ISG Provider Lens™

Digital Workplace of the Future — Services & Solutions

U.K. 2020

A research report comparing provider strengths, challenges and competitive differentiators

Quadrant Report

September 2020

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HEXAWARE

About this Report

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The research and analysis presented in 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 ISG believes to be current as of September 2020, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The lead author for this report is Henning Dransfeld. The editor is Ambrosia Sabrina. The research analyst is Rahul Basu and the data analyst is Bhanwar Chauhan. The Quality and Consistency Advisor is Dr. Linda Delbridge.

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EXECUTIVE SUMMARY

The Digitalisation Trend is Accelerated by Covid-19

In the second quarter 2020, remote working was rapidly accelerating in the UK: The outbreak and regulation relating to COVID-19 forced large and smaller office-based organisations to lead their employees into the remote working environment. Companies had to bring thousands of employees into the home office in short time periods. Judging by the cases reported back to ISG, the technology transformation went ahead without too many obstacles. Questions relating to sourcing enough devices, enabling bandwidth and collaboration tools were by enlarge dealt with smoothly.

The biggest concerns on the sudden home office surge lead to security and change management: Many organisations in the public and private sector had to make shortcuts to bring employees quickly into the remote working environment. This rapid shift has caused security concerns, as Identity and access technologies are not always optimized to the authentication requirements of workers accessing critical systems from home. An even bigger concern is the lost touch with the organization, especially with the elder work population. Change management programs and experience level SLA have become a new paradigm for provider differentiation.

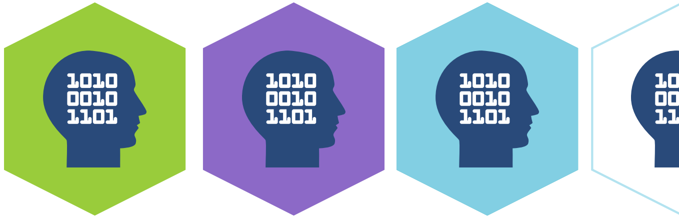
Digital Workplace Consulting Services focus on the digital transformation post-COVID-19: Enabling employee productivity, safety and health at home are becoming critical capabilities. Providers who get this equation right stand a good chance of increasing trust with their client organization and strengthen the ties in the moments of crisis.

Managed Workplace Services are in transition to adapt to the post-COVID-19 environment: Many technologies based on office improvements decline in importance. At the same time, solutions including scaling virtual meeting capacity, securing connections and delivering office furniture and mobile devices to homes are rising on importance. Help desk services are under pressure to deliver on a better employee experience from home and many providers deploy analytics to deliver.

Managed Mobility Services continue to rise in importance: Clients are increasingly looking for seamless collaboration across the fixed and mobile platforms and expect mobile productivity to be enhanced with modern workflow applications which are integrated into corporate backend systems including CRM and ERP. This is another area where clients are wary about security patches and seek robust propositions from providers.

Specialist Unified Endpoint Solutions are becoming a vital tool to enhance the end user experience: Solution vendors are strongly focused on improving the user experience of the clients' employees to the deployment of reliable security features for threats and vulnerability management of the endpoints. Specialized providers play a major role and represent the majority of the leaders in the UEM quadrant.

The market for Unified Communications & Collaboration Solutions has seen growth climb in two consecutive quarters: Whereas scalability and network efficiency were the most urgent requirements with the home office surge, UCC is now very focused on the overall user experience and security aspects. The number of applications and devices supported is on the increase and cloud-based solutions are becoming rapidly more prominent.



Introduction

Simplified illustration

Source: ISG 2020

Definition

The digital workplace of the future refers to the technology ecosystem that enables enterprise employees to securely access their work profiles, stored data, and applications anywhere, anytime, and on any device or platform. It aims to improve digital dexterity and worker productivity while enabling them to connect and collaborate with fellow employees efficiently.

The digital workplace technology ecosystem comprises software solution vendors offering solutions that provide secure device management, continuous access to apps and data over any device, next-generation meeting collaboration, and productivity-focused solutions. It also includes system integrators and service providers that act as partners for enterprises in their workplace transformation journey — helping to assess their workplace environment, suggesting best approaches, managing the entire technical environment and providing support to end users by leveraging the latest and emerging technologies.

Definition (cont.)

As global enterprises grapple with the COVID-19 pandemic, they need to enable remote working at scale for a majority of their workforce. This requires employees to have seamless access to their workplace apps through the device they carry (personal or company-owned). It also requires an overarching technical environment that ensures connectivity and collaboration among globally dispersed employees anytime and anywhere. Also, enterprises must ensure that corporate data and applications remain secure and protected from cyberattacks. This requires significant investments in secure tools for remote working along with meeting and collaboration solutions to ensure employee productivity.

Scope of the Study

As part of this quadrant study, ISG is introducing the following seven quadrants on digital workplace services and solutions.

Digital Workplace Consulting Services: Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture, and creating the roadmap for validating the business case around transformation. Consulting and workplace assessment are an essential part of the digital workplace offering and is offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the end user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end-user personas, providing a roadmap for implementation, enabling technology adoption and change management.

Managed Workplace Services: Managed digital workplace services are comprised of all managed services related to the digital workplace. An IT service desk with level ½ support, in-person technical support and user self-help services form the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services, and managed virtual desktop services.

Definition (cont.)

Managed Mobility Services: With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobility services include support for 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 such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

Unified Endpoint Management Solutions: Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a unified approach to managing desktops, PCs, and mobile and smart devices through a single console. A UEM solution should support both on-premise and cloud deployments, remotely manage and configure devices, and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.

Unified Communication and Collaboration Solutions: Unified communication and collaboration solutions includes integrated solutions that combine state-of-the-art collaboration tools with telephony. These include corporate social networks, next-generation intranet solutions, business communications, and team- and content-centric collaboration. They can also extend to groupware, knowledge management, email, conferencing, activity streams, microblogging, and talent and competence management. The software solutions help in productivity improvements for end users by providing them with new and improved ways to communicate with colleagues and continuous expansion of the company's knowledge base. These solutions ensure that people on a team or project are connected regardless of device or location. They can create accessible workspaces and virtual rooms, enable collaboration via chat, audio and video channels, integrate into the corporate ecosystem, and enable the coordination and management of knowledge. It is a cloud-based software solution that can be used by both mid-sized and large enterprises.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

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

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

"Rising Stars" are usually Product Challengers with high future potential. 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 also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 1 of 5

	Digital Workplace Consulting Services	Managed Workplace Services	Managed Mobility Services	Unified Communication and Collaboration	Unified Endpoint Management
Accenture	Leader	Leader	Leader	Not in	Not in
Alcatel-Lucent	Not in	Not in	Not in	Product Challenger	Not in
Atos	Leader	Leader	Leader	Leader	Not in
Avaya	Not in	Not in	Not in	Leader	Not in
Baramundi	Not in	Not in	Not in	Not in	Product Challenger
BlackBerry	Not in	Not in	Not in	Not in	Market Challenger
BlueJeans	Not in	Not in	Not in	Market Challenger	Not in
Box	Not in	Not in	Not in	Not in	Product Challenger
BT	Product Challenger	Market Challenger	Market Challenger	Not in	Not in
CA	Not in	Not in	Not in	Not in	Contender
Cancom	Not in	Product Challenger	Product Challenger	Not in	Not in
Capgemini	Leader	Leader	Product Challenger	Not in	Not in
Cisco	Not in	Not in	Not in	Leader	Not in
Citrix	Not in	Not in	Not in	Not in	Leader

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 2 of 5

	Digital Workplace Consulting Services	Managed Workplace Services	Managed Mobility Services	Unified Communication and Collaboration	Unified Endpoint Management
Coforge	Not in	Contender	Not in	Not in	Not in
Cognizant	Product Challenger	Not in	Product Challenger	Not in	Not in
Computacenter	Leader	Leader	Leader	Not in	Not in
COYO	Not in	Not in	Not in	Contender	Not in
CSS Corp	Not in	Contender	Not in	Not in	Not in
Damovo	Not in	Not in	Not in	Product Challenger	Not in
Digital Workplace Group	Leader	Not in	Not in	Not in	Not in
DXC	Leader	Leader	Leader	Not in	Not in
Ericsson	Not in	Not in	Not in	Product Challenger	Not in
Fujitsu	Product Challenger	Leader	Leader	Not in	Not in
Getronics	Market Challenger	Leader	Leader	Not in	Not in
Google	Not in	Not in	Rising Star	Leader	Not in
HCL	Leader	Leader	Leader	Not in	Not in
Hexaware	Product Challenger	Rising Star	Product Challenger	Not in	Not in

Digital Workplace of the Future – Services & Solutions - Quadrant Provider Listing 3 of 5

	Digital Workplace Consulting Services	Managed Workplace Services	Managed Mobility Services	Unified Communication and Collaboration	Unified Endpoint Management
IBM	Leader	Product Challenger	Leader	Not in	Product Challenger
Infinite	Not in	Not in	Contender	Not in	Not in
Infosys	Product Challenger	Product Challenger	Product Challenger	Not in	Not in
ITC Infotech	Not in	Not in	Contender	Not in	Not in
Ivanti	Not in	Not in	Not in	Not in	Leader
Jive	Not in	Not in	Not in	Market Challenger	Not in
LogMeIn	Not in	Not in	Not in	Not in	Product Challenger
LTI	Not in	Product Challenger	Not in	Not in	Not in
Matrix42	Not in	Not in	Not in	Not in	Product Challenger
Microland	Contender	Contender	Contender	Not in	Not in
Microsoft	Not in	Not in	Not in	Leader	Leader
Mitel	Not in	Not in	Not in	Product Challenger	Not in
Mobileiron	Not in	Not in	Not in	Not in	Market Challenger
Mphasis	Market Challenger	Market Challenger	Market Challenger	Not in	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 4 of 5

	Digital Workplace Consulting Services	Managed Workplace Services	Managed Mobility Services	Unified Communication and Collaboration	Unified Endpoint Management
Nation Sky	Not in	Not in	Not in	Not in	Product Challenger
NFON	Not in	Not in	Not in	Contender	Not in
NTT	Leader	Leader	Not in	Not in	Not in
NTT DATA	Product Challenger	Market Challenger	Product Challenger	Not in	Not in
Okta	Not in	Not in	Not in	Not in	Leader
Orange Business Services	Product Challenger	Not in	Market Challenger	Not in	Not in
Rocket.Chat	Not in	Not in	Not in	Market Challenger	Not in
Slack	Not in	Not in	Not in	Leader	Not in
Smarp	Not in	Not in	Not in	Product Challenger	Not in
Snow Software	Not in	Not in	Not in	Not in	Market Challenger
SOTI	Not in	Not in	Not in	Not in	Contender
Stefanini	Not in	Product Challenger	Contender	Not in	Not in
TCS	Leader	Leader	Leader	Not in	Not in
TeamViewer	Not in	Not in	Not in	Product Challenger	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 5 of 5

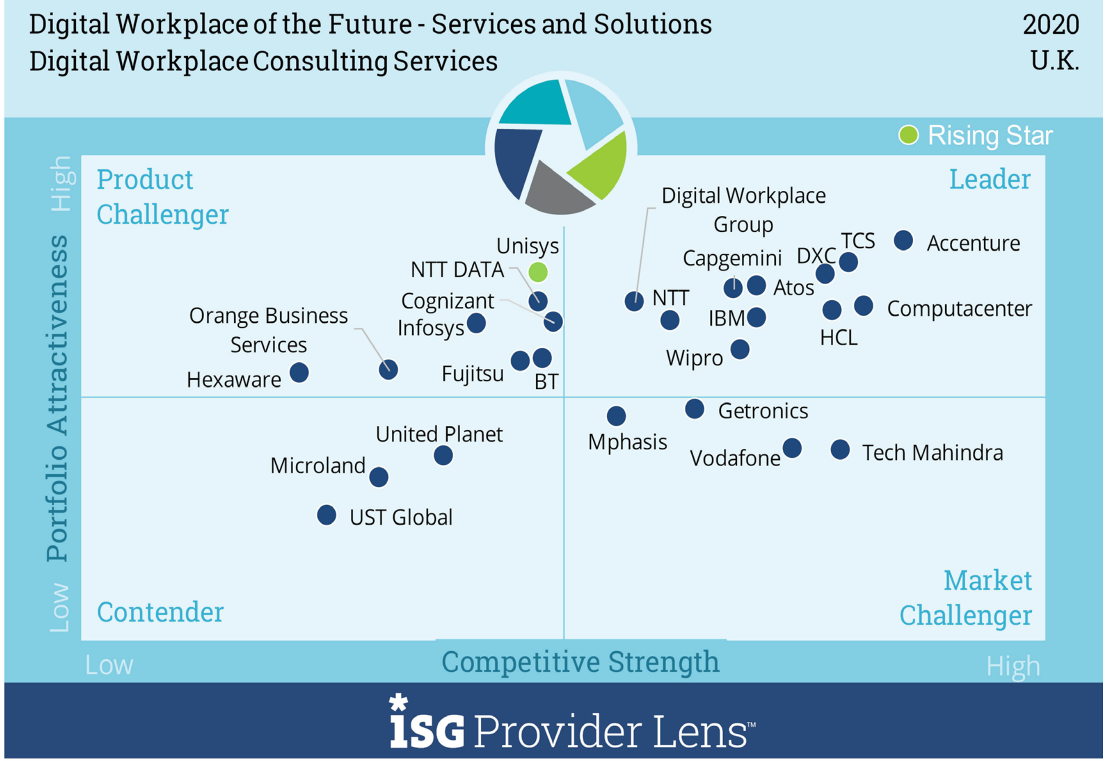
	Digital Workplace Consulting Services	Managed Workplace Services	Managed Mobility Services	Unified Communication and Collaboration	Unified Endpoint Management
Tech Mahindra	Market Challenger	Market Challenger	Product Challenger	Not in	Not in
Trend Micro	Not in	Not in	Not in	Not in	Leader
UberConference	Not in	Not in	Not in	Market Challenger	Not in
United Planet	Contender	Not in	Not in	Not in	Not in
Unisys	Rising Star	Leader	Not in	Not in	Not in
UST Global	Contender	Not in	Not in	Market Challenger	Not in
Visionet	Not in	Not in	Not in	Market Challenger	Not in
VMware	Not in	Not in	Not in	Product Challenger	Leader
Vodafone	Market Challenger	Market Challenger	Leader	Not in	Not in
Wipro	Leader	Leader	Leader	Not in	Not in
Zensar	Not in	Product Challenger	Product Challenger	Not in	Not in

Digital Workplace of the Future – Services & Solutions Quadrants

DIGITAL WORKPLACE CONSULTING SERVICES

Definition

Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture, and creating the roadmap for validating the business case around transformation. Consulting and workplace assessments are an essential part of the digital workplace offering and are offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end-user personas, providing a roadmap for implementation, and enabling technology adoption and change management.



Source: ISG Research 2020

DIGITAL WORKPLACE CONSULTING SERVICES

Eligibility Criteria

- Provide consulting and workplace assessment services that are independent of the associated managed services.
- Vendor-neutral approach in assessing the best technology partner.
- Established methodology for end-user persona segmentation.
- Ability to define and visualize modern workplace environment for enhancing user experience and to measure it.
- Inclusion of technology adoption and change management services in the consulting portfolio.

Observations

In response to requirements caused by COVID-19, the initial enterprise focus was to move many more employees into the remote working environment: Customers are now strongly looking for support in solving questions relating to an optimized infrastructure and the right security concept. In addition, the biggest hurdle to productivity is people overcoming organizational changes. The demand for linking workplace services more directly to business success is becoming stronger: Customers are becoming increasingly aware of the importance of the employee experience for overall success in the workplace.

ISG has identified 26 companies for this quadrant, naming 11 as Leaders and one as a Rising Star.

- **Accenture** combines access and experience on the business side with strong technological competences. Accenture is one of few IT services providers with a strong recognition in the business departments.
- **Atos** offers a balanced approach on human, technological and environmental factors. All three aspects receive equal consideration in delivering a tangible strategy, solution and roadmap for clients.
- **Capgemini** provides services that span the entire chain from strategy consulting to execution. The digital workplace consulting business is backed by in-depth experience in transformation.

DIGITAL WORKPLACE CONSULTING SERVICES

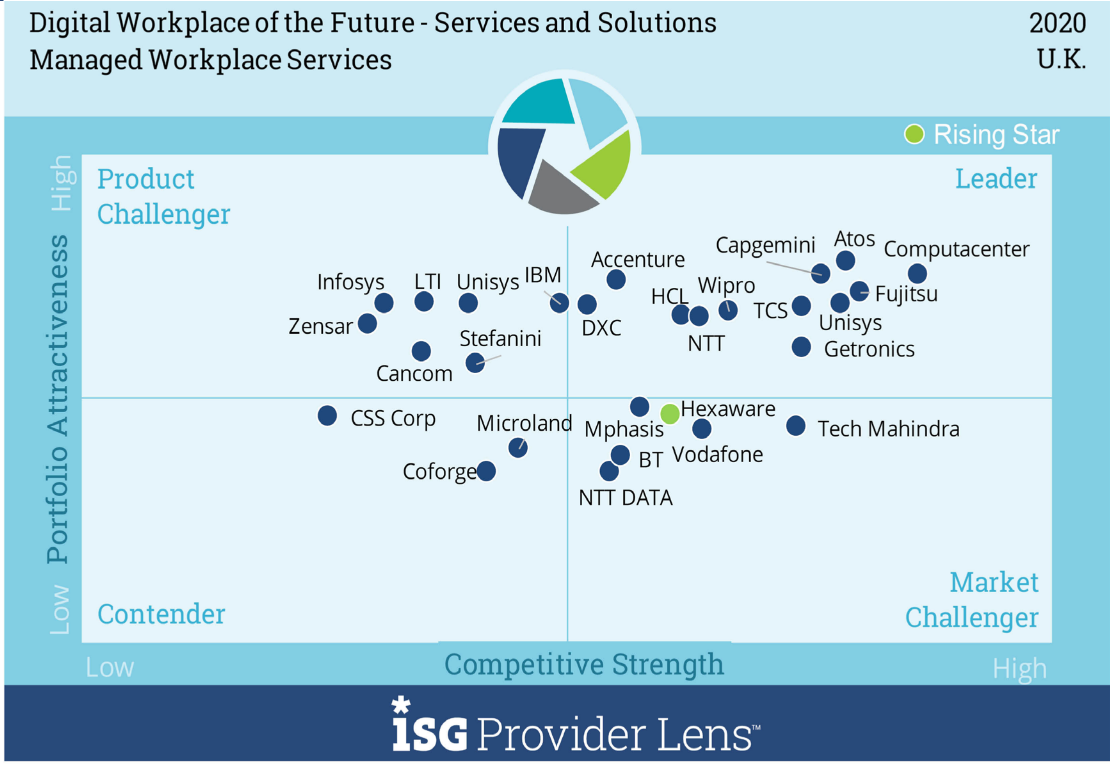
Observations (cont.)

- **Computacenter** provides a highly structured consulting offering to the UK market. The consulting engagement is divided into five transparent stages from Assess & Design to Adoption. The latter is concerned with implementation and includes support through organizational change implications.
- **Digital Workplace Group** enjoys good momentum and was recognized as a leading digital consultancy by the Financial Times in 2020. DWG continues to grow both its client base and its brand recognition in the UK.
- **DXC** is a highly experienced IT consulting organization. DXC Consulting Services helps stakeholders formulate goals, develop strategy, and plan a roadmap for flexible, emerging technology solutions.
- **HCL** is an established player for digital workplace consulting services in the UK market. A large team of experienced advisors and consultants deploy a proven methodology with enterprise clients to embrace the digital transformation of the workplace.
- **IBM** deploys sophisticated analytics services to support the consulting approach. The company uses integrated analytics, automation and cognitive technology to create an intelligent support infrastructure that is continuously learning with each interaction.
- **NTT** is an exceptionally customer-driven service organization. An ongoing Center of Excellence — accountable for generating continuously optimized service, cost, flexibility and satisfaction improvements — is an integrated component of the consulting proposition.
- **TCS** has a comprehensive and well-structured consulting proposition that covers all major aspects from strategy design to technical implementation and is backed by 350 consultants in the UK.
- **Wipro** provides a broad consulting capability with a rich set of methodologies. From creative thinking methods for the conceptional phases to rapid deployment for transformational themes, Wipro has structured engagement support methods for different parts of the journey.
- Rising Star **Unisys** offers a strong consulting proposition on experience level measurement. The provider makes full use of its technology competence to enable clients to track and improve their employee experience on workplace technologies.

MANAGED WORKPLACE SERVICES

Definition

Managed digital workplace services comprised all managed services related to the digital workplace. An IT service desk with level 1 and 2 support, in-person technical support and user self-help services form the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services, and managed virtual desktop services.



Source: ISG Research 2020

MANAGED WORKPLACE SERVICES

Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents.
- Offer onsite field support and in-person technical assistance.
- Set up self-help kiosks, tech bars, IT vending machines and digital lockers.
- Offer managed services for collaboration and communication over diverse platforms.
- Provide device support, predictive analytics and proactive monitoring services.
- Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud.

Observations

The largest transformation in workplace services for 2020 is related to COVID-19. The acceleration of remote working has put the emphasis for managed services on supporting modern collaboration services, security services and managing the volume of change from evergreen IT within a distributed environment.

Innovative technologies like automation and AI are focused on scaled environments. Organizations have come under sudden pressure to enhance the remote end-user experience, to spot security breaches arising from technical shortcuts being made in the rush to get employees into the home working environment, and improve overall remote services support.

Technologies for personalizing the user experience continue to evolve. Customers get more sophisticated in their requirements that managed services solutions deliver the right application in the right context to the right user.

ISG has identified 28 companies for this quadrant, naming 12 as Leaders and one as a Rising Star.

- **Accenture** offers a rich portfolio including special workplace services for specific segments. For example, the service supports industry-specific solutions including front-line worker tools and applications, process digitization, and tailored combinations of digital and physical workplace solutions.

MANAGED WORKPLACE SERVICES

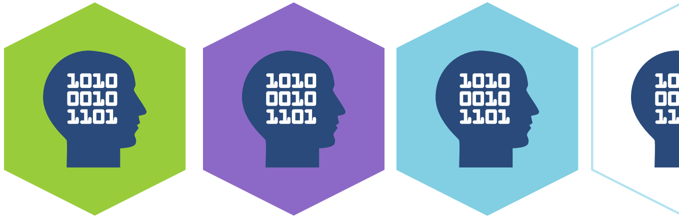
Observations (cont.)

- **Atos** has a rich, innovative digital workplace service offering. The company employs AI and machine learning for services and is focused on employee usability and satisfaction for workplace transformation projects.
- **Capgemini** deploys innovation to identify user issues early. Capgemini uses business technology and data analytics to proactively identify issues and then mitigate or eliminate them before they become critical or widespread. That is, it turns data and information into early actionable solutions.
- **Computacenter** is known for high-quality engineering services and a broad portfolio. Computacenter provides a largely automated digital delivery platform, an ecosystem of proprietary tools, data and processes to deliver simpler, faster and cost-efficient capabilities.
- The **DXC** offering is flexible and highly automated. DXC's digital workplace service portfolio is flexibly structured and combines traditional workplace management with client virtualization. DXC drives innovation, especially through automation.
- **Fujitsu** provides an innovative and human-centric workplace service. The offering focuses on employees and their workplace needs rather than technology. The digital workplace service portfolio is underpinned with strong technical skills and experience.
- **Getronics** delivers a comprehensive digital workplace solution with deep integration expertise in collaboration solutions. Integration of Microsoft products with Cisco and other leading communications providers is the home turf of Getronics.
- **HCL** has a strong global track record of delivery on transformation projects. It is very experienced in digitally transforming the workplace by shifting complex and mature IT infrastructures into a modern service platform. HCL has hardly any legacy revenue base in the UK.
- **NTT** has a highly innovative, analytics-based approach with its Dynamic Workplace Services. The provider uses insight-driven analytics and AI in combination with predictive instance measurement to solve client issues proactively.
- **TCS** puts employee experience at the core of its digital workplace offering. The TCS digital workplace vision is to provide an intuitive, immersive and intelligent workplace to enhance the user experience by maximizing their digital dexterity and their wellness.

MANAGED WORKPLACE SERVICES

Observations (cont.)

- **Unisys** is continuously extending the breadth of its workplace service offering. Via the application of AI, analytics and automation, the provider extends its classic IT service desk operation into enterprise workplace activities including the support of HR and workflows and devices for specific business functions.
- **Wipro** provides an innovative set of support services for remote working. Wipro deploys cognitive bots to eliminate repetitive employee tasks, thereby improving employee efficiency and refactors applications to an integrated mobile platform through crowdsourcing.
- Rising Star **Hexaware** emphasizes end-user experience. The engineering on its workplace platform centers on trouble-free infrastructure and performing applications. For Hexaware, key considerations in any service design are “user first,” “personalized experience,” and “consumerization.”



RISING STAR: HEXAWARE

Overview

Hexaware has built its digital workplace story around four pillars: connect, analyze, automate, and innovate. Hexaware provides a platform-based services delivery to enhance user experience and drive automation.

Caution

Hexaware could strengthen its portfolio and positioning on business-relevant application distribution. The company lags its competitors on increasing employee productivity by delivering the right application at the right time to the right user.

Strengths

Strong focus on end-user experience: The engineering on its workplace platform centers on trouble-free infrastructure and performing applications. Key considerations in any service design are "user first," "personalized experience," and "consumerization." Hexaware is proactive with clients in positioning SLAs that are related to business outcomes.

Innovative, extensive support service: Users can access dashboards on their systems with a single window view, reset their passwords without the need of IT support and access a chatbot via voice recognition through a variety of channels.

Proactive issue resolution: The company is widely deploying predictive analysis to resolve issues before users realize that they have a problem.

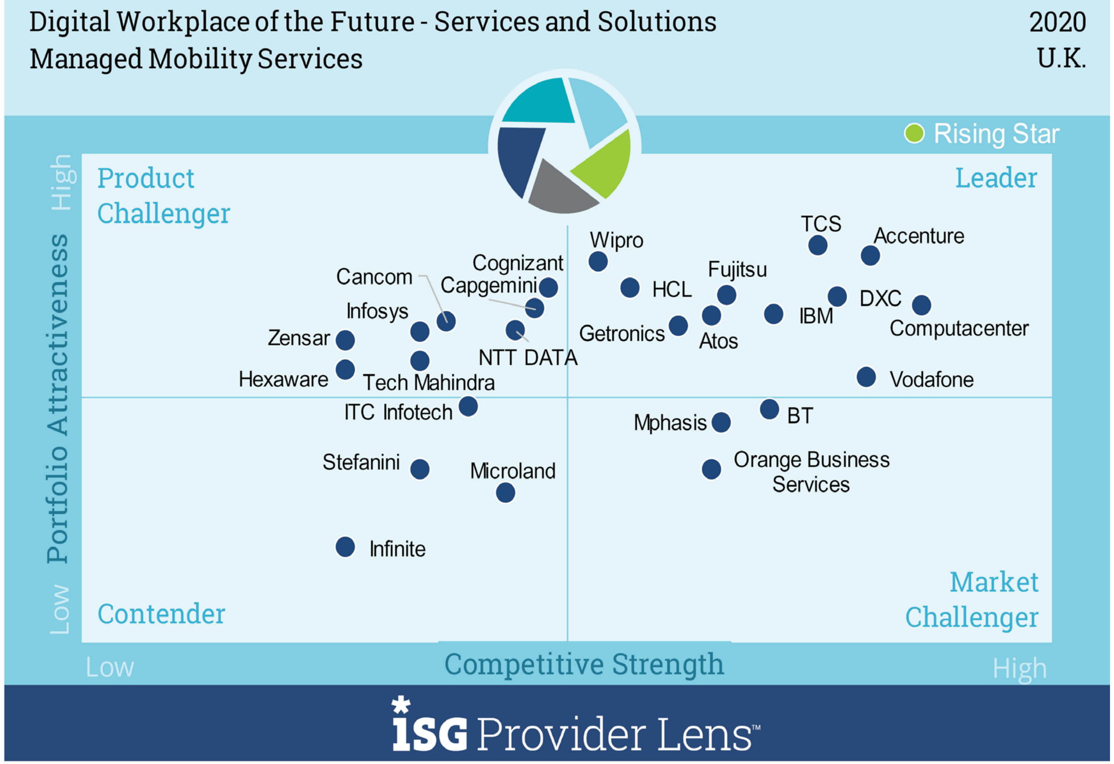
2020 ISG Provider Lens™ Rising Star

Hexaware provides an innovative workplace services offering to the UK market with extensive user support services.

MANAGED MOBILITY SERVICES

Definition

With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment, and accessibility related to roles and access policy. Managed mobility services include support for 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 such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.



Source: ISG Research 2020

MANAGED MOBILITY SERVICES

Eligibility Criteria

- Ability to support a large number of mobile phones, smartphones and smart devices (number will vary per country) in the respective countries with at least 25 percent of them managed outside the home region.
- Offer device sourcing and logistics, managed unified endpoint management (UEM), financial management, device security and mobility program management.
- Provide implementation and support for enterprise mobility, support for BYOD, mobility expense and asset management.
- Manage complete device lifecycle management and device as a service (e.g., hardware as a service, personal computer as a service).
- Develop industry specific plug-and-play mobility solutions.
- Offer support for single sign-on, secure app access and smart devices.

Observations

Mobile enterprise services continue to be more strongly integrated with workplace services. Many customers look for a single pane of glass and common processes to cover fixed and mobile device management and device lifecycle management. Content distribution across different platform and universal access to Microsoft Teams, including on mobile devices, were the most pertinent mobility issues raised during the pandemic.

The development of mobile business applications and distribution to the right user via IAM mechanisms is the second large trend. To satisfy the mobile user experience, providers are expected to optimize solutions that enable smart and secure application distribution. In this context, analytics capabilities are more widely deployed to generate insights on user experience and proactively improve fault repairs.

ISG has identified 27 companies for this quadrant, naming 11 as Leaders and one as a Rising Star.

- **Accenture launches device-as-a-service offering:** Device as a service is a good example of services developed via a strong technology ecosystem.
- **Atos** offers both a global presence and a focus on local delivery in the UK. It provides end-to-end services that form a complete mobile enterprise service with security solutions complemented by a strong partner network and solution co-development.

MANAGED MOBILITY SERVICES

Observations (cont.)

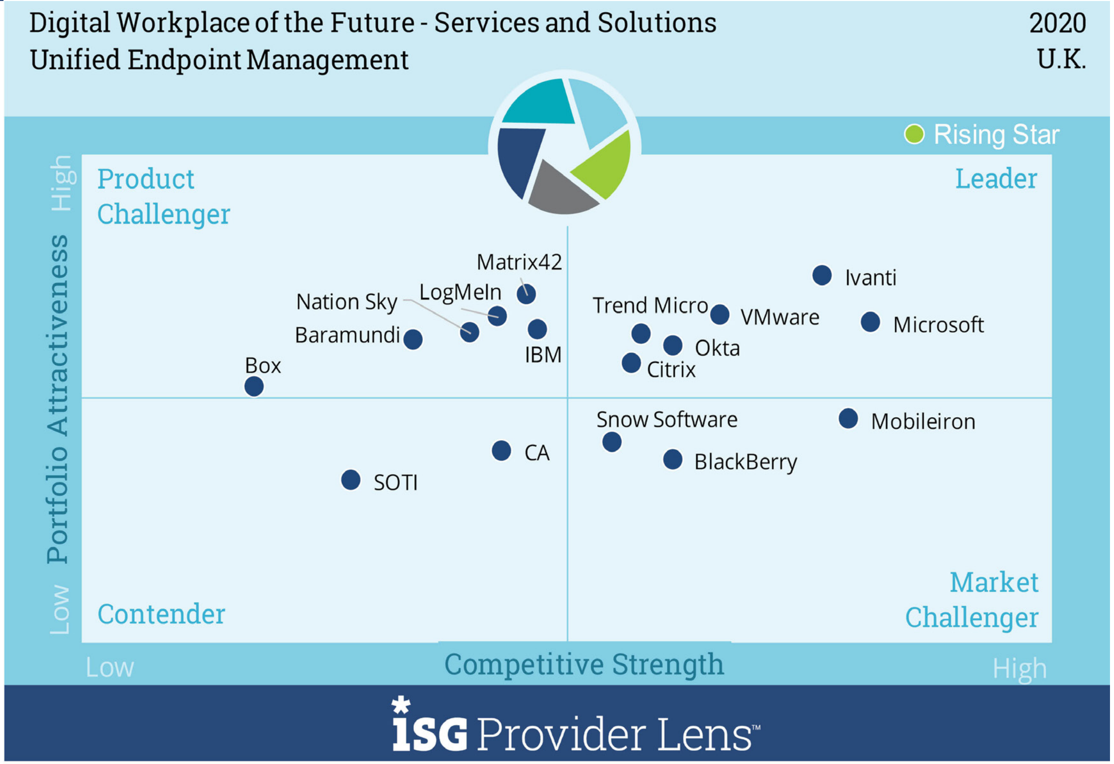
- **Computacenter** has a strong position and history of enterprise mobility in the UK market. Its professional sales approach as an early challenger in the market for mobile enterprise services to very large UK accounts started a decade ago and has led to a large client base.
- **DXC provides a state-of-the-art EMM solution:** DXC offers modern management capabilities in partnership with Microsoft and VMware to provide unified user experience. Its unified endpoint management services extend to all fixed and mobile work devices including printers.
- **Fujitsu's** compelling mobility solution is comprehensive and underpinned with strong technology partnerships, including all leading solution providers for device management platforms.
- **Getronics** drives a mobility-first approach for workplace services. Getronics displays a high commitment to mobile users and their integration into the overall workplace strategy.
- **HCL** brings a broad EMM services proposition to market. The offering is complete. The offering "technology expense management" including cloud infrastructure expense can be regarded as a unique selling point today.
- **IBM** has deep engineering expertise for mobile enterprise services and its own solution. IBM uses its own managed mobility services for more than 700,000 company devices and it manages over 8 million devices globally.
- **TCS** services include device lifecycle management, application and security management, and mobility consulting services.
- **Vodafone** has global delivery capabilities for mobile devices and services. Vodafone has the scale to provide device lifecycle management services to enterprise clients with globally distributed requirements. That applies to many UK enterprise customers.
- **Wipro's** mobile enterprise portfolio is supported by a large professional services organization. Wipro has a dedicated team of over 1,500 mobility consultants with an average industry experience of 10 – 15 years across mobile application development and management.

UNIFIED ENDPOINT MANAGEMENT

Definition

Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets, laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a consolidated approach to managing desktops, PCs, and mobile and smart devices through a single console.

A UEM solution should support both on-premises and cloud deployments, remotely manage and configure devices, and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.



Source: ISG Research 2020

UNIFIED ENDPOINT MANAGEMENT

Eligibility Criteria

- Ability to offer an independent software solution for UEM that can be purchased separately.
- Software solution to provide MDM, EMM, MCM, MAM, secure user access and profile management.
- Solution to integrate with system managers such as Microsoft System Center Configuration Manager (SCCM) and administer devices from different platforms.
- Manage smart devices.

Observations

Providers in the Unified Endpoint Management space are clearly dedicating an always increasing level of attention to improving the User Experience of the clients' employees to the deployment of reliable security features for threats and vulnerability management of the endpoints. Specialized providers play a major role and represent the majority of the leaders in the UEM quadrant.

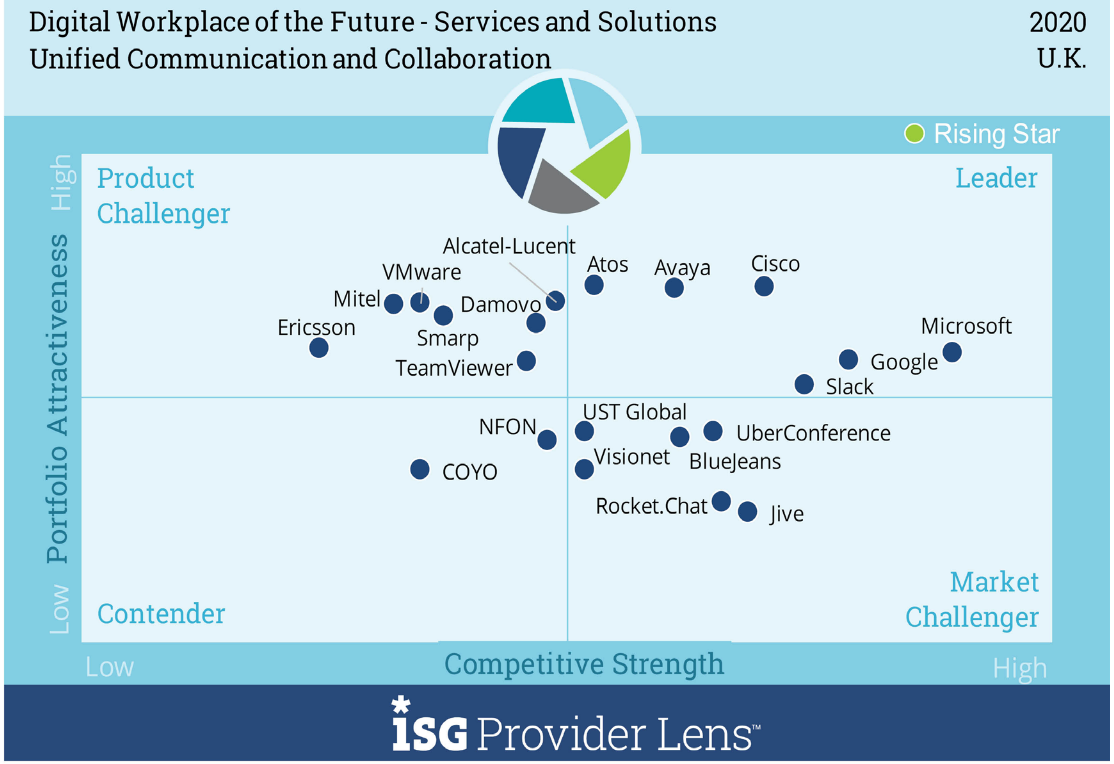
ISG has identified XX companies for this quadrant, naming six as Leaders.

- **Citrix** has put a strong focus on enabling the same user experience across devices.
- **Ivanti** leads the quadrant in the flexibility of its solution.
- **Microsoft** shines for the combined Azure and Office 365 capabilities leveraged in its UEM offering.
- **Okta** has singular features related to the identification and authentication of users in the UEM space.
- **Trend Micro** powers a security solution in the UEM space for the best-in-class UEM providers.
- **VMware's** leading position is a consequence of the automation features of the UEM solution that strongly improve user experience.

UNIFIED COMMUNICATION AND COLLABORATION

Definition

Communication and Collaboration Solutions includes integrated solutions that combine state-of-the-art collaboration tools with telephony. These include corporate social networks, next-generation intranet solutions, business communications, and team and content-centric collaboration. It can also extend to groupware, knowledge management, email, conferencing, activity streams, microblogging, and talent and competence management. The software solutions deliver productivity improvements for end users by providing them with new and improved ways to communicate with colleagues and continuous expansion of the company's knowledge base. These solutions ensure that people on a team or project are connected regardless of device or location. They can create accessible workspaces and virtual rooms; enable collaboration via chat, audio and video channels; integrate into the corporate ecosystem; and enable the coordination and management of knowledge. It is a cloud-based software solution that can be used by both midsized and large enterprises.



Source: ISG Research 2020

UNIFIED COMMUNICATION AND COLLABORATION

Definition (cont.)

These solutions reduce the geographical barriers to professional communication and help organize corporate communication events to increase employee engagement. Organizations use meeting solutions to collaborate during both informal and formal meetings such as external presentations, training, webinars and town hall meetings. Some videoconferencing systems offer software integrations for marketing automation and customer relationship management (CRM) to synchronize key business data with specific conferences, enabling seamless follow-up communication and updating of contact accounts. Meeting solutions should follow protocols to protect information online through encryption and compliance with internationally recognized security and privacy standards.

Eligibility Criteria

- Ability to provide cloud-based solutions for audio/video meetings and conferencing; solutions can also be deployed onsite.
- Allows videoconference hosts to access presenter controls, invite guests to meetings and integrate with conference room systems.
- Provides chat, remote access, desktop and application sharing.
- Provide facilities for recording, playback and sharing of sessions for future reference.
- Integration of drawing tools with virtual whiteboard functions.
- Supports various devices, from room systems to PCs, laptops, smartphones and tablets.
- Provides functions to reduce email use and complement intranet usage.
- Focus on companywide information exchange and team/content-based collaboration.
- Technology differentiation with focus on measurable productivity gains.
- Covers elements in a converged, enterprise, social collaboration service bundle that offers chat, audio/video collaboration, content collaboration and integration with third-party enterprise applications.

UNIFIED COMMUNICATION AND COLLABORATION

Eligibility Criteria (cont.)

- Offers productivity, knowledge management, content collaboration and workflow management.
- Integration with both IT and non-IT business functional applications.
- Integration of bots with artificial intelligence (AI), use of ML for content collaboration.
- Ability to offer both freemium and on-premises versions.
- Partnerships and customer acceptance in both medium and large enterprises.
- Meeting and conferencing solutions enable online communication and interaction by combining messaging and content sharing.
- Provides softphone features or PBX telephony integration, integrated VoIP, and toll-based audio-calling options.

Observations

The Unified Communication and Collaboration (UCC) space is increasingly characterized by a growing focus on user experience and security aspects by providers. The number of applications and devices supported is always increasing as it is the tendency to provide comprehensive solutions that integrate seamlessly with the broader external ecosystems at the clients' level. Cloud-based solutions are definitely playing a more and more important role.

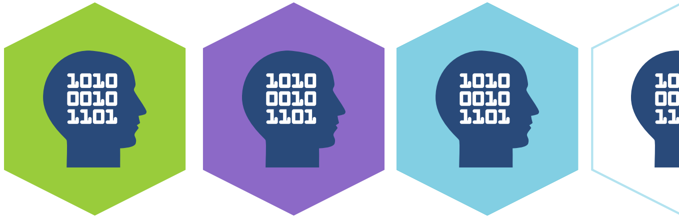
ISG has identified XX companies for this quadrant, naming six as Leaders.

- **Atos** is a leader the UCC space thanks to its combined offering of solution and delivery capabilities.
- **Avaya** deserves leading positioning in the UCC space for its multi-cloud application ecosystem, which allows collaboration continuity across customers' cloud journey.
- **Cisco** maintains its solid position as a leader as a consequence of the innovations in its Webex platform, which include people insight, facial recognition capabilities, natural language processing (NLP) and artificial intelligence.

UNIFIED COMMUNICATION AND COLLABORATION

Observations (cont.)

- **Google** specializes in communication tools with its Meet and Chat solutions. Collaboration is enabled by the native features of the broader G Suite.
- **Microsoft** is gaining a lot of traction thanks to the further development of its Teams solution, now almost completely replacing Skype for Business. The breadth of its offering and of its customer network makes Microsoft an undisputable leader in this space.
- **Slack** stands out for the number of third-party applications that the provider allows to integrate into its solutions.



Methodology

METHODOLOGY

The research study "ISG Provider Lens™ Digital Workplace of the Future - Services & Solutions 2020" analyzes the relevant software vendors/service providers in the U.K. 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 2020 ISG Provider Lens™ Digital Workplace of the Future — Services & Solutions 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. Leverage 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 & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Henning Dransfeld, Author

Principal Consultant, ISG Research, Germany

Henning Dransfeld is a thought leader regularly publishing on trends related to the mobile enterprise, the digital workspace and IoT markets. As an analyst, ICT strategist and go-to market expert he has developed deep insights into portfolio development and changing customer requirements. Through his experience as analyst and marketing strategist, he is in a strong position to support the definition and execution of go-to-market strategies for ICT services.

Jan Erik Aase, Editor

Director, Principal Analyst and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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