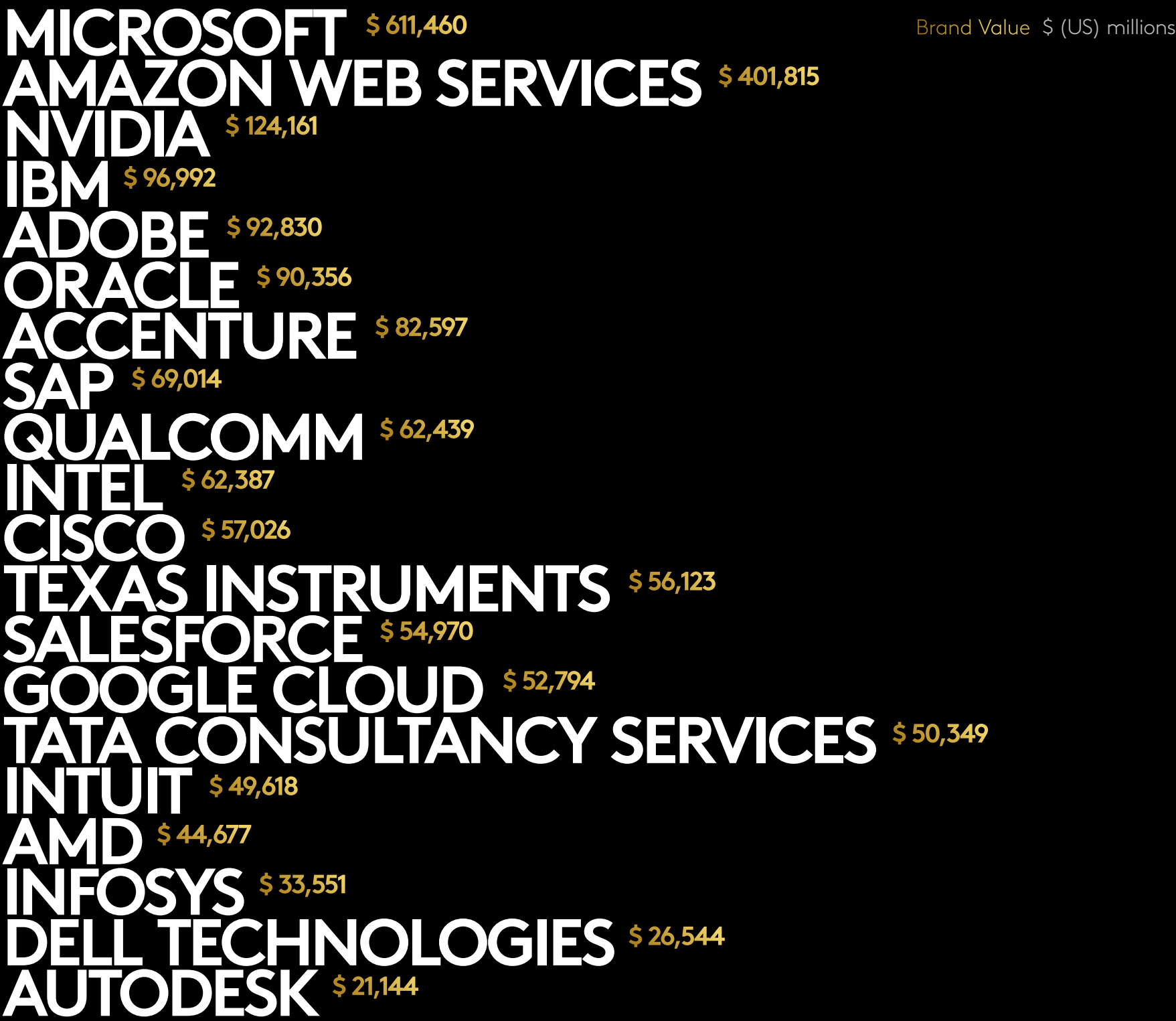


BUSINESS SOLUTIONS AND TECHNOLOGY PROVIDERS

KANTAR BRANDZ

BUSINESS SOLUTIONS AND TECHNOLOGY PROVIDERS TOP 20:



DEFINITION:
Business Solutions and Technology Providers include brands that provide (i) IT systems and software infrastructure, including software, middleware, cloud computing, components for manufacturing of smart/IoT devices or (ii) Software and applications for design, publishing and digital media, and business processes like accounting, finance, productivity, sales, teamworking or messaging, or (iii) IT consulting/outsourcing for business.

SCALING UP/ THE BOOMING BUSINESS OF 'BUSINESS TRANSFORMATION'

Category Brand Value	N/A
Year-on-Year Change	

Business Solutions and Technology Providers Top 20 Total Brand Value	\$ 2,140,844 m
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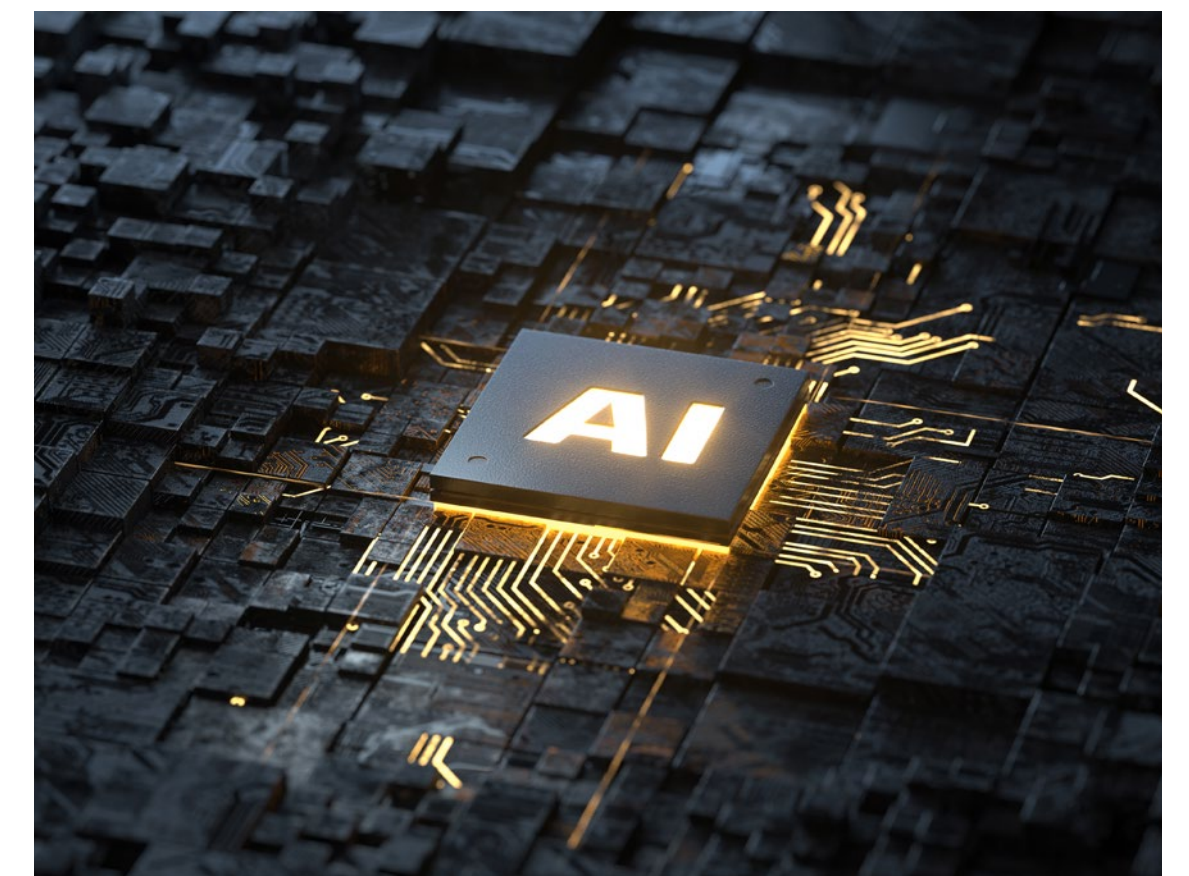
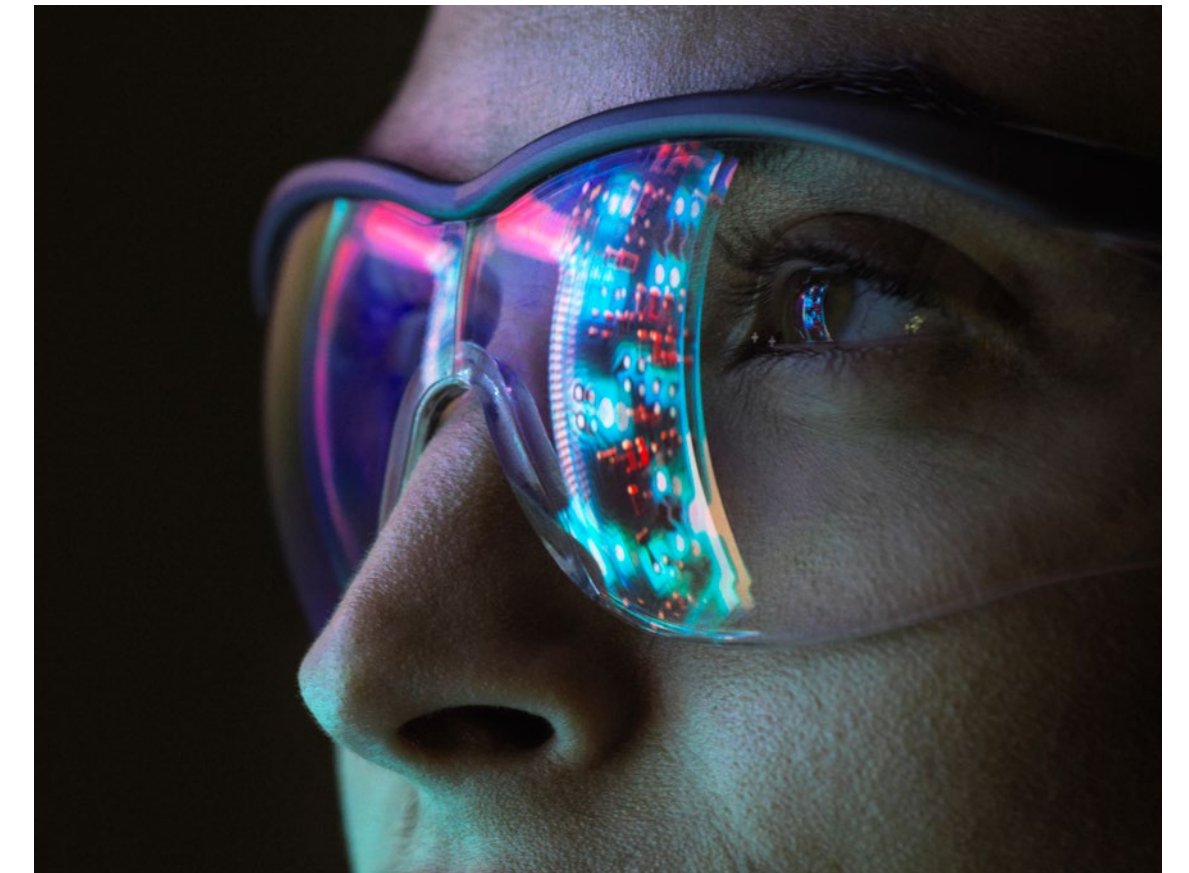
This year, the total value of the twenty brands that make up the world's top business solutions and technology providers exceeded \$2 trillion. Simply put, it's a good time to be in the business of business transformation.

The shifts toward digitalization and work-from-home, which began at the height of lockdown in 2020, have certainly continued through 2022. If anything, this digitalization push has acquired more scope and complexity as the world has begun to open up, and companies have started to emerge "survival mode" and plan more ambitiously for the coming decade.

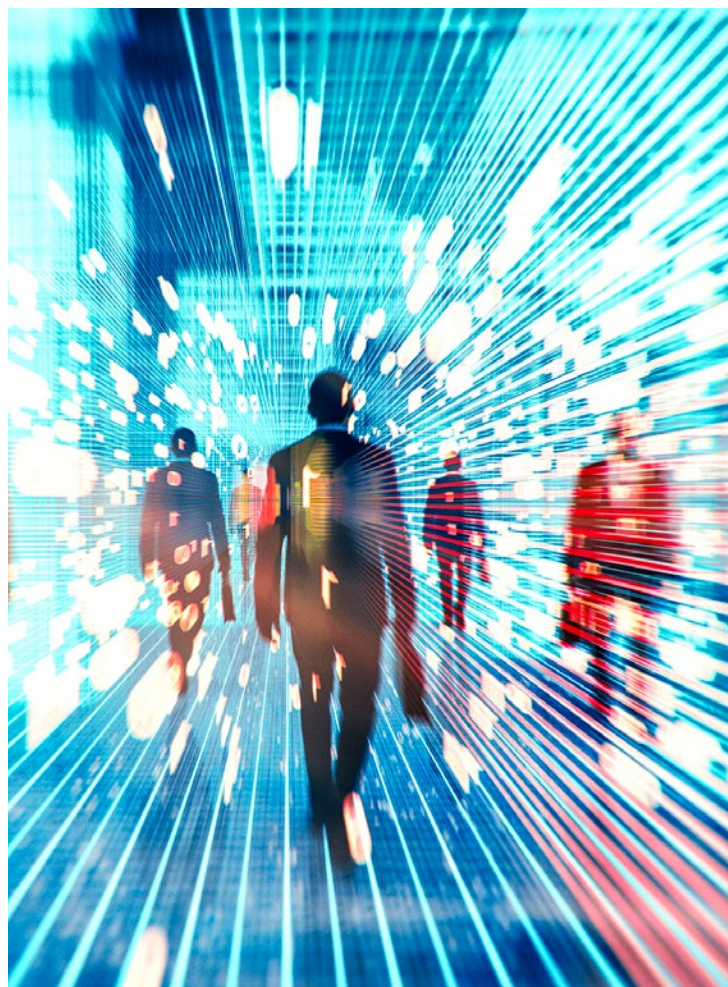
In other words, today's moment is about so much more than standing up new telecommuting software and e-commerce workflows - important as those tasks remain. Instead, the business world is working to overhaul its entire communications and enterprise infrastructure - to incorporate more cloud computing, more 5G, more AI and graphics processing power. More security protections and data compartmentalization, too, of course: to keep everything running safely in a perilous world, while remaining in compliance with a widening array of governmental requirements.

Meanwhile, in the digital marketing sphere, government regulations have hastened the shift to a post-cookie world. The race is now on to build the services that will supplant more traditional digital trackers.

The business solutions and technology providers in this year's BrandZ Top 20 are all at the heart of these transformation efforts. Once again, though, Microsoft has stood apart as the world's most valuable brand in this category. Azure, Microsoft's cloud computing product, has continued to drive strong growth for the company during this new era of more flexible work and virtual schooling. These shifts have also driven surging sales of personal computers - and as a result, Windows has reemerged as a strong secondary growth engine for the company.



BUSINESS SOLUTIONS AND TECHNOLOGY PROVIDERS



Going forward, the company's Teams product, which emerged as a pandemic-era symbol of remote work, also aims to be the center of Microsoft's push into metaverse, with a focus on workplace collaboration. Today, startups like the New York-based Touch are offering "Metaverse as a Service," which involves building out custom, branded Teams spaces for companies that looking to jumpstart their migration into virtual realms.

Interestingly, one of the biggest emerging players in metaverse design is NVIDIA. It's easy to see NVIDIA's rise in the BrandZ rankings as chiefly a function of the global economy's insatiable demand for chips. Certainly, most (but not all) chipmaking brands have increased in value over the past year. But NVIDIA's future plans are intriguingly multifaceted in their embrace of software as well as hardware.

At the 2022 Consumer Electronics Show in Las Vegas, NVIDIA fully unveiled its so-called Omniverse concept: a 3D design and collaboration platform, powered by VR-optimized NVIDIA chips, that promises to be fully compatible with the newest 3D rendering tools from brands like Autodesk, Epic Games, and Adobe. NVIDIA's keynote presentation then culminated in the announcement of a new, free-to-use, consumer-facing version of Omniverse - available for immediate download on NVIDIA'S site.

The prominence of names like Epic Games and Adobe in metaverse chatter speaks to the uniquely spatial nature of this kind of system design; it's the rare business transformation realm in which fluency with video game animation engines is just as important as traditional codewriting skills.

Of course, Mark Zuckerberg's Meta, too, hopes to have a strong say in the future of the corporate metaverse - and indeed, many of Meta's proof of concept videos have featured business applications, rather than the more casual forms of social networking that the company formerly known as Facebook built its fortune on. These are still early days, but clearly the business upside of the metaverse is enticing enough that it's forced two big corporates to venture into entirely new areas of business. (And one of those corporations, the enterprise formally known as Facebook, is taking this opportunity so seriously that it's even changed its name!)

Meanwhile, back in "meatspace"... many top business solutions and technology providers have made real strides on their corporate reputations over the past year. Nine out of the world's 20 most valuable Business Solutions brands improved their responsibility credentials in the last year: Adobe, Amazon Web Services, AMD, Autodesk, Google Cloud, Infosys, Intel, Intuit and Qualcomm. The majority of these eight have improved their social and environmental credentials, and half have also improved their relationships with employees and their supply chain.

The business case is clear for increased attention to sustainability and responsibility in this category. As businesses of all stripes turn to publishing more environmental and social impact reports as part of their annual reporting processes, the strength (or weakness) of Business Solutions brands on issues like carbon neutrality can now directly and publicly affect how well their clients meet certain responsibility benchmarks. So clients have more incentive than ever to partner with service providers that have their own houses in order around social responsibility. In short, when Business Solutions brands do better, their partner brands do better too - and look better, to boot.

BUSINESS SOLUTIONS AND TECHNOLOGY PROVIDERS

BRAND SPOTLIGHT



Valued separately for the first time in this year's BrandZ rankings, Amazon Web Services (AWS) continues to grow at an impressive rate. Founded in 2002, AWS is a pioneer in providing on-demand cloud computing platforms and APIs to individuals.

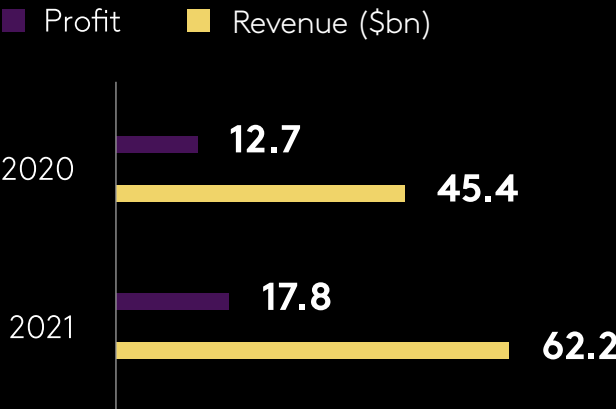
Just as importantly, AWS has retained its reputation for value and disruption through the unique flexibility of its "volume based" model. It offers a range of transparently priced cloud deals for huge corporations and small businesses alike.

2022 BRAND VALUE

\$401,815M

New

AWS continues to grow in revenue and profitability

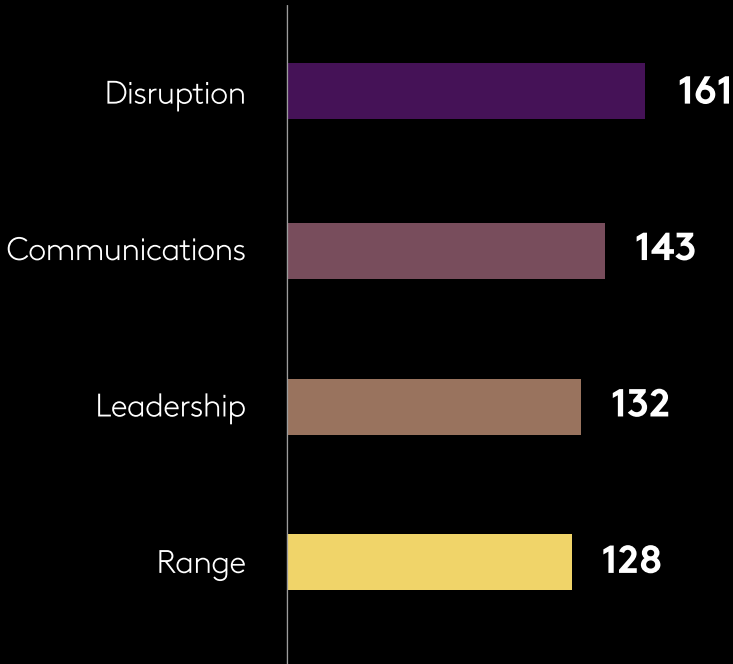


AWS proportion of Amazon total operating income



A disruptive business model and range of services

*all elements define AWS relative to brand size



BRAND SPOTLIGHT



This year, one of India's most famous tech success stories has made its debut on the BrandZ Global Top 100. Thanks to the disruptions of COVID-19, Infosys's core competency of enabling digital transformation has never been more in demand.

But as the brand's CEO, Salil Parekh, put it recently to an Indian newspaper, "Infosys has invested heavily over the last few years in anticipation of an increase in digital spending by clients, and would have registered a similar pace of growth even without the Covid-19 pandemic."

"Large companies have seen the benefits of digital in the last 18-24 months to better connect with customers or employees or within the supply chain... [But] we've been taking digital projects over the last four years, and not just the last six months."

2022 BRAND VALUE

\$33,551M

New

Transforming businesses and their workforce in an increasingly digital environment



Big Ideas

Strong performance on both Corporate reputation AND Purpose

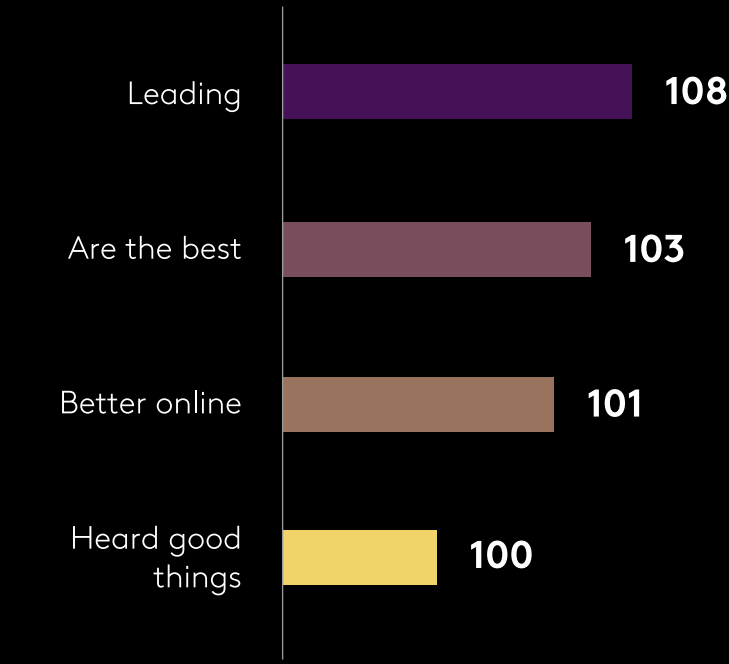


Navigate your next

'We help our clients transform their organizations to become a thriving Live Enterprise by augmenting their core digital capabilities, advancing their operating models and transforming their talent for the future.'

Investment in digital capabilities has built momentum and leadership credentials

*all elements define Infosys relative to brand size



BUSINESS SOLUTIONS AND TECHNOLOGY PROVIDERS

ACTION POINTS/ BRAND BUILDING

1

BUILD BRAND AWARENESS

Much of the marketing activity around Business Solutions brands is heavily tactical in nature – “performance marketing,” essentially, that’s geared towards lead generation and aimed at a small inner circle of decision makers. Much rarer is the marketing output that seeks to put forth a broader vision of a brand’s distinctive identity and values. These are kinds of attributes that indicate not merely what services the brand can offer today, but where it is heading over the next decade – whether it’s well-positioned, in other words, to be a longer-term strategic partner. Tactical outreach will always have its place in this category – but there are many missed opportunities to articulate a larger brand vision along the way.

2

COURT THE NEXT-GEN

Business Solutions brands have good handle on who their current customer is: relative to other categories, they are dealing with much smaller group of decision-makers. What they need to research, instead, is the next generation of corporate leaders. Career paths are changing, and companies are making concerted pushes toward incorporating greater diversity of experience in their ranks. The person who will be contracting with your brand in five or 10 years’ time may think very differently from the MBA graduate or IT veteran you are currently accustomed to dealing with; for starters, this future leader may have very different philosophies around client service, environmental sustainability, and corporate responsibility.

3

EMBRACE META-WHIMSY

For years, Adobe’s communications have stood apart for their embrace of the colorful, the creative, and the fanciful. Now, the burgeoning metaverse offers the chance for other, more staid Business Services brands to loosen up, and introduce elements of fun and absurdity into the mix.

In these early days, the metaverse is a little silly – and that’s OK to admit, and even to use to one’s benefit. (Let’s be honest... Hardly anyone has legs yet! That’s funny!) For the first time in a while, the rise of the metaverse has caused Silicon Valley to recapture some of the excitement that surrounded the early Internet.