



\Orchestrating a brighter world

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**CUSTOMER  
VALUE LEADER**

*Maximizing the Price/Performance ROI for Customers*

*RECOGNIZED FOR BEST PRACTICES IN THE  
SOUTHEAST ASIAN DIGITAL WORKPLACE  
MANAGEMENT SERVICES INDUSTRY*

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**Best Practices Criteria for World-class Performance**

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. NEC excels in many of the criteria in the digital workplace management services space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Customer Impact</i>
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

**The Transformation of the Digital Workplace Management Services Industry**

The digital workplace management services market is undergoing significant transformation, driven by key trends, specifically, the shift to hybrid and remote work environments. Evolving work styles, employee preferences, customer expectations, and business models mandate that the workplace must transform. Employees seek greater flexibility in their work-life balance, boosting the adoption of digital workplace solutions that support remote and flexible working arrangements. This transition has put extraordinary demands on IT infrastructure and support services.

Enhancing employee experience (EX) is becoming standard practice, representing a shift toward more human-centric workplace solutions. Although a customer-first approach has been the cornerstone of business strategy, EX is pivotal to the success of any organization.

Technology advancements catalyze this transformation as businesses increasingly use cloud computing, automation, and artificial intelligence (AI) to streamline operations and enhance user experiences. Companies are transitioning from traditional, manpower-intensive support models to intelligent, self-service solutions that enable proactive and automated incident resolution. The reliance on AI and automation to improve efficiency, reduce operational costs, and enhance the digital EX has become a significant growth driver for the market.

The market is witnessing a strong emphasis on omnichannel support, where employees can access IT services through multiple platforms like mobile apps, WhatsApp, Microsoft Teams, and web portals. With

generative AI (GenAI) and virtual assistants becoming ubiquitous, they can offer multilingual assistance and solve issues promptly without human intervention.

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**Krishna Baidya,**  
**Sr. Director, ICT Practice - Asia Pacific**

Cost optimization remains paramount for the industry, as businesses look for flexible and scalable IT support models that reduce operational expenses. The emphasis is shifting from transactional support towards strategic partnerships, which create value through technology-enabled solutions.

Cybersecurity and compliance remain critical, with patch management and endpoint security gaining prominence. Organizations seek unified endpoint management solutions supporting distributed workforces while maintaining robust security protocols.

Collectively, these trends point towards a more intelligent, user-centric, and technologically advanced approach to

workplace management, where employee experience and operational efficiency are central.

### Orchestrating Value Beyond IT: NEC’s Integrated Approach to the Modern Workplace

NEC’s modern workplace management solution is designed to meet the evolving needs of today’s hybrid and digitally distributed enterprises. In a business world driven by remote/hybrid work, cloud migration, and rising cybersecurity concerns, NEC offers clients an integrated, scalable, and automation-first approach to workplace operations, demonstrating tangible business value across cost, efficiency, and end-user experience dimensions.

At the core of NEC’s value proposition is its ability to consolidate IT service delivery into a cohesive, self-sustaining ecosystem. The company consistently delivers a well-calibrated balance between cost efficiency and functional performance for its clients.

NEC’s unified endpoint management (UEM) agent enhances business impact by proactively identifying and remediating endpoint issues such as disk space shortages, battery health degradation, or application crashes. In one government deployment, NEC preemptively flagged deteriorating battery performance for VIP users. This enabled NEC to execute targeted, proactive replacements before failures occurred, enhancing both uptime and executive satisfaction. Importantly, NEC’s UEM also supports auto-ticket generation for detected issues. Yet, these tickets are not charged to the client, turning automation into a value-added service rather than a billing opportunity.

The AI Contact Center, built on AWS Connect but augmented by NEC’s own models and integration, contributes meaningfully to cost reduction and service speed. For example, automated workflows for password resets and account unlocks are fully executed through bots with multi-factor authentication, eliminating the need for live agent involvement. NEC’s smart queueing system further identifies user tiers—like VIPs versus general support users—based on caller identity and routes them accordingly, ensuring service prioritization without added administrative overhead.

The business impact of this approach is immediately observable in real-world deployments. For instance, NEC's implementation with Fujifilm across 8 countries in the Asia-Pacific, supporting over 1,400 users, exemplifies the measurable cost and performance benefits. Prior to NEC's involvement, a significant proportion of support tickets (over 50%) were repetitive issues such as password resets. By introducing AI-powered virtual assistants and automated password management workflows, NEC reduced the total monthly ticket volume from 3,000 to 1,500—a 50% reduction that directly translated into lowered operational costs for the client.

Ultimately, NEC's value proposition is about transforming IT support from a cost center to a strategic business enabler, delivering measurable efficiency gains, cost savings, and enhanced organizational agility.

### Delivering End-to-end Confidence: From Onboarding to Everyday Excellence

NEC differentiates itself through flexibility and a partnership-oriented model. The company customizes

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solutions to address specific organizational pain points rather than adhering to standard service-level agreements (SLAs). This approach has enabled NEC to maintain long-term relationships with clients across government, healthcare, and enterprise sectors, with some partnerships extending 6 to 7 years.

The cornerstone of NEC's client relationships is being highly consultative and responsive, shaped by its regional proximity and deep vertical expertise. Rather than selling individual tools, NEC approaches engagements as a transformation partner, assessing client environments and tailoring the right combination of 3<sup>rd</sup> party or own

developed ITSM, UEM, contact center automation, and endpoint support services.

NEC's integrated platform model further streamlines the procurement process. Clients interact with a single vendor across all core service layers, reducing contractual complexity and integration risk. NEC's team demonstrates technical fluency in scoping custom deployments, including integrating Amazon Web Services (AWS)-native services, configuring omnichannel touchpoints, and automating workflows. This ensures clients receive not only a capable solution but also one that is aligned with their unique operating environments and performance objectives.

The quality of NEC's service ownership experience is reflected in its ongoing investment in automation, self-service, and proactive support. Features like real-time engineer tracking (for field support), automated ticketing, and UEM-triggered remediation contribute to a significantly more responsive and transparent service experience. Additionally, NEC's Advanced Response Center (ARC) architecture—merging service desk, network operations center (NOC), and security operations center (SOC)—ensures cross-functional ownership of service outcomes. Clients benefit from faster issue escalation, seamless handoffs between teams, and a unified point of contact for managing incidents. NEC's commitment to

non-intrusive, value-added automation (for instance, non-billable tickets for auto-healing tasks) further enhances the customer experience by prioritizing resolution over revenue.

NEC also emphasizes sentiment-aware service delivery. Virtual agents can detect emotional tone and prompt real-time intervention from supervisors, improving resolution quality and end-user satisfaction. This is particularly relevant for high-touch clients and sectors with VIP user groups.

NEC's service delivery model is designed to optimize both resolution speed and user experience. Its AI Contact Center combines AWS Connect infrastructure with NEC's own AI models and orchestration logic, allowing for intelligent call routing, conversational bots, and automated resolution flows, like password resets and multi-factor authentication (MFA).

One of NEC's most distinctive features is its omnichannel consistency—users receive the same interaction logic and branding whether they engage via WhatsApp, Microsoft Teams, UEM chat, or via ITSM chatbot. This shortens learning curves and ensures a uniform experience across platforms. The contact center also includes sentiment analysis, allowing NEC to proactively intervene during live interactions to de-escalate issues.

From an operational standpoint, NEC's managed intelligent edge services (MIES) for enhanced IT services management (ITSM) deliver value by improving ticket management workflows, offering pre-populated fields for faster input, and incorporating mobile-first accessibility via the MIES-on-the-Go app. This app not only allows for real-time visibility into ticket updates, allowing for messaging and resolution on the move, but also includes a unique capability: live engineer dispatch tracking akin to ride-hailing services. Clients can monitor where their assigned engineers are and view their estimated time of arrival (ETA), enhancing field service interactions. This consumer-grade transparency is rare among enterprise managed service providers (MSPs) and substantially improves trust and satisfaction during high-impact incidents.

### **Predictable Innovation: A Pricing Model Aligned with Performance**

NEC's commercial model is strategically designed to deliver both cost efficiency and technological agility. By leveraging advanced cloud infrastructure, particularly AWS, and embedding GenAI for multilingual support and intelligent routing, NEC reduces the need for manual intervention and enables continuous, 24/7 support. This automation-first approach optimizes IT operational costs while simultaneously enhancing the end-user experience.

Unlike traditional managed service models that charge per ticket or AI query, NEC offers comprehensive service bundles that include unlimited use of AI-powered virtual assistants and self-healing capabilities, provided as standard rather than as premium add-ons. This leads to highly predictable cost structures, even as service complexity grows. This model offers significant value for cost-sensitive sectors such as retail and government. A prime example is Fujifilm, which achieved a 50% reduction in monthly ticket volume after implementing NEC's automation suite, illustrating the clear ROI of this approach.

Further amplifying its value proposition, NEC's core ITSM and UEM platforms are developed in-house, helping eliminate expensive per-seat license fees typical of third-party-based offerings. The result is a subscription-based model that delivers scalable modernization without hidden costs, enabling clients to align IT investments with business outcomes.

### Empowered People, Trusted Brand: The Human and Cultural Engine Behind NEC's Value Creation

NEC is positioned to continuously offer high-quality workplace management services anchored on its commitment to human capital and brand strength. The company promotes a culture of continual learning, operational flexibility, and innovation—traits enhanced over decades of trusted partnerships across Southeast Asia's private and public sectors.

At the workforce level, NEC prioritizes cross-functional training and resource flexibility. Support engineers are experts across different technical disciplines and are scheduled based on a workload-based round robin schedule to ensure service continuity during shifts or absences. This nimble staffing structure, coupled with knowledge sharing, helps develop operational resilience and client satisfaction.

NEC's pursuit of professional excellence also includes its investment in workforce development technologies. AI-driven sentiment analysis and call recording reviews accomplish real-time quality assurance and training interventions. This data-driven feedback loop empowers supervisors to recognize talent gaps, customize coaching, and maintain consistently high service standards.

Demonstrating technological resilience amidst unprecedented times, NEC transitioned its support operations by strategically migrating them to remote environments, leveraging a cloud-native AWS-based contact center platform. Since then, the company has undertaken a cloud migration strategy that involves both AWS and Azure, developing custom landing zones that not only ensure seamless remote operations but also reinforce robust security protocols. By creating dedicated cloud environments with stringent access controls and compliance frameworks, NEC safeguarded service levels, enhanced operational continuity, and demonstrated its technological agility and commitment to maintaining high-performance infrastructure during unprecedented challenges.

Further, NEC's ability to nurture internal innovation by enabling its teams to co-create proprietary platforms, such as its custom ITSM, virtual assistants, and endpoint management solutions, elevates service differentiation and helps cultivate a sense of ownership and engagement among staff, contributing to talent retention and organizational momentum.

These internal capabilities are reflected externally through NEC's strong brand identity. With a proven track record in infrastructure and IT transformation across the Asia-Pacific, NEC is a dependable partner that delivers. The company's transition to cloud-native workplace solutions demonstrates its ability to adapt to market opportunities and significance in a digital-first economy. Client endorsements from esteemed institutions throughout the region, both public and private sector entities, affirm NEC's reliability and executional maturity. Its capability to support mission-critical environments, including high-touch assistance, further reinforces its premium and practical brand through sophisticated services delivered with local responsiveness and accountability.

Overall, NEC's empowered workforce and strong brand image create a positive feedback loop: energized, highly trained service teams foster trust with customers and build brand equity, positioning NEC as a leader in digital workplace management services in the region.

## Conclusion

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NEC's workplace management portfolio stands out not just for its technical completeness but also for its coherent and value-driven service experience across the customer lifecycle—from purchase and onboarding to everyday use and strategic growth. The company's modern workplace management services deliver exceptional value by aligning technology, automation, and service delivery into a tightly integrated offering.

With its strong overall performance, NEC earns Frost & Sullivan's 2025 Southeast Asia Customer Value Leadership Recognition in the digital workplace management services industry.



## What You Need to Know about the Customer Value Leadership Recognition

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Frost & Sullivan's Customer Value Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

### Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### Business Impact

**Financial Performance:** Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

**Customer Acquisition:** Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

**Operational Efficiency:** Company staff performs assigned tasks productively, quickly, and to a high-quality standard

**Growth Potential:** Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

**Human Capital:** Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

#### Customer Impact

**Price/Performance Value:** Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience:** Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence:** Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience:** Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

## Best Practices Recognition Analytics Methodology

### Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	<b>Opportunity Universe</b>	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	<b>Transformational Model</b>	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	<b>Ecosystem</b>	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	<b>Growth Generator</b>	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	<b>Growth Opportunities</b>	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	<b>Frost Radar</b>	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	<b>Best Practices</b>	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	<b>Companies to Action</b>	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

\*Board of Directors, Investors, Customers, Employees, Partners

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

## The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

