

## IDC MarketScape

# IDC MarketScape: Worldwide Employee Experience for Integrated Employee Workspaces 2025 Vendor Assessment

Zachary Chertok

**THIS EXCERPT FEATURES SERVICENOW AS A LEADER**

## IDC MARKETSCAPE FIGURE

### FIGURE 1

#### IDC MarketScape Worldwide Employee Experience for Integrated Employee Workspaces Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## ABOUT THIS EXCERPT

---

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Employee Experience for Integrated Employee Workspaces 2025 Vendor Assessment (Doc # US53672525).

## IDC OPINION

---

Digital workspaces continue to evolve as organizations rework the calculus for how internal resourcing, knowledge transfer, and communications reach and support employees in the flow of work. Recent IDC data shows that as companies grow, executive leadership teams are 57% likely to concentrate on optimizing workloads toward improving operational and cost efficiency. In response, HR and operations leaders along with line-of-business (LOB) managers are evenly motivated to design new AI-driven processes and practices and to consolidate employee data and resource sourcing locations for greater ease of access, curated creation, and use case-directed orchestration.

The integrated employee workspaces (IEW) market is maturing well beyond legacy intranet and communications tools to meet growing demand for centralized resource and knowledge access, intelligent resource creation and curation, and broader communications and collaboration support. Maturity is leading to different vendor design and partnership approaches for how companies can and will orchestrate collaborative and resource-ready workspaces:

- **Architecture unity:** Vendors supporting architecture unity are designing their platforms as core or transient systems of record that internalize client data, applications, resources, creation studios, and more regardless of where they originate — native or not. Architecture unity consolidates the data environment to personalize portal design experiences, curated resourcing, and driven engagement based on a single, native, and internalized orchestration model. The central model goes beyond AI resource provisioning to inform content creators and enable generative AI (GenAI) tools to optimize the characteristics of content, program, and communications rollouts to how each employee is most likely to engage them.
- **Augmented orchestration:** Vendors supporting augmented orchestration unify existing sources of employee resources, knowledge, tools, communications, content, and digital access. Augmented orchestration consolidates access

through a single portal that uses AI to curate internal and external resources. Augmented orchestration leans into use case and engagement insights to recommend additional provisions development based on impact, sentiment, and performative use cases and outcomes. Augmented orchestration concentrates first on employee access, accuracy, and curation before delving into deeper state platform architectural unity and design recommendations.

- **Specialized design and development:** Vendors providing specialized design and development options unify organizational resource access for employees while concentrating on specialized delivery and access columns that are commonly role based but can also be persona based or entirely industry specific. Specialized design and development vendors often target a specific organizational end goal and curate for specialized teams, skill sets, or proprietary working divisions across the organization. Specialized design and development includes deep competencies for resource design, deployment, and curation, with diverse native toolsets for resource stakeholders to oversee and draw insights from specified use case designations.

IDC expects that IEW market to grow at a compound annual growth rate (CAGR) of 13.5% over the next five years (source: IDC's Semiannual Software Tracker, May 2024). While today, IEWs are 47% more likely to be driven by IT orchestration than by HR in partnership with LOB requirements, IDC expects the gap to close as HR and IT increasingly work together to support a more efficient and adaptable line of business (source: IDC's *Future of Enterprise Resilience Survey, Wave 3*, April 2025; n = 893).

Driven first by orchestration demand, IEWs are likely to grow more central to how companies facilitate the right resources for the right employees at the right time and in the right context. As demand for business efficiency and outcomes productivity rises in the office of the CEO, IDC's data indicates that IEWs are 97% likely to align and evolve to shadow human business execution with dynamic and responsive resource environments curated to the way people personally grow and get work done.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

---

The vendor inclusion list for this IDC MarketScape is designed to accurately depict vendors that are representative of an experience-centric IEW buyer's selection list. IDC defines an IEW as enterprise portals that integrate access to information and multiple applications and present them to the business user in a useful format. IEWs provide a metadata-driven presentation framework for developing applications that tie together capabilities often provided by other product categories. IEWs are used by businesses to tailor the look and feel of their digital resource access environment. IEWs must also include IT tools for role-based or rule-based administration and access governance. Modernizing IEWs go one step further to leverage metadata or act as a provisional

system of unity for central systems of record to influence and drive employee digital resource curation as well as additional creation for new applications, tools, resources, content, knowledge, and communications.

Vendors must meet the following inclusion criteria for participation in this 2025 IDC MarketScape for worldwide employee experience (EX) for integrated employee workspaces:

- Minimum of 250 active customers (corporate entities)
- Global presence operating in two or more regions spanning North America, Europe, and the Asia/Pacific regions
- Be deployed in the cloud as managed hosted private cloud or platform as a service (PaaS)/software as a service (SaaS) in a public cloud with clients in cloud production for at least 12 months
- Market presence and momentum based on IDC inquiry and positive revenue growth
- Producing revenue of at least \$10 million in annual software, nonservices revenue within the 2024 calendar year prior to the IDC MarketScape evaluation
- Having target and scale to meet the needs of organizations supporting 500+ employees with 50%+ of the customer base in this range
- Providing the following capabilities:
  - Creation, curation, and ingestion of content that can be assembled, processed, or approved for intranets, mobile applications, social media platforms, news feeds, and other channels or devices (Content management must be configurable to support single or multiple stakeholder centers for specialized content support across targeted working groups.)
  - Personalization framework support for curated and optimized resource access for diverse characteristics of working types, employee classifications, and workplace access requirements (e.g., desked versus deskless and field workers)
  - Data and access security, roles, and permissions management
  - Analytics and reporting at the infrastructure/architecture, content and resource, and user curation layers with data exports, trends analyses, and extensibility for partner support, AI frameworks, and agent training
  - Robust partner community including solutions, data, training, campaign management, cross-sell opportunities, and data security and framework protocols
  - Support for, guidance around, and automation and adherence to regulatory, compliance, and governance laws, policies, and/or guidelines

## ADVICE FOR TECHNOLOGY BUYERS

---

Business priorities are doubling down on outcomes efficiency as executive leadership teams increasingly prioritize operational orchestration shifts to support personalized execution in the line of business. Recent IDC data shows that the office of the CEO is 98% likely to consider digital unity frameworks and modeling to be relatively recession proof — in other words, the office of the CEO increasingly wants to forego operating silos to get to a point where the organization can intelligently drive targeted resources and enablement to value-oriented employees through lean and optimized channels (source: *IDC's Future of Enterprise Resilience Survey, Wave 3, April 2025; n = 893*).

As business narratives move away from rigid resilience into flexible adaptability, IEWs are emerging as a key tool for resource access creation, curation, and unity in the front end, with capacity for data extensibility management and resource directional modeling in the back end. IEWs that function as platforms for data unity, extension, and internal curation and curated creation modeling are also carrying additional benefits by overcoming data disparity barriers across multiple solutions for companies seeking to consolidate AI advisor and agent training, deployment, and adoption.

Modernizing the organization, the employee experience, and everything peripherally tied to it (e.g., employer brand, employee satisfaction [ESAT], time to business execution, and quality and timeliness of business outcomes) is setting a rising number of organizations on a pathway to IEW orchestration. While underlying narratives may favor drives to AI enablement, IEWs are proving crucial to overcome existing digital systems, resource repository, and dataset disparities and segregation by orchestrating the existing digital ecosystem into a single source of access and insights-driven actioning. While using an IEW as a system of data and insights truth varies based on the vendor deployment and partnership model, companies are turning to IEWs to drive efficiency, expose data cleanliness, and work toward a singular work enablement model that supports employees in the flow of work across any resource requirement needed to drive outcomes, support customers, and keep time-based objectives on track.

Consolidated user access experiences are expected to grow especially as conversational and agentic user experiences grow more mainstream. As digital agency rises to the surface for features like intelligent search and partnered resource access delivery responsively and predictively in the flow of work, buyers should start to evaluate their front end and back end as well as an emerging orchestration middle layer. While digital agency is forecast to gradually supplant the user experience front end for employee access and resource engagement, the middle layer will remain underneath to enable traditional portal management and opt-in engagement, search, and access.

It will be important to facilitate both models:

- For agentic resourcing, AI systems autonomously drive resources, insights, and recommendations to employees based on conversational engagement and/or preemptive analysis of what they are most likely to need or engage based on tasks, priorities, and emerging challenges. AI agents connect and complete interim tasks between human engagements to facilitate continuous workflows in the line of business. Agents require minimal human oversight to complete their predefined goals with the highest probability outcomes that best support the flow of work. Agentic provisions, resource generation, and automated curation personalized to each employee's unique field needs will increasingly support employees to stay focused on the flow of tasks at hand without stopping to reference even curated materials in a designated portal.
- For orchestrated portal access, employees will still have the capacity to acutely look for highly specialized resources, tools, and content that may not be reflected in AI-based recommendations built from the system's understanding of what they need or what could benefit them, their work, and their growth at any point in time. Portal access will be supported by its own AI capabilities in intelligent search, AI curation and personalization, parameter, access, compliance management, and more. Orchestrated portal access will also remain integral for workspace managers who create, set guidance for, and parametrize curation parameters for content, resources, applications, and broadcast or group communications.

IEW buyers should think about the long-term and evolutionary capacity of their resource orchestration capabilities in addition to thinking about what they need to modernize in their existing environments. Vendors should provide acutely aligned capabilities to meet current demand within cost boundaries while providing a sightline into future data and resource unity potential facilitated by modernizing access options.

Buyers should also be aware that AI enablement is not traditional automation and carries a different set of risks, capabilities, and opportunities. Beyond systems and resource unity, IEW vendors should also be prepared to partner for educational training around what the shift to AI-enabled capabilities means in the transition from deterministic access and curation frameworks into probabilistic ones that require more guidance and training.

IDC advises technology buyers to look for the following when selecting an IEW partner:

- A flexible architecture to support repurposable and redeployable content blocks, role-based templates, application portals, and communications tools
- A content and program creation space and authoring environment that is intuitive and supported with generative AI (GenAI) editorial, suggestion, and bias-

reduction support (GenAI should be restricted to only access permitted data and metadata housed within the IEW or made accessible in applications integrated with or accessed within the IEW. Access to data and metadata helps improve how GenAI recommendations are optimized based on employee behaviors, trends, and engagement insights.)

- Capabilities to deploy, publish, promote, and communicate content to and through diverse channels (Consider options to leverage AI recommendations for deployment optimization including content type selection.)
- Comparable shows of capability for supporting similar organizational deployments across a host of use cases including moderated traffic flows, large and small-scale content and resource curation, workspace customization support, permissions and gating across common and disparate working group types and characteristics, and strong uptime across all access modalities
- Ease of use and strong workforce adoption/engagement metrics across all applicable user space categories spanning the customer base
- Proven and recommended bidirectional partnership support between the vendor and its partners that includes support for diverse partnership modalities including API integrations and digital agent handshakes
- An extensible strategic outlook for product and platform development that includes partner growth, continued internalized resource creation and curation support, AI investments, and support for growing knowledge and data orchestration (Consider current and future backing for I/O psychology and behavioral science guidance, expertise, and thought leadership.)
- Global multisite management with support for multiple native languages, local points of presence/datacenters, and adherence to regulatory guidelines and frameworks
- Financial stability and ability to support future solutions against a backdrop of changing client and user expectations

## **VENDOR SUMMARY PROFILES**

---

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### **ServiceNow**

ServiceNow is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide employee experience for integrated employee workspaces.

ServiceNow provides a central, AI-infused omni-channel experience that includes conversational access tools, mobile engagement modalities, and a portal environment for employees to access all resources, knowledge, and help desk environments needed to navigate their experiences at work. ServiceNow unifies and orchestrates knowledge and resource access in its experience layer while serving as a conduit to unify the underlying data environment in support of AI assistance, advisory, and agency.

Quick facts include:

- **Employees:** 10,000+
- **Top industries:** Financial services, government and public sector, healthcare, manufacturing, technology
- **Key markets:** Enterprise
- **Cloud type:** SaaS, managed hosted PaaS
- **Cloud security:** ISO 27001, SOC 1, SOC 2, FedRAMP, ISO/IEC 27017:2015, ISO/IEC 27001:2013, ISO/IEC 27018: 2019, ISO/IEC 27701:2019, SSAE 18 SOC 1 and SOC 2 reports, BSI Cloud Computing Compliance Controls Catalog (C5) standard, APEC Privacy Recognition for Processors (PRP), ISMAP Cloud Service, EU Cloud CoC, DoD IL4 PA for U.S. DoD and IC Entities, DoD IL5 for the National Security Cloud, Multi-Tier Cloud Security (MTCS) Standard for Singapore Level 3, ASD IRAP Assessed for OFFICIAL and PROTECTED Cloud Services, Government of Canada GC Cloud Provider, AICPA SOC 2 TSC + HITRUST CSF, U.K. Cyber Essentials Plus certification
- **Integration options:** No code/low code, APIs, scripting, native connectors, microapps
- **Pricing model:** Seat based
- **Top integrated apps:** Microsoft (365, Teams, SharePoint), Okta, Workday, SAP, UKG, Jira

ServiceNow supports a unified and omni-channel engagement layer designed to steward how resources, tools, and institutional knowledge reaches individual employees.

ServiceNow provides:

- **Knowledge and resource access curation:** ServiceNow can index knowledge, metrics, insights, information, and resource access from native and partner application sources as well as spanning any number of intranet databases clients may be using. Knowledge, metric, and resource access and delivery can be gated and permitted by user characteristics like role, division, and location, and ServiceNow's core AI capabilities can personalize portal displays, content promotion, and application and resource orchestration based on trending user

behavior, task urgency, and outcomes priorities. While ServiceNow does not operate as the central system of record across client knowledge, application, and data sources, it does serve as the central access orchestration layer to facilitate greater ease of access and more personalized access to the tools and resources employees need to set, achieve, and grow toward their goals.

- **Global support and enablement:** ServiceNow is committed to supporting global universality across its orchestration enablement. Global enablement is a key consideration within platform and capability design, especially to support governance across all client needs, especially within frameworks for personalized curation, data and insights visibility, and communications standards. ServiceNow supports centralized and configurable governance standards as well as generative AI support for automated translation with localized language support for real-time global team collaboration.
- **Voice of the employee:** ServiceNow provides tools to capture and act on the voice of the employee as well as integrate captured insights into AI-based curation and orchestration frameworks and models. Active listening within ServiceNow is facilitated by pulse surveys, which can be configured by stage in the candidate and employee life cycle, and voluntary feedback, which incorporates an "always-on feature" for employees to provide unsolicited feedback directly in the ServiceNow portal. ServiceNow also supports passive listening through embedded surveys that are incorporated within service interactions to gather immediate and responsive process and service feedback and sentiment insights. ServiceNow natively supports sentiment analyses and trends identification for dashboard readouts and infusions into digital orchestration for everything from GenAI-supported communications enhancements to content, program, resource, and task personalization and curation.
- **Experience strategy:** ServiceNow's client partnership extends into service delivery and guidance to promote optimized experience management within configured portals and channeled resource access management. ServiceNow runs an employee portal contest for participants to exhibit their portals and employee experience orchestration strategies including how feedback is included and channeled into improvements. Companies using ServiceNow have access to templates, framework guidance, and change management support to optimize ServiceNow as their orchestration core in support of EX and corporate resourcing guidance for optimal accessibility in the flow of work.
- **Digital agency:** ServiceNow maintains a vision for AI-empowered employee experiences that focus on deskless workers in a bid to support all employee classifications by design regardless of the remoteness of their access characteristics. ServiceNow empowers frontline managers with AI

recommendations for everything from team curation to personal career development options within the leadership column. ServiceNow's support for central resource and data orchestration also enables it to serve as the organization's AI agent control tower to train, direct, and transact digital agents based on a common insights foundation even if the foundation consists of formerly disparate data environments.

ServiceNow supports and enables a unified EX orchestration environment that provides a single experience access point for employees curated to their unique workflows and consisting of the resources, knowledge, and insights they will need to achieve and grow. ServiceNow's AI curation pairs relevant resources with the right employees to balance goals and opportunities exposure, keeping them focused on their primary objectives while surfacing opportunities for growth, development, and collaboration.

ServiceNow is supported globally with options to manage the platform centrally or from concentrated stakeholder centers. As an experience orchestration platform, ServiceNow does not require companies to remove legacy information systems and instead brings them together with advanced indexing, AI curation, and federated search capabilities to optimize the time employees spend accessing resources within the context of the time allocated to their primary responsibilities.

## **Strengths**

ServiceNow customers note that the platform provides uniform access to operational and organizational services and resources personalized responsively and predictively for each employee. Customers also noted that access management does not just extend to employees in the flow of work but also facilitates dynamic connections and collaboration across response teams to employee requests including support in resourcing and for digital, process, and knowledge enablement.

Customers find that ServiceNow capably fulfills their configuration and compliance requirements including attribute management, permissions, and allowances across global regions and dispersed workforces. Protocol fluency and capabilities extend into ServiceNow's AI orchestration and assistance supporting employees to manage tasks and access across portal-integrated digital resources native and non-native to ServiceNow. Advanced orchestration and workflow automation behind employee access points help employees reach the tools and resources they need to fluidly move through their work and task requirements while minimizing process-based disruptions and time loss or lags.

Overall, customers find ServiceNow to be highly capable as a front-end resource orchestration tool with back-end data management capabilities that fuel AI-driven partnerships between employees and their digital workspaces. ServiceNow customers

view the tool as a key aspect of how they drive activation and adoption of curated resources and applications while those with more advanced use cases rely on ServiceNow's metadata insights to drive awareness of new curation opportunities.

## Challenges

ServiceNow's orchestration focus requires clients to have at least a foundational understanding and inventory of the resources and access maps they want to automate as the starting point for AI personalization. Consequently, customers found that ServiceNow's configurations and deployments could be time-consuming while requiring a deeper bench of both process and technical personnel. Similarly, while customers generally found ServiceNow support teams and/or SI partners to be very knowledgeable toward getting the solution up and running, sourcing strong implementation partners could be difficult due to very high demand and being outpaced by larger clients. As a result, some clients noted limiting their customizations more than expected in the earliest stages of engagement and use.

Customers also found that ServiceNow's licensing structure was very complex, leading to higher costs to cover their uniquely configured environments. Pricing complexity led to difficulty in predicting costs, making it difficult to secure internal investment and buy-in on the basis of a business case beyond ServiceNow's proven and somewhat ubiquitous brand value.

Once live, customers and their employees generally found ServiceNow easy to engage and supportive of expanded resource access through intelligent workflow automation and AI-assisted search. Despite the advantages in the end-user experience, administrators faced challenges managing across the solution back end especially for additional integrations and resource installs. Along those lines, many customers noted that they forwent integrating legacy solutions into the ServiceNow environment until after the initial go live to delay added complexity until after go live. As customers transitioned to a live environment, they found that upgrades could be disruptive and that ServiceNow's support teams could vary significantly in their level of responsiveness unless explicitly dedicated based on the contract type.

## Consider ServiceNow When

ServiceNow falls into the categories of *specialized design and development IEWs* as well as *architecture unity IEWs*. ServiceNow is well suited to global enterprise-scale companies with complex IT, HR, and workforce workflow, resource management, and service optimization requirements. ServiceNow supports AI-driven, personalized employee resourcing across a broad range of digitally facilitated environments within organizations spanning services, resources, knowledge, tasks, and insights. ServiceNow brings all aspects together into a single orchestrated portal for employee access and

engagement. ServiceNow's personalization is backed by the platform's AI workflow optimization capabilities and insights-backed personalization capabilities that support a directional ecosystem of resource and enablement provisions within each portal prioritized by urgency and for productivity. As employees engage with ServiceNow, contributed data and metadata further help inform resource owners, content teams, managers, and more about how to orchestrate resource creation, curation, and deployment for optimized activation and adoption.

Companies seeking enterprise-grade resource access centralization and management as well as AI-advanced workflow and resource orchestration optimization can benefit from using ServiceNow. While ServiceNow's underlying advances make the platform more expensive than some of the other IEW options, the solution's advanced orchestration capabilities allow it to conform to and manage both across and within highly complex work environments with multi-characteristic attributes, characteristics, and regulatory and compliance requirements. Consequently, companies requiring scale, localization, and dynamic and ongoing compliance support across workforce and process changes can benefit from partnering with ServiceNow. ServiceNow can also benefit organizations looking to set themselves up to go one step beyond deploying an IEW and take their first step toward framing centralized digital agency management.

## APPENDIX

---

### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this 2025 IDC MarketScape for worldwide employee experience for integrated employee workspaces, vendor size is based on relative revenue scale

determined by IDC's 2024 Software Tracker and validated in partnership with each participating vendor. For details regarding the vendors and size of the IEW market, see *IDC Market Share: Integrated Employee Workspaces (IEW), 2025: Growth Fueled by AI and EX Personalization Demand* (forthcoming).

## IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

IDC defines an IEW as enterprise portals that integrate access to information and multiple applications and present them to the business user in a useful format. IEWs provide a metadata-driven presentation framework for developing applications that tie together capabilities often provided by other product categories. IEWs are used by businesses to tailor the look and feel of their digital resource access environment. IEWs must also include IT tools for role-based or rule-based administration and access governance. Modernizing IEWs go one step further to leverage metadata or act as a provisional system of unity for central systems of record to influence and drive employee digital resource curation as well as additional creation for new applications, tools, resources, content, knowledge, and communications.

Points of entry to partnership and vendor deployment models can be categorized according to the following:

- **Architecture unity:** Vendors supporting architecture unity are designing their platforms as core or transient systems of record that internalize client data, applications, resources, creation studios, and more regardless of where they originate – native or not. Architecture unity consolidates the data environment to personalize portal design experiences, curated resourcing, and driven engagement based on a single, native, and internalized orchestration model. The central model goes beyond AI resource provisioning to inform content creators and enable generative AI (GenAI) tools to optimize the characteristics of content,

program, and communications rollouts to how each employee is most likely to engage them.

- **Augmented orchestration:** Vendors supporting augmented orchestration unify existing sources of employee resources, knowledge, tools, communications, content, and digital access. Augmented orchestration consolidates access through a single portal that uses AI to curate internal and external resources. Augmented orchestration leans into use case and engagement insights to recommend additional provisions development based on impact, sentiment, and performative use cases and outcomes. Augmented orchestration concentrates first on employee access, accuracy, and curation before delving into deeper state platform architectural unity and design recommendations.
- **Specialized design and development:** Vendors providing specialized design and development options unify organizational resource access for employees while concentrating on specialized delivery and access columns that are commonly role-based but can also be persona-based or entirely industry specific. Specialized design and development vendors often target a specific organizational end goal and curate for specialized teams, skillsets, or proprietary working divisions across the organization. Specialized design and development includes deep competencies for resource design, deployment, and curation with diverse native toolsets for resource stakeholders to oversee and draw insights from specified use case designations.

## LEARN MORE

---

### Related Research

- *IDC's Worldwide Future of Work Use Case Taxonomy, 2025* (IDC #US52943525, June 2025)
- *IDC Market Glance: Employee Experience, 2Q24* (IDC #US52313024, June 2024)
- *IDC MarketScape: Worldwide Experience-Centric Intelligent Digital Workspaces 2024 Vendor Assessment* (IDC #US49741923, January 2024)

### Synopsis

This IDC study provides a guide to the landscape of worldwide employee experience for integrated employee workspaces (IEW) vendors and presents the criteria most important for companies to consider when selecting a solution partner in the space. IEWs comprise a wide range of assembled solution spaces spanning intranets, application orchestration, content creation, AI curation tools, native tools and capabilities (recognition, communication, etc.), and more. The assessment examines

both qualitative and quantitative characteristics to characterize and define success in content, communications, collaboration, task engagement, and resource orchestration and engagement across diverse employee classification types and field access requirements. Evaluation of participating vendors is based on a comprehensive and rigorous framework that assesses vendors relative to the inclusion criteria and IDC's definition frameworks for capabilities and strategies. The study highlights the factors that are expected to be most influential for success in the IEW market currently and forecast over the next two years.

"IEWs are gaining momentum as companies look to drive more deeply into employee resource orchestration and facilitation in the flow of work," says Zachary Chertok, senior research manager for Employee Experience at IDC, "Continued drives for efficiency and productivity in the achievement of business outcomes are driving IT, HR, operations leaders, and LOB managers to rethink how the digital environment meets employees. At the core of their evolving drive is a growing goal to enable employees to focus on and stay in the flow of completing and developing toward their goals and objectives. IEWs are unlocking capabilities to orchestrate resource access and lean into AI and digital agency managed from a central model and column for the future state of the enabled employee at work."

## ABOUT IDC

---

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

## Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
[blogs.idc.com](http://blogs.idc.com)  
[www.idc.com](http://www.idc.com)

---

### Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit [www.idc.com](http://www.idc.com) to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit [www.idc.com/about/worldwideoffices](http://www.idc.com/about/worldwideoffices). Please contact IDC at [customerservice@idc.com](mailto:customerservice@idc.com) for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.