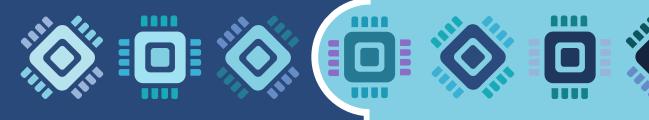# ☀iSG Provider Lens™

Digital Workplace Services

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

October 2017

About this Report

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This report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers, and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of August 31, 2017. ISG recognizes that many mergers and acquisitions have taken place since that time and that those changes are not reflected in this report.

The lead author for this report is Mrinal Rai. The report was edited by Jan Erik Aase. Researchers were Shachi Jain and Bhanwar Chauhan.

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EXECUTIVE SUMMARY

- **Digital workplace is increasingly defined by end users:** Enterprises are moving away from a "one size fits all" approach when it comes to defining workplace strategy. With the consumerization of IT, end user preferences increasingly play the decisive role in workplace transformation initiatives. End users expect a consumer-like experience from their enterprise IT. They use the same devices and, in some cases, the same applications for both personal and office work. End-user behavior toward these assets form the periphery of the digital workplace, which affects end-user behavior within the core enterprise workplace. In the modern digital workplace, the periphery defines the core.

- **Consulting for workplace digital transformation is gaining importance:** Enterprises increasingly are looking for advisory and consultative approaches to adopt new and emerging technologies in their workplace environment. It is easy to be taken by the promises modern technologies like augmented and virtual realities offer. Dedicated consulting will assess the current enterprise environment and advise on the viability of the technology implementation. Consulting also helps identify key end user behaviors, called personas, within an organization. These personas should not be predefined by the organization but should be assessed according to the user's role in the organization and his or her behavior, motivation and pain points.

- **Mobility goes beyond mobile:** Mobile strategy is no longer a separate element of the overall digital workplace strategy but is an integral part of it. Enterprises are acknowledging that offices other than sales and marketing can benefit from a defined mobility strategy. Field worker enablement is a key focus area in many enterprises. Mobility spans beyond just mobile phones. It also covers all handheld and remote assets, including tablets, Internet of Things (IoT) devices and industry-specific field equipment like point of sale (POS) stations in retail and patient record systems in healthcare. Defining an enterprise mobility strategy now goes beyond mobile device management, remote wipe and VIP support. It also covers larger aspects of enterprise mobility, such as mobile application management, business process mobilization, mobility effectiveness assessment and enterprise app stores.

- **Traditional workplace services are becoming line-of-business-centric:** Traditionally, basic workplace services or end-user computing has been considered a siloed and disjointed IT function. However, with mobility penetrating different business functions, workplace services is becoming industry focused and a line-of-business rather than only a CIO responsibility. Service providers are deemphasizing their pride in the scale of devices managed and instead focusing on how well the workplace integrates with the rest of the business.

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- **Service desk consolidation is on the rise:** ISG has observed an increase in contracts related to IT service desk consolidation. More and more, large enterprises are trying to consolidate and standardize their IT support and service desk functions. As service desk jobs that require lower-level skills are automated, demand for higher-skilled onsite support is increasing. Enterprises are looking to consolidate their many geographically dispersed service desks into fewer service desks that are more efficient and more easily managed. At the same time, service providers are augmenting their on-site support with solutions like tech cafés.

- **Automation and analytics play key roles in the shift-left approach:** Automation and analytics can reduce the volume of low-level incident tickets and may lead to their complete elimination. Many service providers have developed their own automation platform solutions that can be applied to workplace support functions. These solutions can help reduce and eventually eliminate level 0 and 1 incidents through auto-healing and self-help functionality. Millennial end users would like to solve their IT problems themselves rather than reaching out to service desks, and automation enables this end user behavior. Analytics that can predict system failure based on device or application usage are key to automatic self-healing systems. Automation enables the shift-left approach, helping reduce cost and improve service desk efficiency.

- **Increasing use of intelligent and conversational agents:** Automation powers virtual agents to assist end users. Many services providers deploy intelligent conversational agents or chatbots to interact with and assist end users. An intelligent chatbot can understand end users' problems with devices or applications and can self-heal or send an automated request to the help desk on a user's behalf. It interacts with end users like a human service desk agent and can help in all workplace activities, from on-boarding to off-boarding. Chatbot agents can include "sentiment analysis" to help them gauge end users' feelings by their text entry. Sometimes these automated agents are integrated with other business processes and applications so they can trigger application output or function based on a user's suggestion. It is like conversational commerce where the system directs end users to relevant applications based on the content of the conversations.

- **The digital workforce is growing:** With the increasing use of robotic process automation (RPA), some service providers are offering virtual workers that can handle complete end-to-end tasks. These digital workers can replace low-skilled jobs in many business and IT processes. Using RPA for workplace services support is a growing trend and is expected to pick up pace.

- **Windows 10 and Office 365 help companies move toward the digital workplace:** Windows 10 allows enterprises an approach to unified endpoint management. The new Windows operating system has advanced security mechanisms and is specifically suited for enterprises deploying an any-device-anytime strategy. Most Windows-using enterprises have either already migrated to Windows 10 or are in the process. Similarly, Microsoft's Office 365 suite provides cloud-based tools to improve productivity and collaboration irrespective of device and location. Microsoft's Skype for Business is another popular tool for unified collaboration in the digital workplace. The rapid improvement of features on Windows 10 and Office 365 is accelerating enterprise movement toward a digital workplace environment.

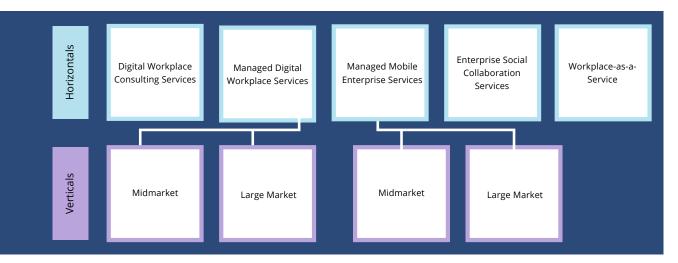**ISG** Provider Lens™

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- **BYOx:** The bring-your-own-device (BYOD) policy is now a commonplace phenomenon with almost every organization adopting it in one form or another. Enterprises allow employees to use their own devices, applications and platforms to get their work done. A similar concept of BYOx, in which x can mean an asset or service, also is gaining traction, and the concept of BYOA, in which A means asset, is now prevalent. Technologies like application refactoring or containerization provide ways to securely access applications over any platform or device.

- **Involvement of non-CIO office is enabling the digital workplace:** With increased support for BYOD and increased focus on improving the user experience, enterprises are reexamining how they can empower employees via technology to increase productivity. Many organizations believe they can achieve positive ROI from such enablement. As a result, we see different business offices other than the CIO getting involved in projects related to workplace transformation. For example, the HR department may get involved by developing policies to enhance the user experience, which has benefits for morale and for employee on-boarding and off-boarding. ISG has observed increased involvement of non-IT departments in transformation initiatives. Some organizations may call it workplace transformation while others call it digital strategy.

- **VDI is on the rise:** Sophisticated and highly regulated industries have always gravitated to the desktop virtualization approach for the tighter control it enables. With the growing popularity of digital workplace technologies and increasing use of mobility, virtual desktop infrastructure (VDI) has gained more adopters from different industries.

- **Productized offerings gain popularity:** Many service providers are moving toward a productized offering in digital workplace services. These offerings are generally cloud based and are offered in a "pay-as-you-go" or "pay-per-user" model. Users get cloud-based "workspaces," which can be a single interface for the end user to access all their workplace data and applications. Other managed services around workplace will form the back-end support system of such productized offerings. Many services providers are already offering a mobile version, most of which include a virtual assistant and service desk function at the minimum.

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■ **Cloud-based content management enables collaboration:** Cloud-based applications for the workplace environment are on the rise. Many organizations are encouraging rather than prohibiting shadow IT to improve productivity. Enterprise IT is seeing cloud-hosted applications as an opportunity instead of a challenge. Enterprise-controlled use of cloud-based collaboration tools like Dropbox and Box can provide an efficient way to support collaboration within a group or organization.

■ **Enterprise social collaboration expands:** Enterprise social collaboration has gone beyond the days of Yammer and SharePoint and expanded to include team collaboration elements like those offered by Slack and HipChat. The goal is to offer a comprehensive solution that contains all productivity elements, including productivity apps, social communities, enterprise applications and enterprise IT. "Kill the email" is the philosophy behind increasing team-based collaboration. Mobile applications and accessibility is the key driver in this space. Many service providers are offering consulting and implementation services for tools and technologies that enable enterprise social collaboration. They know it is the next step to reach the digital workplace stage. To reap all the benefits of a digital workplace, enterprises must invest in collaboration through social, wiki, knowledgebase, content management, gamification and microblogging channels.

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Introduction

Horizontals	Digital Workplace Consulting Services	Managed Digital Workplace Services	Managed Mobile Enterprise Services	Enterprise Social Collaboration Services	Workplace-as-a-Service
Verticals	Midmarket	Large Market	Midmarket	Large Market	

Definition

Digital workplace is the defining model for how end users access and collaborate on their work-related data and applications. It is the conceptualized view of a connected, always-on, collaborative workplace environment that is device- and platform-independent. Digital workplace services cover consulting and managed services around mobility, service desk, enterprise social collaboration and workspace-as-a-service.

Our research studies the investigation efforts and buying decisions of typical enterprise clients. When contemplating a significant strategy transformation, implementing agile practices or incorporating automation into its environment, an enterprise client will benefit from a study that examines an entire ecosystem for an individual service line. Whether that is ADM, workplace services, contact center services,

Definition (cont.)

data center or IoT, each of these focus areas is typically made up of consulting and advisory services, system integration, development and support. Therefore, the ISG studies will be comprised of an analysis of multiple quadrants that cover a variety of services. Vendors are classified into one of four quadrants, but there are multiple quadrant areas included in this report.

This study on digital workplace services includes seven quadrants that represent key services in this space. It includes one quadrant on consulting services and two quadrants on managed services, covering managed workplace services and managed mobile services. The managed services quadrants are further broken into mid- and large-market quadrants. There are also quadrants for enterprise collaboration services and VDI on cloud or cloud workspaces. These quadrants are further defined as follows.

- **Digital workplace consulting:** This quadrant assesses firms that provide consulting services for analyzing the workplace environment and defining a roadmap to transform it.

- **Managed workplace services:** This quadrant assesses providers that deliver managed services around IMAC, service desk and desktop management. It is further divided into two quadrants:
  - **Managed workplace services: Midmarket** assesses providers that deliver managed workplace services to clients with a user base of not more than 2,000.
  - **Managed workplace services: Large market** assesses providers that deliver managed workplace services to clients with a user base larger than 2,000.

Definition (cont.)

- **Managed mobile enterprise services**: This quadrant evaluates providers that deliver managed services related to mobile device management, enterprise mobility and related services. It is further divided into two quadrants:
  - **Managed mobile enterprise: Midmarket** assesses providers that deliver managed mobility services to midmarket clients with a user base of less than 2000.
  - **Managed mobile enterprise: Large market** assesses managed mobility services providers to clients with more than 2000 users.

- **Enterprise social collaboration:** This quadrant assesses providers that deliver consulting and implementation services for enterprise social collaboration.

- **Workspace-as-a-Service:** This quadrant assesses providers that deliver workplace service via VDI or a public/private/hybrid cloud platform.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix that categorizes services providers into the following four segments.

Leader

The "leaders" among the companies in the category have highly attractive products and services and very strong market and competitive positions; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders that are providing strategic impulses to the market. They also ensure their innovative strength and stability.

Product Challenger

While "product challengers" offer a product and service portfolio that provides above-average coverage of corporate requirements, they are not able to provide the same resources and strengths as the leaders. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market challengers" are very competitive, but they still have significant portfolio potential and clearly lag the "leaders." Market challengers often are established vendors that have been somewhat slow to address new trends, perhaps due to their size and company structure, and therefore still have some potential to optimize their portfolios and increase their attractiveness.

Contender

"Contenders" are lacking mature products and services or sufficient depth and breadth of their offering, while they also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Companies that receive the "Rising Star" award have a promising portfolio, including the required roadmap, and an adequate focus on key market trends and customer requirements. Rising Stars are mostly product challengers with high future potential. A "Rising Star" also has excellent management and understanding of the local market. This award is given only to vendors or service providers that have made substantial progress toward their goals within the last 12 months and are on target to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovation.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

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Digital Workplace Cross-Quadrant Provider Listing 1 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
Accenture	Leader	Not In	Not In	Not In	Leader	Leader	Not In
Atos	Product Challenger	Not In	Leader	Not In	Product Challenger	Leader	Product Challenger
AWS	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Bearing Point	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Capgemini	Product Challenger	Not In	Market Challenger	Not In	Rising Star	Rising Star	Not In
Cognizant	Rising Star	Leader	Leader	Leader	Product Challenger	Product Challenger	Market Challenger
CompuCom	Market Challenger	Leader	Leader	Leader	Market Challenger	Not In	Not In
CSS Corp	Not In	Contender	Contender	Not In	Not In	Not In	Not In
Deloitte	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Dimension Data	Contender	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Rising Star
DXC	Leader	Not In	Leader	Not In	Leader	Leader	Not In
Fujitsu	Product Challenger	Leader	Rising Star	Not In	Product Challenger	Not In	Not In

Digital Workplace Cross-Quadrant Provider Listing 2 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
Genpact	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Not In	Market Challenger
HCL	Leader	Not In	Leader	Not In	Leader	Leader	Rising Star
Hexaware	Product Challenger	Leader	Product Challenger	Rising Star	Product Challenger	Product Challenger	Contender
IBM	Leader	Not In	Leader	Rising Star	Leader	Leader	Leader
Infinite Computer Solutions	Contender	Contender	Contender	Contender	Contender	Not In	Not In
Infosys	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
ITC Infotech	Product Challenger	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In
KPIT	Contender	Market Challenger	Contender	Contender	Contender	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Mphasis	Not In	Market Challenger	Contender	Not In	Not In	Not In	Not In
NIIT	Not In	Contender	Contender	Contender	Contender	Not In	Not In

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Digital Workplace Cross-Quadrant Provider Listing 3 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
NTT DATA	Leader	Not In	Leader	Not In	Market Challenger	Market Challenger	Leader
Pomeroy	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Stefanini	Contender	Leader	Market Challenger	Market Challenger	Contender	Not In	Not In
TCS	Leader	Not In	Leader	Leader	Leader	Leader	Market Challenger
Tech Mahindra	Not In	Market Challenger	Contender	Not In	Not In	Not In	Contender
Unisys	Leader	Not In	Leader	Not In	Leader	Product Challenger	Market Challenger
UST Global	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
VMware	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Wipro	Leader	Not In	Leader	Leader	Leader	Market Challenger	Leader
Zensar	Product Challenger	Rising Star	Product Challenger	Product Challenger	Contender	Contender	Contender

Digital Workplace Quadrants

DIGITAL WORKPLACE CONSULTING SERVICES

Definition

Digital workplace consulting services are advisory services specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing a workplace strategy, defining the business case and return on investment (ROI) and providing a roadmap for digital transformation.

Digital workplace consulting has gained prominence in recent years. Previously, workplace transformation targeted cost reduction in end user computing as its main goal, and consulting was confined to fit end users to enterprise defined uniform personas. With the advent and popularity of mobility, enterprises started to buy consulting services to help define their mobile strategy specifically for field work, such as sales. In the BYOx era, workers can use multiple devices, applications and platforms irrespective of their work domain. The introduction of smart IoT assets, artificial intelligence, virtual reality devices and related apps has increased the scope of digital workplace consulting.

Digital Workplace Consulting

2017 U.S.Quadrant

● Rising Star

Leader

Product Challenger

High Portfolio Attractiveness Low

Low   Competitive Strength   High

Cognizant
Zensar
Atos
UST Global
Capgemini
Fujitsu
Hexaware
Infosys
ITC Infotech
Genpact
Dimension Data
Infinite Computer Solutions
Bearing Point
KPIT
Stefanini
Compucom

IBM
Accenture
TCS
DXC
HCL
Wipro
Unisys
NTT DATA
KPMG
Deloitte

Contender

Market Challenger

Source: ISG Research 2017

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DIGITAL WORKPLACE CONSULTING SERVICES

Definition (cont.)

More than ever, enterprises are in need of workplace consulting services. They need to assess the current workplace environment and select appropriate digital technologies that will help achieve business goals and enhance the end user experience. Change management also has become an integral part of this service. Enterprises are no longer buying separate consulting services for improving the end-user services function and for enabling mobility. A holistic digital workplace consulting service is expected to address both change management and the assessment of the current environment, as well as recommending the adoption of cutting-edge technologies for the workplace environment.

The consulting services space traditionally has been dominated by large independent consulting firms. However, many technology service providers have also developed consulting capabilities to wrap around their managed workplace service offerings.

"One size doesn't fit all" is the mantra for almost all service providers. Their consulting capabilities focus on creating end-user personas based on roles, preferences, devices, platforms and sometimes geographies. A consulting service also analyzes the ticket history and support services repository to assess the incidents and issues that can be automatically resolved. Mobility consulting services includes advisory on the complete device lifecycle, mobile business case, operating system and platform selection. Consulting services also include assessing the viability of implementing a virtual desktop environment.

Service providers offering value-added services in their consulting offerings, lead the market. These services include design thinking, innovative workshops with clients, HR interaction and the application of analytics and cognitive computing in persona identification. Value-added services for mobility strategy consulting include consulting on Apple product strategy, IoT devices and mobile strategy implementation assessments.

DIGITAL WORKPLACE CONSULTING SERVICES

Observations

- Accenture, with its well-known consultancy and technology partnership through Avanade, leads this market. It is followed closely by IBM, which has a mobility-specific consulting practice and Watson-enabled persona identification methodology.

- DXC, with its well-defined practice and Microsoft product-specific advisory framework, is also a leader in this space.

- HCL and TCS are key players through their Kaleidoscope methodology and Digital Reimagination Studio offerings, respectively.

- Wipro leverages its experience in different industries with turnkey projects in its consulting services.

- Unisys takes a big-data-and-analytics approach for persona definition and provides consulting services focused on Microsoft products.

- NTT DATA takes a pragmatic approach when it comes to choosing digital workplace consulting, which positions it as a leader.

- Cognizant is currently a Product Challenger and the Rising Star of this quadrant. It has achieved fast growth in North America, has a robust mobility strategy and is emerging as a leader in this space.

ACCENTURE

Overview

Accenture's digital workplace consulting services helps clients improve workforce productivity and meet their end-user experience goals. It provides consulting services around modern technology adoption, enterprise mobility, change management and improving the in-house workplace environment. Its consulting practice works across a broad ecosystem of digital workplace partners. It especially leverages the Avanade joint alliance with Microsoft to provide leading Microsoft digital workplace and mobility services.

Strengths

Reputed consulting capabilities: Accenture is one of the world's leading consulting firms. Its digital workplace consulting is based on global best practices in strategy, industry and process experience. Accenture is a benchmark in IT process consulting, and its digital workplace consulting is no exception. Accenture offers consulting around human capital management and change management in the workplace. It also includes social collaboration, mobility and secure-anytime access to improve technology adoption and productivity.

Avanade capabilities: Accenture and Microsoft's joint venture Avanade provides digital workplace consulting services on the Microsoft platform. It also focuses on employee productivity, user-experience design and field force enablement. Its Microsoft-centric approach is a key differentiator.

Vendor-agnostic model: Accenture Accenture provides standalone consulting services and can advise irrespective of the vendor environment. Accenture has relationships with key vendors like HP, Dell, Cisco, Amazon, Google, VMware and Microsoft.

Caution

Because application integration is key to mobility consulting, Accenture's competitors may have a potential competitive advantage in those situations where Accenture doesn't own integration.

Accenture is generally preferred by large enterprises for integrating mobility into lines of business functions. However, small and medium businesses offer a comparatively larger scope for mobility enablement, where Accenture has limited presence.

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Accenture has a vendor-agnostic standalone consulting practice for digital workplace services. ISG advisors regard Accenture consultants as highly experienced technologists.

DXC

Overview

DXC has a well-known advisory practice inherited from both its parent companies (CSC and HPES). The company has more than 200 digital workplace advisors worldwide. Its workplace advisory practice has grown by 20 percent and serves more than 200 clients. It has a strong partnership with Microsoft, VMware, Citrix and has developed a structured advisory framework for all the partners' products.

Strengths

Experience with diverse industries: DXC has experience assisting clients from diverse industries, including travel and transportation, manufacturing, distribution, healthcare, public sector and energy. It has success stories about how clients in these industries have enabled their workforces with mobility and BYOD.

Well-defined advisory framework: DXC has a structured and well-defined framework for its workplace services consulting practice. It starts with stakeholder alignment, then goes on to build a business case/ROI and can go deep into any workplace mobility and support solutions. DXC then assesses the client's current workplace environment and plans a detailed deployment.

Advisory services for Microsoft products and cloud migration: DXC has a dedicated practice for advising client migrations to Windows 10 and Office 365. It assesses the entire environment, including Active Directory, network, support and security. It also has a dedicated advisory practice for cloud workload migration.

Caution

DXC's consulting services are not vendor/supplier independent. Its advisory services are geared toward its own implementations and managed services.

Though it provides advisory services for the Google environment, DXC's consulting is too Microsoft-centric. It should develop its consulting and advisory capabilities for the collaboration and social enterprise space in general; Microsoft is not always the leading player.

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DXC has a known reputation in consultancy services. Its dedicated practice has helped clients from different industries envision and undertake the digital workplace transformation journey.

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HCL TECHNOLOGIES

Overview

HCL's digital workplace consulting services revenue in the U.S. accounts for 44 percent of its global workplace-consulting services. The company has achieved approximately a 32 percent increase in its revenue from workplace consulting in last three years. Big data and analytics drive its consulting approach.

Strengths

HCL Kaleidoscope™: HCL's user profile persona-led consulting approach is called Kaleidoscope™. It provides an objective assessment of its clients' position in the digital journey and advises on the steps needed to reach the target digital state. It prioritizes the CIO's initiatives and uses big data and analytics to create a virtualization strategy based on device and application utilization.

Co-innovation and industry customization: HCL has invested in co-innovation labs for digital initiatives to transform workplace services. It has hired more than 100 senior technology specialists to work with clients who partner for research at these labs. HCL also has developed industry-specific blueprints for configuration settings and tweaks them according to customer requirements.

Mobility consulting: HCL provides a vertical-oriented enterprise-wide mobility strategy that includes BYOD-policy and mobile-infrastructure provisioning consulting. It also provides advisory services for engineering and measuring the digital experience on mobile devices.

Caution

Although HCL has many consulting success stories of clients implementing shift-left strategies, it has fewer examples of mobile strategy consulting clients than its competitors.

HCL's consulting services are a precursor to its own managed services. It offers consulting services to prepare its clients for implementing its own solutions and managed workplace services.

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HCL's big data and analytics-driven consulting services help enterprises define their different user personas and specific requirements.

IBM

Overview

IBM's digital workplace consulting portfolio covers planning and design to developing optimal target architectures for implementation. It has wide coverage in the workplace domain, which spans mobility, service desk, collaboration and VDI. It uses Watson-enabled cognitive intelligence to develop end-user personas.

Strengths

Industry-oriented consulting methodology: IBM digital workplace and mobility consulting services leverage the company's industry solutions to capture and address industry pain points. It advises clients on industry-specific mobility adoption challenges. IBM's experience with different industries also helps it provide specific ROI strategies for workplace investments.

Cognitive persona development: IBM leverages its cognitive intelligence toolset to develop end-user personas. It deploys desktop agents and online surveys to collect information on application usage and work styles. It runs analysis on the collected data and augments it with information collected via focus group discussions and interviews.

MobileFirst infrastructure consulting: IBM's MobileFirst consulting practice is dedicated to implementing mobile infrastructure. It involves a unique decision-checkpoint analysis in which it analyzes different mobility solutions against the client's cultural, line-of-business and key decision criteria requirements. This methodology also analyzes the environment for gaps in workplace applications, network, support, management and security.

Caution

IBM offers vendor-independent consulting services, but clients are generally overwhelmed by the sophistication of associated IBM solutions and end up contracting for managed services, which doesn't make its workplace services a standalone offering.

IBM has limited footprint for midmarket segment clients who, as a whole, greatly need mobility and BYOD consulting services.

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IBM has years of experience in transforming workplace environments for clients in diverse industries. Its workplace consulting practice considers and is aligned to its clients' business process requirements and overall business strategies.

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NTT DATA

Overview

NTT DATA's digital workplace consulting services are oriented to its own managed services. It has approximately 100 digital workplace services consultants in North America.

Strengths

Pragmatic focus: NTT DATA's engagement with clients takes a pragmatic approach that assesses technological opportunity against business viability. Its consulting vision is focused on saving the client from "shiny object syndrome" in the digital era. The company's consulting services assess the practical viability of key digital workplace technologies like VDI, social collaboration and BYOD in the client's environment.

Innovation framework for key stakeholders: NTT DATA's digital workplace consulting defines IT, business and workforce as key stakeholders. Technology innovation implemented in its consulting approach is assessed against four key parameters: business empowerment, workforce experience, need for continuous improvement and risk compliance.

Consulting specific to digital workplace needs: NTT DATA offers a dedicated consulting practice around digital workplace requirements. It provides consulting to enable businesses to migrate to Windows 10 and for adopting a desktop-as-a-service and desktop virtualization approach.

Caution

NTT DATA does not market its digital workplace consulting, which is generally wrapped within its managed workplace services. It should communicate its differentiation in technology pragmatism.

NTT DATA can leverage capabilities of its sister companies in NTT Group to include elements of mobile strategy and enhance its consulting portfolio.

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NTT DATA is an experienced service provider in managing infrastructure transformation. Its integration with Dell Services has enhanced its consulting abilities.

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TCS

Overview

TCS digital workplace consulting services in North America experienced 27 percent growth in the last three years. It provides workplace advisory via its Digital Reimagination Studio and mobile strategy-based consulting.

Strengths

Strong scale and growth: TCS has increased its number of consultants by 70 percent in North America in last three years. It has 131 digital workplace consultants in North America. Half of its global digital workplace consulting revenue comes from North America.

Mobility-focused consulting: TCS digital workplace consulting focuses on enabling mobility in client's environment. It provides mobile strategy for prototyping, design, development and deployment.

Digital Reimagination Studio: TCS works with its client teams in its Digital Reimagination Studio to explore business transformation possibilities through digital technologies. The combined team first discovers end user needs then defines the opportunity for workplace transformation. Once the opportunity is defined, the team refines it with business models and delivers a business case in favor of the transformation initiative.

Caution

TCS digital workplace consulting centers mostly around mobility and collaboration. It should showcase more examples of how it defines personas using an analytics engine, codified algorithms and its Ignio™ platform.

TCS digital workplace consulting is an integral part of its managed service implementation, and the need for managed services often drives the consulting. TCS needs to position itself as a thought leader in this space for consulting, followed by managed services.

2017 ISG Provider Lens™ Leader

TCS's rapid growth in North America and its mobility practice act as key pillars of its consulting strategy. It is fast growing to become a leading player in this space.

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UNISYS

Overview

Unisys digital workplace consulting covers endpoint management, mobility, collaboration and cloud technologies. It has a strong focus on the Microsoft-oriented workplace environment. It differentiates its approach by analytics-based persona identification.

Strengths

Persona identification through analytics: Unisys identifies user personas in the client workplace environment through heavy use of big data and analytics. It analyzes usage patterns for different workplace elements like devices, applications, app deployment, geographic presence and support systems. It uses big-data pattern recognition to identify different personas with similar usage categories in the workplace. Unisys also organizes client workshops and applies its industry experience to refine the personas.

Persona categorization: Unisys' UMethod consulting approach promises that personas will depend less on demographics and more on digital dexterity. It categorizes a persona by usage instead of roles. Unisys provides recommendations for best approaches like VDI, cloud-based productivity, collaboration and mobility, wherever applicable. Unisys persona categorization also includes end user's motivation needs, goals and pain points.

Microsoft focus: Unisys has a dedicated, consulting-like assessment and migration practice for Windows 10 and Office 365.

Caution

Unisys experienced a decline in its revenue growth from digital workplace services in the last three years. Its competitors have a higher growth rate in this space.

Unisys' consulting approach toward Microsoft products is both a strength and weakness. Its preference for the Microsoft stack can be a hindrance for non-Microsoft workplace productivity environments.

2017 ISG Provider Lens™ Leader

Unisys's experience in diverse industries and its unique capabilities for persona identification through data analytics are key differentiators.

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WIPRO

Overview

Wipro's digital workplace consulting clients in North America grew 75 percent in 2016 over the previous year. Its consulting service is mainly focused on mobile enablement and is highly influenced by its recent DesignIT acquisition.

Strengths

Focus on digital experience creation: Wipro's consulting services focus on creating a digital experience for users through its digital consulting unit. Wipro's recent acquisition of DesignIT adds consulting services to enable innovation through disruptive technologies. Its digital workplace services portfolio provides solutions for virtualization, mobility and user-experience management.

Experience from turnkey projects: Wipro has experience executing turnkey and greenfield projects for clients from different industries. Many of these projects started with creating the required IT infrastructure from scratch. Consultants that worked on these projects have deep experience in specific industries, which is reflected in Wipro's engagements.

Mobility-specific consulting: Wipro has a dedicated mobility consulting practice and mobility center of excellence, which evaluates and incubates new mobile technologies. The company provides advisory services to address mobile user experience, artificial intelligence/virtual reality and business processes. Wipro has made multiple acquisitions to fill its talent gap. It has also created a $100 million fund to invest in startups at the cutting edge of technology.

Caution

Wipro is known more as an implementer than an advisory service provider. It should position itself as a thought leader in this space.

There is limited number of examples of Wipro using its HOLMES™ platform for data analysis for persona creation. The company should showcase more examples of its capability to define personas through its automation platform.

2017 ISG Provider Lens™ Leader

Wipro's ability to execute turnkey projects for large-scale clients sets it apart from its competitors. Its experience and scale in managing workplace services also strengthens its consulting practice.

RISING STAR: COGNIZANT

Overview

Cognizant gets the majority of its digital workplace consulting services revenue from the U.S. It has a dedicated practice for mobile strategy consulting and enterprise mobility. Cognizant has adopted an inorganic growth strategy to adopt the design-thinking approach in its consulting capabilities.

Strengths

Digital workplace consulting differentiation: Cognizant's workplace consulting breaks device experiences into three categories. Its "three-screen" model differentiates the user's experience on a tablet from the experience on a mobile phone or desktop devices. Its consulting service leverages the company's 3-P model, which not only improves productivity and personalization but also changes the perception of business IT as an enabler and facilitator rather than as a cost center.

Dedicated mobility consulting: Cognizant has a dedicated practice for enterprise mobile strategy consulting. It provides consulting for assessment, app development tools, service integration, analytics, security, testing, operating systems and mobile operations. It has a nine-pillar framework for defining mobility strategy that also addresses strategy related to deploying DevOps tools for mobile devices.

Key acquisitions: Cognizant has acquired many firms to increase its capabilities in design thinking. These companies specialize in design and experience thinking, industry and marketing solutions. The list includes American firms Idea Couture, Cadient Group and Mirabeau.

Caution

Cognizant's consulting practice is heavy on mobility and focuses more on developing customer-facing mobile apps. The company should showcase more examples of persona development for mobile use cases within an enterprise.

Cognizant has a very niche consulting practice. Ninety percent of its engagements have a design-and-run component and only ten percent are standalone consulting engagements.

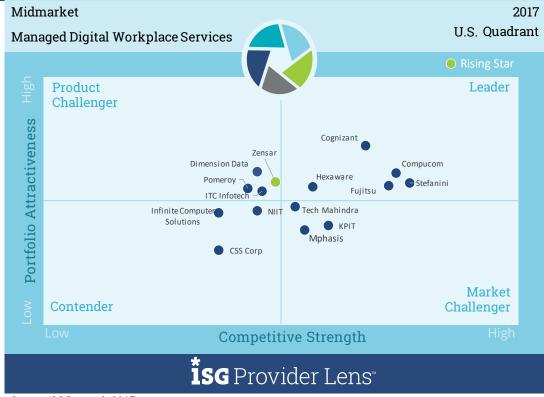### 2017 ISG Provider Lens™ Rising Star

Cognizant has experienced rapid growth in North America in digital workplace services. Its mobility-specific consulting services cover DevOps and emerging technologies, which can be a differentiator.

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Definition

Managed digital workplace services are comprised of all managed services around the digital workplace. It includes operational services such as service desk, IMAC, break-fix, self-help, hardware and software maintenance, user administration, troubleshooting, change management and transition management.

Enterprises are looking for ways to adopt "shift-left" self-service strategies to manage incident tickets through the service desk. Service providers are providing automation-enabled workplace support services to reduce or eliminate the need for human intervention. The more tasks a provider can automate with managed services, the higher its degree of competitive differentiation. The inclusion of robotic process automation, artificial intelligence and cognitive capabilities adds value in this category.

Source: ISG Research 2017

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MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Definition (cont.)

The midmarket segment is price sensitive but open for innovative and customized offerings. These clients would be interested in embracing completely digital and automated solutions for workplace services. Service providers that combine collaborative workplace services with cognitive- and AI-enabled automation will lead this market. Clients in this segment look for a single vendor to provide workplace services strategy, design and deployment services.

Observations

- Among the large players, Cognizant emerged as a leader in this space. The company's Constantly Ready Infrastructure service is a key driver for this positioning.

- CompuCom and Stefanini are strong in the U.S. and have extensive services in managing workplace and service desk operations. They also offer extensive onsite and field support.

- Hexaware is a leader in this segment because of its automation-focused workplace services and center of excellence that is oriented to emerging technology.

- Fujitsu is providing automation-focused workplace services in this segment. Its RPA digital workforce offering is a differentiator.

- Zensar offers digital workplace services that use automation and analytics to measure end-user satisfaction and reduce ticket volumes. Its growth rate for winning contracts in North America is quite impressive, which is why it has been identified as the Rising Star in this segment.

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COGNIZANT

Overview

Cognizant's revenue for managed workplace services in North America makes up a majority of its global workplace services revenue. It provides automation and AI-enabled offerings to create collaborative workplaces, in addition to traditional user and device management services. Cognizant's automated self-service features include password reset, self-help kiosks and knowledge search through its SymphonyWorks platform.

Strengths

Rapid revenue growth: Cognizant has achieved steady growth of more than 25 percent in its digital workplace revenues and a 20 percent increase in employee headcount in the past three years. The company is winning new contracts to continue its growth trajectory. It is investing in modern technologies like Docker plus cloud-based solutions from players like Cloud Foundry, VMware and ServiceNow.

Automation- and analytics-led approach to digital transformation: Cognizant uses automation, AI and self-healing tools to enhance employee satisfaction. It is also aligning social, mobile, analytics and cloud (SMAC) technologies with integrated applications, infrastructure, business processes and solutions to deliver next-generation service platforms.

Strong brand recall value and customer focus: Cognizant is a well-known player in the infrastructure services market. It is well regarded by clients due to the adaptability and flexibility of it business-oriented solutions.

Caution

Cognizant has strong traditional end-user computing and service desk services capabilities. However, it also should position itself as a strong player providing modern, adaptive and highly collaborative workplace services. The company needs to focus on the broad portfolio of managed digital workplace services beyond IT support and service-desk operations.

2017 ISG Provider Lens™ Leader

Cognizant is one of the few service providers whose transformative infrastructure services include DevOps specialization. Cognizant's new Constantly Ready Infrastructure framework includes elements of agile application delivery and DevOps capabilities within infrastructure services.

COMPUCOM

Overview

CompuCom, a strong U.S. player, is one of the pioneers in delivering persona-based services and self-service kiosks for onsite support. It also provides intelligent vending machines for on-site device procurement. Compu-Com offers analytics-driven service desk capabilities through design thinking consulting and the ASCEND digital platform to implement end-to-end digital transformation strategy.

Strengths

Strong capabilities in U.S. managed workplace services: CompuCom's nearshore and onsite presence across the U.S. is a key factor contributing to its growth; 79 percent of its managed workplace services revenue comes from North America. It also provides very strong capabilities for transitioning the service desk function, desktop engineering and IMAC services.

Increasing focus on automation and artificial intelligence: CompuCom recently partnered with Arago, a leader in intelligent automation solutions. CompuCom aims to integrate robotic process automation and cognitive components into its entire service stack. It provides enterprise level automation to mid-size enterprises.

Customer satisfaction: CompuCom claims to have an end-user satisfaction rating of 4.8 out of 5, which is among the highest in the industry.

Caution

CompuCom is a strong player in service desk automation, IT support and desk-side services. It needs to expand the scope of its services beyond the traditional CIO office and elements of enterprise wide collaboration and design thinking.

2017 ISG Provider Lens™ Leader

CompuCom has case study examples with retail midmarket clients for whom it improved service desk and IT support services. CompuCom has a strong delivery presence in the United States and has global coverage for its clients. The company's IT kiosk services and Performance Bar/Solution Cafés are major differentiators in the market.

FUJITSU

Overview

Fujitsu's managed workplace services consists of three key components: Social Command Center, Intelligent Engineering and Workplace Anywhere. It also has developed its RPA capabilities to provide digital workforce services.

Strengths

Social Command Center: Fujitsu's Social Command Center is oriented toward workplace support services. It provides "shift-left" support with data analytics, automation and proactive maintenance. It also provides self-help experience through a virtual agent powered by AI, automation and contextual support.

Workplace Anywhere: Fujitsu's "Workplace Anywhere" approach is aimed at delivering managed workplace services in the cloud, on-premises and in virtualized environments. It has embedded analytics and automation for service desk services.

Automation and RPA approach: Fujitsu's Intelligent Engineering services bring together automation-enabled support services with data analytics and machine learning. Fujitsu's RPA practice provides a digital workforce to autonomously complete repetitive, rules-based processes. Its XpressWay consulting approach helps clients implement RPA-based digital workforce services.

Caution

Fujitsu has limited presence in the North American region and is providing basic workplace managed services to its clients there. It needs to showcase more examples of how it facilitates workplace transformation with RPA and automation in the region.

2017 ISG Provider Lens™ Leader

Fujitsu is a major player in Asia Pacific and Europe and is expanding its presence in North America. It has success stories in the midmarket segment and is a good fit for this market segment.

HEXAWARE TECHNOLOGIES

Overview

Hexaware Technologies has increased its managed digital workplace services revenue in North America by 65 percent in the last three years. Seventy percent of the company's global digital managed workplace services revenue comes from North America. The company manages 385,000 end users in the region.

Strengths

Automation-focused workplace support services: Hexaware offers the RAISE IT automation platform, which includes intelligent monitoring, reporting and IT service management. This platform automates workplace support services to drive end-user productivity. The company reports a 90 percent first contact resolution rate and 85 percent end-user satisfaction rating.

Self-service for end users: Hexaware offers self-service capabilities through its DOCK IT platform. DOCK IT manages the entire hire-to-retire lifecycle for end users. It also integrates with Amazon's Alexa ChatOps tool, which provides voice-enabled assistance in the service desk.

Nearshore and onsite experience: In North America, Hexaware provides workplace support services both on-site and from nearshore. It also offers an onsite tech support service called Magic Bar.

Focus on emerging technologies: Hexaware established a center of excellence for digital workplace services with a goal of creating cross-skilled teams with niche skillsets. It follows the philosophy of automation first, self-service next and smart people last enabled by artificial intelligence, machine learning and complex-event processing. Hexaware already is developing solutions and helping clients with solutions on newer technologies like hyper converged infrastructure.

Caution

Hexaware should pursue the market aggressively as its revenue from managed workplace services is far less than the service providers it considers to be its competition.

Hexaware also needs to increase its presence in U.S. and North America as enterprises there are increasingly looking at onsite service delivery.

2017 ISG Provider Lens™ Leader

With its aim to "shrink IT and grow digital" and its automation-focused digital workplace services, Hexaware is well positioned to serve midmarket clients.

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STEFANINI

Overview

Stefanini delivers transformative digital workplace services in collaboration with its clients. Its client base consists of large midmarket companies; it manages around 1.2 million end users in North America.

Strengths

Focus on service desk operations: Stefanini's service desk services optimize operations through automation and artificial intelligence. It has invested heavily in its Automation Platform 2020+ to develop Sophie, which is a SaaS-based intelligent automation platform. Sophie is based on cognitive computing, and provides self-adapting, interactive and contextual automation. This helps to provide self-learning, human-like interaction plus self-healing automation capabilities. Stefanini also offers walk-up service kiosks with a custom storefront look to improve the user experience for service desk interactions. Stefanini reports its first-level resolution rate is 83.5 percent and a 92 percent end-user satisfaction rating among its clients.

Extensive experience in serving midmarket: Stefanini has extensive service delivery experience in the midmarket, with the majority of its contracts coming from that segment. More than 50 percent of its clients are from North America and it has a contract renewal rate of 82 percent.

Caution

Stefanini offers automation-oriented service desk and desktop management services. It still needs to invest in developing digital workplace services to expand its capabilities in digital experience and collaboration.

Stefanini has limited on-site presence for service desk services in the U.S. As automation leads to the elimination of low-level service desk jobs, clients require service desk technicians with higher skills that are located onsite rather than offshore.

2017 ISG Provider Lens™ Leader

With its well-known capabilities and experience in managing workplace and service desk services, Stefanini is a preferred choice in the midmarket segment.

RISING STAR: ZENSAR

Overview

Zensar's "outside-in" approach for managed workplace services focuses on automation and analytics services. Zensar believes the business effectiveness of a digital workplace can be measured by three Ps: preventive, proactive and predictive. Its client base and managed end users grew by 20 percent in 2016.

Strengths

Analytics-led services: Zensar offers an "outside-in" approach for managing digital workplace managed services providing CXOs visibility into real-time end-user analytics. It provides insights around app usage, end user behavior and location analysis. It manages to achieve a 30 percent increase in user productivity and 99 percent end user experience visibility, according to the company.

Automation-led "shift left" approach: Instead of relying only on traditional end-user support metrics, Zensar's digital workplace practice emphasizes business-driven KPIs. Its service desk offers more than an 85 percent first-call resolution rate and more than 70 percent first-level resolution. Zensar reports its self-care and self-healing services eliminate 45 percent of incidents and reduce resolution time by 60 percent.

Industry-specific solutions: Zensar has developed workplace use cases for different industries like healthcare, manufacturing, retail and financial services.

Caution

Zensar recently acquired Keystone Logic to increase its presence in the U.S., specifically in the retail industry. However, to compete against established leading service providers, Zensar should further enhance its geographic presence in the region with more nearshore and onsite options.

Zensar's digital workplace services rely heavily on automation. The company needs to show more examples of its automation capabilities with cognitive and artificial intelligence elements to provide complete intelligent support.

2017 ISG Provider Lens™ Rising Star

Zensar's automation and analytics services provide an efficient way to eliminate level -2, -1 and 0 incidents and improve efficiency in handling higher complexity incidents. With its increasing presence in the region, it will be a good fit for midmarket enterprise enterprises with limited infrastructure that are looking for automated services.

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MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Definition

Managed digital workplace services consist of all managed services around the digital workplace, including all relevant operational services such as service desk, hardware and software maintenance, user administration, troubleshooting, change management, transition management and others.

Enterprises are looking for ways to adopt "shift left" strategies in managing incident tickets through the service desk. Service providers are offering automation-enabled workplace support services to eliminate the need for human intervention for many tasks. The more tasks a service provider can automate with managed services, the greater it can differentiate itself from its competitors. Service provider inclusion of robotic process automation, artificial intelligence and cognitive capabilities each represent a value add in this category.

Large enterprises often have complex workplace environments. Many are looking to reduce IT support costs and enhance the end-user experience via automation. In addition, because of the

Large Market
Managed Digital Workplace Services

2017
U.S. Quadrant

○ Rising Star

Product Challenger

Leader

High

Low Portfolio Attractiveness

Fujitsu
Dimension Data
Zensar
Infosys
UST Global
Pomeroy
ITC Infotech
Hexaware
NIIT
Infinite Computer Solutions
Tech Mahindra
Mphasis
KPIT
CSS Corp

DXC
Cognizant
IBM
Atos
Wipro
Unisys
HCL
TCS
NTT DATA
Compucom
Stefanini
Capgemini

Contender

Market Challenger

Low   Competitive Strength   High

ISG Provider Lens™

Source: ISG Research 2017

MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Definition (cont.)

complexity of their end-user personas and workplace environment, scale-based parameters like device management and onsite presence also remain important criteria. Large enterprises form the next-generation sourcing clients that need to align their workplace services with their business objectives to create cost advantage and improve productivity.

Observations

- DXC, IBM and Wipro emerge as leaders in this segment. They each have huge operational scale and strong presence in the North America. IBM and Wipro offer highly automated solutions for workplace support services. DXC is focused on digital workplace and has a strong partner base in this domain.

- Cognizant is increasing its market presence with new wins and its future-oriented Constantly Ready Infrastructure services model.

- TCS and HCL have been strong market players in North America. TCS, with its Ignio platform, and HCL, with its DRYiCETM platform, provide agile and automated solutions for workplace management.

- NTT DATA also is a leader in this space because of its scale of operations and strong regional presence from its Dell Services acquisition.

- Unisys is a strong player in managed workplace services. Its onsite support and Tech Café are already popular services in the region.

- CompuCom has a strong presence in the U.S. and North America. Traditionally, it has been a key player in end-user computing. With recent acquisitions, it has developed automation capabilities specific to service desk services.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Observations (cont.)

- Atos is a strong global player in digital workplace services. It has recently acquired and partnered with companies in the artificial intelligence and collaboration space. It has augmented and enhanced its overall digital workplace offering.

- Fujitsu has enhanced its workplace services by including RPA and other digital workforce elements. Although the company has a strong presence in the midmarket, it is positioned as the Rising Star for the large market segment.

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ATOS

Overview

Atos considers digital workplace services one of the four focus areas for its next three-year growth strategy and aims to grow its revenues from this practice by almost 20 percent. Atos offers services for digital workplace advisory, consulting, design thinking and business enablement and has vertical industry solutions.

Strengths

Human-centric approach to workplace transformation: Atos' digital workplace strategy takes a human-centric approach that does not anonymize end users. Atos designs and offers its services on the "Everyone is a knowledge worker" premise. It customizes its services based on the organization and employee needs.

Ability to support business-oriented workplace transformation: Atos covers the complete technology stack for end-to-end workplace services and provides industry-specific solutions for the banking, financial services and insurance (BFSI), manufacturing, entertainment, hospitality and healthcare industries. It delivers a connected experience through its Circuit collaboration product and OpenScape unified voice and video product. Those services are complemented by its cloud portfolio to offer hybrid or public cloud-based collaboration with Office 365, Unify UCaaS and Circuit.

Focus on enhanced customer experience: Atos implements persona analysis and management concepts to enhance customer experience and satisfaction. It has recently partnered with Cognicor to deliver an AI-enabled virtual assistant to automate its service desk services.

Caution

- While Atos is slowly gaining market share in North America, it is lacking in how it markets and promotes its offerings and capabilities to U.S. clients. Atos still leverages its European contacts to gain traction in the North American market.

- To stay competitive, Atos needs to invest in cognitive capabilities and develop more intelligent, predictive and automated solutions. It can also act as a catalyst to target some key industries that will be investing in digital workplace services.

2017 ISG Provider Lens™ Leader

With its diverse portfolio of services, recent acquisitions and partnerships around collaboration and AI, Atos positions itself as a leading global player for digital workplace services.

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COGNIZANT

Overview

Cognizant's revenue for managed workplace services in the North America region represents a majority of its global revenue from these services. It is emphasizing its automation and AI-based services to provide collaborative workplaces, in addition to traditional user and device management. The company provides automation-based self-service features like password reset, self-help kiosks and knowledge search through its SymphonyWorks platform.

Strengths

Rapid revenue growth: Cognizant has witnessed steady growth of more than 25 percent and in its digital workplace revenues and 20 percent in employee count in the past three years. It is winning new contracts in the region to continue its growth trajectory and investing in modern technologies like Docker and cloud-based solutions from players like Cloud Foundry, VMware and ServiceNow.

Automation and analytics-led approach to digital transformation: Cognizant leverages tools for automation, AI and self-healing to enhance employee satisfaction. It also is aligning social, mobile, analytics and cloud technologies (SMAC) with integrated application, infrastructure, business processes and solutions to deliver next-generation service platforms.

Strong brand recall value and customer-focus: Cognizant is a well-known player in the infrastructure services market. It is well regarded by clients due to the adaptability and flexibility of its business-oriented solutions.

Caution

Cognizant is strong in traditional end-user computing and service desk services capabilities. However, the company also should position itself as a strong provider of modern, adaptive and highly collaborative workplace services. The company needs to focus on the broad portfolio of managed digital workplace services beyond IT support and service desk operations.

2017 ISG Provider Lens™ Leader

Cognizant is one of the few service providers whose transformative infrastructure services also include DevOps specialization. Cognizant's new Constantly Ready Infrastructure Framework includes elements of agile application delivery and DevOps capabilities within infrastructure services.

COMPUCOM

Overview

CompuCom, a strong U.S. player, is one of the pioneers delivering persona-based services and self-service kiosks (which it calls Solution Cafés) for onsite support. It also provides intelligent vending machines for on-site device support. CompuCom offers analytics-driven service desk capabilities through Smart-Desk and its Advanced Intelligent Automation (AIA) framework to implement end-to-end digital transformation strategy.

Strengths

Strong U.S. managed workplace services capabilities: CompuCom's nearshore and onsite presence across the U.S. is a key factor contributing to its growth; 79 percent of its managed workplace services revenue comes from North America. CompuCom has very strong capabilities for transitioning the service desk function, desktop engineering and IMAC services.

Increasing focus on automation and artificial intelligence: CompuCom recently partnered with Arago, a leader in intelligent automation solutions. CompuCom plans to integrate robotic process automation and cognitive components into its entire service stack.

Customer satisfaction: CompuCom claims to have an end-user satisfaction rating of 4.8 out of 5, which is among the highest in the industry.

Caution

CompuCom is a strong player in service desk automation, IT support and desk-side services. It needs to expand the scope of its services beyond the traditional CIO office and elements of enterprise wide collaboration and design thinking.

2017 ISG Provider Lens™ Leader

CompuCom has case study examples in the energy, financial and healthcare sectors in which it helped clients improve their service desk and IT support services. CompuCom has a strong delivery presence in the U.S. and global coverage for its clients. The company's IT Kiosk services and Performance Bar/Solution Café are major differentiators for its onsite support.

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DXC TECHNOLOGY

Overview

DXC Technology's workplace services have three principal focus areas: automation in workplace operations, analytics for end-user experience and artificial intelligence for workplace support services. The company has a strong partner ecosystem and has a well-known track record in managed workplace services that was inherited from both its parent companies, Computer Sciences (CSC) and HP.

Strengths

Strong geographic coverage: The newly formed DXC is bigger and has more delivery centers in the U.S. than its two parent companies thanks to its ongoing acquisitions and strategic investments. Today, DXC has presence in 150 countries with almost 70 service desk locations and more than 180 client walk-in centers.

Transformation-centric services with strong cost advantage: DXC offers self-service portals and self-healing technologies, consumer-like walk-in centers, video support kiosks, automated vending solutions, system and incident analytics, cloud-based service desk tools and mobile support applications to make its services more people-centric than technology-centric. Its transformation-oriented services have helped clients achieve cost savings of up to 40 percent and raise end-user satisfaction to 92 percent or higher.

Leverage cognitive intelligence for support services: DXC leverages RPA, analytics and cognitive intelligence to offer services like predictive device management, self-healing toolboxes, smart portals and AI chatbots to identify patterns and improve productivity. These initiatives are part of DXC's effort to reduce its support site count.

Caution

DXC needs to build its client base from legacy CSC and HPE clients that already have separate existing relationships with the parent companies by cautiously cross-selling to existing clients.

DXC has a strong focus on cloud-based, location-independent workplace services; its large existing client base may prevent DXC from pursuing a one-sided VDI approach.

2017 ISG Provider Lens™ Leader

Its massive scale of operations and strategicpartnerships in the U.S. make DXC a leader in managed services for both the traditional and automation-driven collaborative workplace.

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HCL TECHNOLOGIES

Overview

HCL Technologies' U.S. revenue from managed digital workplace services is 48 percent of its global total. Its digital workplace practice is part of the company's Mode-1 services offering, which focuses on creating automation-led agility and flexibility in its existing workplace services portfolio. HCL also has developed vertical workplace solutions for the retail industry.

Strengths

Extensive service offering: HCL's digital workplace services practice covers the entire spectrum of traditional end-user computing and service desk functionalities. It reports a high first-level resolution rate of approximately 80 percent and end-user satisfaction of 85 percent.

Proprietary frameworks and IPs: HCL's DRYiCETM framework applies automation and cognitive learning to workplace operations. It includes several productized offerings, such as LUCY for virtual assistance, Optibot for self-help and Workblaze for predictive analytics.

High customer retention rate: HCL is well regarded by clients due to its flexibility and adaptability in accommodating customer requirements. HCL has a high customer retention rate and enjoys more than a 90 percent contract renewal rate.

Caution

HCL relies on automation- and analytics-led delivery of workplace services and places its practice in its Mode-1 strategy. Mode-1 deals with transforming the traditional IT managed services business and making its delivery more lean and agile. Its competitors, however, are enhancing their service offerings by including digital experience, IoT, cloud and analytics elements. Though HCL too offers these services but it positions them within its Mode-2 strategy. The company needs to position its enhanced digital workplace service offering in both Mode-1 and -2 for mature digital clients.

2017 ISG Provider Lens™ Leader

HCL's unique "relationship beyond contract" approach is well appreciated by clients and ISG advisors. Its DRyiCETM platform is built on the IT4IT framework to provide agile services that are based on the IT value chain for the workplace domain.

IBM

Overview

IBM offers an integrated suite of workplace services that harnesses Watson's cognitive capabilities. It delivers personalized user support services with focus on managed mobility and collaboration services.

Strengths

Vast geographic coverage: IBM manages and delivers workplace services in 170 countries and has 41 delivery centers worldwide. It supports 6.9 million devices and 10 million seats globally.

Wide service portfolio: IBM has a wide digital workplace portfolio ranging from traditional end-user computing services and unified endpoint management to workplace support services (WSS). Its WSS portfolio delivers personalized user support services and offers automated password reset, remote take-over and live click-through chat support to Watson. The portfolio also includes collaboration tools like IBM Verse, IBM Connections, IBM Domino and IBM Sametime.

Cognitive intelligence to transform service desk: IBM is leveraging Watson to analyze service desk tickets and identify processes to be automated. Based on the analytics, Watson helps build automated solutions around foundational services like automated password reset and self-service portals.

Caution

Because IBM has a vast portfolio of digital workplace services and one of the largest partner programs, it ends up competing with its own partners, especially in the collaboration and security spaces.

IBM's workplace services rely heavily on Watson's self-learning abilities and its continuously evolving knowledge repository. IBM's clients tend to be protective of their content and do not contribute to building Watson's knowledge repository, which may limit the solution's ability.

2017 ISG Provider Lens™ Leader

IBM's unparalleled experience, scale and product and services portfolio make it a one-stop-shop for managed workplace services. It can be a preferred choice for large enterprises with complex workplace requirements.

NTT DATA

Overview

NTT DATA's digital workplace practice emphasizes assessing the viability of latest digital technology for meeting its large enterprise clients' current workplace needs. The company delivers customized, end-to-end user experiences after assessing each customer's needs for technology adoption. It has more than 30 years of experience providing end-user services ranging from desktop support to client virtualization, cloud and mobility.

Strengths

End-to-end workplace transformation services: NTT DATA manages approximately 7 million end users in North America. Besides traditional EUC services, it offers context-aware end-user analytics across devices to enable predictive management and self-healing.

Automation of IT support: NTT DATA has a modular and deployable enterprise architecture for IT infrastructure services automation, called Services Automation and Governance Ecosystem (SAGE). The intent is to understand the customer's environment and assess how to reduce human intervention for ticket resolution. SAGE can reduce costs and enhance user experience by improving Level 1.5 and Level 2 support through self-healing and end-user analytics. NTT DATA's use of new cognitive systems is transforming the service desk function from a low-skilled operation to a data-rich component of workplace strategy.

Expanded presence in North America: NTT DATA has an extensive geographic presence, especially in North America, thanks to its Dell Services acquisition. Twenty six percent of the NTT DATA's global workforce for managed digital workplace services is in North America.

Caution

NTT DATA has sister companies under the NTT Group banner, all servicing the global market. In a few infrastructure disciplines, duplication exists. This creates confusion for potential clients and calls for a combined go-to-market approach in the U.S.

2017 ISG Provider Lens™ Leader

NTT DATA's workplace services are targeted at enabling the digital workforce with a user-centric consumption-based model. Its dynamic workplace services provide context-aware support, content provisioning, self-service, automation and flexibility.

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TCS

Overview

TCS has developed a comprehensive portfolio of services to deliver an insight-driven, autonomous and social-enabled digital workplace. It generates 50 percent of its managed workplace services revenues from North America and has achieved growth of more than 16 percent in the past three years.

Strengths

Strong and growing practice: With a 98 percent contract renewal rate, TCS manages around three million digital workplace users, worldwide. Approximately 58 percent of its managed workplace services clients are large enterprises. It claims approximately 15 percent annual growth in managed workplace services clients in the U.S.

Automation and analytics enhance UX: TCS leverages end-user analytics to identify incident ticket trends and areas for automation. With automation, TCS has been able to help its clients realize cost savings as high as 25 percent in a short engagement. Its ignioTM platform includes cognitive support, such as automated resolution and user analytics to develop employee personas.

Higher operational efficiency: TCS has helped clients introduce features like chat and automated self-healing to modernize their legacy IT support systems. With reported first-call and first-level resolution rates of approximately 85 percent, TCS has helped multiple clients improve their service desk services, reduce their mean-time-to-resolution (MTTR) and increase end-user satisfaction.

Caution

TCS is known as a strong application services player rather than an infrastructure service provider. Although it has been marketing its digital workplace services, it is yet to position itself as an end-to-end workplace transformation provider.

While TCS offers automation focused innovation in its managed workplace services, most of its clients still pay on a time and fixed-price model. The company needs to communicate its differentiation in infrastructure services to entice clients to pay on an outcome basis.

2017 ISG Provider Lens™ Leader

TCS's global delivery capabilities combined with its automation platform ignio™ enables its client to increase IT productivity and cost benefits.

UNISYS

Overview

Unisys' managed workplace services practice in the U.S. represents 42 percent of its global workplace services revenue; 22 percent of its total managed workplace services is in the North America region. Unisys' revenue from end-user computing and service desk services forms 32 percent of the company's total revenue. The company focuses on helping clients support their legacy environments while moving to a digital workplace. It offers a support model that manages all devices in the cloud using a single platform and solution.

Strengths

Strong presence in North America: Unisys manages 1 million end users with 44 percent annual growth in the North America region. The U.S. and Canada contribute 48 percent of company's total revenue.

Field and on-site support capabilities: Unisys offers Tech Café services to deliver on-site support, which also integrates with clients' legacy environments. Some competitors partner with Unisys to offer field services in the North America region because of its coverage.

Automation and self-help services: Unisys provides automation and self-help services as a standard offering in its workplace solution. These services use a rich knowledge base to develop persona-based self-help services. Unisys uses end-user experience monitoring to help end users proactively resolve performance problems with their devices and applications and add to the persona services, thereby helping match the right level of support, service and device type to each persona. The company has a high end-user satisfaction rating of approximately 94 percent.

Caution

The company saw a dip in revenue from managed workplace services in 2016. The company also had a continuous decline in its infrastructure services revenue for the last three years.

2017 ISG Provider Lens™ Leader

Unisys has a strong managed workplace services practice in North America. Its Tech Café and onsite support services make it a preferred choice for large enterprises in the region.

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WIPRO

Overview

Wipro's managed digital workplace services revenue in North America is 39 percent of its global workplace services revenue. The company pursues large enterprises with a high number of users. Its services focus on delivering end-to-end business transformation rather than just cost savings and operational efficiency improvement.

Strengths

Expansion of offerings through partnerships and acquisitions: Wipro's acquisitions of DesignIT, Appirio and InfoServer have enhanced its traditional infrastructure capabilities by adding components of design thinking, BPaaS and SaaS. It also has added local capabilities in Europe, North America and Asia Pacific to address the growing need for nearshore/on-site presence.

Strong growth in revenues: Wipro has produced 40 percent growth in digital workplace revenues in North America over the last three years. It has increased its on-site headcount in the region by 28 percent over the same period.

Integration of HOLMES™: Wipro has integrated its HOLMES™ automation platform and natural language processing (NLP) capabilities with its managed digital workplace services to minimize or eliminate manual processes. The platform can be deployed to perform end user IT analytics, monitor virtual desktops, execute self-healing functions through chatbots and develop predictive, prescriptive and anticipatory models.

Caution

Wipro is one of the key players that have developed comprehensive, business-oriented workplace services offerings, but it needs to position itself as a digital transformation player and a business differentiator. Wipro needs to invest in effective marketing, which can help it compete against its large-scale competitors.

2017 ISG Provider Lens™ Leader

Wipro has been a key player in managed workplace services. It has strengthened its practice by including its automation platform, business transformation-oriented services and experience in executing turnkey and greenfield projects.

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RISING STAR: FUJITSU

Overview

Fujitsu's managed workplace services consists of three key components: Social Command Center, Intelligent Engineering and Workplace Anywhere. It also has developed its RPA capabilities to provide digital workforce services.

Strengths

Social Command Center: Fujitsu's Social Command Center is oriented toward workplace support services. It provides shift-left support with data analytics, automation and proactive maintenance support. It also provides self-help capabilities through a virtual agent powered by AI, automation and contextual support.

Workplace Anywhere: Fujitsu's "Workplace Anywhere" approach is aimed at delivering managed workplace services in the cloud, on-premises and in virtualized environments. It has embedded analytics and automation for service desk services.

Automation and RPA approach: Fujitsu's Intelligent Engineering services provide automation-enabled support using data analytics and machine learning. Fujitsu's RPA practice provides a digital workforce to autonomously complete repetitive, rule-based processes. Its XpressWay consulting approach helps clients implement the RPA-based digital workforce services in the workplace environment.

Caution

Fujitsu is providing basic workplace managed services to its clients. It needs to showcase more examples of providing workplace transformation with RPA and automation in the region.

Fujitsu has more workplace management-related engagements in the midmarket segment. It should showcase more examples of its services for large enterprises in North America.

2017 ISG Provider Lens™ Rising Star

Fujitsu's RPA-focused digital workforce services offer a unique value proposition for large enterprise clients.

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MANAGED MOBILE ENTERPRISE SERVICES - MIDMARKET

Definition

Managed mobile enterprise services includes, at the minimum, mobile device management (MDM), policy configuration, device configuration, device knitting, device lifecycle and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

Increasingly, the mobile enterprise is interested in cloud-based office productivity suites like Office 365, Google Suite and team collaboration tools. Managed enterprise mobility revolves around enabling mobile users with single sign-on features to securely access productivity apps and data anytime and anywhere. With the introduction of smart, wearable devices, the scope of these services has extended to include elements of IoT.

The midmarket is cost-sensitive but is also looking for innovative approaches with a quantifiable business impact. Ideally, managed mobile enterprise services for this segment should be highly

Midmarket Managed Mobile

2017 U.S.Quadrant

Source: ISG Research 2017

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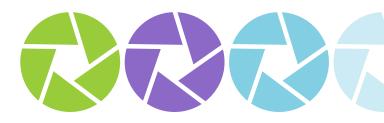## MANAGED MOBILE ENTERPRISE SERVICES - MIDMARKET

Definition (cont.)

standardized and provide innovative components. The midmarket client would be willing to adopt a 100 percent BYOD strategy and would encourage end users towards a BYOx environment (where x includes applications, data and services).

Observations

- Wipro and TCS are generally strong in the large enterprise market, but they also target mobility services clients in the midmarket. Enterprises looking for a complete BYOD approach prefer them for their innovative solutions.

- Cognizant is also a leader in this segment because its services focus on a digital experience and close collaboration with their development team.

- CompuCom has been very strong in this region and offers the basic mobility managed services.

- Hexaware's enterprise mobility services offer support for enabling BYOD and shadow IT management. The company's consulting-led approach can be beneficial for midmarket clients.

- IBM, with its unparalleled mobility services, is also targeting the midmarket segment with its cognitive and analytical offerings.

COGNIZANT

Overview

Cognizant's managed mobile services revenue from the U.S forms the majority of its global total. The midmarket segment is of medium priority for the company.

Caution

Cognizant should showcase more case studies in the North American market for its mobility managed services. The company has only a few success stories, and they are predominantly in the retail space. Cognizant still lags its competitors in market penetration and experience with complete end-to-end mobility services.

Strengths

Emphasis on consulting: Cognizant offers dedicated consulting services to help enterprises decide on mobility initiatives. The company also focuses on mobility consulting in its digital practice. It has partnerships with leading vendors VMWare, RSA and Microsoft for mobile device management, biometric authentication and Active Directory integration, respectively.

Close integration with application development: Cognizant's managed mobility services is closely integrated with the mobile app development team. Because its approach embraces the application-infrastructure synergies, IT infrastructure management and application development teams can work in sync. Cognizant has experience with clients in the retail industry, where it helped develop mobile applications and with back-end systems integration. It also helps clients develop business scenarios for mobile apps for both customers and employees.

SymphonyWorks: Cognizant's SymphonyWorks platform provides support for client BYOD initiatives. The digital engagement platform allows users to provision devices and applications in an app store-like interface. The platform also offers analytics with a support dashboard and user experience score.

2017 ISG Provider Lens™ Leader

Cognizant's consulting capabilities combined with its mobility partner ecosystem make it best suited for the mid-sized market. Clients in this segment typically require business-oriented consulting and implementation support, and Cognizant is well positioned for these services.

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COMPUCOM

Overview

CompuCom's revenue from North America is approximately 80 percent of its total managed mobile services revenue. CompuCom offers mobility management services that cover both basic MDM and advanced EMM.

Caution

CompuCom provides basic mobility management services that include elements of device management, expense management and application support. To stay competitive, it should showcase more examples of these services integrated with automation and analytics.

Strengths

Strong market presence: CompuCom has a strong presence in the North America region. It has partnerships with leading telecom players like AT&T to help clients with telecom expense management through its enterprise mobility management services.

Strong portfolio of MDM services: CompuCom offers typical MDM services like reporting, MAM support, policy configuration, Level 1 mobile help desk, device kitting and procurement. It has many success stories about integrating MDM solutions into client environments from diverse industries in North America.

Value-added mobility services: CompuCom provides policy governance, assessment and planning services. It also offers assessment and planning services for potential cost savings while adopting a mobility approach. It has an Apple device enrollment program and provides specific services for procuring and managing Apple devices.

2017 ISG Provider Lens™ Leader

CompuCom has a strong presence in the U.S. market and extensive experience in mobile device management. Its expense assessment feature can be particularly helpful for midmarket enterprises setting out on a mobility journey.

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TCS

Overview

TCS's managed mobility services form the highest share of its digital workplace services revenues. The company has a strong focus on mobility services and the North America region accounts for approximately 53 percent of its global revenues from managed mobile services. Midmarket constitutes 42 percent of its managed mobility services client base.

Strengths

Strongest managed mobility services revenue and market share: TCS has more managed mobility services revenue than its peers both globally and in North America. Its revenue in this segment has increased by around 60 percent globally and 64 percent in North America in the last three years.

Solid platform: TCS's productized mobile app platform MobitioTM covers service desk, end-user computing, data center and application support services. The platform is embedded with TCS's ignio™ automation framework and provides collaboration solutions to enhance productivity.

Mobile security services: TCS leverages an industry-standard toolset to deliver end-to-end mobile device management, device security and application management services. It has created rights management and identity templates for data protection and breach prevention. TCS also has experience in building cloud-based identity solutions to manage integration and single sign-on across multiple applications and device platforms including web, SaaS and enterprise apps.

Caution

At present, TCS is cross-selling its innovative mobility solutions to its existing application services clients. The company should create new mobility-focused opportunities with fresh clients to promote its differentiation in the space.

2017 ISG Provider Lens™ Leader

TCS offers innovative mobility solutions through its platform Mobitio™. This COTS-like offering is a key differentiator for clients taking a mobile-first strategy.

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WIPRO

Overview

Wipro's managed mobility services in the U.S. and North America provide 40 percent of its global managed mobility services revenues. It offers mobility services driven by consulting and assessing the client environment. The midmarket is a medium priority for the company.

Strengths

LiVE Workspace™: Wipro's LiVE Workspace™ is a mobility-focused, integrated workplace-as-a-solution offering that provides an anywhere, any device, any network continuum experience irrespective of the end user environment. LiVE Workspace offers mobile device management, identity and access management services through integration with AirWatch, MobileIron and Intune solutions.

Focus on mobile-first clients: Seventy percent of Wipro's digital workplace clients are well advanced in their mobility and cloud journeys. Wipro gives the highest priority to clients with a mobile-first strategy. Wipro has extensive experience in delivering mobility services like device lifecycle management, MAM and mobile app deployment for different industries in North America.

Turnkey and greenfield mobility-related projects: Wipro has experience delivering some interesting turnkey and greenfield projects involving the complete setup and maintenance of the digital workplace. These large-scaled projects have an extensive scope that includes implementing BYOD and CYOD (choose your own device) strategies.

Caution

Wipro has one of the strongest portfolios of services in the managed mobility space. This portfolio is part of its infrastructure management services. It also has a separate mobility practice with mobile app development and testing capabilities. Recently, the company acquired DesignIT, which is focused on end-user experience design. Since Wipro is focusing on digital and mobile-first clients, it should integrate its mobility-related services under a single umbrella oriented to digital user experience.

2017 ISG Provider Lens™ Leader

Wipro's experience managing mobility environments, along with its strong services portfolio, can help mid-market clients quickly set out on the BYOD journey with minimal infrastructure.

RISING STAR: HEXAWARE

Overview

Seventy percent of Hexaware's global managed mobile services revenue comes from the U.S. and North America region. The company had an almost equal percent increase in its annual revenue from these services. It offers mobile managed services through virtualization as well as enterprise mobility. The company manages approximately 10,000 end users in the region with its mobility services.

Strengths

Consulting-led approach: Hexaware's comprehensive enterprise mobility services include basic services and relies heavily on a consulting-led approach. It helps clients decide on BYOD enablement and has experience dealing with shadow IT requirements. It also implements mobility services using virtual desktop services on hyper-converged infrastructure.

Mobile app-based IT support: Hexaware offers mobile application-based services to help end users reach out to the IT helpdesk. The app has fully enabled features for self-help and allows users to raise incident tickets and provision data and apps on their mobile devices. It also has a built-in virtual personal assistant for easy access.

Partnerships: Hexaware has partnerships with leading MDM vendors like AirWatch and Citrix for which it helps implement their mobile device management and identity access management features.

Mobile Security services: Hexaware provides mobile security services, including antivirus-anti malware, data leakage prevention, encryption and data key management.

Caution

Hexaware should showcase more experience in managing mobile enterprise services in North America. The company has some success stories in other regions, but most relate to mobility services in the airline industry. It should extend its mobility managed services to other industries as well.

2017 ISG Provider Lens™ Rising Star

Hexaware's mobility consulting services combined with its automation-focused managed services are a good fit for midmarket clients and large enterprises.

RISING STAR: IBM

Overview

IBM is one of the strongest mobility service providers. It has a strong and very experienced mobility practice that manages more than 8,000 clients globally. It has more than 275 patents for mobility-related innovation. IBM provides managed mobility services on premise, in a hybrid cloud and in a public cloud environment with ROI as high as 108 percent. IBM typically caters to large enterprises but has recently started focusing on the midmarket.

Strengths

Cognitive Unified Endpoint Management: With Watson, IBM provides unified endpoint management using automation, analytics and cognitive capabilities. Watson analyzes contextual usage by end users and personas to provide actionable insights on data and content for complete user-experience management.

Strong partnerships with Apple: IBM also provides managed mobility services exclusively for Apple devices. It covers device procurement, onsite support, service desk, self-help, file sync share, app compatibility and device enrollment. IBM develops business-oriented apps for iOS. IBM's Mobile First for iOS service has the added advantage of using BlueMix and Watson's cognitive computing.
IBM also has partnerships with other device manufacturers like Microsoft.

Other mobility-related partnerships: IBM partners with key vendors around the world that specialize in mobile computing, VDI solutions, analytics, enterprise mobility and ITSM. The list includes Zebra Technologies, Brightstar, AT&T, VMware and Citrix.

Focus on midmarket: With its enterprise app store feature and packaged offering, IBM is specifically targeting small and medium businesses.

Caution

Midmarket clients can be overwhelmed by the size and scale of IBM. There are many tier two and smaller players providing mobility services. It may be a challenge for those providers to transition to and from a smaller player when a midmarket client engages with IBM.

2017 ISG Provider Lens™ Rising Star

IBM is the most experienced service provider in mobility management services. Its automation-enabled services coupled with its scale of operations and partnerships make it a one-stop shop for enterprise mobility management.

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MANAGED MOBILE ENTERPRISE SERVICES - LARGE MARKET

Definition

Managed mobile enterprise services include, at the minimum, mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

The mobile enterprise is seeing popularity and acceptance grow for cloud-based office productivity suites like Office 365, Google Suite and team collaboration tools. Managed enterprise mobility revolves around enabling mobile users with single sign-on features to securely access productivity apps and data anytime from anywhere. With the introduction of smart wearable devices, the scope of these services has extended to include elements of IoT.
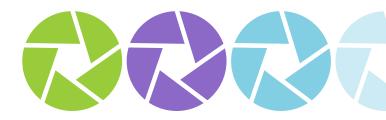

Source: ISG Research 2017

MANAGED MOBILE ENTERPRISE SERVICES - LARGE MARKET

Observations

- Accenture and IBM lead the market with their innovative services and focus on digital user experience.

- DXC has a strong presence because of its strategic partnerships with mobility vendors and services that measure mobility initiative effectiveness.

- TCS has the strongest growth in mobility revenue and client wins, while Wipro is a leader because of its experience in unique, mobility-focused turnkey projects.

- HCL's DRYiCETM platform provides collaboration and automation capabilities related to mobile managed services.

- Unisys is holding its market share for basic mobility management services and has a strong market presence.

- Capgemini has a strong product portfolio focused on end-user experience and is rapidly gaining market share.

ACCENTURE

Overview

Accenture claims to be focusing on digital transformation and mobility. It has a strong consulting practice for digital workplace transformation and managed services. It provides managed mobile device management via a network of third-party service providers. Accenture's digital workplace services leverages experts across its strategy, consulting, technology, operations and digital service lines. Its mobility services cover mobile device, application, infrastructure and financial management.

Accenture's capabilities in managed mobile services also leverage its capabilities in managed digital workplace and service desk, which is not considered in this study.

Strengths

Focus on mobility and field support: Accenture's mobility services go beyond mobile phones. The company is focused on enabling field workers from different industries. The Accenture Innovation Center for Mobility provides extensive field force management implementation experience across multiple industries and technologies.

Mobility services via Avanade: Avanade, a joint venture between Microsoft and Accenture, provides enterprise mobility services for Windows mobile devices. It also helps enterprises adopt Office 365 for mobile devices.

Partnership with Apple: Accenture has recently partnered with Apple to develop iOS-specific apps for enterprises. Accenture works with Apple experts in its digital innovation labs to develop these applications. The partnership also helps enterprises move legacy applications to the iOS environment.

Partner eco-system: Accenture also partners with Google and provides services to enable enterprises adopt Android platform. With Google, Accenture is developing transformative enterprise mobility and cloud solutions. It also partners with leading EMM vendors like MobileIron, SOTI, VMware, Intune and Citrix.

Caution

Accenture's managed mobility services rely mainly on its consulting and application development and maintenance services. It provides basic mobile device management and other workplace services via third-party partners while its service desk and managed infrastructure services capability is not well known.

2017 ISG Provider Lens™ Leader

Accenture has a strong application services portfolio that includes mobile app development and testing services. Accenture is highly experienced and well regarded among large enterprise clients.

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DXC TECHNOLOGIES

Overview

DXC offers a set of comprehensive mobility management services for its clients. This end-to-end mobili-ty-as-a-service solution manages approximately 1.3 million mobility seats globally. It has longstanding partner-ships with mobility-related vendors including Microsoft, VMware and SAP. The company inherits the capabilities in mobility management from its parent companies CSC and HP.

Strengths

Strong capabilities in traditional services: DXC offers services covering the complete stack of MDM and EMM services. Its advisory-led services focus on mobile device lifecycle management, enterprise mobility and mobile application management. It also includes deploying lightweight Windows 10 images, agile mobile app develop-ment and testing services.

Identity management and mobility security services: DXC provides security services at the network, device, back-end infrastructure and application levels. It offers application protection at the coding stage and also provides app containerization services. It delivers identity access management services by conducting policy enforcement at the network level.

Business result-oriented analytics: DXC produces analytics-enabled insights into mobile application to help ascertain the ROI on mobility-related investments. It also provides predictive analytics by monitoring device location and other parameters.

Flexible as-a-service model: DXC's mobility services can be provisioned in the cloud. It has a strategic partnership with Microsoft and is helping clients access Office 365 and manage cloud-based Windows 10 apps on mobile devices. DXC offers a per-user, per-month pricing model.

Caution

DXC's strategic partnership with Microsoft for mobility managed services is both a strength and a caution. Similar partnerships are needed for other cloud-based productivity application vendors as large enterprises move toward non-Microsoft collaboration tools.

DXC should gain more market share, especially after the merger, as its competitors have signed a number of managed mobility contracts lately.

2017 ISG Provider Lens™ Leader

DXC has a comprehensive mobility service covering both traditional and cloud-based services that are oriented to business results. Its trusted brand is a preferred choice for large enterprise clients.

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HCL

Overview

HCL's managed mobility services revenue in the North America region is 44 percent of its global total. The company reported an impressive 40 percent increase in its managed mobility services business in the region in the last three years, with a 90 percent contract renewal rate.

Strengths

Enterprise mobile management: HCL provides mobile device management and services to mobilize applications on the iOS and Android platforms. It manages 205,200 users with its mobility management services in North America. The company provides MDM and EMM services, including device lifecycle management.

Focus on mobile app management: HCL's services put more emphasis on mobile application and content management than on device management. HCL provides related services like application refactoring, sandboxing, email management, app versioning, identity management and a mobile app store.

Next-gen services: HCL has developed its digital workplace services in response to the changing technology landscape. Its services emphasize technologies that are expected to play a role beyond mobility enablement in the coming years. It focuses on enhancing collaboration, gamification and smart IoT device environments through automation and its DRYiCETM framework.

Caution

HCL's success stories in enabling the mobility environment come mostly from the retail industry. Its experience in other industries is limited to mobile device management. It should showcase more examples of its differentiated offerings for other industries.

2017 ISG Provider Lens™ Leader

HCL is well regarded by its clients and has a high retention rate. Its future-oriented mobility services are well suited for large enterprises that are looking to mobilize their workforce.

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IBM

Overview

IBM has a strong and very experienced mobility practice that manages more than 8,000 clients globally. It has more than 275 patents for mobility-related innovations. It provides managed mobility services in on-premises, hybrid and public cloud environments and reports ROI as high as 108 percent.

Strengths

Cognitive UEM: With Watson, IBM provides unified endpoint management (UEM) using automation, analytics and cognitive capabilities. Watson analyzes data about contextual usage by end users and personas to provide actionable insights for complete user experience management.

Strong partnerships with Apple: IBM also provides managed mobility services exclusively for Apple devices. It covers device procurement, onsite support, service desk, self-help, file sync share, app compatibility and device enrollment. IBM also develops business-oriented apps for iOS. IBM's Mobile First for iOS service has the added advantage of using BlueMix and Watson's cognitive computing. IBM also has partnerships with other device manufacturers like Microsoft.

Other mobility-related partnerships: In North America, IBM partners with key vendors specializing in mobile computing, VDI solutions, analytics, enterprise mobility and ITSM. The list includes Zebra Technologies, Brightstar, VMware, AT&T and Citrix.

Caution

IBM has a well-established mobility management practice that is integrated with its Watson-enabled workplace support services. Serving large enterprise clients with managed mobility services requires integrating with the client's workplace support environment. It could be a challenge for IBM to integrate with third-party managed service desks in such client environments.

2017 ISG Provider Lens™ Leader

IBM is the most experienced service provider in mobility management services. Its automation-enabled services, coupled with its scale of operations and partnerships, make it a one-stop shop for enterprise mobility management.

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TCS

Overview

Mobility managed services account for the highest share of TCS' digital workplace services revenues; North America is its largest market for these services.

Strengths

Strong managed mobility services revenue and market share: TCS has more managed mobility services revenue than its peers both globally and in North America. Its revenue in this segment has increased by nearly 60 percent globally and 64 percent in North America in the last three years.

Solid platform: TCS' productized mobile app platform MobitioTM covers service desk, end-user computing, data center and application support services. The platform is embedded with TCS's ignioTM automation framework and provides collaboration solutions to enhance productivity.

Mobile security services: TCS leverages an industry-standard toolset to deliver end-to-end mobile device management, device security and application management services. It has created rights management and identity templates for data protection and breach prevention. TCS also has experience building cloud-based identity solutions to manage integration and single sign-on across multiple applications and device platforms that include web, SaaS and enterprise apps.

Caution

At present TCS is cross-selling its innovative mobility-based solutions to its existing application services clients. The company should create new mobility-focused opportunities with fresh clients to differentiate itself in this space.

TCS is still viewed as a major application service provider in the large market. It should showcase its capability in wider workplace offering in addition to providing mobile app development services.

2017 ISG Provider Lens™ Leader

TCS has taken a platform approach to offering innovative mobility-focused solutions. This commercial-off-the-shelf-like offering is a key differentiator for clients that are pursuing a "mobile first" strategy.

UNISYS

Overview

Unisys's managed mobility services are part of its unified endpoint management services. It provides mobile policy management and endpoint security. Unisys manages mobile devices in North America through its extensive onsite support services and Tech Café services.

Caution

Unisys's mobility services cover mobile device and access management. To stay competitive, Unisys should also include elements of digital experience design and mobility effectiveness monitoring solutions in its solution stack.

Strengths

Strong market presence: Unisys manages approximately 350,000 users with its mobility management services in North America. That represents 80 percent of the total number of mobile users it manages globally. Unisys also has partnerships with leading service providers for onsite support for mobility issues. Unisys reports it has a 100 percent contract renewal rate, making it a strong local player.

Services at transitioning stage: Unisys has a mobile center of excellence for service delivery that provides differentiation for its transition management services. Unisys can provide support services for the increased load when mobility, change management and knowledge management programs are implemented.

Security and identity access management: Unisys provides services for identity access management via biometric authentication and has fingerprint authentication experience. It also provides application container-ization for non-authorized device access.

2017 ISG Provider Lens™ Leader

Unisys has a strong presence and is known for its support services in the North America region. It is well suited for clients beginning a mobile-enablement journey.

WIPRO

Overview

Wipro's managed mobility services in North America provide 40 percent of its global revenues in this segment. It offers mobility services that are based on an assessment of the client environment.

Strengths

LiVE Workspace™: Wipro's LiVE Workspace™ is a mobility-focused, integrated workplace-as-a-solution offering that provides anywhere, any device, any network continuum experience irrespective of the end-user environment. LiVE Workspace offers mobile device management, identity and access management services through integration with AirWatch, MobileIron and Intune solutions.

Focus on mobile-first clients: Seventy percent of Wipro's digital workplace clients are advanced in their mobility and cloud journeys. Wipro gives the highest priority to clients with a mobile-first strategy. Wipro has extensive experience delivering mobility services like device lifecycle management, MAM and mobile app deployment for different industries in North America.

Turnkey and greenfield mobility-related projects: Wipro has experience delivering some interesting turnkey and greenfield projects involving the complete setup and maintenance of a digital workplace. These large-scaled projects have an extensive scope that includes implementing BYOD and CYOD (choose your own device) strategies.

Caution

Wipro has one of the strongest portfolios of managed mobility services. Its portfolio is part of its infrastructure management services. It also has a separate mobility practice with mobile app development and testing capabilities. Recently, the company acquired DesignIT, which is focused on end-user experience design. Since Wipro is focusing on digital and mobile-first clients, it should integrate its mobility-related services under a single umbrella oriented to digital user experience.

2017 ISG Provider Lens™ Leader

Wipro's experience in managing the mobility environment for large clients and its business-oriented approach can be a good fit for enterprises in this segment.

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RISING STAR: CAPGEMINI

Overview

Capgemini is a strong mobility service provider in Europe; North America is its largest revenue-generating region, providing 30 percent of annual revenue. Managed services make up 21 percent of Capgemini's total revenue. Its digital workplace falls under both its infrastructure managed services and digital and cloud services.

Strengths

Applications- and experience-focused solutions: Capgemini's My Workspace is a cloud-based workspace portal where users can access their entire work environment on any device. It provides access to mobile, web and cloud-hosted applications. It supports MDM and MAM on any mobile device. Another Capgemini solution, My Support, provides provisioning self-service and IT support services.

App containerization: Capgemini provides Citrix-enabled enterprise mobility services called Worxsuite that containerize mobile applications and separates personal applications and data from corporate applications and data.

Co-innovation with clients: Capgemini's Applied Innovation Exchange platform helps clients make the best use of mobility and other technologies that are best suited for their business environment. It provides clients access to designers, technologists, sector experts, business and technology partners, academics, research organizations and startups.

Caution

Capgemini has limited examples of mobility-focused My Workspace implementations in the North America region.

ISG advisors have experienced challenges in transitioning services with Capgemini.

2017 ISG Provider Lens™ Rising Star

Capgemini's device-agnostic collaborative workplace solutions and its consulting capabilities is a strong combination for large enterprise clients.

ENTERPRISE SOCIAL COLLABORATION SERVICES

Definition

Enterprise social collaboration services enable end-user collaboration within the workplace. The category includes consulting and implementation services for social media-style community building, enterprise content management, crowdsourcing, productivity suites, employee engagement, file sync-share and microblogging.

Collaboration services increasingly are seen as the face of the connected and automated future workplace. Enterprise social collaboration has transformed from just being a company intranet-centric service to becoming a connected, engaging, device-independent, cloud-enabled, productivity-oriented service. In an end-user-defined environment, a user should be able to access his or her complete workspace in one place and be able to engage with peers and support services from any device, anywhere. This collaborative workplace should provide platforms for idea generation, crowdsourcing and gamification, all of which should enhance productivity.

Enterprise Social Collaboration Services

2017 U.S.Quadrant

Source: ISG Research 2017

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ENTERPRISE SOCIAL COLLABORATION SERVICES

Definition (cont.)

Irrespective of their size, enterprises large and small need collaboration services to make the best value in their workplace environment.

Enterprise social collaboration services are usually embedded within the service provider's digital workplace services value proposition and are not offered separately. Service provider consulting capabilities play a key role in this space. Providers with experience assessing workplace readiness for collaboration, change management and ROI consulting will lead the market. Many service providers offer dedicated solutions for enterprise collaboration that were either developed in-house or acquired from a company specializing in this space.

Observations

- IBM is a leader here because it has services to support collaboration initiatives and offers its own solutions.

- TCS has experience delivering enterprise collaboration services to clients in North America. Its Knome collaboration platform has a gamification engine to enable and support crowdsourcing.

- Accenture has a dedicated consulting practice for social media collaboration for both the end customer and the internal employee.

- HCL provides different social collaboration platforms and services for its clients' end customers and internal workforces.

- Atos, with its acquisition of Unify, has a strong value proposition in the social collaboration space.

- DXC's enterprise collaboration services leverage its strong partnerships with vendors like Microsoft and Google.

- Capgemini offers consulting services for enabling mobility and collaborative productivity. It's My Workspace is a cloud-based platform with integrated collaboration and productivity applications.

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ACCENTURE

Overview

Accenture is among the social transformation opinion leaders and its consulting offering provides customers development support for these areas. Visionary thinking is among Accenture's core business values and is an important aspect of its reputation for helping companies embrace social business transformation. Its enterprise social collaboration services connect a client workforce through content management, crowdsourcing, file sharing, unified communication and Cloud Office services. It leverages the Avanade joint alliance with Microsoft to provide leading Microsoft enterprise social collaboration services.

Strengths

Dedicated social media practice: Accenture offers a range of social media solutions that cover strategy, monitoring, sales, customer care and collaboration. This practice also includes services for enterprise social collaboration. Accenture provides services for social media strategy, organizational design, process integration and execution, internal collaboration and innovation with analytics.

Accenture Technology Labs workshop: Accenture offers a workshop conducted by Accenture Technology Labs to help clients assess the feasibility of their social collaboration strategy and align it with business objectives.

Growing market presence: Accenture has recently won many large digital contracts on the strength of its mobility services, cloud capabilities, technology stack, social media and consulting heritage. It has experience delivering collaboration services to diverse industries and public sector clients.

Office in the cloud: Accenture's Office-in-the-Cloud capability is based on its digital workplace collaboration services primarily across Microsoft and Google offerings. It provides social services integrated with line-of-business applications, real time co-authoring, analytics-driven enterprise search and unified collaboration in an 'as a service' model.

Caution

Accenture should showcase more examples of its social collaboration services in different industries.

2017 ISG Provider Lens™ Leader

Accenture's strong consulting capabilities, thought leadership and Office-in-Cloud places it as a leader in enterprise social collaboration.

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ATOS

Overview

Atos has become an important player in the social collaboration market with its acquisition of Unify. Digital workplace is a key element of Atos' strategy for the next three years. It understands the importance of collaboration services in its overall portfolio and has taken an inorganic growth approach to complete its offering.

Strengths

Unify: Atos acquired Unify, which specializes in providing unified communication and collaboration. Its Circuit product provides team-level collaboration with content storage and search features. It helps clients cut silos out of collaboration and provides solutions to connect and collaborate. Circuit and Unify's unified voice and video collaboration product OpenScape serve as true differentiators of Atos' capabilities in the digitally connected and collaborative digital workplace.

Partner ecosystem: Atos has partnerships with leading productivity suite vendors Microsoft, Box, Google Apps and Syncplicity. It also has partnerships with players like Cisco and Polycom to provide end-to-end unified communication and collaboration services.

Focus on social skills: Atos is proposing to clients a new way of working and providing user experiences through social collaboration with zero email. The company also is planning to introduce social media skills in its service desk capabilities.

Caution

Atos has compelling case studies for its collaboration services in the public sector in North America. It needs to expand its reach for these services across the commercial sector.

Atos' competitiveness in this space relies heavily on Unify's consulting capabilities. Enterprise social enablement is much more than implementing a collaborative tool. It also involves elements of change management and cultural assessment. Atos needs to complement Unify's capabilities with its years of experience in workplace consulting, especially when it targets large clients in North America.

2017 ISG Provider Lens™ Leader

Atos is one of the few leaders that has taken a direct product-based approach to developing enterprise social collaboration capabilities. As it expands its presence in the North American market, there is strong potential for leveraging Unify's capabilities.

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DXC TECHNOLOGY

Overview

DXC's partnership with Microsoft and its comprehensive unified collaboration and communication practice make it a strong player in enterprise social collaboration. It also provides customer analytics services that are equally applicable to an in-house business environment.

Caution

DXC's enterprise collaboration services are solely dependent on services provided by external vendors. While technology is a key element in social collaboration, it is only a means to an end. DXC needs to include elements of social community and gamification services in its portfolio.

Strengths

Strong Microsoft partnerships: DXC's services built around Office 365 cover readiness assessment, required transformation and managed services. It also offers solution accelerators to speed up Office 365 adoption and migration. DXC EMPOWER is a self-learning portal that acts as a wiki knowledge library and skill builder for Office 365-related services. DXC also offers a dedicated Skype for Business implementation service.

Content management services: DXC has partnerships with leading cloud content management vendors Dropbox, Citrix, OneDrive and Google. It provides secure enterprise file sync and share services. DXC's cloud file management services integrate business process workflows and provide secure access to content in the cloud. It also allows for seamless collaboration over any device, anywhere.

Other collaboration experience powered by analytics: DXC's modern workspace user experience provides automated meeting organization and content distribution. DXC's collaboration services are backed by an analytics service, which measures the effectiveness of the collaboration platform.

2017 ISG Provider Lens™ Leader

DXC offers support and usage analytics for every key collaboration solution in the market. It is best suited for large-scale implementation of productivity suites.

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IBM

Overview

IBM provides many social collaboration products and services. It offers a platform to host social collaboration applications, an enterprise networking suite, email and messaging solutions and cognitive enablement for collaboration. IBM has a dedicated social collaboration business for which it has been developing products and solutions.

Strengths

Dedicated social collaboration practice: IBM has a dedicated practice for collaboration and has developed solutions for collaborative and mobile workplaces. Its Notes and Domino solutions provide business collaboration functions using email, messaging, calendars and to-do lists.

Solutions for enterprise social collaboration: IBM offers an email and messaging suite for the mobility-enabled digital workplace. Its Verse email solution provides cloud email hosting for any device. IBM Connections is a well-known product in the social collaboration space. IBM already has several success stories in which it enabled clients in their enterprise collaboration initiatives.

Cognitive capabilities in collaboration: IBM has integrated Watson's cognitive capabilities in its existing collaboration solutions and also with other productivity suites. With cognitive capabilities, its Verse email solution provides advanced search feature and ease of use. Cognitive applications in Connections have improved contextualized content availability for users. IBM also offers cognitive capabilities for Office 365 migration with the introduction of engagement and sentiment analysis and automatic idea generation.

Caution

IBM has a strong social collaboration services practice. It needs to make it a more dominant feature of its digital workplace and mobility service and position the managed workplace services as back-end support.

IBM also needs to delineate its different offerings in this space and specify clear use cases for each.

2017 ISG Provider Lens™ Leader

IBM has an unparalleled position as a leader in enterprise social collaboration. Its consulting and collaboration solutions enabled by cognitive intelligence are well suited for enterprises.

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HCL

Overview

HCL's enterprise social collaboration services come under its wider collaboration portfolio. That portfolio consists of customer analytics for marketing, workplace collaboration and enterprise content management. HCL's digital workplace consulting services include elements of social business transformation.

Strengths

HCL ScoutBot: HCL ScoutBot™ is an enterprise social chatbot platform that integrates with Skype for Business and connects coworkers. It has AI-enabled automation that connects end users with the appropriate expert to address their query. It supports multiple languages and has filters for foul language. It also integrates with knowledgebase and ITSM tools for ticket generation.

Other collaboration-related services: HCL provides a framework for digital end-user experience on traditional collaboration platforms like SharePoint. Examples of its framework's capabilities include a Flipbook experience on Word documents and audio, video and Scribble Search and IFTTT rules for enterprise applications.

Gamification approach: HCL offers gamification solutions to help its clients propagate innovation, collaboration and transformation in their work environment. Gamification is part of HCL's workplace services catalog and focuses on gamifying key processes related to end-user engagement and collaboration.

Caution

HCL has disparate elements of enterprise social collaboration in its different service portfolios. It needs to improve the front end of its digital workplace services.

HCL has strong analytical services for social media management for its clients' end customers. It should leverage these capabilities for its clients' internal workplace environments.

2017 ISG Provider Lens™ Leader

HCL has experience and capabilities in providing social collaboration solutions under different service lines. The combination of these capabilities can be a packaged solution for its clients.

TCS

Overview

TCS has a comprehensive offering and many client case studies involving social collaboration services. It manages approximately 350,000 users in North America with its social business consulting and collaboration services.

Strengths

Specific services for social collaboration: TCS provides industry-focused social collaboration consulting and implementation services. It covers social media strategy formulation, managed services and solutions. TCS offers many in-house developed solutions for enabling social collaboration. It has partnerships with leading social collaboration vendors, including Jive, Liferay, Slack and Yammer.

Knome: TCS has been using its Knome social collaboration platform for many years and also has implemented elements of it for airline and insurance industry clients. The platform has been known to generate high social interaction volumes in the form of chats and blog posts.

Gamification approach: TCS has implemented its gamification solutions for clients to improve collaboration at both the employee and customer levels. TCS' crowdsourcing services provide collaboration-related KPIs, knowledge articles and peer-to-peer collaboration for its clients.

Caution

TCS needs to position Knome and social collaboration services as the face of its digital workplace offering. Application services is TCS' strength and combining it with collaboration services and the company's managed workplace services would be an ideal digital workplace offering.

2017 ISG Provider Lens™ Leader

TCS' experience in social collaboration services and its gamification-led approach make it a frontrunner in the enterprise collaboration market.

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RISING STAR: CAPGEMINI

Overview

Capgemini's strong consulting practice and My Workspace platform cover aspects of enterprise social collaboration. My Workspace provides containerized access to collaboration solutions.

Strengths

Strong consulting practice: Capgemini's digital workplace consulting practice focuses on mobility, productivity and collaboration. Capgemini is in the process of developing capabilities for social collaboration at the employee level. The company has successfully deployed gamification-led collaboration internally.

My Workspace: My Workspace is a single platform for providing access to productivity and enterprise line-of-business applications. It also integrates with popular cloud-based content collaboration tools like Box, OneDrive and Dropbox. My Workspace includes elements of crowdsourcing and social collaboration for real-time interaction.

Co-innovation with client: Capgemini's Applied Innovation Exchange platform helps clients make the best use of technologies, including social collaboration, and helps determine which are best suited for their business environment. It provides clients access to designers, technologists, sector experts, business and technology partners, academics, research organizations and startups.

Caution

Capgemini has notable examples from other regions about enabling its clients' workforce with enhanced collaboration and productivity. It should showcase similar success in North America.

Capgemini has yet to integrate the disparate elements of its consulting and deployment services to provide a collaborative workplace experience.

2017 ISG Provider Lens™ Rising Star

Capgemini continues to focus on enabling end-user experience and improving digital workplace collaboration. If the company gains more clients, it will become a real thought leader in the North American market.

WORKSPACE-AS-A-SERVICE

Definition

Many service providers are moving toward a productized offering for digital workplace services that is cloud based and offered as a "pay-as-you-go or pay-per-user model. These cloud-based "workspaces" are single interface platforms where end users can access all their workplace data and applications. Other managed workplace services will form the back-end support systems for such productized offerings. In this quadrant, ISG assesses providers that deliver a cloud-based workplace service via virtual desktop infrastructure or public/private/hybrid cloud. Also known as Desktop-as-a-Service and Workplace-as-a-Service, it is abbreviated as WaaS.

Nearly all service providers offer customized VDI but often fall short of creating a transparent, flexible, user-centric pay-as-you-go model in standardized packages. Market leaders like VMware define this space, and most service providers are developing solutions based on their platforms. Many other service providers with platform-agnostic approaches and strong partnership and alliance ecosystems are offering a productized solution in this market.

Workplace-as-a-Service

2017 U.S. Quadrant

- Rising Star

Product Challenger · Leader · Contender · Market Challenger

High — Low: Portfolio Attractiveness

Low — High: Competitive Strength

Labels: Dimension Data, AWS, IBM, VMware, UST Global, Atos, NTT DATA, Wipro, Tech Mahindra, Zensar, HCL, TCS, Unisys, Google, KPIT, Hexaware, Cognizant

Source: ISG Research 2017

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WORKSPACE-AS-A-SERVICE

Observations

- VMware, Amazon Web Services (AWS) and IBM have years of experience providing VDI solutions, have strong market presence and are leading this space.

- NTT DATA, with its strong services portfolio and success stories, is also a market leader.

- Wipro's VirtuaDesk™ is a VDI solution that also provides platform-inde-pendent workspace services in the cloud.

- Dimension Data offers hosted desktop solutions and 3-D workspaces. It is a product challenger and is emerging as a Rising Star.

- Through its productized offering and its DryICE™ enabled MyWorkplace solution, HCL provides an all-inclusive DaaS. It is a market challenger and is emerging as a Rising Star.

AMAZON WEB SERVICES

Overview

Amazon Web Services (AWS) has a Workplace-as-a-Service (WaaS) offering called Amazon WorkSpaces. It was launched as a Windows-specific workplace service solution in 2014. With its leadership position in the public cloud market, AWS leads the WaaS space as well.

Strengths

Early pioneer: AWS was one of the early pioneers for cloud-based standardized desktops. As such, the company had a major impact on the development of the cloud workplace market and is driving this segment.

Modular offering: Customers benefit from having modular options based on WaaS.

Pricing options: As usual, AWS's pricing for workspaces is both transparent and flexible. AWS offers both monthly and hourly billing options.

Amazon WAM: With the Amazon WorkSpaces Application Manager (Amazon WAM), clients can upload their own applications directly to make them available to their employees. The Amazon WAM Lite version can be used free of charge.

Caution

There are few named references for AWS WorkSpaces. References are paramount for trusting a consumer-focused company to get things right in the B2B context.

Amazon needs to raise awareness of AWS WorkSpaces, especially for its pioneering work, and capitalize on its history and position before others catch up.

2017 ISG Provider Lens™ Leader

AWS is driving the market for cloud workplaces – particularly for highly standardized SaaS offerings delivered through the public cloud.

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IBM

Overview

IBM offers its Workplace-as-a-Service (WaaS) via IBM cloud. IBM provides basic managed services with shared and published applications and self-service options. It also offers Level 2 and 3 application support along with application assessment and migration services.

Strengths

Rich experience: IBM benefits from a strong heritage in desktop management, software and hardware solutions and integration services as well as its best-of-breed solution portfolio.

Strong competitive positioning: IBM has a strong market position that competitors find hard to match, particularly in the public sector. IBM has solutions catered for specific needs and actively markets them to the U.S. government sector.

Mobility-first strategy: Through the MaaS360 Suite, formerly Fiberlink, and its R&D alliance with Apple, IBM delivers on its mobility-first strategy and provides extensive support for mobile devices and applications.

Pricing options: The virtual desktop offering is flexibly priced on a per-user, per-month basis and is comprised of a fully managed solution backed by a business grade SLA. This is a differentiating factor.

Caution

The offering does not yet include a fully standardized and transparently priced SaaS component delivered via the public cloud.

Connecting the WaaS offering with IBM's own SaaS marketplace would further strengthen the company's position.

Other than the government sector, IBM has a limited number of customer examples for its WaaS offering in the North American market.

2017 ISG Provider Lens™ Leader

IBM proposes a full-service, business-grade virtual desktop positioned for enterprises in North America, but there are some features yet to be developed to turn it into a full-fledged SaaS offering.

NTT DATA

Overview

NTT DATA has a strong virtualized, cloud-based workplace services practice. It provides services to deploy WaaS in a public, private or hybrid cloud on the VMware, Citrix, Microsoft and Nutanix platforms.

Strengths

Strong portfolio of services: NTT DATA presents a full-fledged SaaS proposition for workplace services that is transparent and flexible. Different modular options are competitively priced on a per-month/per-user basis.

Innovative support: The WaaS offering is backed with a sophisticated and innovative support system that includes self-healing, self-service and a third-tier support with 24/7 availability.

Successful executions: NTT DATA is showcasing early examples of differentiated transformation projects that resulted in highly standardized cloud-based virtual desktop environments.

Seamless experience for legacy operating systems: NTT DATA provides an open web-test link to assess its capabilities in deploying virtualized access to older Windows operating systems on new devices and platforms.

Caution

With its WaaS proposition, NTT DATA is up against competitors like VMware and AWS that are better known in the market and have greater traction in North America.

The transformation to WaaS represents a major shift for many organizations. NTT DATA must strengthen its market position to be trusted as a provider.

2017 ISG Provider Lens™ Leader

NTT DATA combines solid engineering and support services with a full-fledged SaaS proposition for workplace services. The company's flexible, transparent pricing is another asset.

VMWARE

Overview

VMware has been a pioneer in desktop virtualization (VMware coined the term VDI), and its Horizon product offers virtualized desktop solutions in the cloud. With its recent partnership with Microsoft Azure, VMware has a strong value proposition in the market.

Strengths

Experience and leadership: VMware is one of the two leading desktop virtualization experts in the market and enjoys a high degree of awareness in the market for its WaaS offering.

Services portfolio: VMWare's Instant Clone technology, App Volumes and User Environment Manager allow for rapid provisioning of personalized Windows 10 desktops with the full scope of functionality.

AirWatch: With the integration of AirWatch (which VMware acquired in 2013), VMware is now in a powerful position to offer a full suite of mobile and fixed endpoint services through a cloud workspace proposition.

Caution

VMware is making a play for an all-out virtualized desktop offering. That could be too much, too soon for many organizations still bound by distributed administration infrastructures.

References are an important factor for purchase decisions, and VMWare would benefit from new local references for its workspace offering.

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Considering the degree of awareness in the market for desktop virtualization, VMware's market presence in the cloud workplace segment could be even higher.

As VDI or WaaS awareness and adoption grow, VMware can leverage its experience and capabilities to strengthen its market position.

WIPRO

Overview

Wipro's VirtuaDesk™ provides virtualized desktop services in either on-premises, hybrid or public cloud envi-ronments. Wipro has a strong partner network and has years of experience providing VDI solutions. Through VirtuaDesk, Wipro can provide rapid deployments of unsupported, older versions of applications and operating systems like Windows 7 in a mobile environment.

Strengths

Strong portfolio: Wipro has a solid WaaS offering that can be delivered via a public cloud environment and comes with business-grade support.

Supporting help-desk services: Wipro's help desk and support services include an innovative, proactive alerting and predictive analytics tool to keep incidents and associated call rates low.

Strong alliances: Wipro forged promising alliances with leading telecommunications providers AT&T and Verizon to get more market traction in North America for its cloud-based workplace proposition.

Caution

Although Wipro provides a fixed-price service at a competitive rate, the pricing is not as modular as that of leading competitors in this space.

Wipro must build its market presence and get more leverage with its partners to increase its current sales figures from indirect channels.

2017 ISG Provider Lens™ Leader

Wipro brings an interesting offering for WaaS and innovation in proactive support services to the market.

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RISING STAR: DIMENSION DATA

Overview

Dimension Data hosts and resells Citrix and VMWare Desktop-as-a-Service and offers hosted virtualized desktop services. It also offers 3D Workspace as a comprehensive Desktop-as-a-Service proposition.

Strengths

Service portfolio: The company's digital workspace portfolio addresses relevant trends such as unified endpoint management and integration of Windows 10, the cloud workspace and Office 365.

Innovative services: Dimension Data provides real innovations, such as a self-service portal that can help reduce the workload of the help desk staff.

Aggressive sales and marketing: Dimension Data is actively positioning its cloud proposition. The organization covers all core technologies required for workplace service virtualization. The sales force encourages migration to the cloud.

Caution

Dimension Data needs to strengthen its position in the large accounts segment. It should aggressively engage in marketing and showcase successful case studies in North America.

Dimension Data has to further develop its cloud-based workplace offering to become a true WaaS delivered from the public cloud.

2017 ISG Provider Lens™ Rising Star

Dimension Data provides a very innovative digital workplace service built on its own proprietary cloud platform.

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RISING STAR: HCL

Overview

HCL provides a cloud-based workplace service offering through its LibreDesk and DryIce™ enabled MyWorkplace solution. North America constitutes 44 percent of its global revenues from its WaaS offering.

Strengths

Productized initiatives: Through its cloud-hosted virtual desktop offering LibreDesk, HCL provides subscription-based desktop and application access to end users. Its DryIceTM platform enables its MyWorkplace solution to provide one-stop access to end user's entire workplace environment.

Cloud-based app provisioning: HCL's MyWorkplace provides cloud-based application provisioning with options to rent applications, install them on local devices or run them completely in the cloud. MyWorkplace facilitates a smooth employee onboarding and offboarding process.

Strong partner ecosystem: HCL partners with leading independent software vendors like Citrix, VMware, Microsoft, RES, Atlantis, ASG, NexThink, Aternity and Nutanix. It offers its LibreDeskTM through cloud service partners like Azure, Microsoft and VMware. Its MyWorkplace solution leverages Citrix for application virtualization.

Caution

HCL is too focused on productizing its offerings and may run the risk of confusing its clients about their specific use cases and clear distinctions.

HCL has WaaS case studies in the banking and financial services industry. It also should showcase examples from other industries, like media entertainment, where virtualized desktop or application latency is a key consideration.

2017 ISG Provider Lens™ Rising Star

HCL has a robust offering providing cloud-based virtualized desktop services. It is emerging as a strong player in this space.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2017 - Digital Workplace Services" analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of the Digital Workplace Services target market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities and use cases

4. Leveraging of ISG's internal databases and advisor knowledge and experience (wherever applicable)

5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following key evaluation criteria:
   - Strategy and Vision
   - Innovation
   - Brand Awareness and presence in the market
   - Sales and partner landscape
   - Breadth and Depth of portfolio of services offered
   - Technology Advancements

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ISG Provider Lens™ | Quadrant Report
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ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.