NTT DATA

Shaping tomorrow: NTT DATA powering the next era of total workplace experience

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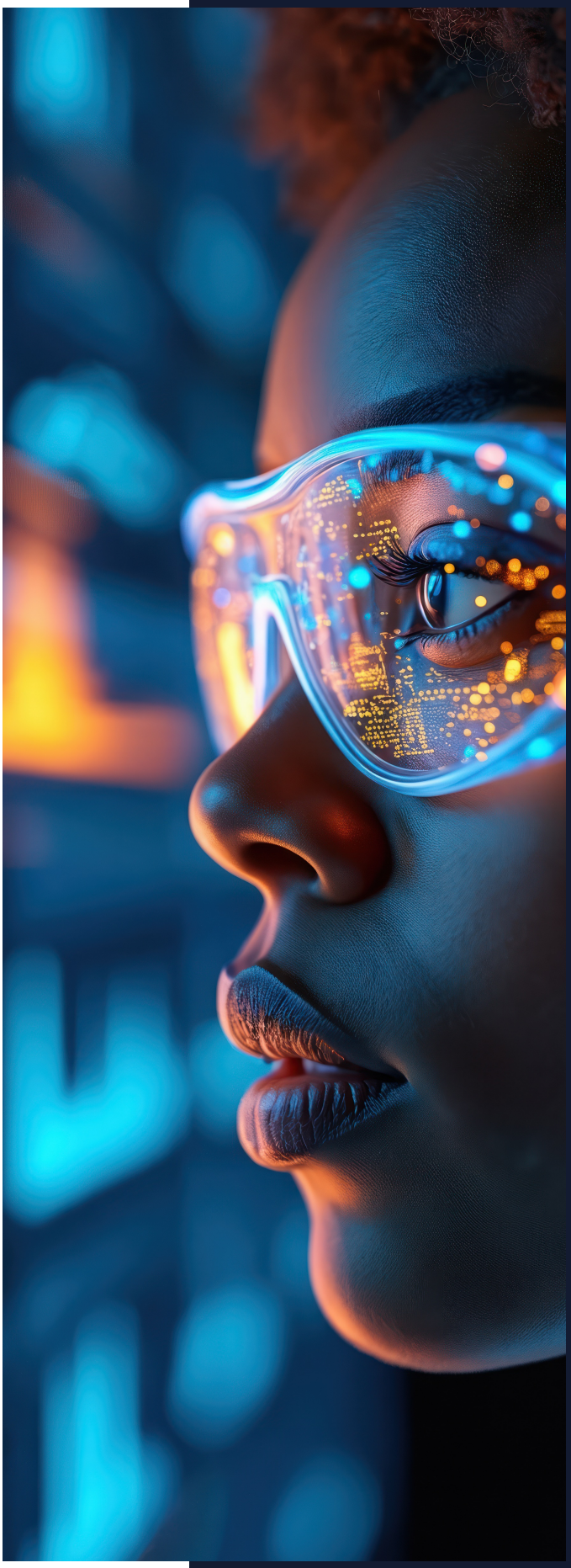

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As we stand on the cusp of a new AI era, the workplace is no longer defined by locations, devices or isolated systems. It is becoming a unified, intelligent, experience-driven fabric — one that connects people, spaces and technologies with the need for unprecedented fluidity. This is not merely an evolution in how we work; it is a rearchitecture of what the workforce expects from an enterprise.

The Future of Work 2030 captures insights from 330 executives across five regions and 10 industries and indicates a profound shift in how enterprises must reimagine their workplaces and the total workforce experience.

The study, conducted by Everest Group and presented by NTT DATA, shows that by 2030, most organizations expect to have an end-to-end, holistic view of workplace, network and field operations under a single construct of accountability and experience to provide a singular user experience. The study further highlights the intersection of technology and industry context, offering a tailored, sector-specific vision for how organizations can build the future of work with relevance and impact.

The way forward is clear. Building a future workplace requires a clear blueprint anchored on four foundational pillars:

- **Cognitive** — Intelligent, AI-driven experiences
- **Composable** — Modular and adaptive architectural design
- **Connected** — Integrated, frictionless ecosystems
- **Curated** — Personalized and meaningful employee experiences

Together, these pillars define how enterprises can fully transition into the next era of work.

NTT DATA recognizes both the urgency and the opportunity of this moment. As a global leader in digital workplace services, we are committed to helping enterprises shift from a fragmented, siloed approach to a fully converged outlook that unlocks a truly empowered and seamless workforce experience.

Our deep, end-to-end capabilities across digital workplace services, infrastructure, cloud and security uniquely position us to deliver this transformation at scale. Powered by agentic AI, our services connect the platforms, processes, industry-relevant solutions and people that fuel business growth. The result is an outcome-driven, enterprise-wide transformation that delivers improved user experience through AI and hyperpersonalization.

With decades of experience across industries, we help organizations unlock higher productivity, greater workforce engagement and enhanced customer experience. By embedding intelligent automation and agentic AI at the core, we are shaping smarter, sustainable workplaces that adapt, guide and scale. Work becomes more intuitive, insights become more actionable and people become more empowered to focus on what matters most.

The workplace of the future is here and is already taking shape. Together with our clients and partners, we are building workplaces that are intelligent, adaptive and transformational. Workplaces designed to meet the demands of tomorrow, deliver meaningful impact and stay ready for what comes next.

Sujay Bhattacharya
Senior Managing Director and Global Head Digital Workplace Services
NTT DATA

Everest Group®

March 2026

Future of Work 2030

A Playbook for Workplace Transformation

Contents

Executive summary

The workplace is entering its next wave of transformation. The last decade built the digital backbone for hybrid work through automation, cloud adoption, and collaboration platforms. Yet progress remains fragmented across technology, people, and sourcing. The next phase demands a fundamental shift: running the workplace, network, and field as one operating fabric tied to business outcomes. Integration, not simply addition, must define how enterprises think and run.

Decisions should now center on business problems and measurable value, not only tools. Enterprises are beginning to source services through a unified construct, where workplace, network, and field operations share accountability and experience-linked scorecards. As AI scales, enterprises should back real, in-workflow use cases with production metrics for accuracy and safety, and fund structured reskilling so AI adoption translates into trusted impact. Everest Group's survey of 330 global enterprises shows this shift is already underway:

- 78.5% of enterprises anticipate more than half of their workforce will complete reskilling on AI
- 80% expect outcome-based pricing models to replace fixed contracts as the preferred way to procure workplace services
- 83.9% agree workplace investments targeted at frontline and mobile roles will deliver greater RoI than continued investments in office role technologies

The priority now is to embed intelligence where work happens to augment people, not to run experiments. This requires formal reskilling, clear ownership, and governance that ties AI to repeatable business outcomes. Simultaneously, workforce needs are evolving. Ensuring parity for frontline roles through reliable connectivity, fit-for-purpose devices, and tailored support will determine whether digital investments convert to real productivity.

Technology strategy should mirror the business system. Leading organizations deploy reinforcing clusters – assistants with smart endpoints, modern connectivity, and experience platforms. As a result, gains compound rather than compete. At the same time, governance must keep pace through integrated sourcing, outcome-linked Experience Level Agreements (XLAs), and shared scorecards that track reliability, adoption, time-to-value, and risk controls.

The path forward is pragmatic: run the workplace as one operating fabric, scale technology clusters that solve real work, and govern by outcomes. Enterprises that do so will be best positioned to turn modernization into durable gains in productivity, resilience, and growth.

What has changed, what is next?

Over the past decade, the workplace has evolved through distinct waves. The first centered on automation and standardization as enterprises digitized services, expanded self-service, and selectively adopted cloud. Then came the pandemic-induced hybridization era, as people, devices, and applications became fully distributed. Enterprises adapted with zero-trust access, scaled remote support, and invested in experience analytics that made employee sentiment measurable.

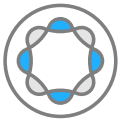
A third wave is now taking shape: convergence. This next phase is not about simply adding more tools but about integrating what exists. Technology, space, and people are increasingly designed to operate as parts of a unified, programmable fabric. Early adopters are aligning workplace, network, and field services around shared outcomes and unified accountability rather than managing them as separate silos.

By 2030, 81% of enterprises expect to bundle workplace, network, and field services into a single outcome-based contract, collapsing silos into one layer of experience and accountability.

What this could mean in practice for key components of enterprise IT ecosystem:

Technology
Applications and data are deployed where they create the most value across cloud, edge, or endpoints, running on modern networks such as Wi-Fi 6/7, private 5G, and SASE with shared IT-OT telemetry

Space
Space is less about locations and more about context, with decisions made closer to where work happens enabled through IT-OT convergence and private 5G



People
AI assistants scale across roles, helping reskilled, cross-functional teams work seamlessly across digital and physical environments

Operating model
Enterprises shift toward modular, API-first architectures and outcome-linked XLAs with zero-trust security embedded by design

In short, the last decade built the backbone for reliable, distributed work. Enterprises testing and scaling convergence are likely to shape the years ahead.

The enterprise landscape today: facing foundational gaps

Convergence may be the next S-curve, but most enterprises remain at varying stages of readiness. Foundational elements remain uneven: fragile networks, workforce skill gaps in AI and automation, and technology stacks that demand premium investments and leadership sponsorship but often deliver underwhelming results. Exhibit 1 outlines these foundational challenges.

Exhibit 1: Major enterprise foundational gaps

Source: Everest Group, 2026 Future of Work survey (330+ enterprises, >US $1 billion revenue)

84% of enterprises believe >30% of their workforce will require reskilling or upskilling for AI and automation by 2030

80% of enterprises often experience network-related performance issues

43% of enterprises encounter low employee adoption or change resistance as primary challenge in scaling workplace transformation

3.6% of enterprises prioritize the frontline as an investment, even though 51% strongly agree that investment in the frontline will generate higher RoI than continued investment in knowledge-worker technologies

Enterprises that leave these foundational gaps unaddressed will struggle to advance future strategies in technology, people, and space. Those that invest early in integration, skill, and change management will shape the next era of convergence.

> "For us AI is still in that place where for a lot of our frontline and operations teams it's an abstract thing. So, AI is welcome for them, but only after basics are covered."
>
> – VP of IT, a global manufacturing firm

The vision for future of work 2030: the 4C model

Everest Group take

Enterprises today face widening gaps between technology modernization and measurable outcomes. Despite heavy investments in cloud, AI, and hybrid work, they still lack an operating blueprint that orchestrates technology, space, infrastructure, and people as one cohesive workplace. The 4C model for the future of work – Cognitive, Composable, Connected, and Curated – provides that blueprint, helping leaders modularize technology, embed AI into work, unify IT and OT, and design persona-driven experiences governed by outcome-based metrics such as XLAs that link modernization to business value. Rather than viewing the 4C model as a static end state, enterprises see it as a practical guide to move from isolated modernization efforts toward orchestrated, outcome-driven transformation.

To realize the art of the possible, enterprises need a clear operating blueprint that orchestrates technology, infrastructure, and people's experiences as one fabric. We call this the 4C model for the future of work, offering enterprises a guide that is both structured and actionable. Exhibit 2 lays out this model.

Exhibit 2: Defining the 4C framework

Source: Everest Group's interaction with industry leaders (2026)

Defining the 4C

Cognitive

AI-first workplace: copilots and automation embedded directly into daily workflows

Composable

Modular by design: plug-and-play workplaces that scale and adapt through APIs

Connected

Always-on fabric: resilient, edge-ready networks unifying IT, OT, and IoT into one fabric

Curated

Persona-driven experiences: context-aware, persona-driven experiences ensuring frontline-office parity

Why it matters: voice of the industry

"Copilots for compliance review and AI for product quality through images are use cases we see gaining traction."

– VP of IT, a global manufacturing firm

"The biggest shift in the budget has been around the move from electronic medical record implementations to human capital platforms as the technology stack must stay flexible."

– CIO, a leading healthcare enterprise

"Going forward, bundling private 5G with the workplace is an operational necessity and not just a means of cost savings."

– Senior Director, Fortune 500 BFSI enterprise

"We see 5-10% of the IT budget shifting to technology investments for the frontline workforce over the next five years."

– VP of IT, a global manufacturing firm

Maturity model for achieving the 4C vision

Everest Group take

Roughly one in ten enterprises today qualify as best-in-class on their 4C workplace journey, consistently achieving superior outcomes and higher satisfaction with their investments. Their strength does not come from larger budgets or running more pilots, but from treating the workplace as an integrated system where networks, cloud, edge, and AI evolve together as one fabric. This approach lets them scale tactical and operational gains and stay ahead on strategic outcomes, while most peers still rely on point solutions that solve immediate gaps but limit impact. Capturing the full strategic prize is still an aspiration for all enterprises where they currently look at deeper convergence across the stack as the answer to unlock that benefit.

Everest Group maps the journey toward the 4C workplace through a maturity model that spans enterprises from basic performers to best-in-class leaders. Maturity is measured by the value enterprises realize across three tiers of outcomes:

Tactical outcomes
operating costs, safety, compliance, and utilization

Operational outcomes
efficiency, scalability, security, and employee productivity

Strategic outcomes
innovation, competitive positioning, and enhanced Employee Experience (EX)

We have broadly defined these enterprise classes across the maturity model as follows, keeping in mind the key elements of the IT ecosystem:

- **Basic:** fragmented tools and networks, limited integration, ad-hoc telemetry; siloed teams with limited digital skills, and cost and compliance as main KPIs
- **Intermediate:** unified workplace platforms, better network reliability, early AI pilots, rising cross-functional collaboration, growing digital skills, and initial XLA metrics
- **Best-in-class:** integration-first technology stack, edge-ready and resilient networks, telemetry-driven operations, fusion teams in place, high digital fluency across roles, outcome-linked XLAs, and high innovation

Advancing through these classes shifts enterprises from cost and compliance to resilience and productivity, and ultimately to innovation and growth. Each step refines how the workplace is built and measured. Exhibit 3 lays out this maturity model.

Exhibit 3: 4C maturity model for the future of work

Source: Everest Group's definition of best-in-class supported by the Future of Work survey (2026)

Maturity: Low Medium High

Enterprise distribution across the three maturity stages	50% **Stage 1** Basic	40% **Stage 2** Intermediate	10% **Stage 3** Best-in-class
Strategic impact across innovation, competitive positioning, focus across workforce types, and EX	Low	Low	Medium
Operational impact across efficiency, scalability, security, and employee productivity	Medium	High	High
Tactical impact across operating costs, safety, compliance, and utilization	Low	Medium	High

Current state of maturity

Most enterprises sit in the basic or intermediate tiers, constrained by fragmented networks, partial integration, and uneven workforce readiness. Roughly one in ten operate at best-in-class maturity; these leaders deliver stronger outcomes and even report higher satisfaction with workplace progress. However, current value is concentrated in tactical and operational gains, with higher strategic outcomes expected to come as enterprises accelerate deeper convergence across the stack.

Best-in-class enterprises report 1.24 times higher satisfaction with progress on their top workplace priorities compared with other organizations.

Enterprise progress and priorities across the 4C dimensions by 2030

Exhibit 4 shows where enterprises stand today and where they aim to be by 2030 across the four 4C dimensions. It highlights current maturity levels, adoption gaps, and future priorities shaping the path to a converged workplace.

Exhibit 4: Where organizations stand today and where they expect to be across 4C

Source: Everest Group, 2026 Future of Work survey (330+ enterprises, >US$1 billion revenue)

	Cognitive	Composable	Connected	Curated
Now	Best-in-class enterprises report 91% of generative AI initiatives are fully implemented or already delivering tangible value, versus 47% among other enterprise classes	96% of enterprises believe that budget availability and investment prioritization will not impact their ability to achieve a location-agnostic workplace architecture	95% of enterprises still occasionally report network-related performance issues that disrupt work 40% of enterprises cite integration and orchestration as top barriers to scale	37% of enterprises list improving EX as a top priority, and 47% seek to include EX telemetry among their success metrics 48% of enterprises cite limited visibility into EX and productivity as a top challenge
Future adoption outlook	74% of enterprises expect their employees to rely on copilots for most daily task steps by 2030 57% of enterprises expect productivity uplift above 35% from AI technologies such as generative and agentic AI by 2030	31% of enterprises are expected to adopt a flexible architecture by 2030 that runs workplace applications across cloud, edge, and endpoints 39% are expected to build modular, API-driven workplace applications by 2030 tailored to user roles or personas	85% of enterprises expect more than half of real-time decisions to occur at the edge by 2030 56% of enterprises plan to operate a unified network that serves both IT and OT systems by 2030	83% believe contextual AI will personalize applications in real time using environmental and biometric signals by 2030, making one-size-fits-all obsolete

How best-in-class stay ahead

Best-in-class enterprises excel by designing technology adoption around four levers that turn tools into a synchronized workplace fabric, delivering near-term gains and enabling long-term outcomes. Exhibit 5 outlines the four enablers of technology readiness.

Exhibit 5: Best-in-class enterprises' success drivers

Source: Everest Group, 2026 Future of Work survey (330+ enterprises, >US$1 billion revenue)

Integration-first readiness

Best-in-class enterprises report **20% lower integration issues** than other enterprises

Cluster-led adoption

Best-in-class enterprises are **three times more likely to scale** copilots, 5G, edge devices, and EX platforms together, turning clusters into compounded outcomes

Address barriers early

Best-in-class enterprises are over **two times more likely to track network reliability as a success metric** than other enterprises

Scaling frontier technologies

Best-in-class enterprises are **1.3 times more likely** to move frontier technologies from pilot to production

Playbook to industry application

Everest Group take

Across industries, convergence is advancing along distinct priorities. Manufacturers emphasize composability, preferring to buy what already works and integrate it with existing estates. BFS firms are the most mature, bundling private 5G, workplace, and IoT as an operational necessity and building interoperable data across IT and OT via digital twins and telemetry bridges to sync edge devices with AI engines in real time for proactive decisioning. Healthcare leads in AI scaling but must better manage data-privacy risks. Insurers remain early in generative AI, with most in PoC stages, yet the real opportunity lies in scaling AI across claims and underwriting through composable, data-governed platforms. Federal, state, and local agencies plan a technology-spend rise on frontline enablement, focusing on digital tools that enhance service delivery and efficiency.

Each industry has a unique mix of personas, challenges, and regulatory demands that shape its trajectory toward 2030. The 4C framework acts as both vision and playbook, helping leaders benchmark where they stand and plan for the next phase. Exhibit 6 illustrates this framework

Exhibit 6: The 4C framework as a leadership playbook

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

Defining the 4C

Cognitive	Composable	Connected	Curated
Why it matters: voice of the industry			
"How is AI delivering value today and how do best-in-class enterprises expect to scale it by 2030?"	"What technology stack anchors composability today, and what bets define 2030?"	"What tech foundations make it real, and how do we govern it? Private 5G, Wi-Fi 6/7, zero-trust, and XLAs"	"What personas are we curating for today versus 2030 and what metrics prove success?"

Exhibits 7-11 apply the 4C playbook to each industry, mapping how leaders are positioned today and how their aspirations evolve toward 2030.

"Our roadmap currently hinges on the question of how do we build interoperable data and control planes that actually unite IT and OT? As today, all our devices, sensors, and field equipment run in silos, and thus AI gets trapped in pilots and does not offer its true value to us. We look to move to a more composable stack built on microservices and clear API contracts, not bolt-ons where we are able to govern outcomes on reliability, safety, and explainability, not just uptime."

– AVP, Fortune 1000 Insurance enterprise

Exhibit 7: Manufacturing industry maturity model

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

	Manufacturing: **today**	Manufacturing: **2030 aspiration**
Cognitive	Manufacturing has moved fast on generative AI with 62% already deploying initiatives, yet impact remains limited as only 2% see measurable gains	By 2030, the focus shifts to scaled productivity, with 70% expecting copilots to become a core part of daily work and 82% expect to reskill over 30% of their workforces to fully realize AI-driven efficiency
Composable	Today's factories run on Wi-Fi 6/7, endpoint security, and Virtual Desktop Interface (VDI) for stability, yet internal process gaps and network latency remain as major barriers for a location-agnostic workplace	By 2030, 94% of manufacturers plan to adopt flexible, API-driven architectures, as priorities shift toward network orchestration, digital twins, and predictive ITOps to overcome today's process and latency gaps
Connected	Today 80% of manufacturer's often struggle with network issues, undermining always-on production, with only 30% tracking edge or network reliability as a key success metric	By 2030, 52% expect private 5G to remain in pilot mode, 62% identify asset tracking, safety, and compliance use cases, and 80% plan to anchor these deployments on providers with global data centers to ensure low latency and data residency
Curated	60% of manufacturers run a mixed workforce of both office and frontline staff with 46% citing employee sentiment and real-time experience telemetry (eNPS, CSAT) as key success metrics	By 2030, budgets rebalance toward the shop floor as 42% of enterprises project greater emphasis on frontline, mobile, and operational roles, while 86% agree frontline roles deliver higher RoI per dollar than office functions

Manufacturing – best-in-class report card

- **Cognitive:** Best-in-class manufacturers are starting to convert AI into outcomes, with 10% already reporting tangible generative AI benefits compared to only 2% across all surveyed enterprises
- **Composable:** Best-in-class manufacturers are further along in implementing technologies that defines the 2030 aspiration. 100% best-in-class enterprises report deploying network orchestration and predictive IT operations in parts of the enterprise
- **Connected:** Best-in-class manufacturers demonstrate stronger acceleration toward network modernization, as 75% plan private 5G deployments versus 52% across all enterprises
- **Curated:** Best-in-class manufacturers show greater maturity in performance measurement (62.5% versus 46%) and a sharper focus on rebalancing budgets toward frontline enablement (50% versus 42%), ensuring that productivity gains translate directly to the point of work

"The industry is getting away from on-site installations and increasingly using a buy-before-build motto. We would rather buy a product that is already working and integrate it with what we have."

– VP of IT, a global manufacturing firm

Exhibit 8: BFS industry maturity model

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

	BFS: **today**	BFS: **2030 aspiration**
Cognitive	BFS firms have accelerated generative AI adoption with 56% already implementing initiatives, yet only 2% are realizing tangible benefits, prompting 68% to hire AI-specific talent to close capability gaps	By 2030, 84% expect to reskill over 30% of their workforces to fill this gap; however, BFS leaders believe frontline workforce will be the primary beneficiary, with 82% expecting productivity gains of over 36% compared with 44% for office workers
Composable	Today's BFS technology backbone runs on Digital Employee Experience (DEX) platforms, Unified Communications and Collaboration (UCC) tools, and edge-enabled devices, yet limited skilled resources and strict compliance requirements continue to restrict progress toward a truly location-agnostic workplace	By 2030, the stack evolves as network orchestration, edge devices, and digital twins rise to the top of technology priorities, with 82% of firms preferring partners with native edge-to-cloud integration capabilities to simplify delivery and achieve modular, secure scalability
Connected	Network fragility persists with 72% of enterprises often facing network issues, while only 38% tracking edge or network reliability as a key success metric	By 2030, the focus turns to experience-centric connectivity as 82% plan to bundle workplace, network, and field support into outcome-based XLAs, as banks look to deploy IoT sensors and digital twins with telemetry bridges to connect edge devices and AI engines in real time, enabling predictive maintenance
Curated	BFS workplaces are hybrid with 82% operating a mixed model with office and frontline roles, and 48% tracking employee sentiment and telemetry as key success metrics	By 2030, budgets tilt toward frontline workers, as only 56% expect parity across personas, while 48% strongly agree that frontline roles deliver higher RoI per dollar than office work

BFS – best-in-class report card

- **Cognitive:** Best-in-class banks progress faster on AI scale with 83% already deploying generative AI compared with 56% among overall surveyed enterprises
- **Composable:** Best-in-class are further along in implementing technologies that define the 2030 aspiration. All best-in-class enterprises report deploying edge-enabled devices and digital twins in parts of the enterprise
- **Connected:** Best-in-class BFS enterprises show stronger network stability, with only 33% often reporting network issues versus 72% of peers. This edge comes from proactive modernization as 67% best-in-class have already deployed Wi-Fi 6/6E/7 at scale compared to 28% overall
- **Curated:** Best-in-class BFS banks place stronger emphasis on EX, with 33% ranking EX and engagement as top workplace priorities (versus 30% of peers). They further lead in maturity: 100% have deployed DEX platforms at scale (versus 82% of peers)

"We look at bundling of private 5G, workplace, and IoT as an operational necessity rather than just a cost-cutting measure."

– Senior Director, Fortune 500 BFSI enterprise

Exhibit 9: HLS industry maturity model

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

	HLS: **today**	HLS: **2030 aspiration**
Cognitive	Despite regulatory guardrails, HLS enterprises are rapidly scaling generative AI, with 64.7% already implementing initiatives, yet 88% acknowledge rising risks around safety, quality, and compliance	By 2030, privacy remains paramount, as 57% of HLS enterprises favor providers with in-house LLMs. Further, AI copilots become embedded in clinical workflows as 70.5% expect employees to rely on them for most daily tasks
Composable	Today's healthcare systems rely on ITSM, network orchestration, and DEX platforms as their top technology agenda, yet fragmented data and limited skilled talent hinder progress toward a location-agnostic workplace	By 2030, Desktop-as-a-Service (DaaS), VDI, and copilots move to the forefront, with 69% planning to adopt flexible architectures, and 84% favoring partnering with providers offering edge-to-cloud integration capabilities to achieve agility without compromising compliance
Connected	Connectivity remains fragile, with 80% of healthcare enterprises often facing network issues that threaten always-on patient care	By 2030, 49% expect private 5G to scale across multisite operations, while 84% anticipate IT-OT convergence will unlock major gains in security, resilience, and innovation
Curated	Healthcare workplaces remain office-skewed, with 53% primarily knowledge-based roles, and 41% organizations tracking employee sentiment and real-time telemetry (eNPS, CSAT) as a success metric	By 2030, 47% expect budgets to stay office-focused; however, 86.2% agree frontline and mobile roles deliver greater RoI

HLS – best-in-class report card

- **Cognitive:** Best-in-class HLS firms are ahead in realizing generative AI's potential, with 43% already reporting tangible benefits compared to just 7.8% of the broader industry, demonstrating early success in translating AI pilots into measurable clinical impact
- **Composable:** Best-in-class firms are ahead in modular transformation, with 85% already deploying DaaS, VDI, and copilots that define the 2030 aspiration
- **Connected:** 71% of best-in-class HLS firms view seamless device handovers across network zones as a top frontline need (versus 55% of peers). Stronger adoption of network orchestration technologies reinforces this focus, with 86% of best-in-class deploying SD-WAN and dynamic routing across their operations (versus 78% overall)
- **Curated:** Best-in-class HLS organizations are shifting toward balanced workforce investments, with 57% expecting budgets evenly distributed across segments, compared to 47% of peers still office-focused. They are also ahead in EX maturity, as 43% best-in-class have implemented DEX platforms at scale (versus 26% of peers)

"We eliminated 80% of the network infrastructure in a building with 5G infrastructure coverage."

– CIO, leading healthcare enterprise

Exhibit 10: Insurance industry maturity model

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

	Insurance: **today**	Insurance: **2030 aspiration**
Cognitive	Insurers remain cautious in generative AI adoption, with 48% still in PoCs and 62% expecting reliance on external talent, reflecting internal capability gaps	By 2030, the industry aims to move past pilots, with 88% expecting AI agents to replace multilingual IT help desks, while 80% expect completion of formal reskilling for more than half the workforce to build in-house AI expertise
Composable	Today's insurers rely on AI-powered endpoints, endpoint security, and DaaS to maintain operational stability, yet fragmented systems and limited skilled talent restrict their ability to build location-agnostic, agile workplaces	By 2030, network orchestration, endpoint security, and DEX platforms rise in priority with 92% enterprises planning to adopt flexible architectures and API-driven applications, while 76% favor partners offering native edge-to-cloud integration capabilities to ensure secure, scalable delivery
Connected	Network fragility remains a defining challenge, as 94% enterprises often face network issues, hindering real-time customer service and claims processing	By 2030, the industry looks to remain cautious on rebuilding digital trust through resilient connectivity with 56% expecting private 5G to stay in pilot mode
Curated	Workforce models are office-skewed, with 50% workforce being primarily office-based, and 48% tracking employee sentiment and real-time telemetry (eNPS, CSAT) as success metrics	By 2030, 50% expect budget priorities to remain focused on office workers; however, 84% agree frontline and mobile roles deliver greater RoI than office workers

Insurance – best-in-class report card

- **Cognitive:** Best-in-class insurers are ahead in generative AI maturity progressing faster from pilots to production, with 100% having implemented initiatives, compared with 48% of overall surveyed enterprises stuck in PoCs/pilots
- **Composable:** Best-in-class insurers lead in technology adoption, with 75% already deploying the full set of 2030 aspiration technologies, such as network orchestration and DEX
- **Connected:** Best-in-class insurers demonstrate stronger connectivity readiness, with 100% planning to bundle workplace, network, and field support into outcome-based XLAs by 2030 (versus 75% of peers). Their edge comes from faster progress on IT-OT convergence, as 75% expect to be fully prepared with unified security, monitoring, and governance by 2030 (versus 30% overall)
- **Curated:** 100% best-in-class insurers have adopted hybrid workforce models (versus 60%), showcasing higher commitment to balanced investments, with 75% planning spend parity across workforce segments, versus 48% of peers still office-focused

"Generative AI adoption is still early; nearly all insurers are in PoCs, but the real opportunity is in scaling AI across claims and underwriting, linking it with composable platforms and data governance."

– AVP, Fortune 1000 Insurance enterprise

Exhibit 11: North America federal, state and local industry maturity model

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

	North America federal, state, and local: **today**	North America federal, state, and local: **2030 aspiration**
Cognitive	Federal, state, and local agencies remain cautious in generative AI adoption, with 64% still in pilots and 76% acknowledging new risks around safety, quality, and compliance	By 2030, adoption becomes more pragmatic, as 98% expect AI agents to replace multilingual IT help desks, while 42% still expect that over 40% of their workforce requires reskilling to ensure responsible AI deployment
Composable	Today's federal, state, and local IT backbone relies on endpoint security, UCC, and edge-enabled devices to maintain control, yet compliance and integration hurdles limit agility	By 2030, priorities expand as edge-enabled devices, immersive collaboration tools, and UCC platforms move into the top tier: 82% plan to adopt flexible architectures, while 80% prefer partners offering native edge-to-cloud integration capabilities to enhance agility and interoperability within secure boundaries
Connected	Federal, state, and local networks are more resilient than most industries, with only 62% often reporting reliability issues, but visibility is limited, as only 28% track edge/network reliability as a success metric	By 2030, 60% of federal, state, and local agencies expect to scale private 5G. Further privacy remains paramount, as 82% favor partners with global data center providers to ensure low-latency processing and data residency within tightly regulated environments
Curated	Workforce structures are tilted toward frontline and distributed teams, with 54% operating mixed models, and 30% primarily frontline or remote. Measurement maturity stands out, as 58% track employee sentiment and real-time telemetry (eNPS, CSAT) as key success metrics	By 2030, workforce investments are expected to remain balanced, yet 34% of federal, state, and local agencies plan to prioritize frontline roles, and 78% agree that frontline and mobile positions deliver greater RoI, reflecting a shift toward mission proximity and operational agility

North America federal, state and local – best-in-class report card

- **Cognitive:** Best-in-class agencies are moving faster on AI scale, with 86% already deploying generative AI, compared with 64% in overall surveyed enterprises, reflecting greater readiness to operationalize AI under strict oversight
- **Composable:** Best-in-class agencies lead in technology adoption, deploying a fuller set of 2030 aspiration technologies, including edge-enabled devices and UCC
- **Connected:** Best-in-class agencies demonstrate superior network reliability, with only 16% often facing connectivity issues, compared with 62% overall. Their strength lies in faster IT-OT convergence progress, as 50% expect to be ready to roll out secure, unified networks across multiple functions by 2030 (versus 40% in peers)
- **Curated:** Best-in-class agencies run more inclusive and distributed workforce models, with 86% operating mixed teams versus 54% across the sector

"We expect tech spend for frontline to rise by 10-15%, with a focus on equipping them with digital tools to deliver services efficiently."

– CIO, leading federal sector enterprise

Focus on the frontline workforce

Frontline roles are where experience, safety, and productivity gains converge, yet they remain underfunded in most enterprise modernization agendas. While 51% of leaders strongly agree that investment in frontline workers yields higher RoI per dollar than current allocations, only 22% of enterprises place a growing emphasis on mobile, operational, and frontline roles or make frontline transformation their top digital workplace investment.

Among enterprises with large frontline populations, priorities center on driving revenue growth through next-generation technologies such as AI and immersive solutions, reducing operational costs by digitizing high-volume processes, and improving workforce safety while lowering compliance risks through real-time monitoring.

What will change by 2030?

- **Step change in augmentation: 67%** of enterprises expect frontline workers to use **more than 10 AI assistants** daily by 2030, embedding intelligence directly into work
- **Material productivity impact: 68% expect productivity gains exceed 35%**, as AI assistants move from pilots to embedded workflows across shop floors, warehouses, and field operations

Exhibit 12 outlines the core technology stack that enables frontline workers and supports their digital experience.

Exhibit 12: The technology stack enabling frontline workers

Source: Everest Group 2026

Defining frontline success for enterprises

Measuring success will require enterprises to move beyond cost metrics toward experience-linked outcomes: the extent to which frontline employees are enabled in their daily tasks, tools and assistants are adopted and effectively utilized, and sentiment metrics reflect levels of satisfaction, engagement, and safety.

Bottom line is that frontline environments are becoming AI-augmented, edge-native workspaces. Enterprises that equip their frontline teams with the right stacks and govern progress using live experience metrics will convert modernization into measurable gains in growth, safety, and productivity.

Experience management
Dex analytics for monitoring and improvement

Security and trust
Endpoint security and zero-trust architectures

Always-on communication
Unified collaboration platforms for shift-based teams

Reliable service backbone
ITSM platforms for resilient operations

Network and edge-enabled devices
Designed for shop floor, field, and depot workflows

Operating and measuring the 4C workplace

Understanding how enterprises plan to scale and measure impact

Enterprises are moving from experimentation to execution to scale the 4C workplace by 2030. Progress hinges on three enablers-talent, ecosystem, and governance, and is measured through productivity, resilience, and experience. Best-in-class are already embedding reskilling, fusion teams, and sourcing consolidation into daily operations. The next step is to deepen ecosystem partnerships, institutionalize AI-enabled governance, and adopt outcome-linked metrics that tie technology adoption to business results. Organizations that act now will be best positioned to capture productivity gains, build resilience, and elevate workforce experience on the path to 2030.

Exhibit 13 highlights how enterprises plan to build the 4C workplace by 2030 and the outcomes they expect to achieve.

Exhibit 13: How enterprises plan to enable and measure the 4C workplace by 2030

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

Enablement outlook
building the foundation for scale

Talent and operating model enablement

Around 68% of enterprises are reskilling and partially rolling out employees into fusion teams that fuse workplace, network, IT-OT, IoT, and data skills

78.5% expect more than half of their workforce to complete formal AI and digital reskilling by 2030

Sourcing and ecosystem enablement

Over 80% of enterprises are consolidating under outcome-linked XLAs and bundled workplace, network, and field support models to hold a single provider accountable

76.7% prefer edge-to-cloud integrators with IT-OT expertise and zero-trust capabilities

Governance and change enablement

Enterprises are creating experience CoEs to own role blueprints, pattern libraries, and telemetry, delivered by cross-functional teams across sites

Governance ownership is expanding to include guardrails, catalogs, and telemetry management for AI, edge, and platform ecosystems

Impact outlook
building the foundation for scale

Productivity and performance outcomes

73% of enterprises believe AI will free time for higher-order work

81% of enterprises believe AI will make employees more successful in their roles

54% of enterprises consider the adoption and utilization of digital tools and platforms a key success metric for a futuristic workplace

Resilience outcomes

81% of enterprises believe IT-OT convergence will deliver significant gains in security, operational resilience, and innovation

52% of enterprises cite composable use cases as the most important digital workplace need for their frontline workforce today

Experience and parity outcomes

29% of enterprises report that ensuring parity and support for frontline or deskless workers is a top workplace priority, signaling continued focus on closing persona-specific gaps

EX telemetry and role-based personalization will help enterprises to achieve frontline parity with knowledge workers in digital enablement

Conclusion

Enterprises are entering a new era where technology, workplaces, and people are designed to work in sync, but most are not equally prepared. Most organizations cluster at basic or intermediate maturity, and closing the gap requires execution discipline, not more point solutions. Leaders differentiate by advancing their workplaces, networks, cloud, edge, and AI together and governing the whole through outcome-based pricing tied to business outcomes.

The path forward is clear: enterprises must rebuild the backbone with zero-trust endpoints, API-first integration, and edge-ready networks; rebalance investments toward frontline parity and experience telemetry; reskill the workforce at scale while enabling fusion teams to own catalogs and guardrails; and redefine sourcing and commercial models around outcomes by bundling workplace, network, and field into a single layer of accountability. Early movers will turn modernization into sustained gains in productivity, resilience, and growth by 2030.

Appendix

This section offers a glimpse into the characteristics of the 330 respondents that formed the basis of the study.

Exhibit 14 shows the survey respondents' split by industry, revenue, and region.

Exhibit 14: Percentages of survey respondents by industry, revenue, and region

Source: Everest Group's Future of Work survey conducted with over 330 global enterprises with revenue >US$1 billion (2026)

Split of survey respondents **by region**

North America	36%	Europe	15%	Asia Pacific	15%
United Kingdom and Ireland	15%	Rest of the World (RoW)	18%		

Split of survey respondent organizations **by annual revenue**

US$5-10 billion	51%	US$10-50 billion	31%	>US$10 billion	18%

Split of survey respondents **by industry**

Manufacturing	15%	BFS	15%	Insurance	15%
North America federal, state, and local sector	15%	Healthcare and life sciences	15%	Electronics and high technology	7%
Retail, distribution, and CPG	5%	Energy and utilities	3%	Aerospace and defense	3%
Others	7%				

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