill

AI, automation and experience-centric platforms reshape digital workplace ecosystems

Overall market conditions, trends and changes since FY24

The digital workplace software market has undergone a significant transformation since FY24, driven by the convergence of hybrid work models, AI innovation and heightened expectations for EX. The post-pandemic normalization of remote and hybrid work has solidified the need for robust digital workplace infrastructures that support productivity, collaboration and security across distributed environments.

In FY25, enterprise IT leaders are prioritizing autonomous IT operations, real-time observability and employee-centric design. ISG's market FY25 road map highlights a shift toward balancing speed and risk in deploying digital workplace technologies, with an emphasis on tools that enhance UX and productivity. Endpoint security, EX and endpoint management are increasingly integrated, reflecting a holistic approach to digital infrastructure.

The market is also seeing the rise of services as a software (SaaS 2.0), where AI agents support and execute tasks autonomously. This evolution is redefining traditional SaaS models and introducing agentic software services that combine management and optimization.

Key market conditions, trends and changes regarding DEX software and solutions

The digital employee experience (DEX) segment has matured rapidly. According to Business Research Insights, the DEX software market grew from $0.97 billion in FY24 to $1.15 billion in FY25, with projections reaching $4.25 billion by 2033. This growth is fueled by enterprise demand for proactive IT management, sentiment analytics and sustainability-focused device lifecycle planning.

ISG's FY25 global solutions study and analysis reveal a strategic pivot from basic telemetry to AI-driven autonomous experience

Employee experience drives platform unification and proactive IT management.

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management. Vendors such as Nexthink, Lakeside Software and Riverbed have expanded their platforms with predictive analytics, generative AI (GenAI) assistants and mobile observability tools. Tanium's emergence as a Leader underscores the growing importance of real-time sentiment tracking and self-healing capabilities.

ISGs' market analysis highlights the integration of disparate tools into unified platforms, enabling enterprises to illuminate blind spots, drive adoption and measure experience-level agreements (XLAs). M&A activity, such as 1E's acquisition of Exoprise and Riverbed's launch of Aternity Mobile, reflects a strategic push to serve frontline and mobile workers effectively.

Key market conditions, trends and changes regarding AI-enabled digital workplace solutions

AI has become the cornerstone of digital workplace innovation. In FY25, nearly all enterprises are investing in AI, yet only 1 percent consider themselves mature in deployment. The focus has shifted from experimentation to integration, with AI embedded across workflows to enhance productivity, automate support and deliver contextual insights.

ISG's analysis of market intelligence estimates AI could unlock over $4 trillion in productivity gains, but short-term returns remain elusive. Organizations are grappling with shadow AI, the unsanctioned use of AI tools by employees, which introduces risks around data security and compliance. As a result, governance frameworks and responsible AI training are becoming essential.

AI-enabled platforms now offer self-healing systems, virtual assistants and predictive diagnostics. Microsoft's Copilot, Nexthink Assist and Lakeside Software's GenAI integrations exemplify this trend. Atlassian's FY25 Developer Experience Report shows developers saving over 10 hours weekly using AI, though organizational inefficiencies still offset these gains.

The convergence of AI with collaborative work management also reshapes project execution. Vendors such as Asana, Monday.com and Smartsheet are embedding AI to automate workflows, generate insights and enhance team productivity. Notion's AI-driven content creation and Zoho's Zia assistant demonstrate how AI is democratizing access to intelligent tools across enterprise functions.

Marketplace conditions evolving over the next 12 to 18 months

Over the next 12 to 18 months, the digital workplace market will continue to consolidate around platforms offering unified experience management, AI orchestration and scalable automation. Vendors will differentiate through innovation velocity, global reach and vertical-specific strategies.

By FY26, we expect that:

- AI maturity will accelerate, with enterprises moving from pilot projects to full-scale deployments along with deeper integration of AI into ITSM, unified endpoint management (UEM) and collaboration platforms.
- Outcome-based pricing models will gain traction, especially for AI agents and automation tools.
- Systems integrators (SIs) will play a pivotal role in bridging the gaps between legacy systems and modern digital workplace solutions. Their ability to customize, integrate and optimize AI-enabled platforms will be critical to enterprise success.
- Security and compliance will remain top priorities, especially as AI tools handle sensitive data and automate decision-making.
- Sustainability and green IT initiatives will influence device lifecycle management and software procurement decisions.

Implications for developers, vendors and buyers

For developers and vendors:

- Platform unification is essential. Vendors must consolidate disparate tools into cohesive ecosystems that support observability, automation and collaboration.

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- AI capabilities must be explainable and secure, with clear governance and user training to ensure responsible use.
- Vertical-specific solutions will gain favor, especially in healthcare, finance and manufacturing, where compliance and customization are critical.
- Partner ecosystems will expand, with vendors collaborating with managed service providers (MSPs), SIs and cloud providers to scale reach and functionality.

For buyers:

- Vendor selection will prioritize integration, automation and AI maturity. Buyers will seek platforms that reduce IT friction, enhance EX and deliver measurable ROI.
- Proof of value will be key. Enterprises will demand reference cases, outcome metrics and transparent pricing models.
- Hybrid work support remains non-negotiable. Solutions must offer seamless experiences across devices, locations and roles.

Role of SIs and service providers

SIs and traditional IT services providers are uniquely positioned to capitalize on the evolving digital workplace landscape. As enterprises seek tailored solutions, these providers can:

- Bundle AI-enabled platforms with their own services, offering end-to-end digital transformation packages.
- Provide integration expertise, connecting legacy systems with modern tools to ensure seamless workflows.
- Deliver managed services, including observability, automation and compliance monitoring, using DEX and AI platforms.
- Act as strategic advisors, guiding clients through AI adoption, governance and optimization.

The value of digital workplace solutions to SIs and service providers lies in their ability to differentiate offerings, accelerate time to value and drive recurring revenue through managed services and platform reselling.

AI integration, platform unification and employee-centric design are reshaping digital workplace solutions, driving automation, observability and measurable experience across hybrid environments.

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Provider Positioning

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	Digital Employee Experience (DEX) Solutions	AI-enabled Digital Workplace Solutions
Anunta Tech	Contender	Product Challenger
Bumblebot	Contender	Contender
Catchpoint	Contender	Not In
Cisco	Market Challenger	Market Challenger
Citrix	Market Challenger	Market Challenger
ControlUp	Leader	Leader
Dynatrace	Market Challenger	Market Challenger
eG Innovation	Product Challenger	Product Challenger
HCL Software	Contender	Contender
Hexnode	Product Challenger	Contender

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Provider Positioning

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	Digital Employee Experience (DEX) Solutions	AI-enabled Digital Workplace Solutions
HPE	Contender	Not In
Ivanti	Product Challenger	Product Challenger
Lakeside Software	Leader	Leader
Liquidware	Contender	Contender
ManageEngine	Leader	Leader
Microsoft	Market Challenger	Leader
Nanoheal	Product Challenger	Product Challenger
Nexthink	Leader	Leader
Omnissa	Product Challenger	Product Challenger
Riverbed	Leader	Leader

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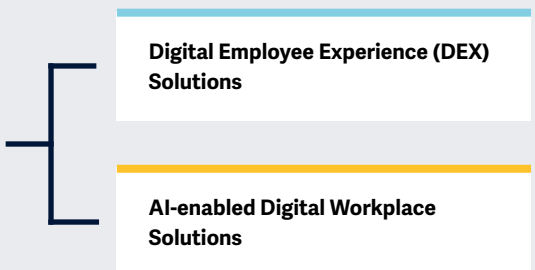
Provider Positioning

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	Digital Employee Experience (DEX) Solutions	AI-enabled Digital Workplace Solutions
ServiceNow	Leader	Market Challenger
Tanium	Leader	Contender
TeamViewer-1E	Leader	Leader
Workelevate	Contender	Contender
Zscaler	Market Challenger	Not In

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This study evaluates technology vendors that support **back-end IT operations** and **front-end EX** in the context of the future of work.



Simplified Illustration Source: ISG 2025

Definition

The future of work is rapidly evolving due to technological advancements and the resulting new opportunities. This report examines technology solution vendors that are best equipped to capitalize on these opportunities. While many organizations are adopting return-to-office strategies, a significant number of global companies are implementing hybrid working models for their employees. According to the ISG Buying Behavior Research — Future Workplace Study, an average of 45 percent of the workforce in global organizations is expected to work remotely. Additionally, the integration of AI usage is expected to generate 28-50 percent savings in IT operations.

As remote work persists and enterprise IT organizations face pressure to do more with fewer resources, the adoption of solutions that automate various back-end IT operations is rising. The performance of workplace technology endpoints — whether devices, applications or associated networks — has a profound impact on the end-user experience.

Disruptions can lead to productivity losses, prompting IT organizations to seek proactive software solutions that automatically resolve issues affecting user productivity.

Many technology solutions are designed for IT organizations and AI has expanded its capabilities. Enterprise IT aims to achieve more with fewer resources by leveraging AI to enhance processes and improve end-user experience. This approach involves using AI to ensure that essential tools remain operational, monitoring asset performance and proactively resolving issues before they impact users.

This report addresses key areas for technology vendors concerning the challenges and opportunities related to the future of work in the modern workplace.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/ solutions: Digital Employee Experience (DEX) Solutions and AI-enabled Digital Workplace.

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

- Transparency on the strengths and weaknesses of relevant vendors
- A differentiated positioning of vendors by segments on their competitive strengths and portfolio attractiveness
- Focus on the global market

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.

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 (exceptions are possible).

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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.

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Digital Employee Experience (DEX) Solutions

Who Should Read This Section

This report is valuable for service providers offering digital employee experience (DEX) solutions globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief human resources officers (CHROs)

should read this report to identify the leading DEX solution providers. This information will aid them in planning and enhancing EX with technology. They can understand the metrics and KPIs used by leading providers to evaluate the effectiveness of DEX solutions and learn about tools that enhance communication and collaboration among employees, contributing to a more cohesive workplace culture.

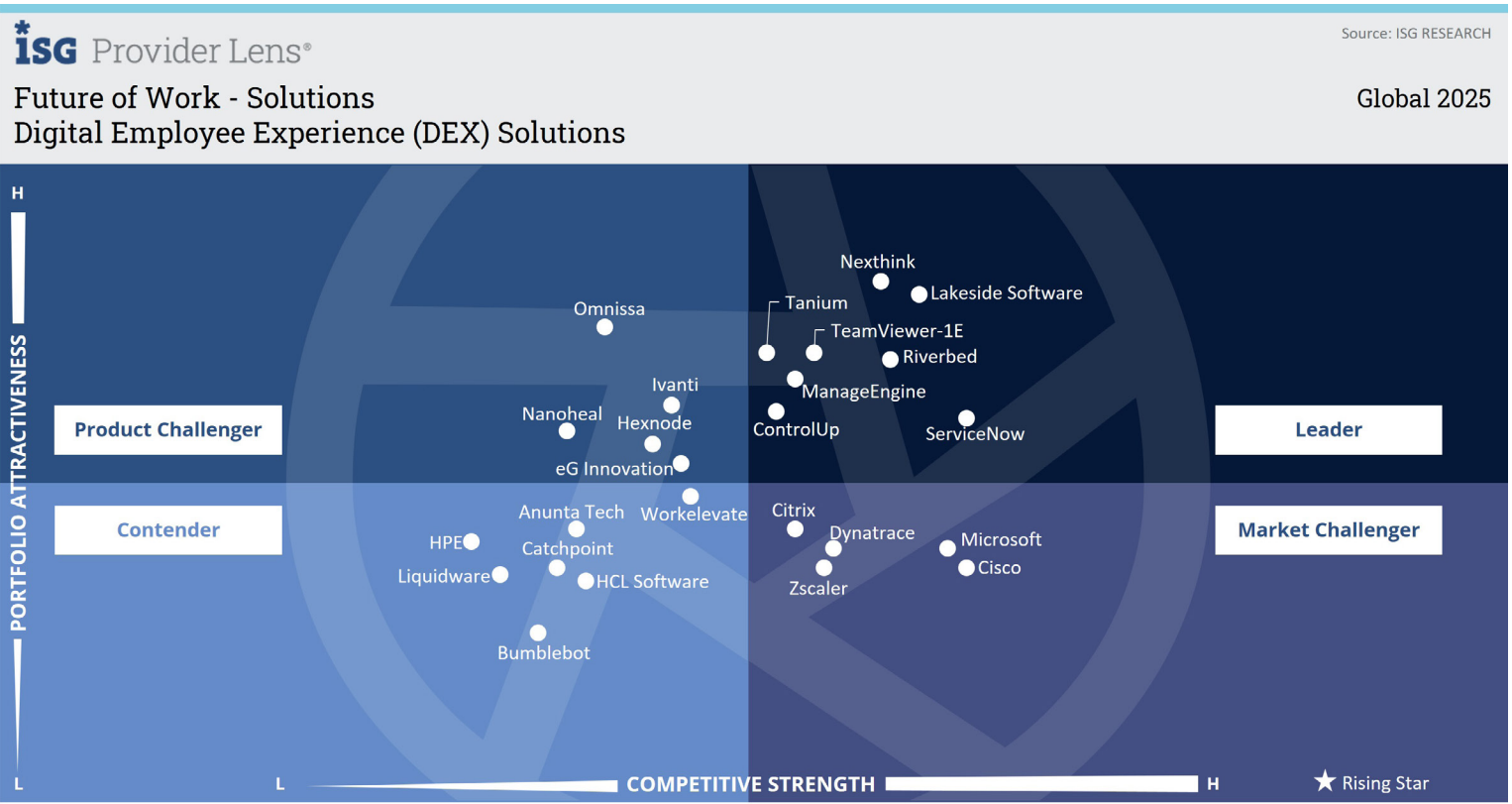
Technology professionals,

including workplace technology leaders, should read this report to learn about DEX solution providers' relative positioning and capabilities. This information will help them build effective partnerships with solution providers for ongoing support and innovation and develop best practices for deploying DEX solutions in digital workplaces within their organizations.

Digital professionals

should read this report to learn how DEX solution providers align their digital transformation initiatives and to compare these providers with one another. This information will help professionals understand how these solutions can streamline workflows and reduce operational silos. It will also assist in discovering metrics and KPIs to evaluate the effectiveness of communication and collaboration initiatives.

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This quadrant evaluates **global DEX solutions** and their vendors, helping enterprise IT leaders identify tools that **enhance digital experiences, automate support and optimize hybrid workplace** performance.

Bruce Guptill

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Definition

This quadrant assesses global technology vendors that provide DEX solutions, also known as end-user experience management (EUEM) or digital end-user experience (DEUX) solutions. DEX solutions measure, analyze, benchmark and manage the end-user experience with workplace technologies, including endpoint devices, applications, operating systems and networks. They collect data from endpoints using an endpoint agent and can be enhanced with user feedback.

The insights derived from DEX solutions enable IT organizations to improve the end-user experience with digital workplace technology. These solutions offer automated issue remediation and are increasingly favored for improving automation and endpoint management. As employees work remotely and use multiple devices, IT needs tools to ensure device security, optimize technology performance and enhance EX. DEX solutions provide IT support with real-time information to quickly resolve user issues, ensuring seamless technology performance.

Eligibility Criteria

1. Provide DEX solutions either as a **standalone offering** or as **part of a comprehensive** IT/endpoint management solution
2. Continuously **monitor endpoints**, such as devices, applications and network touchpoints, **using a lightweight endpoint agent**
3. Deliver **telemetry-based insights** into the technology landscape that affect EX across the entire digital workplace ecosystem
4. Offer **automated resolution and remediation** for issues to ensure uninterrupted end-user productivity
5. Enable **user self-help** to allow individuals to resolve issues independently
6. Maintain a **global presence with clients** in all major regions

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Observations

The Digital Employee Experience (DEX) Solutions quadrant in FY25 reflects a maturing and increasingly attractive market, with more providers deepening AI integration, expanding automation and enhancing endpoint observability. The focus of vendors and users has shifted from core telemetry to proactive, autonomous experience management. Vendors and developers are investing heavily and rapidly in GenAI, sentiment analytics and workflow orchestration to reduce IT friction and improve employee productivity. Strategic M&A and partnerships, such as TeamViewer's acquisition of 1E, have accelerated platform unification and global reach.

Several providers have expanded their capabilities significantly compared to FY24, with Tanium moving from Rising Star status in FY24 to Leader status in FY25. The quadrant also saw increased emphasis on multitenant scalability, compliance and integration with ITSM and security ecosystems. Leaders continue to add value through innovation velocity, global deployments and vertical-specific strategies.

Through 2026, we will see the market consolidating even more around platforms that offer unified DEX across hybrid environments, with AI-driven remediation and real-time insights becoming baseline expectations. We expect to see the number and scope of qualified competitors increase as well, potentially confusing buyer choice and vendor positioning.

From the 40 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders.

controlUP

ControlUp has expanded its broad platform scope with ControlUp ONE, added ChromeOS support, and invested in AI-driven workflows and MSP tools to enhance unified, autonomous experience management.

Lakeside Software

Lakeside Software introduced its SysTrack Mobile Experience in May FY25, enhancing overall MacOS support and expanding predictive analytics and automation capabilities. This initiative reinforces proactive IT operations and improves client value delivery globally.

ManageEngine

ManageEngine is a DEX leader driven by deep R&D, AI-powered automation, global expansion, and strong revenue growth—delivering integrated, scalable IT solutions across endpoint, security, and experience management.

Nexthink

Nexthink has extended its Infinity platform, enhanced its integration with AppLearn for digital adoption, and broadened AI-driven automation and global partnerships to strengthen proactive remediation and sentiment analytics.

Riverbed Technology

Riverbed has significantly expanded its Aternity platform with AI-led automation, introduced SmartOTel telemetry and Aternity Mobile, and deepened strategic partnerships, notably with Intel, to boost observability and remediation.

servicenow

ServiceNow's DEX leadership combines increasingly intricate integration of AI-driven workflows, with market-leading IT services expertise to deliver proactive and personalized experiences—fueling strong enterprise adoption and double-digit subscription growth.

TANIUM

Tanium has significantly advanced the value of its Automate module with the XEM platform, expanded its real-time sentiment tracking and self-healing features, and strengthened partnerships with Microsoft and ServiceNow for autonomous endpoint management.

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TeamViewer-1E

TeamViewer-1E is a changed and changing DEX leader, fueled by its strategic merger, AI-driven unified platform, rapid ROI, and enterprise adoption—advancing automation, endpoint visibility, and global digital workplace transformation.

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Leader

"Tanium leads in DEX solutions with its Autonomous IT platform, global scale and strategic partnerships, delivering real-time remediation, user empowerment and enterprise-ready innovations backed by $1.1 billion in funding and strong IPO positioning."

Bruce Guptill

Tanium

Overview

Tanium, headquartered in Emeryville CA, employs over 2,000 people across 19 global offices. Its Autonomous IT core solution emphasizes comprehensive autonomous endpoint management. The company has raised over $1.1 billion and is backed by major venture capital firms. Growth is fueled by expanding cloud-based DEX offerings. Tanium uses AI-driven automation and proactive detection to predict emerging issues and resolve problems before they impact users or operations. Strategic initiatives include modules for engagement, performance, real-time sentiment analysis and automated remediation. Investments in AI and deep integrations with Microsoft and ServiceNow have enhanced client value.

Strengths

Comprehensive DEX capabilities: Tanium's DEX integrates real-time monitoring, sentiment analysis and automated remediation via its Performance and Engage modules. This enables IT organizations to proactively monitor, manage and improve digital experiences across endpoints.

Automation and self-help features: The Engage module empowers users with trigger-based self-service remediation, custom notifications and surveys. These help to reduce helpdesk load and enhance productivity through automated, self-service issue resolution.

Scalable global reach and visibility: Tanium's zero-infrastructure platform supports enterprise-scale deployments, offering real-time intelligence and control across hybrid environments. The solution is hosted across one U.S. government and seven regional clouds to meet data residency requirements and certifications such as FedRAMP.

Strategic investments and partnerships: Since 2023, Tanium has secured major investments from firms such as TPG and IVP and built strategic partnerships with Microsoft, ServiceNow, Cisco and Accenture. These moves reinforce its focus on its Autonomous IT platform and integrated digital workplace strategies.

Caution

Tanium's powerful capabilities can demand significant configuration and integration effort, especially in hybrid environments, which can delay the realization of full value. Clients are advised to seek professional consulting and advisory services to assist with engagement assessments related to Tanium.

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AI-enabled Digital Workplace Solutions

Who Should Read This Section

This report is valuable for service providers offering AI-enabled digital workplace globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Technology professionals

should read this report to understand how providers' relative positioning and abilities can help them plan AI-enabled digital workplace solutions effectively. This information will help them build effective partnerships with service providers for ongoing support and innovation and develop best practices for deploying managed digital workplace services within their organizations.

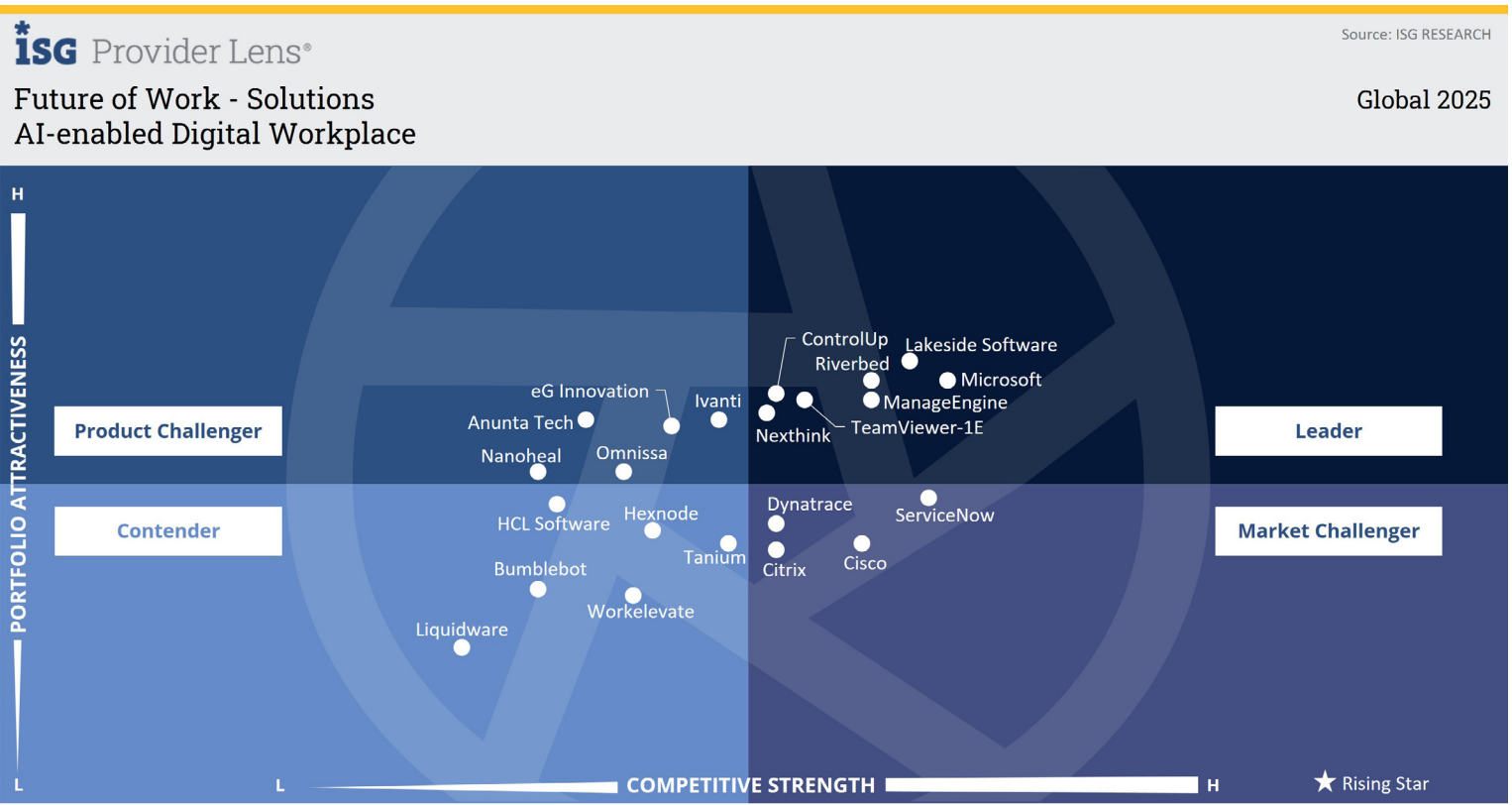
Chief information officers (CIOs)

should read this report to understand how current processes and protocols influence an enterprise's potential use and the limitations of AI-enabled digital workplace solutions. This information will help professionals identify potential risks associated with adopting new technologies and methods to mitigate such risks.

Digital professionals

should read this report to learn how unified communication and collaboration solution providers align their digital transformation initiatives. This information will help professionals understand how these solutions can streamline workflows and reduce operational silos and further discover metrics and KPIs to evaluate the effectiveness of communication and collaboration initiatives.

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This quadrant evaluates global software **vendors offering AI-enabled digital workplace solutions** that enhance automation, security and productivity, helping enterprises **manage hybrid environments intelligently.**

Bruce Guptill

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Definition

This quadrant assesses global technology vendors that provide AI-enabled solutions for the digital workplace and modern end-user technology. These solutions integrate AI with modern end-user computing (EUC) technologies, including desktop as a service (DaaS), virtual desktop infrastructure (VDI), mobile device management (MDM) and enterprise mobility management (EMM). AI-enabled digital workplace solutions enhance automation, intelligence and proactive management across these technologies, optimizing user experience, security and operational efficiency.

The solutions offered by the vendors in this quadrant assist IT teams in managing and securing workplace environments more effectively by leveraging AI-driven insights, predictive analytics and automation. As hybrid and remote work models continue to gain traction, enterprises increasingly seek AI-driven solutions that enhance user productivity, reduce the IT workload and improve service desk efficiency.

Eligibility Criteria

1. Offer AI-enabled digital workplace solutions either as a **standalone offering** or **as a part of a comprehensive** solution
2. **Integrate AI into core EUC functionalities**, including VDI, DaaS, MDM and unified endpoint management (UEM)
3. Enable **contextual and intelligent support** for end users, featuring virtual assistants, self-service recommendations and automated troubleshooting
4. Support **security and compliance enforcement** through AI-driven policies, anomaly detection and adaptive security mechanism
5. Demonstrate **successful implementation** or have a running PoC with an actual client, rather than just showcasing capabilities
6. Maintain a **global presence** with enterprise clients

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Observations

New for this FY25 study, this quadrant reflects a strategic marketplace pivot toward AI-first digital workplace platforms and workforce enhancement services.

The quadrant highlights a convergence of observability, security and EX, with vendors embedding GenAI, virtual assistants and self-healing capabilities. Strategic investments, such as Microsoft's massive Copilot expansion and TeamViewer's acquisition of 1E, underscore the shift toward unified, intelligent platforms. Vendors are also rapidly scaling global reach, enhancing partner ecosystems and aligning with enterprise compliance and sustainability goals. Digital employee experience(DEX) and endpoint management leaders now emphasize AI-driven automation, predictive analytics and intelligent support across VDI, DaaS and UEM.

The quadrant's evolution reflects growing enterprise demand for proactive, scalable and secure digital workplace solutions that reduce IT workloads and improve ROI. The FY25 landscape is defined by innovation in AI orchestration, contextual support and automation maturity, with all Leaders in this quadrant newly positioned. We expect the 2026 landscape to attract an even larger number and range of vendors, as buy-side interest (and spending) broaden, as SI partners more aggressively integrate the solutions with their service portfolios and as vendors fast-track their use of AI within product development.

From the 40 companies assessed for this study, 22 qualified for this quadrant, with seven being Leaders.

ControlUp has expanded its ControlUp ONE platform with AI-driven automation, no-code workflows and SaaS monitoring. It has deepened MSP support and partner engagement, with 80 percent of bookings via channels.

Lakeside Software

Lakeside Software has enhanced its SysTrack platform with GenAI assistants, predictive analytics and Moveworks integration, enabling proactive IT management and self-service support across hybrid environments.

ManageEngine has embedded GenAI and hybrid AI into its IT suite, enhancing automation, endpoint security and compliance. It has expanded its global reach and partner ecosystem without major M&A.

Microsoft

Microsoft has globally and technologically scaled Copilot, Intune and Places with AI integration across EUC platforms. Its strategic investments and partnerships have driven global adoption and measurable ROI across enterprise environments.

Nexthink

Nexthink has expanded its Infinity platform with its AppLearn acquisition, AI-powered diagnostics and contextual support tools. This strengthened its global reach and automation for proactive digital experience management.

Riverbed Technology

Riverbed has advanced its adaptive AI platform with predictive analytics, VDI optimization and GenAI assistants. Its strategic Intel partnership and global deployments have enhanced its observability and automation capabilities.

TeamViewer-1E

TeamViewer acquired **1E** in early FY25 to unify AI-driven DEX and remote support. The integrated platform delivers automation, endpoint visibility and enterprise-scale deployments.

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Appendix

The ISG Provider Lens® 2025 – Future of Work Solutions 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.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of October 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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

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Lead Author



Bruce Guptill
Analyst and Advisor

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

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

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

Research Analyst



Khyati Tomar
Senior Research Analyst

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. Khyati has over 5+ years of experience in the IT research industry. Before this role, she gained over 2.5 years of experience in the technology research industry, where she conducted various consulting and custom projects and co-authored CIS reports, primarily focusing on the public sector vertical.

In her current role, she supports lead analysts in the research process, authors the Enterprise Context and Global Summary reports, and co-authors focal points and quadrant reports.

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Study Sponsor

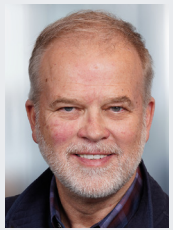


Iain Fisher
Senior Director & Principal Analyst

Iain Fisher is ISG's head of industry research and market trends. With over 20 years in consulting and strategic advisory, Iain now focuses on cross industry research with an eye on technology led digital innovation, creating new strategies, products, services, and experiences by analysing end-to-end operations and measuring efficiencies focused on redefining customer experiences. Fisher is published, known in the market and advises on how to achieve strategic advantage. A thought leader on Future of Work, Customer Experience, ESG, Aviation and cross industry solutioning. He provides major market insights leading to changes to business models and operating models to drive out new ways of working.

Fisher works with enterprise organizations and technology providers to champion the change in customer focused delivery of services and solutions in challenging situations. Fisher is also a regular Keynote speaker and online presenter, having authored several eBooks on these subjects.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®/ISG Research

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 partner 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.

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