Digital Workplace of the Future
Global 2019-20

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: UNISYS

November 2019
About this Report

Information Services Group, Inc. is solely responsible for the content of this report.

Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by and are the sole property of Information Services Group, Inc.

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 July 2019 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.

The lead author for this report is Mrinal Rai and co-author is Rahul Basu. The editors are John Burnell and Grant Gross. The research analyst is Rahul Basu and the data analyst is Bhanwar Chauhan.

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers’ strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.
EXECUTIVE SUMMARY

Digital Workplace of the Future: Dawn of Microsoft Technology and the XLA-Dominated Workplace

The workplace environment is under rapid transformation. Multiple factors challenge large enterprise clients and reassess their workplace strategies in present times. The most prominent challenge is a talent shortage and the related need to reskill and upskill existing staff. While there is a talented workforce out there in the market, the new, younger workers are tech savvy and it is imperative for enterprises to modernize their workplaces to be able to attract fresh relevant talent.

In multiple interactions with industry experts, we learned that younger workers often don’t join a company even after accepting their offer letters. The reason is tech savvy users can get feedback about the firm’s working culture through social media, and can rethink their decisions. Enterprises need to consider developing a positive image about their workplace environment for existing employees, so that they can spread favorable feedback in public forums. Technology can help immensely in enabling that positive image among employees, the end users.

Modern technologies enable enterprise IT to not only provide employees a favorable user experience with their applications and devices, but also to assess their sentiment and working patterns through data analytics. These analytics can generate many possible outcomes that can be useful for multiple enterprise business functions. Managing and monitoring the end-user experience is increasingly becoming a topic of interest among enterprises and their IT departments. Eventually it is affecting how the vendors and service providers hired by the enterprises are managing end user computing in a digital workplace environment.

ISG’s recently released “Creating the Workplace of the Future” report found that many enterprises still look to managed service providers as a source of labor arbitrage or specific time-and-material resources – not as valuable sources of innovation or transformation. In fact, most traditional contract structures fail to support strategic engagement. Traditional contracts use service-level agreements (SLAs) as the key metric. Typical SLAs used require careful governance but do not support strategic engagement.

A modern outlook towards digital workplace require service contracts that measure service provider performance as per measurable end-user experience, using experience level agreements (XLAs). There is a growing interest in XLA-based contracts, although wide acceptability has not been observed, as both clients and service providers are still figuring out best way to structure XLAs. In essence, continuously monitoring system, network, device and application performance can generate analytics that can provide an indication of the prevalent overall end-user experience level with enterprise IT. Leveraging machine learning, data analytics, sentiment analysis and cognitive intelligence can provide significant improvements in the way enterprise end users consume IT services. Many service providers are developing analytics offerings that are personalized around end users to provide the most appropriate actionable insight for enterprise business functions.

Apart from XLAs, another important trend that we are witnessing in the market is the dominance of Microsoft tools and technologies in the workplace environment. Microsoft had always been the de facto technology solution vendor for the workplace, be it operating systems, servers, productivity applications or system configurators. However, with cloud and SaaS applications entering into the workplace, easier and less costly alternatives to traditional Microsoft resources are available. To counter this competition, Microsoft introduced a number of innovative solutions, including the Office 365 cloud-

© 2019 Information Services Group, Inc. All Rights Reserved.
based office productivity suite, Windows10, an omni-device operating system that can support cloud apps, the Intune cloud-based mobile device management solution and the recently announced Windows Virtual Desktop (WVD). These successive steps by Microsoft brought large enterprises back to the Microsoft technology ecosystem. These enterprises are now looking for solution partners and vendors that can enable the latest Microsoft Office 365, Windows 10 enabled workplace environment and manage it. Microsoft is further strengthening its grip on the market by introducing subscription services like Microsoft 365 and Microsoft Managed Desktop. Leading service providers in digital workplace services are developing their offering around these technologies to support upcoming client requirements.

The state of digital workplace of the future services at the moment is Microsoft technology focused and XLA oriented. Different services have their own set of trends and updates.

Digital Workplace Consulting

Workplace consulting is as important as ever. Though some enterprises do not consider their managed service provider as a consulting partner, almost all leading global service providers are developing consulting capabilities on top of their managed services offering.

Consulting capabilities involve not just advisory on end-user persona segmentation and as-is workplace assessment, but also for measuring technology adoption and supporting change management.

Visionary service providers are considering further enhancing their consulting capabilities to include elements of digital dexterity measurement for end users and to extend their managed services scope beyond being enterprise IT centric.

Managed Services – Workplace and Mobility Support

With the advent of XLAs, almost all service providers are building capabilities to measure user experience based on technology usage at the minimum. How the providers define and what they measure as part of end-user experience is increasingly becoming a differentiating factor for service providers.

The growing scope of intelligent automation and cognitive intelligence is opening new doors and unexplored areas to improve end user experience by having a bot or virtual agent act as personal digital secretary, or in some cases, a digital twin of the end user.

There is a huge interest in smart workspace, meeting rooms and intelligent physical campuses. Service providers are investing in these capabilities by partnering with IoT solution vendors.

Augmented and virtual reality technologies continue to be explored for onsite field support.

In mobility, there is a growing interest in moving to a leading enterprise mobility management (EMM) solution vendor like Microsoft, which offers Intune. Service providers are developing offerings to enable the migration.

On the device analytics front, zero-touch Windows 10 migration and application readiness services are significant areas of interest for service providers.

Workplace services clients are seeing value in the device-as-a-service model. Clients do not want to own the hardware and are asking managed service providers to take care of device lifecycle management along with associated device app provisioning and security.
Unified Communications as a Service (UCaaS)

UCaaS is a cloud-focused technology and is susceptible to quick evolution. Large enterprise and mid-market customers have fast-tracked their migration from on-premise and legacy solutions to pure cloud solutions. The biggest shift in the UCaaS marketplace has come because of the improving digital dexterity of end users. It is not just business leaders, but end users themselves who are also looking for new ways to automate the routine tasks associated with communication and collaboration.

The need for a more streamlined workflow has given rise to technologies like artificial intelligence (AI), automated speech recognition (ASR), natural language processing (NLP) and smart assistants in the workplace. Voice-driven artificial intelligence has been the major highlight in the UCaaS segment, and most of the leaders have started to develop solutions around it for their clients. Some of the leaders provide solutions that enable users to take call notes, record action items and schedule meetings by using an omnipresent smart assistant. AI also brings sentiment analysis into the picture, which involves data mining to determine opinions in speech or written text.

While newer technologies are disrupting the UCaaS space, the fact remains that cloud has been the biggest driver of change in this industry. Unified communications delivered as a service through the cloud allows for greater scalability, better mobility, more predictable operating expenses and a more seamless and consistent communication and collaboration experience.

Unified Endpoint Management (UEM)

With the proliferation of different devices and applications, device management has evolved from being device centric to encompassing enterprise mobility management (EMM). UEM offers a culmination of PC device management, mobile device management (MDM) and enterprise mobility management. Many EMM and MDM solution vendors are focusing on offering a holistic, unified endpoint management solution. Many security service providers are also providing unified solutions to manage the different endpoints used to access the workplace environment.

A unified approach to managing different devices and endpoints is in demand. It requires centralized solutions for all devices, including smartphones, tablets, PCs, Macs and smart IoT devices. Because of enterprise IT’s requirement to manage all devices from one solution and end users’ expectations for self-service, UEM solutions are expected to provide end-user self-service, desktop and PC lifecycle management plus endpoint mobility management.

Technologies like artificial intelligence and machine learning can monitor traffic at each endpoint and recognize threats in the device ecosystem. Only issues that are not being automatically resolved will be escalated to human agents.
Introduction

Definition

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

Key trends in digital workplace are driven by users' preference to use technology of their own choice and by the increased relevance of emerging technologies and diverse possibilities they bring. Enterprises are focusing on end user experience enablement and its measurement. Consequently, service providers are moving from SLAs to XLAs in workplace services contracts.

Digital Workplace of the Future - Global

<table>
<thead>
<tr>
<th>Digital Workplace Services</th>
<th>Digital Workplace Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Workplace Consulting Services*</td>
<td>Unified Communications and Collaboration as-a-service (UCaaS)*</td>
</tr>
<tr>
<td>Managed Services – Workplace Support**</td>
<td>Unified Endpoint Management</td>
</tr>
<tr>
<td>Managed Services – Mobility Support**</td>
<td></td>
</tr>
</tbody>
</table>

**Segmented into mid- and large- market at country level

* Providers evaluated at country level as well

Source: ISG 2019
Definition (cont.)

Augmented and virtual reality (AR/VR) reduces and eliminates needs for in-person tech support. Its relevance and use are growing in onsite and remote support. Through use of interactive virtual agents and analytics running on systems and tracking resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There is also an increasing interest in transforming workplace management to a more operating expense (opex) model through device leasing or device-as-a-service approaches where OEMs and service providers handle the complete device lifecycle management and the client pays per month per device usage. There is growing interest among enterprises in desktop virtualization in cloud or DaaS (desktop-as-a-service) and also in unified endpoint management. There also has been a huge interest in various collaboration solutions and platforms because they are becoming the face and focal point for digital workplace enablement and provide visible benefits in end user productivity and other business benefits. However, while enterprises are trying hard to catch up with changing user expectations, they are still unable to match the pace technology is changing and attracting the new-generation workforce.

Scope of the Report

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including global, U.S., Germany, U.K., Brazil, the Nordic countries and Latin America.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.
Definition (cont.)

Digital Workplace Consulting Services

This quadrant assessment centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture, creating the roadmap and for validating the business case for transformation specific to workplace digital transformation.

Managed Services – Mobility Support

Mobility services include secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy, mobile device management (MDM), policy configuration, device configuration, device kitting, device staging, mobile application management (MAM), mobile security and cloud-based services.

Unified Communications as a Service

UCaaS combines voice and telephony, enterprise messaging, online meetings (web, video and audio), team collaboration and presence on a single integrated cloud platform.

Unified Endpoint Management

This quadrant assesses key solution vendors offering a unified solution to manage different endpoints in the workplace environment.

Managed Services – Workplace Support

Managed services for workplace support for IT service desk with level one and two support, along with in-person technical support and user self-help services, form the core of the managed services offering. The quadrant includes next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help, chatbots, managed end-user collaboration (EUC) and unified communications (UC) services and managed virtual desktop services.
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 have therefore still 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.
Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an 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 12-24 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.
## Digital Workplace of the Future - Quadrant Provider Listing 1 of 4

<table>
<thead>
<tr>
<th>Provider</th>
<th>Digital Workplace Consulting Services</th>
<th>Managed Services - Workplace Support</th>
<th>Managed Services - Mobility Support</th>
<th>Unified Communications as a Service (UCaaS)</th>
<th>Unified Endpoint Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>42Gears</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>8x8</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Accenture</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Alcatel-Lucent</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
<td>Not In</td>
</tr>
<tr>
<td>Astreya</td>
<td>Contender</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Atos</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Rising Star</td>
<td>Not In</td>
</tr>
<tr>
<td>Blackberry</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Capgemini</td>
<td>Leader</td>
<td>Rising Star</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Cisco</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td>Not In</td>
</tr>
<tr>
<td>Citrix</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Cognizant</td>
<td>Rising Star</td>
<td>Leader</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>CSS Corp</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Digital Workplace Group</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>DMI</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
</tbody>
</table>
## Digital Workplace of the Future - Quadrant Provider Listing 2 of 4

<table>
<thead>
<tr>
<th>Provider</th>
<th>Digital Workplace Consulting Services</th>
<th>Managed Services - Workplace Support</th>
<th>Managed Services - Mobility Support</th>
<th>Unified Communications as a Service (UCaaS)</th>
<th>Unified Endpoint Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>DXC Technology</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Fujitsu</td>
<td>Product Challenger</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Fuze</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>Getronics</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Google</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>HCL</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Hexaware</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>IBM</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Infinite</td>
<td>Contender</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not In</td>
</tr>
<tr>
<td>Infosys</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>ITC Infotech</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Ivanti</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Rising Star</td>
</tr>
<tr>
<td>Jamf</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Kaspersky</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
<tr>
<td>Digital Workplace Consulting Services</td>
<td>Managed Services - Workplace Support</td>
<td>Managed Services - Mobility Support</td>
<td>Unified Communications as a Service (UCaaS)</td>
<td>Unified Endpoint Management</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------</td>
<td>-------------------------------------</td>
<td>---------------------------------------------</td>
<td>-----------------------------</td>
<td></td>
</tr>
<tr>
<td>LogMeIn</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>LTI</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>ManageEngine</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td></td>
</tr>
<tr>
<td>Matrix42</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td></td>
</tr>
<tr>
<td>Microsoft</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td></td>
</tr>
<tr>
<td>Mitel</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td></td>
</tr>
<tr>
<td>MobileIron</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>Mphasis</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td></td>
</tr>
<tr>
<td>NIIT</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>NTT DATA</td>
<td>Leader</td>
<td>Leader</td>
<td>Product Challenger</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>NTT</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td></td>
</tr>
<tr>
<td>Orange</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
<td></td>
</tr>
<tr>
<td>RingCentral</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td></td>
</tr>
<tr>
<td>Snow Software</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
<td></td>
</tr>
<tr>
<td>Digital Workplace Consulting Services</td>
<td>Managed Services - Workplace Support</td>
<td>Managed Services - Mobility Support</td>
<td>Unified Communications as a Service (UCaaS)</td>
<td>Unified Endpoint Management</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------</td>
<td>-----------------------------</td>
<td></td>
</tr>
<tr>
<td>Sophos</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
<tr>
<td>SOTI</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Star2Star</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
<tr>
<td>Stefanini</td>
<td>Not In</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Tangoe</td>
<td>Not In</td>
<td>Not In</td>
<td>Market Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>TCS</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Tech Mahinda</td>
<td>Not In</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Unisys</td>
<td>Product Challenger</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>UST Global</td>
<td>Product Challenger</td>
<td>Contender</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>VMware</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Leader</td>
</tr>
<tr>
<td>Vox Mobile</td>
<td>Not In</td>
<td>Not In</td>
<td>Market Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Windstream</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Not In</td>
<td>Contender</td>
</tr>
<tr>
<td>Wipro</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not In</td>
<td>Not In</td>
</tr>
<tr>
<td>Zensar</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not In</td>
<td>Not In</td>
</tr>
</tbody>
</table>
Digital Workplace Consulting Services

Definition

Digital workplace consulting centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and creating the roadmap and for validating the business case for transformation. These advisory services are specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing 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 supporting change management.
DIGITAL WORKPLACE CONSULTING SERVICES

Eligibility Criteria

- Consulting and workplace assessment are an essential part of the provider’s digital workplace offering and are offered independently of the associated managed services;
- A vendor-neutral approach to assessing best technology partner;
- Established methodology for end user persona segmentation;
- Ability to define and visualize a modern workplace environment for enhancing end user experience, and ability to measure it;
- Inclusion of technology adoption and change management services in the consulting portfolio.

Observations

- End-user computing is increasingly becoming experience centric that requires traditionally strong infrastructure service providers to develop consulting capabilities. Service providers who are traditionally strong in digital application transformation space are leveraging their consulting and design thinking approach to provide workplace advisory services. Often, it's a precursor to implement their own managed infrastructure services for the latter.
- Atos leads the quadrant with its employee experience services with focus on end user satisfaction and wellbeing.
- TCS, with its technology adoption approach and XLA methodology, is offering strong consulting capabilities.
Digital Workplace Consulting Services

Observations (cont.)

- Accenture provides leading consulting and advisory services based on industry use cases.
- Capgemini supports digital adoption by leveraging the D-GEM framework based on its consulting offering.
- HCL takes a gamification approach towards technology adoption along with its Kaleidoscope persona segmentation methodology.
- IBM differentiates by using cognitive automation for user persona segmentation and its wide coverage in digital workplace-related transformation.

- Wipro’s service delivery incorporates a strong consulting focus.
- DXC Technology’s consulting services leverage its client experience program and partnership with PwC.
- NTT DATA’s pragmatic approach and broad consulting capabilities identify it as a leader.
- Cognizant is taking a consultative approach for workplace transformation initiatives and is identified as a Rising Star.
Accenture leverages its industry-leading consulting capabilities to complement its digital workplace services that cater to both IT and other business function requirements. The company has approximately 16,000 consultants spread globally providing advisory and strategy services for digital workplace. Accenture, together with Avanade, provides consulting services for key transformation initiatives like implementing or migrating to Office 365, Windows 10 and implementing Teams. It also partners with other key vendors including Google, Apple, HP, Dell, Lenovo, ServiceNow, Cisco and VMware and can provide vendor-agnostic consulting and advisory services.

**Strengths**

**Human+ workforce focus:** Accenture understands the employee reskilling and supporting automation enabled “human+” workforce requirements. It provides consulting services to design a workplace inculcating and supporting continuous technology-led employee enablement. Accenture leverages its leading consulting capabilities in the clients’ digital workplace journey starting from migration and also covers key aspects like culture and change management.

**Coverage of key workplace areas:** Its consulting services cover three key areas in digital workplace services producing higher business impact. The first one is physical experiences that deal with physical workplace environment and Accenture provides consulting around smart workspaces and its PLACES solution. The second area is human experience where Accenture provides consulting around its cloud managed workplace and device management services. Third area is digital experience where Accenture provides consulting around enhancing users’ digital experience through interaction with IT and diverse collaboration components.

**Workplace assessment workshop:** Accenture’s workplace assessment model comprises of deep engagement to define the vision, workplace personas, identifying needs/wants and developing plan. The core at this engagement is physical and digital workplace requirements with key focus on technology adoption and change management.

**Caution**

Microsoft has the lion’s share of the large enterprise workplace environment and Accenture or Avanade can be a good fit for these clients consulting needs. However, Accenture also is considering clients in the SMB and mid-market segments that may not always have Microsoft-heavy dependency. Accenture would need to position its consulting abilities in areas other than technology enablement to succeed in those segments.

Accenture is well-known for its consulting approach and is often preferred for service technology implementation and adoption services. However, other service providers, better known for technology implementation are also rapidly building up and enhancing their consulting portfolio.
ATOS

Overview

Atos has a dedicated digital workplace consulting practice as part of its wider digital transformation unit. It leverages 400 Europe-based consultants to provide clients advisory services for workplace transformation initiatives. Atos offers both standalone consulting services and those tied with its own implementation and managed services. Its services focus around solution co-creation with customer, technology adoption, change management and implementing an associated commercial gainshare model.

Caution

Atos consultants are concentrated only in Europe. Visibility to nuances in other geographic markets may require local presence.

To fully realize Atos workplace consulting services, clients' equal participation and contribution is paramount. It could be difficult to help client realize the benefits of change adoption and employee wellbeing without active HRO involvement.

Strengths

People, Platform and Places approach: Atos consulting services focus on three areas: People, which is focused on culture and employee satisfaction; Places, which addresses mobility and smart workspaces and; Platforms, for dealing with technology aspects. These areas consider human, technological and environmental factors in a digital workplace to help clients realize benefits related to talent attraction, user productivity, workplace campus and travel.

Focus on employee wellbeing and happiness: Atos' consulting services are particularly useful for the business HR function as they help provide indicators of employee satisfaction not only from the technical but also a wellbeing perspective. Atos uses analytics to measure factors related to end users' motivation or demotivation. Its Chief Happiness Officer application includes an analytics-driven “Mood Monitor” to measure employee satisfaction.

Knowledge and change management: Atos considers technology adoption and change management as an important step to realizing digital workplace benefits. It focuses on getting change management right at every stage of the transformation journey. Atos consulting services ensure proper knowledge management is provided to help enable experience-enhancing technologies like chatbots.

2019 ISG Provider Lens™ Leader

Atos' digital workplace consulting services cover aspects of employee satisfaction in their jobs in addition to technology availability, which acts as a differentiator.
Capgemini has a strong consulting practice focusing on digital technology adoption, change management and employee happiness; all three are much-needed aspects in a digital workplace.
DXC Technology offers digital workplace consulting services to provide advisory around prominent transformation initiatives both from the business and technology perspectives. Its consulting services are often an initial advisory for its implementation and managed services. The company has more than 70 consultants worldwide and more than 30 industry experts to work with large global clients to help them design their workplace strategy.

Strengths

Partnership with PwC: DXC partners with PwC and provide consultative approaches for transforming business models, end-user digital experience and business processes. The partnership also covers advisory for mobile technologies to increase employee productivity and workplace efficiency.

Other partnerships: DXC has a strong partner ecosystem. Because of its partnership with Microsoft, DXC has a dedicated practice for advising client migrations to Windows 10 and Office 365, which includes validations for the reasons and processes that require migration. DXC’s partnerships with other technology vendors like VMware and Citrix help its consulting capabilities with technology-specific nuances.

DXC client experience program: DXC offers a continuous feedback program in which it engages with clients in a consultative manner and monitors satisfaction and experience levels. DXC has an automated platform to capture client feedback and track initiatives globally. It has a formal structure for follow up and has global and executive visibility.

Caution

DXC is not able to share enough examples of its true consultative engagements that include technology adoption and client cultural change management.

2019 ISG Provider Lens™ Leader

DXC retains its good position in the digital workplace consulting space because of its strong global presence and experience with diverse industry clients.
HCL has showcased substantial improvements in both its portfolio and results pertaining to its digital workplace consulting services. Its robust methodology and experience play to its advantage.

Though consulting is an integral part of digital workplace services, HCL has traditionally been known as a strong IT infrastructure services player from the time when consulting was not an integral part of delivery. It may be challenging for HCL to convince clients to leverage its capabilities like BOOST for technology adoption, especially when clients don't consider it relevant for such offerings.

Kaleidoscope: HCL provides a persona-led consulting service offering called Kaleidoscope™. It touches every aspect of the modern workplace like Windows 10 migration, managed mobility, smart support, cloud-based workspace, collaboration and virtual agents. More than 90 HCL clients are leveraging Kaleidoscope to cover approximately 2 million users. HCL also incorporates advisory on GDPR compliance, augmented reality and IoT.

BOOST: HCL offers a gamification approach called BOOST for enabling technology adoption at clients to accelerate favorable behavior change. It leverages positive reinforcement techniques and user incentivization based on personas and demographics to help market products and services internally. Its DECODE methodology for service implementation aims at developing a more digitally dexterous workforce for its clients.

Technology-led experience enhancement: HCL leverages automation and cognitive technologies in its service delivery, and consulting services is no exception. The company offers a data-driven approach to user persona segmentation and user behavior monitoring. It also leverages recommendations from cognitive virtual assistants about the best hardware fit, which is aligned based on application and device usage.
IBM's consulting practice includes offerings around persona segmentation, change management, business process reengineering and an outcome-based approach.

Overview

IBM provides digital workplace consulting services that focus on end-user persona segmentation-based experience design and optimization. The company's digital workplace consulting uses the best practices it developed through years of experience and its expertise from diverse industries. IBM consultants are a mix of business, strategy and technology experts helping clients strategize the workplace of the future.

Strengths

Cognitive enterprise goal: IBM deploys both cognitive automated approaches, such as desktop agents and traditional methods like surveys to capture information to segment end users into different personas. Cognitive intelligence is applied to collected data, and user behavior is determined and monitored by leveraging the intelligence. IBM consulting services aim at transforming client organizations to become a cognitive enterprise.

Non-IT business interaction: IBM digital workplace consulting services interact with diverse business functions other than business IT. The business relevance and viewpoint of each persona provides function-specific persona segmentation.

Digital workplace technology initiatives coverage: IBM's consulting services cover workplace assessment and help clients explore different technology initiatives. The company has consulting experience and capabilities for digital workplace initiatives involving enterprise mobility, service desk, enterprise collaboration and desktop virtualization.

Caution

IBM is targeting the midmarket segment, but its consulting and advisory services pricing could be a discouraging factor. However, with its new workplace-as-a-service offering, IBM aims to simplify its own service portfolio and reduce midmarket clients' consulting needs significantly.

2019 ISG Provider Lens™ Leader

IBM’s consulting practice includes offerings around persona segmentation, change management, business process reengineering and an outcome-based approach.
Overview

NTT DATA offers digital workplace consulting as part of its Dynamic Workplace offering and as part of its global consulting services portfolio. It uses 250 consultants distributed worldwide to provide strategy and advisory services for workplace transformation initiatives. NTT DATA has many years of experience in providing business context-focused consulting services tied to its own managed and implementation services. Its ties with sister company NTT allows it to cover other elements in workplace initiatives like networking, communication and collaboration.

Strengths

Sister companies in NTT Ltd: In August 2018, 28 firms in the erstwhile NTT Group merged to become NTT Ltd. Many of its constituent companies individually provide different services in the modern workplace environment like Dimension Data and Arkadin. The capabilities and experience of these firms strengthen NTT DATA’s ability to provide a wider range services in the digital workplace space. These sister companies have been delivering managed and secured mobile workplace services worldwide.

Pragmatic focus: NTT DATA takes a pragmatic client engagement 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 digital workplace technologies like VDI and BYOD in the client’s environment.

Comprehensive portfolio: NTT DATA provides consulting services around five key areas: business, IT, digital business, organizational change management (OCM) and project management. Business consulting focuses on industrial nuances, while IT consulting covers the data center, network, IoT, workplace, communication and collaboration aspects of IT infrastructure. Digital business consulting deals with digital strategy enablement and execution, OCM consulting focuses on technology adoption and project management consulting covers project design, reporting and management.

Caution

Although the recent consolidation of NTT companies was aimed to consolidate the parallel service offerings provided by sister companies, NTT DATA must communicate clear differentiation of responsibilities and synergies to clear out any possible confusion.
TCS provides consulting as an overarching capability for its comprehensive digital workplace services that cover various aspects of IT infrastructure, applications, mobility and end user collaboration. The company has 1,000 consultants globally to provide advisory and strategy formulation services for key workplace transformation initiatives. TCS also leverages its global consulting and system integration units that help clients develop innovative business models that take advantage of technological opportunities.

Comprehensive offering: TCS provides consulting services around its Microsoft 365 offering that include strategy and rollout. It also provides consulting services for modern intranet and content services that cover strategy and adoption. The company conducts consulting for mergers and acquisition from the workplace perspective, and consulting around business application transformation. The TCS technology adoption and change management practice within digital workplace services provides advisory around change strategy and technology impact assessment.

XLA influencers: TCS emphasizes measuring end-user experience levels through XLA (experience level assurance) on top of traditional service level agreements. In the consulting phase, TCS identifies XLA influencers and decides upon measurable KPIs for them. These KPIs define the experience level agreement terms that TCS will aim to deliver its services on.

Design thinking approach: TCS's Digital Reimagination Studio uses design thinking methodologies where client teams work with TCS teams collaboratively to assess new business models to take advantage of digital technologies. The iterative design process includes workshops around areas like mobile devices, social collaboration technologies, conversations and augmented and virtual reality implementation for support operations.

Caution

Though TCS has run workplace support implementation services for some time, the modern digital workplace services with significant consulting elements is fairly new. Its focus on technology adoption and change management is a differentiator and market will require some time to realize this.
Wipro provides consulting services as a precursor to its managed and implementation services, making its clients ready for its diverse workplace modernization approaches.

Wipro is well-known in the market as a strong workplace engineering services provider. It should strongly communicate its differentiation in technology adoption and change enablement which is not yet widely known in the market.

Workspace Maturity Model: Wipro leverages its Workspace Maturity Model (WMM) to assess client's current workplace setup from a service desk, field operations, endpoint protection and network perspective. WMM provides insights into technology maturity and business criticality of operations and processes and identify consulting opportunities from both business and technology side. Wipro also has recently integrated its network consulting offering Insightx with WMM that covers the consulting to create business case for network transformation.

Design thinking via Designit: Wipro provides consulting services through a design thinking approach aimed at creating a digital experience for end users. Its DesignIT subsidiary specializes in designing end user experience across devices and platforms. Advisory services cover the virtualization, mobility and communication collaboration aspects of the workplace.

wAssess methodology: Wipro's assessment methodology called wAssess analyzes the client's current workplace environment and suggests application modernization or cloud migration based on legacy or cloud-ready states. Both approaches culminate in the target environment being an available, connected and assisted workplace as defined by Wipro's LiVE Workspace platform.

Strengths

- **Workspace Maturity Model**: Wipro leverages its Workspace Maturity Model (WMM) to assess client's current workplace setup from a service desk, field operations, endpoint protection and network perspective. WMM provides insights into technology maturity and business criticality of operations and processes and identify consulting opportunities from both business and technology side. Wipro also has recently integrated its network consulting offering Insightx with WMM that covers the consulting to create business case for network transformation.

- **Design thinking via Designit**: Wipro provides consulting services through a design thinking approach aimed at creating a digital experience for end users. Its DesignIT subsidiary specializes in designing end user experience across devices and platforms. Advisory services cover the virtualization, mobility and communication collaboration aspects of the workplace.

- **wAssess methodology**: Wipro's assessment methodology called wAssess analyzes the client's current workplace environment and suggests application modernization or cloud migration based on legacy or cloud-ready states. Both approaches culminate in the target environment being an available, connected and assisted workplace as defined by Wipro's LiVE Workspace platform.

Caution

Wipro is well-known in the market as a strong workplace engineering services provider. It should strongly communicate its differentiation in technology adoption and change enablement which is not yet widely known in the market.

2019 ISG Provider Lens™ Leader

Wipro provides consulting services as a precursor to its managed and implementation services, making its clients ready for its diverse workplace modernization approaches.
RISING STAR: COGNIZANT

Overview
Cognizant has recently branded its digital workplace services portfolio as WorkNEXT™. It is focusing on consulting as an important aspect of this portfolio. Although Cognizant has been offering consulting and assessment as part of its managed services, recently it has started focusing on consulting as a standalone offering. The company has large number of consultants worldwide supporting consulting-led initiatives for all Cognizant solutions and services. The company is focusing on workplace enablement areas like change and technology adoption and is already developing dedicated offerings around them. It has been identified as the Rising Star in this quadrant.

Strengths

Consulting with WorkNEXT™: Cognizant offers consulting as key lever for its WorkNEXT™ solution. It focuses on an end user centric approach while conducting as-is assessment and user persona segmentation.

Technology migration consulting: Cognizant offers dedicated offerings for Windows 10 migration and Office 365 adoption. These major technological projects require significant consulting elements and Cognizant is focusing on these aspects.

Thought leadership: Cognizant has recently won some key customer accounts for digital workplace services where consulting was a major part of the implementation. It also recently started positioning itself as a thought leader in digital workplace services by promoting its services on various channels.

Caution
Cognizant's consulting approach is fairly new and relatively less tested than others. It will take some time for the market to start considering Cognizant as a consulting partner in addition to being a managed service provider.
Managed digital workplace services are comprised of all managed services related to the digital workplace. An IT service desk with Level 1 and 2 support, along with in-person technical support and user self-help services form the core of the managed services offering. The quadrant includes next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help, chatbots, managed end user computing (EUC) and unified communications (UC) services and managed virtual desktop services. It also includes smart meeting rooms and field services enabled by augmented reality (AR) and/or virtual reality (VR).
Eligibility Criteria

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

Observations

- As providers are developing AI, machine learning, natural-language processing (NLP), cognitive intelligence and AR/VR capabilities around predictive analytics and proactive monitoring, data-based scope around workplace management has increased many folds. These services are targeted towards enabling enterprise IT administrators with more data and insights than they ever had access to. With significant investments in capabilities to measure end user experience through their behavior on devices and apps, service providers are developing experience-level agreements (XLAs) in addition to and augmented by traditional SLAs. Though XLAs are at a very initial stage and has very few examples of successful implementation, ISG has observed significant interest for them from both enterprise and service provider side. The ability to carve out compelling XLA measurements is increasingly seen as key differentiator for managed service provider in workplace support.

- XLAs targeted towards technical performance of workplace measured by “always-on” and “uninterrupted” service often appear as rebranded terminologies of existing SLAs. However, some providers are differentiating significantly by augmenting technical XLAs with business centric approach and have ability to provide actionable insights around workplace management from business viewpoint as well. The leaders in this space are able to include their improved service offering with an XLA focus.
HCL leads the market with strong productized solutions for predictive analytics and automated service support and its innovative approach to field and onsite support.

TCS provides managed services enabled by cognitive automation through its ONE delivery platform.

Atos provides strong automation enabled and 6E framework powered workplace support services.

Wipro’s comprehensive services cover different aspects of managed workplace support services through the LiVE workspace automation platform.

IBM provides cognitive intelligence-powered workplace support services.

DXC Technology’s MyWorkStyle leverages Bionix and the company’s massive operational scale to execute managed workplace support services.

Cognizant’s newly improved WorkNEXT™ offering covers smart service desk services that leverage cognitive intelligence.

Fujitsu offers strong capabilities in its AI-enabled workplace support services.

NTT DATA’s Dynamic Workplace services has global delivery and onsite support within its portfolio.

Unisys leverages its InteliServe platform and automation-focused service desk services.

Accenture, together with Avanade, manages a large number of end users and focuses on technology adoption.

Capgemini’s Connected Workspace and Smart Support services serve many end users and is the company identified as a Rising Star.

There are many other service providers identified as challengers and contenders in this quadrant. These providers either have a very nascent approach toward XLA or have significant gaps in their offering compared by the leaders.
Accenture is not traditionally known as a strong end-user computing services provider. Clients may be hesitant to approach Accenture for managed services unless a strong transformation element is involved, or if their environment is very Microsoft centric.

Overview

Accenture's digital workplace services include mobile workplace, collaboration and workplace modernization. Accenture and Avanade (its joint venture with Microsoft) together manage more than 4.5 million users globally. Accenture also provides services to measure digital tool adoption in the workplace, end-user behaviors and the corresponding business value realized. Accenture moved up from a Rising Star last year to a Leader position this year because of its increases in operational scale and ability to manage growing end user volume.

Strengths

Comprehensive scale: Accenture offers managed workplace services that include its service desk and onsite support. It provides front-line customer support services from 18 service desk locations and supports more than 100 languages. The company delivers onsite field support from more than 30 locations worldwide and with diverse global partners. It also offers smart building solutions through partnerships with HP, Dell and Lenovo, and works with LogMeIn for AR/VR field support.

Focus on automation: Accenture offers automation-focused service desk and workplace support services. It reports an 82 percent first level resolution rate leveraging automation. Its automation-enabled support services can resolve up to 22 percent of incidents automatically and enables end-user self-help to resolve up to 46 percent of incidents before being raised. The company reports an impressive average end user satisfaction rating of 91 out of 100.

End user technology adoption: Accenture's new Workplace Experience (WX) approach looks at workplace modernization with an experience-centric view covering three key areas: modernizing platforms, optimizing operations and cultural change and employee experience. Its platform modernizing capabilities provide secured and managed workplace platform across devices. Its operations optimization capabilities reimagine how work gets done and cultural change services cover reengineering employee experience. Accenture offers services to raise end user technology adoption through its partnership with vendors like Microsoft and provides analytics on how end-user productivity tools are used. It leverages user and behavior analytics to help drive ROI for digital workplace technologies.

2019 ISG Provider Lens™ Leader

Accenture has been identified as a leader this year owing to its growing scale, strong ties with technology partners and focus on end user experience.
ATOS

Overview

Digital workplace remains a key strategic focus area for Atos and an important pillar of its digital transformation services. The company manages approximately 4 million end users globally and employs 11,000 FTEs for digital workplace services. Atos’ position in this quadrant improved both in terms of portfolio attractiveness and competitive strength this year because of its acquisition of Syntel and continued focus on employee experience.

Strengths

Global operations scale: Atos provides support desk services from eight global production centers (GPCs), which are supported by local production centers for service desk. It also provides onsite support capabilities through 115 global locations and in most cases through its own resources. Atos manages approximately 45 million tickets annually and supports 38 languages.

Intelligent automation services: Intelligent automation services are critical for Atos’ employee experience approach, and it usually targets around 80 percent automation. Atos can fully automate up to 80 percent of change requests and can avoid approximately 20 percent of tickets through analytics. Atos reports that approximately 50 percent of its chat contacts are being resolved through virtual agents, and AI for service desk agents has reduced average handle time (AHT) by 25 percent.

Data-driven employee engagement: Atos’ focus on employee engagement is reflected in its heavy use of analytics and machine learning to provide intelligent automation and context-driven services. Its 6E framework aims to make end users empowered, engaged, enabled, enhanced, educated and efficient through analytics usage.

Caution

Atos has been one of the pioneers in end-user experience measurement. However, it could be challenging for Atos to convince its existing clients longer large-scale service desk and EUC engagements to transform their partnerships to employee experience measurement.

2019 ISG Provider Lens™ Leader

Atos improved its leadership position in managed services globally by expanding its global presence and increasing intelligent automation usage.
Cognizant pushes ahead in the market with new branding, client focus and AI-powered support services.

Cognizant is aggressively pursuing the market with its improved branding and service focus. However, this approach is fairly new and it remains to be seen if clients will accept the new Cognizant, as similar stories are being told by other competitors. Cognizant also has limited capabilities for designing workplace services deliverables based on experience level agreements.

Cognizant’s WorkNEXT™ service portfolio provides a personalized workplace experience with technology innovation that supports business agility and provides seamless collaboration. The Digital Experience Desk services of WorkNEXT™ provide modern workplace support services. Cognizant manages more than 5.9 million users globally and has improved its competitive strength in this quadrant compared to last year due to its increased client base and improved marketing.

**Strengths**

**WorkNEXT™ and Digital Experience Desk:** Cognizant's WorkNEXT™ portfolio covers its entire spectrum of digital workplace services. Its Digital Experience Desk services provides AI-led support services. It has different solution components, including WorkNEXT™ DigiHub for providing analytics-driven, persona-specific support services. Cognizant defines clients' journeys in end-user support services from elementary persona led support to AI-driven contextualized support. Cognizant provides onsite support in more than 100 countries.

**Machine-human led operating model:** Cognizant offers an innovative new operating model consisting of a machine-driven Digital Engagement Platform that supports and augments human capabilities driving the Reliability Platform. While the Digital Engagement Platform covers automated solutions like virtual agents, self-help and self-heal enhancing end user experience, Reliability Platform deals with productivity services leveraging RPA and AI for UEM and workplace engineering.

**Improved sales and delivery efforts:** Cognizant has been investing heavily in improving its sales efficiency by mandating digital workplace sales champions to sell these services to existing accounts in each region. Cognizant also is improving its delivery capability by undertaking initiatives like ProjectNeXT to enable relevant skills and certify digital workplace solution architects on latest technologies.
**DXC TECHNOLOGY**

**Overview**

DXC Technology's workplace and mobility services, also known as MyWorkStyle, has three principal focus areas: automation in workplace operations, analytics for end-user experience and artificial intelligence for workplace support services. It manages approximately 9 million users globally. DXC did not respond to the survey for this study this year, and ISG has analyzed its offering based on information through desk research. Hence there is a dip in its position in this quadrant on both axes.

**Strengths**

**Strong services portfolio:** DXC has massive scale and has service desk delivery centers across the globe. It provides managed services from more than 60 delivery locations and supports 56 languages. DXC also has more than 200 client walk-in centers and video kiosks that provide onsite support. It provides video kiosk services both on its own and through local partners.

**DXC Bionix:** DXC's Bionix™ automation platform offers analytics, AI, efficient lean processes and workflow automation services. DXC has been able to automatically resolve 71 percent of incidents through its self-help and predictive analytics services. Through Bionix, DXC reports potential to eliminate up to 82 percent of incidents. The pre-programmed automation also helps bypass level 1 support and direct users to the right support level. DXC's virtual agent can provide 20 to 30 percent contact reduction.

**Massive scale:** DXC serves more than 1,100 clients with managed digital workplace services in 150 countries. It supports 42.7 million service desk contacts globally in 56 languages.

**Caution**

DXC has a comprehensive digital workplace services portfolio. However, there is limited information available DXC's approach towards measuring employee experience and introducing it in service level agreements.
Fujitsu is a decades-long leader in digital workplace services and retains its leadership position in managed services with continued focus and investments in analytics and cognitive intelligence. Fujitsu continues to improve its service portfolio with increasing reliance on automation and analytics. It has recently started measuring end user experience through analytics. The company should showcase more global examples of using analytics in modern, transformation-oriented service level agreements.

Though Fujitsu has global presence in terms of delivery centers and service desk locations, the majority of its clients and business still come from Europe. For example, approximately 76 percent of the total users, Fujitsu manages are in Europe, while other leaders have balanced number for all geographies.

Strong service desk and onsite support services: Fujitsu has global delivery centers and regional service desk locations in key countries that support more than 38 languages globally. It also provides onsite field support through 15,000 engineers in 249 countries from its four follow-the-sun coordination hubs and 15,000 local onsite and field support partners. Fujitsu also offers clients a walkup center called Connect-IT Bar.

Shift-left approaches: Fujitsu provides innovative shift-left methods. It provides knowledgebase-based self-help services along with users’ search-based semantics and cognitive intelligence. Its virtual agent translates users queries and responds into native languages. Fujitsu reports average 61 percent first contact resolution (FCR) and 68 percent incident reduction through automation, and that approximately 52 percent of incidents are resolved through self-help. Fujitsu has recently started measuring its services effectiveness through end user experience.

Workplace Anywhere and Intelligent Engineering: Fujitsu’s Intelligent Engineering services provide system monitoring and analytics to combat field worker challenges. The services use IoT, smart devices, AR/VR and other technologies. Workplace Anywhere ensures secured access to workplace applications from any device and any location, while also providing automation and analytics for quick ticket resolution.
HCL has seen rapid growth in its workplace services offering and clients in the last year. Its continuous improvements in its service offering place the company as a leader in this quadrant.

Automation-enabled support services: HCL has significantly improved the capabilities in its OptiBot self-help automation solution by enabling it to handle 15 million incidents every year. Its predictive analytics solution WorkBlaze provides real-time experience monitoring, and IntelliZone provides lounge-based IT access with IT vending machines. HCL reports averages of 82 percent FCR, 33 percent incident reduction through automation and 18 percent through self-help.

LUCY: HCL has improved LUCY to handle 2 million contacts and the capacity has been increasing by 200 percent every year. Many HCL clients have accepted LUCY as a digital colleague or personal digital secretary. HCL has recently introduced smart meeting capability with LUCY, and it now also integrates with Pepper, HCL’s humanized bot.

Innovative offerings: HCL is trying to redefine the role of a managed service provider by expanding the scope of services. It is providing portable modular meeting spaces called ZenPods that are equipped with smart analytics to help execute successful meetings. It is also introducing a facial expression analyzer and smart wearables for AR/VR based onsite support.

HCL is developing offerings at a faster rate than the industry is developing use cases. It should focus on initiatives that can be immediately incorporated within workplace transformation initiatives.

HCL offers strong digital workplace services through its productized solution offerings and SMART analytics model. It uses automation, cognitive intelligence and its cognitive virtual assistant LUCY to provide intelligent support services. HCL has more than 19,500 employees managing 3.2 million users globally for approximately 305 clients. HCL has significantly improved its quadrant position on both axes through its strong growth in portfolio and in the scale of users and clients managed.

2019 ISG Provider Lens™ Leader

HCL has seen rapid growth in its workplace services offering and clients in the last year. Its continuous improvements in its service offering place the company as a leader in this quadrant.
IBM

Overview

IBM has extensive experience and massive operational scale to provide managed digital workplace services across the globe. Its workplace support services leverage IBM's analytics, cognitive and automation capabilities. IBM's Workplace Support Services (WSS) cover the entire service spectrum from end user computing to unified endpoint management. IBM manages more than 8.1 million end users globally by leveraging Watson's analytics in support services.

Strengths

**Workplace Support Services with Watson:** IBM's Workplace Support Services significantly leverage its Watson capabilities like continuously learning cognitive chat-based solution, ITSM data analytics and automation. IBM augments its ITSM solutions knowledgebase with a common knowledge management and knowledge accelerator portal. It utilizes semantic analytics to cluster similar incidents based on data collected through unstructured ticket information and digital experience monitoring. The analytics use machine learning to accurately understand the issue and can prioritize ticket types based on their frequencies and handling times. IBM has been able to achieve up to 30 percent cost savings and 38 percent enhanced end user productivity through its automation and analytics services.

**Global coverage:** IBM has 16 strategic delivery centers and 14 complementary centers globally for service desk operations. It supports 50 languages and 8,000 clients in more than 50 countries. The company has around 6,000 service desk agents and 250 distinguished end user experience focused engineers worldwide.

**LUCA and XPIs:** IBM has recently introduced its adaptive virtual personal assistant LUCA, one of the 750-plus IBM patents for digital workplace technologies. LUCA is highly personalized virtual agent that understands the users' need and context while also integrating with business apps and providing automated knowledge acquisition. IBM also follows a modern commercial model that encourages strategic automation adoption to provide high business outcome and value. It also measures service performance in terms of configurable experience performance indicators (XPIs). IBM offers XPIs like CSAT for call agents, first call resolution, NPS and helpfulness of Watson as initial parameters to benchmark against industry best practices.

Caution

IBM has experienced limited traction among clients while incorporating XPIs into existing and newly signed contracts initially. However, the company has strong potential to offer outcome-based service level agreements and it continues to work with clients to define and refine XPIs in agreements.
Overview

NTT DATA's Dynamic Workplace Services offering caters to end-user IT lifecycle management. It provides device provisioning and end-to-end managed services based on user personas. NTT DATA manages an estimated 7.3 million end users globally.

Strengths

Global delivery capabilities: NTT DATA has service desk delivery capabilities in all major geographies. It offers support for more than 20 languages globally.

Automation and AI capabilities: NTT DATA provides automation-enabled managed services that include AI-based virtual agents, user and endpoint monitoring plus enhanced analytics and reporting capabilities. Its predictive analytics and insights are transforming the service desk function from a low-skilled operation to a data-rich component of workplace strategy. NTT DATA has an expert AI automation team with 200 data analysts, data scientists and consultants, and has 1,500 developers of embedded technologies. NTT DATA offers up to 20 percent incident reduction through automation and self-help utilization.

Onsite support services: NTT DATA offers field services with direct presence in 90 countries and in 25 countries leveraging other NTT subsidiaries. It has more than 60 onsite walk-in or tech bar deployments at client locations worldwide.

Caution

There is limited information and client references for NTT DATA's capabilities with experience level agreements.

NTT DATA is a well-known name in North America, but is not as widely known in other geographies. The company serves clients in other regions by leveraging its sister companies in the NTT Group. However, after the recent consolidation of NTT companies, clients will need some education to understand the new organization.

2019 ISG Provider Lens™ Leader

NTT DATA has strong credentials in managed workplace services and retains its leadership position.
TCS

Overview

TCS has strong capabilities in the overall workplace services spectrum. It has been providing service desk and end-user computing (EUC) support for clients for a long time and also has credentials in helping clients through its modern collaboration and intranet consulting capabilities. Since digital workplace services combine these two areas, TCS has emerged as a strong player providing services on both sides of the spectrum. IT manages approximately 7.2 million users globally with its support services.

Strengths

TCS ONE: TCS workplace services are offered by Digital Workplace Studio following the approach of ONE, where O refers to zero-touch IT, N refers to next-gen workplace and E refers to end-user experience. Its support services are provided by the next-gen workplace services that provides analytics and monitoring based automated support.

Global capabilities: TCS has global service desk delivery locations in 29 countries. It also offers onsite support services, including remote support, dispatch, hub-and-spoke and tech café services with GPS-enabled location tracking. The company partners with local companies for field support services. It leverages its Machine-First-Delivery-Model (MFDM) for workplace support service delivery to reduce 20 to 25 percent of tickets through automation.

XLAs: TCS defines the client experience by improving the end-user experience level, and it approaches clients with measurable experience level agreements (XLAs). These XLAs are influenced by measurable parameters for IT experience, ease of access to get IT support, ownership of incident resolution and measurements of implemented changes and technology adoption.

Caution

TCS has been successful in implementing its outcome- or XLA-based approach for its existing managed services clients in workplace support services. However, there are not many examples of its approach with XLAs for end-to-end workplace transformation. TCS offers three different levels of engagements with clients based on their preference for TCS services, and the option with most benefits is most costly.
Overview

Unisys offers end-to-end digital workplace solutions that help in enhancing productivity and collaboration using cloud-based and mobile-centric solutions. The company generates over 75 percent of its digital workplace revenue from workplace support services. It serves over 1,200 clients globally with more than 11,200 employees and manages 5.4 million users globally.

Strengths

**Strong managed and onsite field services portfolio:** Unisys provides global support through its service desk services from major geographies. It handles more than 18 million contacts and supports 25 languages. Its field services coordinate more than 300 global locations and include Digital Tech Cafes™, IT vending machines, strategically located support experts and mobile pop-up cafes for branch offices.

**InteliServe™ platform, AR/VR:** Unisys's global managed service desk is branded as InteliServe™. It uses automation, analytics and robotic process automation for problem resolution. Unisys uses IPsoft's Amelia for its virtual agent technology, using proprietary automation technology to train Amelia based on client requirements.

**Analytics and automation usage:** Unisys reports a first call resolution rate of 59 percent, 17.1 percent incident reduction through automation and approximately 6 percent reduction in incidents through self-help. It enjoys an average end-user satisfaction rating of 89 out of 100. Unisys' field services and onsite support use augmented and virtual reality technology by partnering with Help Lightning. Unisys takes a risk-vs.-business outcome approach to determine automation scope.

Caution

Unisys considers experience level agreements from a gainshare perspectives and has not seen much traction among its clients. Successful XLA implementation relies strongly on technology adoption measurement where Unisys has limited focus.
Overview
Wipro provides digital workplace services through a combination of its workplace maturity model, digital experience index, in-person focus group studies, consumer satisfaction analysis, Pareto analysis and user profiling to determine the service gaps for a user. Nearly 60 percent of the company's Digital Workplace revenue comes from workplace support services. It serves more than 400 clients with over 22,000 employees and manages approximately 8.9 million users globally.

Strengths
LiVE Workspace and global portfolio: Wipro's LiVE Workspace is a consumerized platform for managed services delivery of a connected, always-on and smartly assisted workplace. Wipro's LiVE workspace platform covers service desk, field support and workplace management under managed services and is powered by Wipro's automation and analytics services. Wipro has integrated its automation and natural language processing (NLP) capabilities with its managed digital workplace services to minimize or eliminate manual processes. It provides cognitive, multilingual, AI-based virtual agents. Wipro reports automation resolves up to 40 percent of incident tickets and 20 percent by user self-help.

Recent enhancements: Wipro recently integrated its modern managed network services with LiVE workspace portfolio bridging the gap in backend infrastructure. Its Cognitive Digital Network Infrastructure (CoDNi) framework provides intelligent analytics around application performance based on network usage and proactively raise incidents in ServiceNow in case of abnormalities. Wipro's IoTNxT™ provides smart meeting rooms and enable workspace enabled by AR VR technologies.

Global portfolio: Wipro's support services leverage its global service desk locations and support more than 32 languages worldwide. Wipro also provides onsite support to more than 12,000 sites in 220 countries. It leverages local partners for onsite and field support and partners with LogMeIn, Microsoft and Lenovo for AR/VR based remote support.

Caution
Wipro's initiatives to enhance its workplace offering by including adjacent elements of IT infrastructure like networks act as a differentiator. However, it may need to further market its technology adoption and change enablement services.

2019 ISG Provider Lens™ Leader
Wipro has a wider global reach and strong automation-enabled workplace support services. With its inclusion of modern network services within workplace, it retains its leadership position.
RISING STAR: CAPGEMINI

Overview
Capgemini’s Connected Employee Experience service has important components of smart support services powered by analytics and automation. Its managed workplace support services involve intelligent analytics, cognitive AI solutions, digital adoption services and smart office technology. Capgemini serves an estimated 2 million end users with its managed services across the globe.

Strengths

Smart support services: Capgemini offers a smart Service Center that provides intelligent service desk providing persona-based support, analytics and omnichannel experience. It also includes virtual assistants and web chat, automated password reset and predictive analytics based on Lakeside Software’s SysTrack. Capgemini’s Distributed Smart Services provide second-line support in offices and remotely for devices and includes campus-based onsite support, Tech-Bar and depot services.

Global coverage: Capgemini has service desk locations in 17 countries and follows a right shore center of excellence (CoE) approach. It also delivers onsite and field support through its partner network in 190 countries.

Automation focus: Capgemini reports strong results from its automation-enabled service support, including 91 percent first contact resolution (FCR), 24 percent incident resolution through automation, 33 percent resolution through self-help and an average end user satisfaction rating of approximately 87 out of 100. Capgemini has been successful in implementing technology adoption led experience level measurement with its clients, with approximately 80 percent of its clients measuring chatbot satisfaction and approximately 5 percent of clients adopting XLAs.

Caution
Capgemini has a stronger scale and market presence for managed workplace services in the Europe compared to other regions. However, with XLAs becoming interest topic for clients across the globe, Capgemini is well poised with its global capabilities around measurable user experience-based service agreements.

2019 ISG Provider Lens™ Rising Star
Capgemini offers complete workplace transformation and XLA-focused technology adoption services. It has been identified as a Rising star in this quadrant.

© 2019 Information Services Group, Inc. All Rights Reserved.
Definition

With increasing acceptance of mobility and the bring-your-own-device culture, these services include secured device management, mobile application and content management, and application deployment and accessibility related to roles and access policy. Managed mobile enterprise 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 like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
MANAGED SERVICES - MOBILITY SUPPORT

Eligibility Criteria
- Support at least large number of mobile and smart devices with at least 25 percent of them managed outside the home region;
- Ability to offer device sourcing and logistics, managed UEM, financial management, device security and mobility program management;
- Ability to offer implementation and support for enterprise mobility, support for BYOD, mobility expense and asset management;
- Ability to manage complete device lifecycle management, device-as-a-service (PCaaS);
- Ability to develop industry-specific, plug-and-play mobility solutions;
- Ability to offer support for single sign-on, secured app access and support for smart devices.

Observations
- Device management, though an integral part of digital workplace services, is increasingly seen as a separate unit especially with the growing adoption of Windows 10, device as a service, device monitoring and unified endpoint management. Providers with ability to manage high number of devices, including smart IoT devices lead the market. The leaders in this quadrant also provide strong mobility support through mobile application management services through app refactoring and rationalization. Providers with robust device-as-a-service capabilities offer a strong opex-based service delivery model. Some providers offer their own productized offering in this space to provide a differentiator.
- IBM’s massive scale of devices managed places it as a leader in this quadrant.
- Wipro, through its M2TA framework, provides strong managed mobility services.
- HCL’s FlexSpace and focus on three-level managed mobility services position the company as a leader.
Observations (cont.)

- DXC Technology’s comprehensive device-as-a-service offering is a key differentiator.
- Fujitsu manages many devices globally through its robust offerings and strong partnerships.
- Accenture leverages its strong partnerships and device lifecycle management services to provide managed mobility.
- TCS provides its productized Mobitio offering in addition to its device management capabilities.
- Atos has strong capabilities in device management that it ties to its experience level agreements.
- Unisys’s strong focus on cybersecurity places it as a leader in the quadrant.
ACCENTURE

Overview

Accenture provides enterprise managed mobility (EMM) services that cover mobility strategy consulting, implementation, deployment and managed services. Accenture also provides add-on services like application packaging and endpoint management. It has partnerships with a network of third-party service providers for enterprise mobility management, including Apple, Google and Samsung. It manages 2.8 million mobile and 17,000 IoT devices globally.

Strengths

Ecosystem partnerships: Accenture partners with Microsoft, Okta VMWare, ForgeRock, SailPoint and Oracle for identity access management services. The company also partners with enterprise mobility management solution vendors including VMware, AirWatch, MobileIron, XenMobile, SOTI, Microsoft (for Intune) and BigFix (which HCL acquired from IBM in December 2018). Accenture's device-as-a-service (DaaS) partners include Dell, HPI, Lenovo, VMWare (WorkspaceONE), XenMobile, AirWatch, Microsoft (InTune), Citrix and AWS.

Cloud managed workplace and device lifecycle management: Accenture's Cloud Managed Workplace provides device-as-a-service capabilities where users can self-enroll devices in Intune with AutoPilot deployment. It also offers Mac-as-a-service for Apple workstations. Accenture offers services to transform a workplace environment from on-premise to Azure-managed, both via Active Directory connection and virtual private networks. It also offers Intune and SCCM configuration, endpoint management, application provisioning, patch management and information protection services. It is a fully managed end-to-end cloud workspace management solution for Office 365 in Azure. Accenture also provides managed services for the AirWatch, IBM MaaS 360 and Afaria MDM environments.

MCF: Accenture's Mobility Capability Framework (MCF) model delivers technical and functional capabilities for enterprise mobility. It also assesses and measures mobile enterprise effectiveness by providing analytics for mobility usage and service reporting.

Caution

The majority of Accenture's client examples are in the Microsoft Intune environment. The company also must showcase more implementation examples of device-as-a-service (DaaS) capability, which is gaining more traction among clients. Though Accenture has invested in its DaaS offering and has plans to expand it in coming years.
ATOS

Overview

Atos offers comprehensive managed mobility services covering device lifecycle management and unified endpoint management (UEM) as part of its overall digital workplace services. It is focused on enabling secured access to data and applications on mobile devices. Atos has partnerships with leading identity access management technology and enterprise mobility vendors VMware, Citrix and Microsoft. Atos manages approximately 3.9 million devices globally.

Strengths

Robust service portfolio: Atos provides complete mobility value chain services, including consulting, application assessment, business process mobilization, build services and application modernization. Its operate-and-maintain services provide end-user mobility support and mobility suite implementation. Atos also offers strong security focus and its own unified endpoint management services.

Atos IP and offerings: Atos offers its own solutions and IP for various managed mobility services. Offerings include Atos User application management for mobile application management services, Atos enterprise file sync share, Atos device-as-a-service, Atos Evidian for identity and access management and Atos Hoox for secured hardware services in the manufacturing vertical.

XLAs in device management: Atos offers a combination of traditional SLAs and experience level agreements (XLAs) where the XLA includes a "device experience score" based on measurement of different variables.

Caution

As it did with Hoox, Atos can focus on developing more custom solutions catered to industries. Atos is evaluating options and considering developing offerings in that area.

2019 ISG Provider Lens™ Leader

Atos' managed mobility services leverage its strong device analytics and UEM capabilities that tie back to its user-centered 6E framework.
DXC TECHNOLOGY

Overview

DXC Technology's managed mobility support services include mobile consulting, mobile app building, enterprise mobility management (EMM) and comprehensive device-as-a-service services. It also provides endpoint device and application management, risk mitigation and secured access to data and applications. DXC has more than 250 engineers providing mobility and unified endpoint management services and the company manages 1.5 million mobile devices globally. Its mobility management services also extend to IoT devices.

Strengths

**DXC device-as-a-service:** DXC offers device lifecycle services that allow clients to own, lease, use and refresh devices. DXC has partnerships with leading OEMs and can help clients with device procurement, managed services and device disposal. It provides both thick clients migrated to new operating systems and virtual desktops on thin clients. DXC charges clients on a per-device, per-month basis for this service.

**Mobile enterprise services:** DXC's services include consulting for business process mobilization and mobile app development with UX design and system integration. It follows a DevOps approach for mobile application development, including for industry-specific and IoT smart and wearable device applications. These applications can be containerized and are available through an enterprise app store that can be accessed on any device. DXC offers MDM and EMM services through partnerships with leading vendors. It provides secured access to devices and application with identity access management and data protection at the email, file- and line of business application levels. DXC provides mobile threat protection for application vetting and device compliance.

**Industry-specific mobility services and analytics:** DXC offers specific mobility management services and solutions for diverse industries and work environments like manufacturing shop floors and construction sites. DXC's Mobile Business Insights package includes a single dashboard with consolidated visibility into the device lifecycle. It offers the Mobility Health Index (MHI), which highlights the overall health of an organization's mobility program and operations based on application and device usage.

Caution

DXC offers a robust device-as-a-service offering. ISG has observed serious implications in service billing when large global clients contract a DaaS provider for each geography. DXC should ensure its clients are billed fairly and they are not paying extra because of local taxes in each geography.

2019 ISG Provider Lens™ Leader

DXC's comprehensive DaaS capability powered by its analytics and endpoint protection is a differentiator.
**FUJITSU**

**Overview**
Fujitsu provides global managed mobility services through its enterprise mobility management service automation and consulting capabilities that help clients design new mobile business models and implement them. Fujitsu manages approximately 1.1 million smart phones and laptops and approximately 15,000 IoT, ruggedized and other devices around the world.

**Strengths**

**Full device lifecycle management:** Fujitsu offers device management, MDM, mobile app packaging, application wrapping, testing and role based over-the-air (OTA) provisioning. Its DaaS service allows device procurement through Fujitsu directly or through partners. End users can have their applications pre-installed on their devices along with access to their device app store. It offers content management through ShareFile, Dropbox, Box, OneDrive. It also offers telecom expense management services. Fujitsu adds analytics services to mobile devices managed by the company. It performs analytics of both applications and device performance.

**Strong partnerships:** Fujitsu's partner in managed mobility service include Rogers, Bell, Verizon, AT&T and Sprint in the USA and Mobilife and SCF in EMEA, along with FedEx, Ingram and Clover.

**Industry solutions:** Fujitsu has developed specific solutions to meet mobility requirements in the healthcare and life sciences, manufacturing, energy, consumer goods and retail, telecom, media and travel, transport and leisure industries. It has also developed an Android application for railroad construction and a manufacturing shop floor device lifecycle solution.

**Caution**
Fujitsu has strong and more comprehensive managed mobility services than its competitors. However, its scale of devices managed in North America is estimated to be significantly less than that in Europe and Asia pacific.

2019 ISG Provider Lens™ Leader
Fujitsu offers comprehensive managed mobility services across the globe and has years of experience in digital workplace services.
HCL

Overview

HCL’s managed mobility services are part of its SMART model for digital workplace service delivery. HCL manages approximately 2.8 million devices and approximately 570,000 IoT devices worldwide. It offers mobility consulting, mobile app services, endpoint protection and devices as a service under its managed services umbrella. The HCL offering has Silver, Platinum and Gold levels, which start with basic MDM and escalate to provide app-level protection and asset tracking.

Strengths

Comprehensive portfolio: HCL’s Kaleidoscope consulting services let enterprise clients determine their workforces’ mobility requirements based on user personas. Its alliance with PowWow Mobile helps HCL provide mobile application modernization, while HCL FlexSpace offers device as a service capability. Its Enterprise Mobile Enablement services provide a mobile-first service, including device, application and content management for 570,000 IoT devices. HCL also offers integration between different endpoint management tools and MDM solutions. It has a single console that integrates both on-premise and in-the-cloud device management and provides associated security services.

Asset management: HCL has been able to implement intelligent real-time asset tracking for devices through its intelligent use of RFID technology. It provides geofencing and remedial security actions like remote data wiping.

Industry-specific solutions: HCL has developed industry-specific mobility solutions to support mobile workforces in diverse industries like banking, financial services, insurance, healthcare, pharmaceutical, manufacturing, energy, retail and media.

Caution

The three levels of managed mobility services offered by HCL highlight that should opt for higher levels if they want to get real value out of HCL’s intelligent automation and analytics enabled offerings. The tiering could be a discouraging factor for price sensitive clients.
IBM benefits from its years of experience plus cognitive intelligence-based analytics.

IBM targets the midmarket with its device-as-a-service offering but hasn't been able to report significant client engagements within this market segment for these offerings.

Overview

IBM's comprehensive managed mobility services portfolio includes its device lifecycle services along with analytics-based device health monitoring capabilities. IBM partners with leading EMM and MDM solution vendors. IBM itself offers its own UEM solution, MaaS360, for unified device monitoring. The company manages 8.5 million devices globally.

Strengths

**Comprehensive portfolio:** IBM offers a comprehensive managed mobility services portfolio as part of its digital workplace services portfolio. It provides device procurement and deployment services through its Device Procurement and Deployment offering that covers device choice, procurement, staging and kitting, deployment tracking, disposal and recycling. Zero-touch enrollment and dynamic configurations are important parts of its device management capabilities. IBM also offers virtual desktop and application services powered by partners like VMware and Citrix and file sync and share powered by Box. Its support services include cloud backup, self-help, omnichannel support and OS migration services.

**IBM Device Health with Watson:** IBM recently introduced a patented cognitive analytics platform that uses new and existing data from within the organization to provide a health score for each device. This score is used to predict device refresh requirements, thus eliminating need for time-based replacement (and potential failures) and move to health-based refreshes. IT managers can track the health of all devices in the organization from a single dashboard to understand when and why devices underperform. The capability can allow organizations to extend device lifespans, optimize spending, reduce support costs and provide proactive support.

**Partnerships:** IBM partners with multiple solution vendors in the IDAM, DaaS and EMM spaces. Its partners include Apple, Jamf Pro, HP, Lenovo, Microsoft, Samsung, and Tangoe, among others.
TCS

Overview

TCS’ managed mobility services include device and application management, mobility consulting and industry-specific mobile solutions. It also provides analytics-based device strategy. TCS has invested in mobility innovation centers to develop cutting edge offerings. The company manages approximately 1.8 million devices globally.

Strengths

Comprehensive services portfolio: TCS offers mobile device, content and telecom expense management services. It is investing heavily in its mobility innovation centers to develop differentiated solutions. TCS has ready-to-deploy kits that enable faster mobility adoption. Its Telecom Expense Management services provide mobile plans and asset management. TCS’ mobility consulting services include its Mobile-First design to help clients imagine a mobile workforce. TCS offers different solutions for the retail, manufacturing and life sciences industries.

Mobitio™: TCS’ Mobitio productized mobile app platform 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. The Mobitio framework is customizable for every client.

Endpoint lifecycle factory (ELF): TCS offers ELF services for proactive client health monitoring. It involves automated application patch-and-release management along with unified endpoint compliance. TCS also provides device as a service offering in partnership with Citrix and VMware. It also partners with Microsoft, MobileIron and SOTI for IDAM and EMM services.

2019 ISG Provider Lens™ Leader

TCS’s Mobitio plus its continued investments and scale of devices managed places the company as a leader in this quadrant.

Caution

Though TCS offers support for all aspects of managed mobility services, its services perform best when the company also own the mobile application work, which may not always be the case.
Unisys’ focus on cybersecurity and device monitoring establish it as a leader in this quadrant.

Unisys’ mobility services cover mobile devices and secure access management. To stay competitive, Unisys should also include elements of digital experience design and mobility effectiveness monitoring in its solution stack.

Overview

Unisys offers a very robust managed mobility services portfolio because of its focus on cybersecurity services and its unified endpoint management services. It manages approximately 3.1 million devices globally. Unisys offers a strong device management and mobility management services suite encompassing mobile consulting and partnerships with leading vendors.

Strengths

**UEM**: Unisys recently combined its unified endpoint management offering with its managed mobility services. It manages UEM services for 36 clients and 875,000 end users globally. Unisys has also been investing in multiple lab environments and a mobile center of excellence to develop solutions and services related to managing PCs as mobile devices. Its partnerships with VMware, Microsoft and Cylance help clients manage the diverse devices used by end users in a unified manner, with advanced security and end-user policy implementation.

**Service suite**: Unisys’ Mobile Enterprise Management (MEM) services cover the complete managed mobility services stack, including enterprise application integration, asset management, expense management and application containerization.

**Industry-specific mobility solutions**: Unisys has business-oriented mobility management offerings for many industries, including banking, healthcare, media and the public sector.

Caution

Unisys’s mobility services cover mobile devices and secure access management. To stay competitive, Unisys should also include elements of digital experience design and mobility effectiveness monitoring in its solution stack.
Wipro's managed mobility services include assisting enterprises with mobile environment strategy development, application and device security, increasing adoption and securing content. These services are underpinned by Wipro's mobile strategy consulting, partnerships and vertical solutions. Wipro manages approximately 4.4 million devices and 250,000 other smart IoT devices globally.

**Strengths**

**M2TA**: Wipro recently introduced its M2TA framework that stands for Manage, Monitor, Transform, Absorb. It involves managing the existing mobility landscape and client applications and monitoring application usage. It then suggests mobile-first cognitive enabled applications to be created, and absorbs commonly used apps within virtual assistants like chatbots and collaboration solutions like Teams and Slack.

**Focus on mobile-first clients**: Wipro has a dedicated focus on clients that are advanced in their mobility and cloud journeys and have a mobile-first strategy. Wipro has extensive experience delivering mobility services like device lifecycle management, MAM and mobile app deployment for clients in different industries across the globe. It has partnerships with key identity access management solution vendors, Okta and SAML, and with EMM vendors VMware, Microsoft, Citrix and MobileIron.

**Industry solutions**: Wipro offers dedicated mobility solutions for diverse industries to support field workers and interactions with end customers. It also provides AR/VR enabled mobility-led solutions for industries with complex workplace requirements, like construction sites, secured manufacturing shop floors and aerospace and defense operations.

**Caution**

Wipro has a strong capability portfolio in managed mobility services, however, its scale of managing smart devices is less than its closest competitor.
Unified communications as a service (UCaaS) is a cloud-based delivery model that provides business communications system across multiple channels and devices. UCaaS combines voice and telephony, enterprise messaging, online meetings (web, video and audio), team collaboration and presence on a single integrated cloud platform. It is designed to be accessed from any device – desktops, laptops, tablets or mobile phones. UCaaS enables businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

The objectives of a UCaaS solution provider are to maximize the user experience, specialize in a broad range of communication tools, supply product onboarding and integration expertise, and deliver innovation, training and high service levels. The market is evolving toward UCaaS, and digital workplace application leaders are deploying UCaaS solutions as there has been a fundamental shift from premise-based unified communications (UC) to cloud-based UCaaS.

Definition

ISG Provider Lens™ Quadrant Report | November 2019

© 2019 Information Services Group, Inc. All Rights Reserved.
UNIFIED COMMUNICATIONS AS A SERVICE (UCaaS)

Eligibility Criteria

- Ability to offer PBX features (including voice and telephony, boss/secretary functionality), mobile client, conferencing (voice/web/video conferences, desktop/file sharing), instant messaging and presence;
- Ability to offer business process solutions powered by communication and collaboration, contextual integration of the UC solution, integration with intranets (social enterprise networking suites);
- Offering communications platform as a service (CPaaS);
- Solution should offer rights and role systems, reporting (dashboards), activity stream and e-mail integration (Exchange, Google, etc.);
- Solution should offer mobile apps, ability to support both thick desktop and thin browser clients, knowledge management solution.

Observation

- Leaders have effectively combined calling, meeting and team messaging into single unified communications platforms. While most vendors can deploy subscribers globally, Leaders have full sales, support and partner ecosystems around the globe and help customers derive the most value from their offerings with complete customer success management functions. Access to partner applications is easy through a well-designed app store.
- Microsoft Teams is leading the market by providing a feature-heavy unified communications solution, but banks on an already established user base through Office 365.
- RingCentral is a dominant leader and it continues to differentiate and grow with a robust UCaaS solution and enterprise acceptance.
- 8x8 has gained momentum through its differentiated X Series platform, and has the best-in-class UCaaS and contact center package.
- Cisco leads with a strong and integrated roadmap showcasing UC-One at its core.
- Orange Business Services impresses with its end-to-end offerings as a communications service provider (CSP), its resource pool and commitment to UCaaS engagements.
- Atos, with its own differentiated UCaaS solutions like Circuit and OpenScape Cloud, has been identified as the Rising Star.
Overview

8X8 is a leading cloud provider of enterprise communications solutions that enable businesses of all sizes to communicate faster and smarter across voice, video meetings, chat and contact centers. 8X8’s global revenue was approximately $352 million in 2018 and total revenue increased by 19 percent compared to 2017. 8X8 is headquartered in San Jose, California, and has a workforce of more than 1,700 employees worldwide, with the majority within the North American region. The company serves more than 1 million business users spread across more than 190 countries. Customers range from small businesses to large enterprises with more than 15,000 employees. It recently expanded its CPaaS market reach globally with acquisition of Wavelength earlier this year. Approximately 90 percent of 8X8’s revenues are derived principally within the U.S. from cloud software solution sales.

Strengths

**X Series platform:** 8X8 has launched its latest service innovation, X Series, in the U.S. and has since rolled it out to the U.K., Australia and New Zealand. The X Series platform is valued for having an integrated UCaaS and CCaaS (contact center as a service) capability with the vision of one cloud communications solution. It supports single sign-on, shared presence and directories, extension-to-extension dialing and team collaboration through integrations. X Series is offered with flexible service plans, from plans that provide a new phone system to more complete ones that combine traditionally segregated unified communications and contact center services into one comprehensive offering. 8X8 also recently announced new video conferencing solution 8X8 Meeting Rooms based on Jitsi technology that 8X8 acquired from Atlassian.

**Security and compliance:** 8X8 has expanded into market verticals including finance, healthcare, retail, legal, state and local government and education. 8X8 is one of the only cloud vendors that provides comprehensive compliance certifications, such as HIPAA BAA, FISMA, PCI, CPNI, Privacy Shield Framework, Cyber Essentials, U.K. Government ATO, ISO 27001 and 9001.

**Research and development:** 8X8 has an R&D budget of more than $60 million and has been awarded 170 patents. These efforts provide the foundation for innovation, services and tools that allow businesses to communicate, collaborate, engage and analyze data from every real-time interaction across the organization, globally, in a seamless, easy-to-manage solution. 8X8 also expanded its enterprise API offerings through Wavelength integration.

Caution

8X8 should shift its marketing focus from North America and expand it to a global level. It needs to build its market presence through aggressive marketing and sales for X Series worldwide.

2019 ISG Provider Lens™ Leader

8X8 is a UCaaS solutions specialist and owns its complete technology stack to provide one proprietary cloud technology platform for customers to have access to unified communications and collaboration tools.
Cisco has a broad UCaaS portfolio, part of which was attained through the BroadSoft acquisition. Its Webex UCaaS platform includes calling, messaging, team collaboration, meetings and contact center solutions. The acquisition of BroadSoft helped Cisco expand its cloud capabilities and provided a large UCaaS customer base that uses UC-One. Cisco has an extensive on-premise UC user base as well as a strong user base from Webex's leadership in audio and web conferencing. Cisco has been making innovations in its Webex platforms, which includes people insight, facial recognition capabilities, natural language processing (NLP) and artificial intelligence (AI).

Strengths

Webex platforms: Cisco has realigned its UCaaS portfolio and has a defined global UC roadmap. It has integrated Webex Calling, Webex Meetings, Webex Teams and the emerging Webex Contact Center as its lead UCaaS platform. Webex Calling provides a full UCaaS service for midsize and large accounts. The Webex platform can also integrate with Cisco and third-party on-premise PBX to support hybrid and cloud transition strategies.

UC-One: UC-One is a unified SaaS platform for communications and collaboration which offers calling, messaging and meeting solutions from any device. It includes voice and video, messaging, screen sharing and conferencing in a single cloud application that can integrate with other cloud business applications. UC-One provides mobility to users on a PC, tablet or smartphone, which can be ideal for organizations of any size with geographically spread teams and mobile employees.

Strategic acquisitions: The acquisition of BroadSoft complements Cisco's cloud meetings portfolio in the growing cloud calling and contact center spaces. BroadSoft had a broad reach, considering it as an open standard-based cloud calling platform with more than 23 million business subscribers and a presence in approximately 80 countries, and is available through more than 600 service providers and channel partners around the world. Cisco's acquisition of Accompany will enable enhancements to the Cisco Webex platform and a suite of services by adding intelligence and contextual user information to meeting and team collaboration experiences. It has also recently acquired Voicea to bring AI-based analytics on meetings and CloudCherry providing customer-centric predictive analytics in contact center services.

Caution

The Cisco UC-One solution has a large installed user base, but the team messaging solution needs to be further enhanced to match the likes of Microsoft Teams in functionality and usability.

2019 ISG Provider Lens™ Leader

Cisco's diverse UCaaS solutions and platforms can support a wide set of requirements for enterprises of any size. Its integrated approach with UC-One demonstrates the realignment around a unified communications roadmap.
Microssoft

Overview

Microsoft has positioned Teams as the central hub for communications and collaboration within the Office 365 environment. Microsoft Teams offers enterprise telephony, meeting capabilities and a chat-based workspace that enables users to participate in personal or team messaging. Microsoft is slowly phasing out Skype for Business Online and replacing it with Teams. It is one of the fastest growing UCaaS solutions because of Microsoft’s long-standing presence in the workplace with its Office/Windows suite, which provides a solid foundation to grow in the collaboration marketplace.

Strengths

Go-to-market strategy: Microsoft Teams has a strong advantage over its peers in the UCaaS marketplace as it is a part of the Microsoft Office 365 package. Microsoft Teams has different routes to the market as clients have an option to buy the solution directly, through communications service providers (CSP) or through channel partners. It enables Microsoft Teams to reach out to the target customers at a rapid pace with efficiency.

Growing user base: The user base for Microsoft Teams has risen exponentially due to Microsoft’s strong technology and distribution approach. Teams has a strong brand across organizations of all dimensions through Microsoft Office 365. The majority of the users leverage Teams for its messaging and meeting solutions, but now a good volume of users have started to adopt Teams telephony, which provides business calling for people on a global scale, combining phone system with direct routing and/or calling plans.

Office 365 integrations: Integrations with Office 365 products Word, PowerPoint, Excel, OneNote, SharePoint, Power BI, Delve and Planner are all built into Microsoft Teams, enabling users to access and collaborate on a range of documents. Connectors can be used to receive notifications and updates from a variety of third-party services including Trello, GitHub and Twitter, as well as supporting the Microsoft Bot Framework, thereby bringing intelligent bots into the team environment. Microsoft Teams can integrate with more than 180 external applications covering business functions such as human resource, finance and marketing, as well as various sectors such as education and financial services.

Caution

Microsoft faces a major challenge in bringing its installed base to Teams because clients have widely implemented Skype for Business for unified communications. Replacing PBX, device support and consolidated management and reporting can prove to be a tedious task for Microsoft.

2019 ISG Provider Lens™ Leader

Microsoft Teams offers a complete package of unified communications solutions, and it suits the needs of a broad segment of organizations seeking UCaaS at a feasible cost.
Orange Business Services is a $7.3 billion company with a global workforce of approximately 25,000 employees. It provides UCaaS solutions through its proprietary offering called Business Together as a Service. The solution integrates all communication applications through a single end-user client across multiple devices. It supports 31 languages and can be used on multiple devices, including mobile. It has UCaaS infrastructure across North America, Europe and Asia Pacific. It focuses on large enterprises and multinationals and has 390 clients globally. It has a strong presence in the healthcare, retail and manufacturing industries.

Strengths

Comprehensive services portfolio: Orange Business Services provides services in more than 80 countries and customers typically acquire a rich bundle of services along with UCaaS. For UCaaS, it provides a complete collaboration environment including local field support for gateways and endpoints. It also offers a feature-rich administrator and end user portal for full solution management and administration that can scale from 100 to 100,000 users. Its complementary components include managed mobility, SD-WAN, managed LANs, security, contact center and SIP trunks.

Partner ecosystem: Orange Business Services has a strong partnership with Cisco to provide its UCaaS solutions. It also partners with Equinix, VHM, VMware, Kurmi, Nice and West, which helps Orange to strengthen its UCaaS offerings.

Competitive pricing: Orange Business Service's UCaaS pricing is competitive in comparison to other CSPs in the industry. There is no preliminary requirement for costly equipment purchases or software licenses, nor ongoing maintenance. The company offers a total of 13 different user profiles with a feature list attached to each. Billing is based on user profiles tailored to different user needs, where users only pay for what they use.

Orange Business Services has been late to focus on innovation and technology by using AI, machine learning, API-based integrations and CPaaS. Other UCaaS providers have already started implementing these solutions with clients.
RINGCENTRAL

Overview

RingCentral is a global cloud unified communications and collaboration solutions provider based in the U.S. In 2018, the company's year-over-year software subscriptions revenue increased by 32 percent and was approximately $612 million. It has more than 1,800 employees worldwide. RingCentral provides unified voice, video meetings, team messaging, digital customer engagement and integrated contact center solutions for enterprises globally. Its differentiated open platform application programming interfaces (APIs) enable seamless integration with third-party and custom software applications.

Strengths

**RingCentral Global Office**: RingCentral Global Office is a single global UCaaS solution designed for multinational enterprises that allows companies to support distributed offices and employees globally with a single cloud solution. RingCentral Global Office enables multinational enterprises with one unified and secure solution through global PBX services in over 40 countries, international phone numbers in more than 100 countries, budget-friendly regional and international calling plans, and service localization for more than 10 languages.

**Mobile-centric approach**: RingCentral offers user friendly smartphone and tablet mobile applications that enable users to set up and manage tasks from anywhere. These applications are compatible with iOS and Android smartphones and tablets. Users can modify their personal settings instantly and communicate via voice, text, team messaging and collaboration, HD video and web conferencing, and fax.

**Application integrations**: RingCentral Office solution integrates with other cloud-based business applications such as Salesforce CRM, Google Cloud, Box, Dropbox, Office 365, Oracle, Okta, Zendesk, Jira, and others. Its open platform is supported by APIs and software developer kits (SDKs) that allow developers to integrate their solutions with business applications or with other custom applications to customize their own business workflows.

Caution

A majority of RingCentral’s large clients are in North America. The company has relatively moderate European and Asia Pacific practices compared to its peers. However, it has the required know-how to support global deployments.

2019 ISG Provider Lens™ Leader

RingCentral has a strong set of UCaaS solutions and the required support features for more than 80 countries. To remain competitive as other providers gain momentum, RingCentral must continue to concentrate on cost containment and sensible expansion strategies.
RISING STAR: ATOS

Overview
Atos offers a comprehensive UCaaS suite with its own Unify collaboration solution platform, which includes Circuit and OpenScape Cloud. Unify has updated and improved the functionality of its OpenScape portfolio and further evolved the Circuit unified communications solution. Atos’ proprietary UCC solutions are a core element of its digital workplace strategy. There is a continuing opportunity for a tightly integrated, enterprise class solution such as Circuit and UCaaS in the global market.

Strengths

**Circuit and OpenScape Cloud:** Circuit is Atos’ team collaboration offering with telephony connectivity options for both Unify (which Atos acquired in 2016) and third-party SIP-enabled PBX platforms. OpenScape Cloud is a cloud-based SaaS that delivers an enterprise grade UCaaS offering leveraging Circuit at the core of the user experience. Together, Atos and Unify offer standardized powerful workflow collaboration solutions as well as unique customer- and project-specific solutions.

**Robust partnerships:** Atos partners with strong solution providers, including Microsoft, Google and Voxbone. In Europe, Atos has partnerships with Interoute, Colt, Vodafone, Telefonica and O2 and others. Through its partnership with Sinequa, Atos offers a standard “Business Search” service based on analytics, using Sinequa technology, as part of its standard managed services solutions.

**Industry solutions:** Atos offers customized communications and collaboration solutions powered by Circuit and OpenScape Cloud for the IT, telecom and media, oil and gas and retail industries.

Caution
Atos through Unify and selected partners, distributors and resellers, is growing its customer base in North America. Atos should highlight its partnerships with Google and Microsoft to extend its market awareness worldwide.

2019 ISG Provider Lens™ Rising Star
Atos exhibits its capabilities through Circuit and OpenScape Cloud. Atos’ dedicated focus on UCaaS is evident by treating it as a vital aspect in the company’s digital workplace offering.
Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets, laptops, and PCs. At a minimum, a UEM solution must provide complete enterprise mobility management, which includes mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). UEM provides a unified approach to managing desktops, PCs and mobile and smart devices using a single console.

A UEM solution should support both on-premise or cloud deployment, 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 2019
Eligibility Criteria

- Offering an independent software solution for unified endpoint management that can be purchased separately;
- Software solution should offer MDM, EMM, MCM, MAM, secured user access and profile management;
- Software solution should integrate with systems managers like SCCM and have the ability to manage devices from different platforms.

Observation

- Leading UEM vendors are developing offerings around providing conditional access, stronger identity management and providing zero trust security solutions.
- Microsoft is the leader in unified endpoint management because of its Intune, MSCCM and Office 365 offerings.
- VMware is a leader with its strong Workspace ONE offering. It provides app analytics, configuration manager integration and support for popular operating systems and browsers.
- Citrix, with its endpoint services offering, is also a leader and supports diverse platforms with strong policy controls.
- MobileIron's strengths include authentication, threat protection and multi-platform support.
- Blackberry has added to its profile and is a leader in securing IoT environments.
- IBM is a leader because of its comprehensive offering that includes MaaS360 and Watson-based cognitive intelligence.
- Ivanti has been identified as a Rising Star because it is effectively leveraging its ITSM and ITAM roots in UEM.
BLACKBERRY

Overview

Blackberry UEM is a unified endpoint management solution that is backed by the company’s strong enterprise mobility management capabilities, recent acquisitions and focus on IoT. Blackberry offers EMM, MAM and MDM functionalities for mobile and smart devices through a single management point. It offers a secure mobile application. Blackberry is a well-known brand that carries multiple certifications and has a highly secured privileged identity management (PIM) capability. It supports multiple operating systems like iOS, Android, Windows 10, macOS and Chrome OS.

Strengths

- **Blackberry BRIDGE**: Blackberry recently announced BRIDGE, a new app that integrates Blackberry apps with Office 365. It includes MAM features from both Dynamics and Intune and can provide secure migration between containerized Blackberry applications and Office 365 apps.

- **Enterprise of Things (EoT)**: Blackberry has a strong focus on IoT devices, and its EoT service portfolio leverages strong partnerships with Google (for enterprise Android support) and Samsung (for Knox security). Blackberry is continuously investing and developing features for smart wearable devices. It also supports its own QNX operating system that is used as an embedded system in cars. Blackberry also recently acquired a cybersecurity firm Cylance that provides artificial intelligence and machine learning based intelligent endpoint protection.

- **Secured apps and PIM**: Blackberry offers platform-as-a-service called Blackberry Dynamics SDK and provides security APIs, user interface and complete mobile app lifecycle management. It also offers a shared service framework to integrate with apps from ISV partners. Blackberry has its own set of secure collaboration apps like Work, Access and Workspaces (from the Watchdox acquisition). Its secured PIM container is extensible to both PCs and mobile.

Caution

Blackberry does not offer its own client management software and clients looking for a migration partner for CMT to UEM may not find Blackberry's solution helpful.
CITRIX

Overview

Citrix’s unified endpoint management solution offers endpoint management when used with existing Citrix infrastructure or in combination with Intune. It is a cloud-based solution and banks on the company’s industry-leading mobile application management service, secured enterprise application portfolio, partnerships and acquisitions.

Strengths

Value-added solution over Intune: Citrix UEM provides value-added services over Intune migration by adding granular policy controls and application containerization. Organizations with existing Intune license can leverage Citrix for tighter controls.

Strong policy controls: Citrix also offers strong policy controls for mobile application management at granular levels to cover mobile apps, HTML5, web and SaaS applications plus Windows desktop apps and virtual desktops. It has strong application containerization functionality and integrates with Citrix’s own secure, mobile enterprise-level applications like Citrix Content Collaboration.

UEM support for diverse platforms: Citrix supports co-management with SCCM, FireVault for macOS, Workspace Hub management, Chrome OS and Apple TV management. The company also recently introduced support for Alexa for Business. It acquired the Octoblu multiprotocol IoT platform to create secure IoT devices. Citrix also offers Ready Workspace Hub devices integrated with its UEM capabilities to offer managed and secure smart support to end users. It provides Receiver to connect devices to the Citrix virtualization environment and port the Skype for Business real-time media engine. Citrix Casting allows apps and sessions to be moved from unmanaged devices to the Citrix Ready Workspace Hub.

Caution

Clients that are already investing heavily in the Citrix virtualization environment can make the best use of Citrix’s UEM offering. Though Citrix is confident of convincing its client base to migrate to cloud-based endpoint management, clients may remain skeptical.
IBM's MaaS360 solution offers unified endpoint management and manages endpoints on iOS, macOS, Android and Windows platforms. It provides application-level security through native app wrapping, an app security SDK for integrating authentication features and AppConfig. IBM offers MDM, MAM, app security and mobile threat prevention through cognitive analytics. IBM MaaS360 with Watson was recently awarded by Google as an Android Enterprise Recommended solution for both company-owned and BYOD devices.

**Strengths**

**Comprehensive offering:** IBM has a comprehensive cloud-based offering for unified endpoint management service and provides different subscription and pricing levels. Based on the pricing level, MaaS360 can provide basic EMM features, app containerization, identity management, secured email, browser and productivity apps, threat management and EFSS. MaaS360 integrates with erstwhile IBM BigFix on-premise endpoint and patch management solution. It enables clients to migrate from an on-premise to a cloud-based MDM environment.

**Recent integration:** MaaS360 integrates with Inpixon, a location-based device security service provider. Its Security App Exchange ecosystem recently added two new partners; Corrata, providing mobile threat detection, and Asavie, providing secured IoT connectivity and network protection. MaaS360 also integrates with Wandera a mobile threat defense company providing gateway-based web filtering services for iOS, Android and Windows 10 devices.

**Watson-enabled insights and other enhancements:** IBM offers Watson's cognitive capabilities, which deliver predictive analytics, insights and recommendations to counter threats and vulnerabilities. MaaS360 provides a business dashboard highlighting app usage and performance analytics through MaaS360 SDK or an app wrapper. IBM also introduced the Policy Recommendation Engine that will recommend deployment policies specific to industries and regions. MaaS360 Assistant is a new AI-based virtual agent that interacts with users to enhance their experience and productivity. It uses native speech recognition technology on iOS and Android for voice capabilities.

**Caution**

Now that the deal between HCL and IBM that involves BigFix is complete, clients using BigFix on-premise and MaaS360 on cloud may have some apprehensions.
Microsoft offers unified endpoint management through the Microsoft Enterprise Mobility + Security (EMS) solution suite. Microsoft has added more than 10 million devices under mobility management since its launch. Microsoft has more than 135 million PCs and mobile devices actively managed by ConfigMgr and Intune.

**Overview**

Microsoft’s UEM solution is a one-stop shop for enterprises with SCCM, Office 365, Windows10 and Intune. Because the Microsoft Enterprise Mobility + Security (EMS) solution can showcase tighter integration with the Microsoft ecosystem than its competitors, its popularity and adoption are increasing rapidly.

**Strengths**

**Intune and MS SCCM:** Microsoft EMS includes the company’s Intune mobility management solution and Microsoft System Center Configuration Manager (MSCCM, or SCCM). It allows PCs and mobile devices to be managed through a common console. Integration between SCCM and Intune also allows co-management and migration to unified management. Microsoft recently announced its Desktop Analytics cloud service as part of EMS that can integrate with SCCM. Desktop Analytics can help admins create application inventories and app monitoring in addition to ensuring device health, Windows version compliance, app driver compatibility and update readiness.

**Integration with Office 365:** EMS can be purchased standalone or with Office 365. EMS is a core offering of the Microsoft 365 bundle for enterprises along with Office 365 and Windows 10. EMS provides mobile application management services for Office 365 apps.

**Identity management and security services:** EMS also offers Azure Information Protection for rights management and data classification. Azure Active Directory Premium provides identity protection that includes self-service password reset capabilities, group management, provisioning, policy enforcement and user identity synchronization with on-premises directories and multi-factor authentication (MFA). Microsoft also offers security, predictive protection and granular visibility through Advanced Threat Analytics and Cloud App Security.

**Caution**

While Microsoft and Windows still dominate the workplace environment, new endpoints are emerging. Microsoft EMS is comparatively less focused on managing macOS and Chrome devices despite their growing popularity in enterprises.
MobileIron has strong credentials in EMM and security. Its focus on UEM and wide partner ecosystem place it as a leader in this space.

**Overview**

MobileIron's unified endpoint management service is backed by its security platform and analytics. MobileIron Sentry acts as a gateway and secures data and apps between devices and back end systems. MobileIron Tunnel provides app-level VPN access to protected data. MobileIron UEM can manage Windows devices plus macOS, iOS, Samsung Knox, Android Enterprise and Apple TV.

**Strengths**

MobileIron Access and Zero sign-on: MobileIron Access provides policy-based password-less authentication using zero sign-on and multifactor authentication (MFA) through a third-party SAML authenticator application or through MobileIron's UEM application. Zero sign-on and MFA are available for the Android and iOS platforms. The recently introduced a zero sign-on functionality enables organizations to eliminate passwords and use secured mobile devices as user ID and primary factor for user authentication.

MobileIron Threat Defense and security: Threat Defense provides known and unknown threat detection and remediation at the device, network and application levels without requiring network connectivity. MobileIron also offers desktop security and management for Windows 10, macOS, iOS and Android devices. It can perform risk discovery for Office 365, Salesforce and Box through conditional access. It also recently introduced its mobile application management solution AppStation that offers app wrapping bypassing MDM and providing secured access to corporate apps on unmanaged devices.

Strong Partnerships: MobileIron's partnership with Google Orbitera allows it to manage end-user licenses and identities for online services bought through Orbitera and can also provide application-use analytics. MobileIron has also integrated with McAfee's ePolicy Orchestrator (ePO), enabling common customers to extend existing security policies to mobile endpoints. It has recently partnered with NetMotion and has integrated its network analytics, security and performance management within its UEM solution. It has a strong partner ecosystem with more than 385 technology integrations, 2,092 VARs and 100-plus carriers resell MobileIron solutions. The recently launched MobileIron Marketplace Premier Program expands the range of security solutions available to customers. With this program, MobileIron enables resellers to instantly remarket third-party independent software vendor (ISV) products from Marketplace Premier Partners as well as expand the breadth and depth of solutions available to MobileIron customers.

**Caution**

MobileIron is better known for its mobile device management, enterprise mobility management capabilities and security capabilities. Although integrates with SCCM, it has limited focus on Windows management. Its solutions are targeted more towards frontline workers and management of non-Windows OS.
VMWARE

Overview

VMware's Workspace ONE solution provides complete unified endpoint management. It manages desktops, mobile, IoT and ruggedized devices with diverse operating systems and manages client organization policies. Workspace ONE provides containerized access to corporate apps enabling BYOD and app-level security. VMware managed 1 million Windows 10 devices within the first six month of Workspace ONE's introduction.

Strengths

Workspace ONE Intelligence: Workspace ONE provides intelligence by collecting information from mobile, virtual, desktop, SaaS apps and all endpoint devices. The intelligence enables clients to set policies, build workflows and automate tasks, and integrate with ServiceNow and Slack. Recent acquisitions have bolstered VMware's capabilities in the intelligence space. It acquired mobile app performance monitoring tool Apteligent, which allows IT to view real-time data on crashes, response times and other factors that can affect user experience. By acquiring Wavefront, it can normalize logs and other data generated by infrastructure, applications and even by transitory container-based microservices. VMware's Trust Network with leading vendors can help pull real-time and historic data related to performance.

Integration with SCCM: VMware Airlift connects with any SCCM version, including older ones, to provide co-management for Windows 10 devices using both Workspace ONE and SCCM. The AirLift Connector pulls configuration data out of SCCM and surfaces it in Workspace ONE, coordinates management and makes recommendations for policies that can migrate. It can also automate Group Policy Objects (GPOs) migration from SCCM to Workspace ONE.

Diverse platform support: Workspace ONE supports endpoint management for Chrome OS, a browser that is preferred by many end users. VMware also recently announced support for Dell Latitude Chromebook devices, planned support for iOS13, iPadOS and macOS Catalina. It also recently announced integration with Okta Universal Directory (UD) enabling Workspace ONE to leverage UD instead of on-premises directories to accelerate cloud migration.

Caution

Although Workspace ONE can co-manage with more SCCM versions than Intune, it may be challenging to convince clients with heavy Microsoft dependency to move to another platform for UEM.

2019 ISG Provider Lens™ Leader

VMware is a visionary and established market leader in UEM. With continuous product improvement and growing partnerships and integrations, it offers a comprehensive solution.
RISING STAR: IVANTI

Overview

Ivanti's UEM solution consists of its endpoint management, environment manager policy and analytics solutions. Ivanti's UEM is part of its wider unified IT approach that, along with the company's user workspace management solution, covers OS deployments and end user office productivity solutions. Ivanti is an established name in the client management tools (CMT) space and leverages its position and existing enterprise mobility solutions to provide unified endpoint management. Through its recently announced Ivanti Cloud the company aims to provide cloud-based IT operation assessment by offering a real-time view into device analytics and prescriptive recommendations.

Strengths

Ability to manage legacy OS and multiple device types: Ivanti's UEM solution can manage legacy versions of diverse operating systems like macOS, Linux, Windows etc. Its UEM solution can also manage device types including IoT devices like Apple TV and Raspberry Pi.

Environment manager: Ivanti, through its acquired firm AppSense, offers an identity access management solution that performs context-aware analytics on logon to provide quick logon by avoiding GPOs (group policy objects) and logon scripts. It also provides smooth migration to Windows 10 along with Office 365 and OneDrive, and leverages Autopilot without need for Intune.

Asset management through data analytics: Ivanti’s solutions offer detailed asset management through its Xtraction product. It reports real time data on device health by leveraging connectors with diverse vendors like CA, BMC, ServiceNow, IBM and others.

Caution

Ivanti's Cloud solution was released in March and there were other cloud-based UEM solutions in the market. Ivanti is still preferred for its on-premise implementations.

Ivanti positions syncing files in OneDrive both on-premise and on cloud as a key strength. However, enterprises migrate to file sync share solutions to leverage cloud capabilities and rely less on on-premise data. Moreover, OneDrive is not the prominent file sync share solution vendor, and Ivanti doesn't provide native support for some other solutions.

2019 ISG Provider Lens™ Rising Star

Ivanti has a strong brand name and well known for its IT service management and asset management capabilities. It is offering UEM on top of these services.
Methodology
METHODOLOGY

The research study “ISG Provider Lens™ 2019-20 – Digital Workplace of the Future” analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Digital Workplace of the Future market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & 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

Mrinal Rai, Author
Principal Analyst

Mrinal Rai is the principal analyst for digital workplace and social business collaboration. His area of expertise is digital workplace services and enterprise social collaboration both from the technology and business points of view. He covers key areas around the workplace and end user computing domain viz., modernizing workplace, enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture. In social business collaboration, he focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms. He has been with ISG for over six years and has more than 11 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end-user computing and service desk.

Rahul Basu, CO-Author
Senior Analyst

Rahul Basu is a senior analyst in ISG and is responsible for supporting Provider Lens™ studies on Digital Workplace and Social Business Collaboration. His area of expertise is unified communication and collaboration, social media management and digital marketing. During his tenure, he has developed content for ISG Provider Lens™ in the areas of social media marketing and contact center customer experience. He is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.
Jan Erik Aase, Editor
Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.
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 more than 70 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; 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 digital-ready 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. For more information, visit www.isg-one.com.