About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of 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.

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ISG Provider Lens™ Quadrant Report | November 2019
EXECUTIVE SUMMARY

Digital workplace is the backbone for large digital transformation initiatives that enterprises are undertaking to align technology, employees and business processes. It complements the physical workspaces and includes any device, application or platform that employees would use to fulfill their day-to-day responsibilities. A productive workspace is an integral part of the business strategy and involves not just IT, but larger business functions like human resources, marketing and business units. Collaboration, mobility, the cloud and social networking all have had a large impact on the modern workplace. Enterprises are looking for best-in-class technology to improve the employee experience and thereby enhance their competitive edge.

Enterprises in the U.K. are increasingly investing in new technologies and large transformation projects, and workplace transformation is one of the key focus areas in the region. Key trends in the digital workplace domain are listed below.

- **Connectivity and collaboration remain the key drivers**: The anytime, anywhere and any device requirements of employees have changed business models across all industries. Companies are implementing mobile productivity solutions to enhance connectivity across devices. Employees expect similar experience and information to be delivered on all the devices they use, irrespective of the different interfaces. Providing the ability to collaborate across devices will empower organizations to foster an innovation culture among its workforce, help enable more rapid product development and reduce risk. According to ISG’s Workplace of the Future report, enterprises are investing in emerging collaboration technologies and flexible office spaces to facilitate employee collaboration.

- **Consulting services based on design thinking are on the rise**: Workplace transformation is not just limited to bringing in new technology or automating workflows but has to be thought out more holistically. Customer experience is becoming important and is pivotal for business success and transformation. Applying design thinking principles requires taking end-user concerns as the starting point. More organizations are relying on experts for defining the blueprint and roadmap for digital workplace transformation. They are looking at service providers to bring in that expertise through certified consultants to help them define the parameters that are affecting end-user experience. Digital workplace transformation initiatives can measure their effectiveness and return on investment based on those parameters.

- **Workspaces are becoming more efficient**: Emerging technologies like the Internet of Things (IoT) are helping in making workspaces smarter and more efficient. Facilities management extensively uses IoT to optimize building management and operations through beacons and sensors, thereby reducing the operating cost. Connected workplaces monitor usage and help enterprises reduce their carbon footprint by making
offices energy-efficient. IoT-enabled temperature and lighting controls not only allow for centralized management of resources but also help in running near-real-time usage analytics to optimize workplace utilization.

- **Secure device management solutions for wearables:** Non-traditional mobile gear like wearable IoT devices are proliferating the modern workplaces, and enterprises are looking for ways to manage the equipment without compromising on security. Companies want to extend mobility management to wearable IoT devices and sensors, and they are looking for advanced device management solutions, including business policy implementation and secure application distribution. They seek advanced solutions in areas like mobile device management (MDM), enterprise mobility management (EMM) and unified endpoint management (UEM). The stringent EU law General Data Protection Regulation (GDPR) is resulting in enterprises investing in enhanced security measures to protect personal data related to employees and customers. Emerging technologies enable administrators to secure access to information, rather than use locking devices.

- **Automation and AI are key to workplace strategy:** Enterprises are looking at automation and artificial intelligence to drive “shift left” initiatives. Proactive monitoring of systems, devices and applications enables predictive analytics and proactive incident management. Self-help and self-service features are gaining traction as end users are becoming more comfortable with resolving issues on their own. AI-based virtual agents are increasingly being deployed to provide human-like support to end users. Intelligent chatbots are enabling self-healing technologies and automating service request creation. Sentiment analysis is another area that is gaining traction.

- **Proliferation of AR/VR:** Virtual reality (VR) and augmented reality (AR) are having a significant impact on workspaces. VR is already transforming the field support services and specialized workspaces for professionals like architects, for example by helping design virtual models of office buildings. It delivers a highly immersive virtual workplace environment for remote workers. AR technologies are expected to become mainstream over the next few years as they enable enhanced collaboration between people and machines. Augmented reality can reduce product development time by enabling creation of virtual prototypes. AR-driven use cases are also being developed to improve the safety and compliance in the workspaces.

- **Analytics-driven personas:** Enterprises are increasingly looking for consulting services around end-user segmentation and persona creation. Service providers are effectively leveraging automation and analytics to collect the data from end users and identify patterns based on usage information. The use of automation and advanced analytics underpinned by machine learning (ML) makes the persona segmentation process faster and more accurate.

- **Enhanced user experience:** User experience is a central theme for digital workplace strategy and a driving force behind how companies are allocating funds for capital investment in workplace technology. Employees are being treated as new customers, and similar engagement techniques are being leveraged to ensure enhanced employee experience.
**Introduction**

“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 of workers while enabling them to efficiently connect and collaborate with fellow employees.

Key trends in the digital workplace are driven by users’ preference to use technology of their own choice, and increase the relevance of emerging technologies and the diverse possibilities they bring. Enterprises are focusing on enabling and measuring end-user experience, and service providers are moving from service level agreements (SLAs) to experience level agreements (XLAs) in workplace services contracts.
Definition (cont.)

Augmented reality and virtual reality (AR/VR) reduce and eliminate the need for in-person tech support, and their relevance and use are growing for onsite and remote support. Through the use of interactive virtual agents and analytics that run on systems and track resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There also is increasing interest in transforming workplace management to a 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 used. There is a growing interest among enterprises in desktop virtualization through cloud or desktop as a service (DaaS) and also in unified endpoint management. There also has been 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 business benefits.

Enterprises are trying hard to catch up with changing user expectations, however they are still unable to match the pace at which 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, the U.S., Germany, the 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**

Digital workplace consulting focuses on workplace optimization strategies. Modules include support for defining a workplace strategy, for 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.

**Managed Services – Workplace Support**

Managed services for IT service desk with level 1 and level 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 collaboration and unified communications (UC) services and managed virtual desktop services.

**Managed Services – Mobility Support**

With increasing acceptance of mobility and bring-your-own-device (BYOD) culture, these services include secured device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobile enterprise services include support for mobile device management, policy configuration, device configuration, device kitting, device lifecycle management and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management, mobile security, digital user experience management and cloud-based 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 2

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### Digital Workplace of the Future - Quadrant Provider Listing 2 of 2

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Digital Workplace of the Future
Definition

Digital workplace consulting focuses on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and 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 digital workplace offering and are offered independently of the provider’s associated managed services
- Vendor-neutral approach to assessing the best technology partner
- Established methodology for end-user persona segmentation
- Ability to define and visualize a modern workplace environment for enhancing and measuring end-user experience
- Inclusion of technology adoption and change management services in the consulting portfolio.

Observations

- **Accenture** brings global expertise and domain knowledge to its consulting practice to build a highly strategic offering oriented toward change management for the future workplace.
- **Atos’** focus on end-user experience and its ability to combine future workplace consulting with collaboration, change management and emerging technology impact help it emerge as a leader.
- **Capgemini** uses business process management techniques to help clients achieve workplace transformation, enhanced employee experience and better digital dexterity.
- **Computacenter** provides a structured consulting approach based on end-user roles. It supports clients in defining roles and workflows before rolling out the architecture for digital workplace transformation.
- **DXC** has a dedicated consulting group that is further enhanced by its Microsoft partnership and enables the provider to deliver advanced workplace technologies.
- **HCL** has strengthened its end-user consulting unit in the U.K. and advises clients on business transformation, technology architecture and role-based workflow optimization.
- **IBM** has a strong future workplace consulting business underpinned with an innovative approach to unified endpoint management and emerging trends like artificial intelligence and integration of IoT capabilities.
TCS has developed a sophisticated consulting capability for future workplace transformation. It has a strong foothold in the U.K., particularly in the retail and financial sectors.

Wipro’s consulting approach, which is led by design thinking, helps it deliver user-centric transformational initiatives across touch points as well as design effective workplace interfaces.

Cognizant has been identified as a Rising Star because it offers highly strategic and future-focused workplace consulting services independent of service integration or operations.
ACCENTURE

Overview

Accenture designs architecture and infrastructure roadmaps in addition to developing implementation strategies and transformation plans focused on the digital workplace. It considers digital workplace services to be an integral part of its clients' agenda for holistic digital transformation and journey to the cloud. The company has approximately 16,000 consultants globally.

Strengths

Global brand and domain expertise: Accenture leverages its rich global consulting experience combined with its business-led approach and deep understanding of technology architecture and infrastructure. The provider has a strong track record and is a global brand in technology consulting. Accenture brings a design thinking approach to identify transformation opportunities and works in tandem with clients to take the journey forward.

Consulting approach based on best practices: Accenture's consulting practice draws on extensive best practices from its global engagements. Its U.K.-based consultants have access to international experts and advisors whose knowledge can be leveraged for local customer projects.

Automation experts: Accenture has built strong consulting expertise in automation and employs consultants that focus on identifying and expanding the role of automation for its clients. It has a dedicated workforce that focuses on deploying automation, analytics and AI in the service desk.

Caution

While Accenture has a strong consulting expertise in the digital workplace and a vast ecosystem of partners in the U.K., clients still view it as a Microsoft-dependent technology provider that may not be able to support broader technology initiatives.
Atos' workplace consulting focus is on transformation of employee experience and driving better employee engagement, which makes the company a strategic partner for its clients.

While Atos has been expanding its consulting portfolio globally, the provider could invest in strengthening its position in the U.K. by building a stronger client base specifically in the consulting domain.

Strengths

**Innovation-driven approach for improved employee experience:** Atos heavily leverages intelligent automation and machine learning (ML) to expand its consulting capabilities around improving employee experience. It has extended the scope of its consulting portfolio to include employee lifecycle management capabilities like talent management, engagement analytics and digital adoption, in addition to helping clients drive digital workforce solution adoption at an organizational level.

**Focus on data-driven services:** Atos is building a workplace analytics platform that will collect data from the workplace environment, including devices, tools and platforms. It will use machine learning and algorithm-driven analytics to identify patterns and trends to provide usage-based insights and improve the technology environment for employees.

**Strong technology expertise:** Atos' digital workspace consulting offering is backed by its technology expertise in the domain. Its experience in delivering technical transformation projects has helped the company to develop deep domain expertise in future-focused workplace technology.
Capgemini leverages digital technologies and a workplace transformation framework that is focused on enhancing employee engagement and experience, thereby improving the digital dexterity of the organization.

Although Capgemini offers strong digital workplace consulting services with clear consulting on Brexit readiness for the clients in U.K., it could focus more on improving its market change response time.

Strengths

Connected employee experience: Capgemini’s consulting portfolio focuses on improving employee experience and driving digital adoption in the workplace. Its consulting services offering, Connected Employee Experience, is based on the three key areas of connected workspaces, connected office and connected employees. The consulting services are combined with Capgemini’s digital adoption offering to measure employee adoption and the impact of technology deployment through extensive use of analytics.

Modular consulting approach: Capgemini offers modular consulting for planning and deploying specific workplace solutions. It has developed individual modules for various business cases that also include assessments on Brexit readiness.

Industry-specific consulting: The Connected Employee Experience offering has been verticalized for various industry use cases. These include smart workplaces for manufacturing, cognitive bots for the automotive industry and analytics from smart wireless device chargers in the hospitality sector. The company also collaborates with clients to build vertical digital workplace solutions.

Caution

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Capgemini leverages digital technologies and a workplace transformation framework that is focused on enhancing employee engagement and experience, thereby improving the digital dexterity of the organization.
Computacenter helps its clients to build, deploy and optimize technology platforms in the digital workplace domain. It helps to integrate social collaboration tools like voice, video, messaging and workspace tools to make knowledge sharing more effective. The company reported that nearly 40 percent of its digital workplace consulting revenue comes from the U.K.. It has more than 95 consultants in the region.

**Strengths**

**Structured consulting approach:** Computacenter’s digital workplace transformation offering is highly structured and based on eight distinctive job functions. The predefined user personas range from field worker, knowledge worker, and VIP worker to third-party worker or external consultants. These functional definitions help speed development of strategy aligned to user and business requirements.

**Strong project management capabilities:** Computacenter’s consulting services are managed through its TEMPO project management process, which is based on PRINCE 2 methodology. The effective project management capabilities help in ensuring delivery according to client requirements and support effective technology adoption. Computacenter also provides user adoption services to support transition and to measure the success of technology deployments.

**Collaborative approach:** Computacenter organizes Digithons to drive digital adoption across the client organization. The events bring together IT, business and end users to define the requirements and priorities for the workplace transformation strategy.

**Caution**

As more and more global consulting players are entering the U.K. market, Computacenter should ensure that it is not viewed only as a regional player.
DXC TECHNOLOGY

Overview

DXC Technology provides end-to-end consulting services ranging from strategy to implementation for its clients. The company has a talent pool of over 16,000 consultants and advisors that serve more than 200 Fortune 500 clients. The company focuses on end users and considers mobility a strong aspect of its digital workplace consulting.

Strengths

- **Global consulting practice:** DXC’s workplace consulting capabilities in the U.K. are further strengthened by its global practice that was gained through the acquisition of CSC. It has been able to offer a focused and strategic transformation offering and deliver complex digital workplace transformation projects encompassing people, processes and technology.

- **Client Experience program:** DXC combines its consulting practice with a continuous feedback program, Client Experience, which monitors satisfaction and experience levels. The company uses an automated platform to collect feedback and track initiatives, thereby driving better engagement with clients in a consultative manner.

- **Strong technology background:** DXC has vast experience in delivering workplace modernization services across industries including pharmaceuticals, automotive and telecom. It also offers consulting for business process mobilization and mobile app development with UX design and system integration.

Caution

While DXC is a well-known player in the digital workplace domain among large enterprises, it needs to develop standardized and ready-to-deploy offerings for midmarket customers.

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DXC’s capabilities in delivering workplace modernization services are further enhanced by its mobility practice and focus on end-user experience.
HCL’s focus on smarter workplaces for its customers is based on nano-personalization that caters to each individual user needs rather than to a group of users.

Data-driven assessment: HCL Kaleidoscope™ uses advanced data analytics for a digital assessment of the workplace environment. Its consulting strategy helps benchmark digital maturity and design a business-aligned workplace blueprint. The focus is to create a roadmap that caters to each individual user need after in-depth analysis of the client environment.

Focus on consumer-like experience: HCL's digital workplace consulting is centered on developing a consumer-like experience that would enhance end-user productivity and deliver a future-ready workplace for employees. It uses an application performance index, data on system performance and user productivity, and many other parameters to make recommendations for enhanced user experience.

Drive digital adoption through gamification: HCL's Behavior Change Management program helps clients employ advanced and effective gamification techniques to drive adoption of new technology in the workplace. It helps clients use game dynamics to motivate employees and drive adoption rates through user-friendly measures.

HCL provides consulting, professional and operational services to help clients transform their workplaces into customized, collaborative, connected and intelligent workspaces. The company generates nearly 17 percent of its digital workplace consulting revenue from the U.K. region and has almost 280 consultants.

Caution
HCL should showcase its consulting capabilities as a standalone offering and not as a forerunner to its managed services. Enterprises in the U.K. do not consider HCL to be a strong consulting firm in the digital workplace domain.
IBM provides consulting services that enable enterprises to make smarter decisions and that offer enhanced client and consumer experiences via cognitive data analytics, cloud technology, digital workplace collaboration and integration, and mobile app development. Its digital workplace consulting is focused on optimizing the end-user experience based on the right segmentation and personas.

**Strengths**

**Strong consulting expertise:** IBM combines its deep business and industry insight with the digital innovation capabilities of its consulting and technology professionals to deliver a holistic workplace offering. It has an experienced team of consultants that focus on digital workplace services. It partners with its clients and acts as a diagnostician to assist them in becoming a cognitive enterprise.

**Cognitive consulting approach:** IBM helps clients define digital blueprints, create cognitive operating models and new technology visions in a cloud-centric world. It uses its digital strategy skills, industry insights, design thinking and cognitive consulting approaches to develop end-user personas.

**Business-driven workplace consulting:** Workplace transformation projects involve various corporate departments besides the CIO and IT team, so IBM's consulting includes cross-functional team of business, strategy and technology experts. The provider has significant experience in collaborating with various business functions including HR, marketing and business operations.

Even though IBM's consulting offerings are vendor-agnostic, some clients have expressed apprehension to ISG about engaging with IBM due to its lack of understanding of the provider's vast portfolio of solutions and services.
TCS is an IT services, consulting and business solutions organization. It provides consulting services across workplace engagement ranging from thought leadership on new tools and technologies to change management. The company has reported nearly 14 percent of its global digital workplace revenue from its digital workplace consulting services. It provides services to its clients from more than 1,000 consultants globally.

Consulting practice based on design thinking: TCS leverages its Digital Interactive practice to create experience-led workplace solutions based on context-centered design, design thinking, service design, user experience design and digital content. It helps customers run design thinking workshops and create digital workplace use cases for various challenges including, technology, employee experience and productivity.

Local presence: TCS has been steadily growing its presence in the U.K. and has won large contracts in the region with clients including Marks & Spencer, Asda and British Airways in the past three years. It has been strengthening its local presence by opening new delivery centers and consultancies in the region.

Focus on customer analytics: TCS' Connected Intelligence Platform is based on analytics software that helps its clients design customer engagement strategies. The platform connects each individual touch point along a consumer's digital and physical journey. With TCS, clients can provide the right solutions and services to the right users at the right time, thereby delivering a differentiated workstyle leading to enhanced user experience.

While TCS follows a global delivery approach, enterprises in the U.K. look for regional customer success stories. The company could invest in marketing its local consulting expertise to gain more market share.
Overview

Wipro provides consulting services that help enterprise customers move from a traditional workspace to a digital workspace. Its digital workplace consulting practice includes design thinking capabilities for defining user experience and delivering end-to-end digital transformation. The company reported that almost 20 percent of its digital workplace consulting revenue comes from the U.K. region. It has more than 55 consultants in Europe.

Strengths

Design-based thinking: Wipro extensively applies design-based thinking to create digital workplaces that are aligned to business needs for talent retention, functional productivity and innovation across micro-verticals and job functions to deliver enhanced end-user experience. It uses its proprietary Workplace Maturity Model to create a detailed assessment of the current workplace and to define the end state in terms of a digital workspace that is available, connected, assisted and based on the consumer.

Focus on people in change management: Wipro's consulting practice doesn't focus on just organizational change management but places equal importance on people-related change management. This approach helps the company to drive better adoption of digital workplace technologies among the clients' employees. It also provides business process reengineering services to help transform the underlying process and ensure end-user adoption of the new process.

Strong security focus: Wipro combines security consulting with digital workplace consulting to ensure client organizations in the U.K. are able to meet regulatory requirements prescribed in the region. The company offers security and compliance KPIs tailored to specific industry and geographic regulations.

Caution

While Wipro has showcased various examples to establish its expertise in the digital workplace consulting domain, the provider is still not considered as the first choice for consulting engagements in the U.K. Wipro needs to highlight its standalone consulting projects to establish itself as a strong competitor.
RISING STAR: COGNIZANT

Overview
Cognizant provides consulting services to its clients with innovative workplace solutions that equip multiple types of workers, support any type of device, and provide access to business resources anywhere and anytime while maintaining security. Its digital workplace services enable personalized experiences, improve productivity, promote creativity and innovation, and nurture collaboration to help its clients achieve tangible business outcomes.

Strengths

Mobile-first strategy: Cognizant helps its clients to define and implement strategies around broad digital workplace initiatives and specific elements covering all aspects of an evolving digital workplace consultancy service. Its WorkNEXT™ solutions are built on a secure, mobile-based digital workplace platform and enable a more digitally connected, collaborative, mobile workspace for employees.

Human-centric approach: Cognizant’s workplace consulting approach focuses on enhancing both customer experience and employee experience. Its services and solutions use human-centered design principles and help clients build the right teams, encourage the right skill sets and make the necessary organizational adjustments for a successful workplace transformation.

Future workplace thought leadership: Cognizant is publishing various white papers and thought leadership articles around its workplace capabilities, persona segmentation and future roles in the workplace.

Caution
As IoT devices proliferate in the workplace domain and U.K. enterprises increasingly invest in smart workspaces, Cognizant can scale up its related consulting capabilities.
Definition

Managed services for IT service desk with level 1 and level 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 collaboration and unified communications (UC) services and managed virtual desktop services.
**Eligibility Criteria**

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

**Observations**

- **Accenture** provides an end-to-end suite of workplace support services together with its Ava-nade joint venture to address employee experience, productivity, culture, change and adoption.
- **Atos** offers a strong user-centric approach for workplace services with a key focus on automation-enabled services.
- **Capgemini** proves to be a leader by providing a seamless, user-centric platform, My Workspace.
- **Computacenter** leads the market in the U.K. with its DigitalMe offering, which features a strong focus on features and services for end users.
- **DXC’s** MyWorkStyle leverages the company’s Bionix platform and emphasizes on customer value in providing managed workplace support services.
- **Fujitsu** has a user-centric approach and provides AI-enabled workplace support services.
- **Getronics** has a good local presence and its managed services expertise and extensive reach for onsite support have helped it become a leader.
- **IBM** is a market leader by providing workplace modernization and workplace support services powered by Watson™ cognitive technology.
TCS showcases a fresh approach with its ONE delivery platform and provides automation-focused managed workplace services.

Unisys leverages its InteliServe™ platform and automation-oriented service desk support services.

Wipro emerged as a leader due to its coverage of the complete spectrum of managed workplace support services through its LiVE Workspace™ platform.

HCL provides strong productized solutions for workplace support services and is recognized as a Rising Star in the U.K. market.
Accenture offers a combination of consulting, implementation and managed services spanning both the workforce and the workplace to create people and technology solutions that drive new employee experience and ways of working. It applies automation, analytics and AI to bring intelligent operations to life through the service desk. Its digital workplace services enable anytime, anywhere execution of work via digital communication, collaboration and service models. The company is an active Microsoft partner and Google's top enterprise partner for G Suite. It aims to transform the physical, digital and technology landscape to deliver a new Workplace Experience framework. Accenture and its Avanade joint venture together manage more than 48,000 users across diverse industries in the U.K.

Strengths

**Analytics, automation and AI:** Accenture's digital workplace services are powered by the cloud. The company offers contextual support by leveraging its applied intelligence framework, so clients can utilize intelligent operations to make decisions and act in real time. This framework helps Accenture provide a personalized, proactive support experience that is omnichannel and multilingual and uses analytics, automation and artificial intelligence.

**Strong partner ecosystem:** Accenture has a strong ecosystem of partners and dedicated joint ventures that help the company provide workplace support services that leverage the skills and capabilities of its global delivery network. It partners with HPE, Aruba and Senion for delivering smart meeting solutions and has multiple partners to provide local onsite and field support services in the U.K.

**Industry expertise:** Accenture possesses wide industry expertise and business and technology transformation skills, allowing it to provide clients with a complete and innovative workplace transformation suite. Accenture takes its clients through the entire journey of planning, migration, culture change and management to maximize employee adoption, productivity and cost savings. It has strong expertise in the financial services, manufacturing and retail industries.

Accenture and Avanade are well positioned to serve the U.K. market because they are the architects of the Workplace Experience framework powered by digital workplace technologies.
Atos is an established player in the U.K. market. Its user-centric 6E framework for serving employees and its increasing use of intelligent automation have proven to be differentiators for clients.

Atos has a dedicated focus on large enterprise accounts in the U.K. Expanding its focus to the midmarket can help the company expand its client base and market its workplace solutions.

European advantage: Atos offers a strong portfolio that includes all major technology segments relevant for managed digital workplace services. It delivers services to more than 500 clients in Europe and generates approximately $1.2 billion revenue in this region. It has a well-established position in the U.K. market, with three service desk locations and the demonstrated ability for onsite and field support.

Vertical solutions: Atos supports end users across all industry verticals and has a special focus on retail, financial services, public sector and health. It designs standard role templates by industry and delivers strong benefits through combining technologies like robotic process automation (RPA), AI and chatbots. It showcases industry use cases to highlight its solutions in the digital workplace segment.

Cloud partnership: Atos has formed a global partnership with Google Cloud to deliver secure solutions for enterprise customers. This partnership supports Atos’ digital transformation factory capabilities by providing solutions based on a secure hybrid cloud, artificial intelligence and machine learning.
Capgemini offers robust workplace transformation and support services in the U.K.. It is on the right path to becoming one of the leading providers of workplace services globally.

Capgemini can focus on the mid-market segment for providing managed workplace support services. The U.K. market has matured with time and offers a serious opportunity for service providers in this segment.

**Overview**

Capgemini delivers its managed workplace support services through its proprietary offering, Connected Employee Experience, which has important smart support services components that are powered by analytics and automation. Its managed workplace support services involve service delivery led by intelligent analytics, cognitive AI solutions, digital adoption services and smart office technology. In the U.K., Capgemini has over 80 employees, serves more than 65 clients and manages nearly 300,000 users.

**Strengths**

**Connected Employee Experience:** The Connected Employee Experience offering provides a single, secure portal through which users can interact with their entire work environment using virtually any device, at any time, from anywhere. This platform delivers functionality through dedicated hosted desktops, shared hosted desktops, published applications, enterprise mobility management, and enterprise file sync and share.

**Smart support services:** Capgemini's Smart Service Center provides intelligent service desk services with persona-based support, analytics and omnichannel experience. It also includes virtual assistants and web chat, automated password reset and SysTrack-based predictive analytics. Capgemini's Distributed Smart Services provides second-line support in offices and remote support for devices, and it includes campus-based onsite help, tech bar and depot services.

**Growth enhancers:** Capgemini plans to follow a growth path for the workplace support services space. It focuses on intelligent analytics-led service delivery, cognitive AI solutions, digital adoption services and smart office technology. Capgemini is also planning for significant adoption of modern device management and digital workspace services that will add enhanced automation and integration to service management platforms.

**Caution**

Capgemini can focus on the mid-market segment for providing managed workplace support services. The U.K. market has matured with time and offers a serious opportunity for service providers in this segment.
Overview

Based in the U.K., Computacenter is a leading independent provider of IT Infrastructure services. It provides agile workplace solutions that are powered by analytics, AI and automation through its proprietary DigitalMe offering. The company generates more than $350 million revenue from managed workplace services in the U.K. and has approximately 500 clients in Europe. Computacenter has over 1,700 dedicated employees in the U.K. and they manage more than 1.5 million users. It has distinguished expertise in the retail, banking and manufacturing industries.

Strengths

**Digital workplace portfolio:** Computacenter’s digital workplace portfolio is driven through its DigitalMe offering. Its key focal points are to deliver appropriate technology for working effectively, provide support aligned to the user’s personal preference and offer intuitive collaboration for increased productivity. DigitalMe is powered by analytics, AI and automation, and it is aimed at reducing cost and providing a digital experience.

**Dynamic partnerships:** Computacenter is a Microsoft gold certified partner with multiple gold and silver competencies. It also partners with other major hardware and software vendors including VMware, ServiceNow, Citrix, HP, Lenovo, Dell, Apple and Cisco. These partnerships help Computacenter in delivering a smooth digital workplace journey to its clients.

**AIMY:** Computacenter has a digital delivery platform called AIMY, which is based on artificial intelligence, automation and analytics. AIMY is an ecosystem of tools, data and processes that empower and enable resources to deliver simpler, faster and more cost-efficient capabilities. Some of these tools come from Avaya, BMC, Blue Prism and SAP.

Caution

Computacenter needs to promote its automation approach to the digital workplace, not just in its home market but globally as well.
DXC TECHNOLOGY

Overview

DXC Technology provides workplace and mobility services through its proprietary offering known as MyWorkStyle. It has three principal focus areas: automation in workplace operations, analytics for end-user experience and artificial intelligence for workplace support services. The company manages approximately 7.5 million desktops and 1.5 million mobile devices. It serves more than 1,100 clients in 150 countries.

Strengths

Digital support services: DXC applies artificial intelligence, analytics and proactive processes to eliminate issues before they impact users. It provides digital automation services that monitor systems and devices to eliminate the need for human support. DXC's MyWork portal has self-service options that adapt to user needs via embedded intelligent analytics and bot automation. It also powers virtual assistants to help users with IT issues 24/7.

DXC Bionix™: DXC's Digital Workplace Services practice is underlined by the capabilities of DXC Bionix™. It 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. Bionix has the potential to eliminate up to 82 percent of incidents raised. The pre-programmed automation also helps bypass level 1 support and direct users to the right support level.

Industry-based solutions: DXC is working on dedicated industry solutions for retail, healthcare and financial services. It also covers the connected workforce, with IoT, sensor-enabled services and augmented reality. With MyWorkStyle, DXC gives the user a consumer-like experience, including dedicated enterprise security and instant collaboration solutions.

Caution

DXC could provide a more homogenous portfolio to promote its capability more strongly for midsized and smaller enterprises, especially in the U.K.

2019 ISG Provider Lens™ Leader

DXC has a broad and flexible digital workplace portfolio with its proprietary offering, MyWorkStyle.
Fujiitsu's digital workplace services include three core offerings: Workplace Anywhere, Social Command Center and Intelligent Engineering. It provides a set of integrated support technologies and services that enable organizations to evolve with changing employee needs and business objectives. Managed workplace services helped Fujitsu to generate more than $1.3 billion in revenue for the European region. It manages nearly 2.5 million users in Europe.

**Strengths**

**European understanding:** An established managed workplace services provider in Europe, Fujitsu has a long-time client base in the U.K., particularly in the public sector, retail, manufacturing and finance verticals. It has five service desk locations in the U.K., and they support clients in English.

**User-centric approach:** Fujitsu pursues an innovative approach by addressing the human-centric workplace requirements. The offering is very oriented to users, focusing on optimized devices and applications to support individual business processes. The Fujitsu Digital Workforce platform solution successfully integrates analytics and automation solutions based on AI developments.

**Intelligent Engineering and Workplace Anywhere:** Fujitsu’s Intelligent Engineering services provide system monitoring and analytics to combat field-worker challenges. They 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.

**Caution**

Fujitsu could showcase more examples of leveraging analytics in modern, transformation-oriented service level agreements.
Getronics provides end-to-end digital workplace services to its customers through its Smart Work platform. The portfolio is comprehensive, and its strong assets include secured mobility, managed office, automated intelligence, unified communication services and cloud office. Getronics acquired Pomeroy, strengthening its capabilities in managed digital workplace services by leveraging its service desk and onsite services network.

Strengths

**User-centric offerings:** Getronics' portfolio is well adapted to user requirements. The digital workplace offering focuses on end users and it comprises all major components, including integration of virtual desktop infrastructures.

**Automation-based approach:** Getronics provides predictive analytics, continuous monitoring and automated resolution solutions. It delivers 85 percent first-contact resolution and up to 62 percent incident reduction using end-user self-help and automated resolutions.

**Extensive experience in the U.K.:** The Anglo-Dutch provider has longstanding experience in providing desktop support services. Getronics is second to none in terms of experience, with decades of running global end-user desktop support services.

Caution

Getronics' revenue growth in the last three years is less than its competitors. Getronics should use more specific use cases and customer stories to strengthen its positioning based on business value.

2019 ISG Provider Lens™ Leader

Getronics has a global workplace service portfolio and has good experience with a decent customer base in the U.K. It leverages its extensive local presence and experience in delivering managed workplace services to U.K. clients.
IBM provides transformational workplace support services with a deep focus on solutions driven by analytics and AI.

Overview

In the U.K., IBM provides digital workplace services that include workplace modernization and workplace support services powered by IBM Watson™. IBM focuses on providing personalized user experiences on any device, anytime and anywhere. IBM’s digital workplace services strategy synchronizes with its overall strategy around digital, artificial intelligence and hybrid cloud, and the company helps clients make the transformational changes required on their journey to the cloud.

Strengths

**Transformational workplace offerings:** IBM provides a full spectrum of digital workplace services, such as device lifecycle management, workplace virtualization, workplace collaboration and workplace support. IBM uses integrative analytics, cognitive technology and automation to create an intelligent support infrastructure that is continuously learning with each interaction. It provides capabilities like self-heal and RPA to enable and enhance user experience.

**Workplace support services with Watson™:** IBM Workplace Support Services with Watson™ addresses the challenges of providing the quick and easy solutions demanded by users in a way that reduces the overall number of tickets, lowers costs and improves user experience. It leverages the Watson™ framework and enhances productivity by applying analytics, AI and automation to deliver key business outcomes.

**Presence in the U.K.:** IBM has a powerful brand and has been recognized continuously as one of the leading multinational information technology company in the U.K.. As one of the leading traditional desktop management providers, IBM has many years of experience and brings a strong technological basis to its digital workspace services.

Caution

Even though IBM is targeting the global workplaces services market with its Watson™-based offerings, more action could be taken to ensure that these efforts promote new business in the U.K.
TCS has realigned itself with the ONE delivery framework and it has a comprehensive managed workplace services portfolio for the U.K. TCS has proven its mettle globally with respect to workplace support services, but it could showcase more use cases for the U.K. to expand its client base in this market.

**ONE framework:** TCS workplace services are offered by Digital Workplace Studio, which takes the ONE approach of, where O refers to zero-touch IT, N refers to next-gen workplace and E refers to end-user experience. The company delivers support through next-gen workplace services that provide automated support based on analytics and monitoring.

**Experience level agreements:** TCS defines the client experience by improving the end-user experience level, and it approaches clients with measurable experience level agreements (XLAs). The XLA metrics are influenced by measurable parameters for IT experience, ease of access to get to IT, ownership of incident resolution, measurement of implemented changes and technology adoption. TCS has invested in partnership with niche technology partners such as Nexthink, Nanoheal and Aternity to build its User ITEA (IT Experience Analytics) offering that monitors end-user experience in real time and provides predictive healing.

**Agile workspaces:** TCS Agile Workspaces are different from the usual delivery centers. The company provides client teams a platform to work together with TCS teams across multiple time zones. These workspaces give clients a forum to build for production and allow more freedom from both virtual and physical constraints.
Unisys has not significantly grown in revenue or clients in the U.K. region. It needs to do more to promote its global innovative capabilities in the U.K.

Unisys differentiates itself by providing technology-based workplace support services aimed at increasing user productivity and revolutionizing end-user support.

Unisys InteliServe™: The InteliServe™ platform is an integrated suite of technologies that provide omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication. It uses IPsoft Amelia for the intelligence, robotic process automation (RPA) from NICE for back-office automation, and PowerShell scripts developed in-house to run on devices. Nexthink collects and identifies problems that have been resolved through automation.

Field Engineering Services: Unisys Field Engineering Services use a globally integrated, cloud-based service delivery platform to supply consistent IT support at any location. The practice offers two options for delivering onsite support: Digital Tech Cafe™ and on-demand, onsite services. Field Engineering Services are provided across the globe, supporting multinational organizations that span every major industry. Unisys partners with ByBox to provide onsite and field support in the U.K.

Industry support services: Unisys has a good client base in the U.K.’s financial, manufacturing, and telecom & media industries. Most of these clients leverage the Unisys InteliServe™ platform for their managed workplace support services.

Unisys provides digital workplace services with the right mix of devices, cloud services and self-service automation. It offers end-to-end digital workplace solutions that help enhance productivity and collaboration using cloud-based and mobile-centric assets. The company generates nearly 6 percent of its workplace service support revenue from the U.K. region. It has over 190 employees and manages more than 285,000 users in the U.K.
WIPRO

Overview
Wipro provides digital workplace services through its LiVE Workspace™ proprietary platform. It uses a combination of a workplace maturity model, digital experience index, in-person focus group studies, customer satisfaction (CSAT) analysis, Pareto analysis and user profiling to determine the service gaps for a user. Wipro generates nearly 17 percent of its workplace services revenue from the U.K. region, where the company has more than 3,500 employees and provides language support for English and Gaelic.

Strengths

LiVE Workspace™: Wipro’s LiVE Workspace™ is a dedicated platform for its managed services delivery of a connected, always-on and smartly assisted workplace. It is a standardized and integrated solution that consists of predefined tools, technologies, processes and self-service options. The platform covers service desk, field support and workplace management, and it is powered by the Wipro HOLMES™ automation platform.

Modern workplaces: Wipro uses its proprietary Workplace Transformation Platform to create modern workplaces for accelerating the overall migration to Microsoft Office 365 with an IP-enabled automation process and tools. It provides a shared service center and an industrialized delivery center for implementing and supporting digital workplace solutions across customers.

Partnerships in the U.K.: Wipro partners with WWTS, Hemmersbach and Excis to deliver local onsite and field support services in the U.K. It also partners with LogMeIn, Microsoft and Lenovo for AR/VR support.

Caution
Wipro needs to showcase more workplace services use cases in the U.K., where the market is largely dominated by European players.

2019 ISG Provider Lens™ Leader
Wipro possesses a complete package of workplace services and it has a growing client base in the U.K.
RISING STAR: HCL

Overview

HCL offers digital workplace services through its Smart Digital Workplace Model, which has four cohesive pillars: Smart IT, Smart Machine, Smart User and Smart Spaces. It leverages automation and cognitive intelligence and its LUCY superbot to provide intelligent support services. HCL offers professional services, consulting and operational assistance in the areas of BYOD, mobility, desktop delivery, collaboration, enterprise networks, end-user services, experience management and user support environments. HCL has reported that more than 17 percent of its managed services workplace support revenue comes from the U.K. It supports more than 50 clients in the U.K. with nearly 3,300 employees.

Strengths

Smart Digital Workplace Model: HCL's Smart Digital Workplace Model aims to transform the traditional office into a collaborative, productive, secure and digital workplace. The model consists of four tenets. Smart IT aims to arm IT professionals with real-time contextual data to support user experience at every user touch point. Smart Machine enables and provisions detecting, correcting and self-healing capabilities across the workplace. Smart User empowers users with solutions that drive minimum intervention. And Smart Spaces supports IoT- and wearable-powered workspaces to go beyond traditional workspace management.

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

LUCY, OptiBot and ScoutBot: DRYiCE is a division of HCL Technologies focused on building AI-powered products and platforms. LUCY is a cognitive virtual service assistant that uses IBM Watson™ speech services. HCL's OptiBot has more than 350 preset ServiceNow automations, and its ScoutBot uses Google AI for information gathering and multilingual translations. IBM Watson™ and Google AI power HCL solutions to work well with different languages.

Caution

HCL has a small number of clients in the U.K. However, it has a robust workplace services portfolio and high revenue and client growth rates in the region.

2019 ISG Provider Lens™ Rising Star

HCL is well positioned to grow in the U.K. market with its robust digital workplace services platform. It has a clear path to becoming a Leader in the coming year.
With increasing acceptance of mobility and bring-your-own-device culture, these services include secured device management, mobile application and content management, 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 management and telecom expense management. It also includes larger aspects of enterprise mobility management (EMM) like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
MANAGED SERVICES – MOBILITY SUPPORT

Eligibility Criteria

- Ability to offer device sourcing and logistics, managed unified endpoint management (UEM), financial management, device security and mobility program management
- Provides implementation and support for enterprise mobility, support for BYOD, and mobility expense and asset management
- Manages complete device lifecycle management and device as a service (hardware as a service, PCaaS)
- Develops industry-specific, plug-and-play mobility solutions
- Supports single sign-on, secured app access and support for smart devices

Observations

- **Accenture**'s mobility practice is backed by its strong consulting expertise and a vast partnership network of enterprise mobility solution vendors.
- **Atos** provides integrated enterprise mobility services and has a strong managed services presence in the U.K. financial services vertical.
- **Computacenter** is one of oldest mobile device management service providers, and it has a strong customer base with large enterprise clients in the U.K.
- **DXC**'s managed mobility services portfolio is backed by preconfigured mobile security services, and the company focuses on a high degree of innovation.
- **Fujitsu**'s differentiated enterprise mobility management offering is underpinned by strong integration capabilities and persona-based service delivery.
- **Getronics** has achieved a leadership position with a comprehensive mobility offering, a significant U.K. customer base and a custom-built approach focused on people and work experience.
IBM combines its global consulting practice with well-established enterprise mobility management services, and it has been upgrading its portfolio through investments in automation and artificial intelligence.

TCS focuses on constant innovation in its mobility portfolio and heavily invests in cognitive intelligence, machine learning and natural language processing (NLP) capabilities to enhance its services.

Wipro is the Rising Star. It has developed capabilities to support its clients' mobile transformation initiatives through the M2TA framework and support services backed by merging AR/VR technology.
**Overview**

Accenture's managed mobility offering spans across mobility strategy consulting, implementation, deployment and managed services. It also provides additional services like application packaging and endpoint management. The company's mobility portfolio is backed by extensive partnerships and a network of third-party providers. It manages 2.6 million mobile devices and 17,000 IoT devices globally.

**Strengths**

**Mobility consulting**: Accenture offers management and technology consulting services to help clients develop mobility strategies, mobility business and technology plans, and design mobility solutions. Its solution accelerators help clients in defining and executing a comprehensive mobile strategy including evaluating and establishing Mobility Centers of Excellence, customized enterprise architectures and application strategies, security, and infrastructure strategy and planning.

**Partnerships**: Accenture has a vast network of partners for various mobility services. It leverages Citrix technology offerings such as Citrix Endpoint Management to deliver large-scale, complex mobility solutions that support BYOD. Accenture has also partnered with Apple to create a dedicated iOS practice for enterprise mobile solutions. Its enterprise mobility management solution partners include VMware, MobileIron, XenMobile, Microsoft and IBM.

**Microsoft alliance**: Accenture and Microsoft's joint venture, Avanade, has strong consulting and implementation capabilities for the Microsoft environment. Accenture provides mobility assessment services and managed services for Azure migration, Intune and SCCM management.

**Caution**

Accenture's managed mobility portfolio is heavily dependent on Microsoft technology, whereas enterprises in the U.K. are increasingly adopting mobile environments based on Citrix and VMware. While the company is expanding its offerings with other vendors, clients still do not believe that Accenture can deliver vendor-agnostic solutions.
ATOS

Overview
Atos’ managed mobility services portfolio is included in the company’s User Endpoint & Application Management Services. The offering aims at managing and securing endpoints and applications while providing managed services around key unified endpoint management solutions. Atos provides enterprise mobility services out of global delivery centers and has a global service architect team for U.K. enterprise customers.

Strengths

Comprehensive mobility portfolio: Atos’s mobility services cover the entire spectrum including consulting, assessment, mobile application development and modernization. It provides end-to-end mobility support for end users, including implementation services.

Strong focus on security: Atos has developed a range of secure mobile telephony solutions under the Hoox brand name. The Android-based solution includes secure hardware for encrypted data and voice communication, and it leverages anti-malware toolsets and services from partners like Trend Micro and McAfee.

Focus on end-user experience: Atos offers a combination of SLAs and XLAs (experience level agreements) in its managed mobility offerings. The company has embedded XLAs that are dependent on a device experience score that combines metrics from the work environment.

Caution
Atos needs to showcase its local delivery capabilities and customer success stories in the U.K.. Enterprises in the region are increasingly looking for mobility consulting and implementation services.

2019 ISG Provider Lens™ Leader
Atos’ managed mobility services include strong mobile consulting capabilities and embedded security solutions, and they are focused on transforming user experience.
Computacenter is one of the oldest players in the MDM domain in the U.K. and is constantly investing in expanding its managed mobility portfolio.

**Overview**

Mobility services are a key part of Computacenter's wider digital workplace portfolio. The company's offerings include unified endpoint services and specialized services for mobile-first users like field-service workers and remote employees.

**Strengths**

*Integrated mobile offering:* Computacenter's managed mobility offering is integrated in its digital workplace solution. Its end-to-end solutions enable Computacenter to manage complex mobile environments for its clients. The enterprise mobility scope encompasses device selection, supply chain services, transformational services and subsequent managed mobile services.

*Investment in single management platform:* Computacenter is developing modern management tools to offer a single management platform for all devices, with cloud-first or cloud-only deployment models. It is investing in Microsoft Modern Management platforms, which consist of several tools and technologies from Microsoft including Intune, Windows Update for Business, Microsoft Desktop Analytics and Microsoft Windows Virtual Desktop.

*Strong local presence:* Computacenter has been offering mobility services in the U.K. for more than 15 years and has developed a strong foothold in the market. It was one of the first providers of MDM services in the U.K. and works with major EMM vendors including Apple, Microsoft, VMware, Citrix, MobileIron and BlackBerry.

**Caution**

Computacenter could follow a more targeted approach to showcase its modern mobility solutions capabilities beyond MDM.

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**2019 ISG Provider Lens™ Leader**

Computacenter is one of the oldest players in the MDM domain in the U.K. and is constantly investing in expanding its managed mobility portfolio.
DXC TECHNOLOGY

Overview

DXC Technology has a dedicated mobility product team that designs and builds mobility offerings for the workplace. It helps clients design the new user experience; develop, test and deploy mobile applications; and procure, provision and manage mobile devices. DXC provides a holistic solution covering all stages of the mobile lifecycle and includes preconfigured management tools for many devices, including Apple, Android and Windows 10.

Strengths

**Strong partnerships:** DXC Mobile Enterprise Services delivers solutions based on an extensive partner ecosystem. It leverages Microsoft EMS or VMware Workspace ONE to provide enterprise mobility management. Its mobile device lifecycle capabilities are based on partner solutions from Mobi, Tangoe, HP, Apple, Lenovo and Dell. DXC utilizes technologies from Xamarin, Kony, SAP and HPE in the mobile application services domain. Its Mobile Business Insights solutions are based on GoodData and Microsoft technologies.

**Comprehensive portfolio backed by security:** DXC’s depth of capabilities across the mobility spectrum range from mobile strategy to mobile device lifecycle and application development services. The portfolio is backed by mobile security services that are offered as preconfigured add-ons. It also includes a mobile threat defense solution for iOS and Android by partnering with Lookout.

**Innovation-driven approach:** DXC is investing in future-proofing its mobility portfolio and driving innovation through automation in EMM technology. It is also investing in AI-driven mobility support services and analytics-based device health monitoring services.

Caution

DXC should invest in strengthening its support services for its mobility portfolio in the U.K. along with local support infrastructure for enterprise mobility management.

2019 ISG Provider Lens™ Leader

DXC’s mobility services are a key strategic digital pillar in its digital workplace portfolio and are backed by strong security solutions and services.

Imagine your future®
Fujitsu offers enterprise mobile services as part of its digital workplace services strategy. It has three tiers of industrialized mobile services — Starter, Standard and Premium — and can cater to large, small and midsized clients. The company's overall strategy is focused on innovation; connected services such as cloud, IoT, AI and security; and strengthening its geographical presence.

**Strengths**

**Mobility consulting services:** Fujitsu has developed a number of consulting methodologies like co-creation design thinking workshops, Activ8, and XpressWay for workplace productivity. Its consultative approach enables it to deliver mobile and agile work environments for its clients and identify strategic drivers and operational understanding of who or what the organization serves.

**Persona-based delivery services:** Fujitsu's persona-based service delivery includes receiving user data from sensors and devices in the current environment. The methodology also includes identifying user preferences and then developing a command instruction that modifies a physical operational condition of the device. In addition, the company has extended its device-as-a-service portfolio with proactive, persona-based hardware management solutions.

**Industry focus:** Fujitsu has developed industry-specific managed mobility offerings for the aviation, retail, automotive, financial services and public sector verticals. Fujitsu Market Place Mobile is an omnichannel point-of-service solution for the retail sector that supports offline activity to offer a seamless customer experience.

As more enterprises in the U.K. adopt mobility solutions and BYOD initiatives, Fujitsu could invest in enhancing its local capabilities and showcasing local references for mobility advisory services.
GETRONICS

Overview

Getronics' managed mobility service proposition goes beyond supporting devices and addresses enterprise platform support areas such as application development, content and document management, provisioning, virtualization and security for mobile users. As part of its Smart Work offering, the company provides full support for all devices.

Strengths

Security as an integral part: Getronics offers a mobile security suite that is embedded in its managed mobility offering. The company applies its Secure by Design approach to offer endpoint protection, network security and identity management solutions.

Acquisitions: Getronics has been expanding its managed mobility and security capabilities through acquisitions. For example, its acquisition of Pomeroy has helped it expand to newer geographies while strengthening its OEM relationships with vendors like HP, Cisco and Citrix. The acquisition of security services provider Thales by Getronics' parent company has helped enhance its mobile security portfolio.

User-centric approach: Getronics's Smart Work platforms are customized to user requirements and built around people and the work experience. The end-to-end business platforms include support for desktop PCs, smartphones, tablets and laptops in addition to supporting integration of virtual desktop infrastructures.

Caution

Getronics should invest in highlighting industry-specific use cases and customer successes that show the breadth of its managed mobility offering.

2019 ISG Provider Lens™ Leader

Getronics' ability to support the mobility initiatives of U.K. enterprises is backed by its comprehensive portfolio and embedded security services.
IBM’s Managed Mobility Services portfolio covers the personalized delivery, setup, configuration, security, management and support of workplace devices across many device types and operating systems. The services encompass device procurement, zero-touch enrollment, dynamic configuration, secure cloud backup, containerization, application distribution, enterprise app store, self-service portal, self-help portal, device health monitoring and end-user support.

**Strengths**

**AI-driven device health analytics:** IBM leverages its Watson™ platform to gather usage data from devices and convert it to a device health score. IBM Device Health with Watson is a patented cognitive analytics platform that uses new and existing data from the organization to provide a unique health score for each device. The score is used to dictate when devices are refreshed, moving organizations from time-based refreshes to health-based refreshes.

**Lifecycle management for IoT devices:** IBM enables management of IoT devices through its Watson IoT Platform. It facilitates remote device management by hosting a server on the Watson platform and a device management agent on the devices.

**Vast experience in mobility services:** IBM has strong expertise in mobility and manages more than 8 million devices globally. The company has been providing managed services in this domain for over 30 years. It has made significant investments in automation and AI-driven self-services for mobile device onboarding and lifecycle management.

**Caution**

IBM needs to invest in sales and marketing efforts to promote its managed mobility services portfolio in the U.K.
TCS offers innovative enterprise mobility services that are integrated with new technologies like cognitive intelligence and machine learning. TCS' managed mobility offering is highly dependent on its own proprietary tools and solutions, which may prevent customers with ongoing mobility initiatives to engage with the provider.

**Overview**
TCS offers comprehensive managed mobile enterprise services that include end-to-end device management, application and security management, and mobility consulting services based on its proprietary tools and technologies. TCS has invested heavily in Mobile Innovation Centers to build innovative offerings around enterprise mobility.

**Strengths**

**Embedded consulting services:** TCS’ Managed Mobility services are supplemented by its strong consulting expertise. Its mobile-first design enables TCS customers to transform their workplace environment holistically and address the growing needs of the mobile workforce. It supports more than 1.5 million devices with over 10,000 associates and a dedicated lab for mobility.

**Investment in Mobility Innovation Centers and analytics:** TCS is investing heavily in Mobile Innovation Centers to build new offerings around enterprise mobility. It uses advanced analytics to offer device-related services like health checks based on application usage, hard resets, memory consumption and failed network connections.

**Proprietary mobility solutions:** The company's enterprise mobility platform, Mobitio™, has its own IP and is backed by intelligent automation and real-time analytics. The solution provides real-time IT support through integration with its collaboration platform and service desk operations. The platform-led service can be adopted across multiple channels and integrated across native and hybrid platforms. Its features include location-aware services and virtual assistance based on natural language processing.

**Caution**
TCS’ managed mobility offering is highly dependent on its own proprietary tools and solutions, which may prevent customers with ongoing mobility initiatives to engage with the provider.
RISING STAR: WIPRO

Overview
Wipro offers managed mobility services through its Wipro Enterprise Mobility Management Suite. The services portfolio includes mobility-enabled business strategy, user experience, mobility-ready enterprise systems and data architecture, process reengineering and solution development. The U.K. region accounts for almost 40 percent of Wipro's global managed mobility service revenues.

Strengths

Mobile transformation capabilities: Wipro created the M2TA (Manage, Monitor, Transform, Absorb) framework to help manage existing mobility landscape and monitor the use of enterprise services on mobile devices. The detailed assessment helps the company to create mobile-first, AI- and cognitive-enabled applications and drive user adoption.

Verticalized mobile solutions: Wipro has developed proprietary mobile solutions for various industries to support their sophisticated workplace requirements. Some of its solutions include mobile-based user identity verification for the financial sector, AR/VR assistance and training solutions for the manufacturing and retail verticals, and mobile workplace design services for healthcare.

Focus on AR/VR: Wipro is heavily leveraging augmented reality and virtual reality to develop enterprise solutions for technical support and assistance. Wipro TechPubs uses an AR/VR design studio to provide real-time assistance anywhere for multiple types of hardware including smart IoT devices and smart glasses.

Caution
Wipro needs to invest in marketing its managed mobility capabilities in the U.K. and grow its market share in the region to effectively compete against its peers.

2019 ISG Provider Lens™ Rising Star
Wipro's mobility strategy is targeted toward developing a connected enterprise and driving the convergence of IoT and mobility by leveraging augmented reality and virtual reality.
The research study "ISG Provider Lens™ 2019-20 – Digital Workplace of the Future" analyzes the relevant software vendors/service providers in the U.K. 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 2019-20 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
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