ISG Provider Lens™

Future of Work – Services and Solutions

U.S. 2021

A research report comparing provider strengths, challenges and competitive differentiators

Quadrant Report

Customized report courtesy of:

HEXAWARE

September 2021

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 August 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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ISG Provider Lens™

ISG Provider Lens™

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.

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EXECUTIVE SUMMARY

U.S. Organizations Prepare for the Hybrid Working World

After successfully ensuring business continuity last year amid the outbreak of COVID-19 pandemic, U.S. firms are now focused on preparing their future of work model for hybrid working. Approximately 70 percent of Americans were working remotely in April 2020, according to a survey by Gallup, a number much higher than in 2016. Now, after a year in pandemic, many enterprises and some SMBs are planning to call employees back to the office. However, there is already a growing trend toward the adoption of hybrid mode of working, wherein some workers can permanently work from the location of their choice, while others can work from the office. This trend is gaining traction because of reliance on workplace technologies that have proved their mettle during the challenging times last year. Remote workers had relied on tools and devices that helped them stay productive, connected and collaborative in the last year. As the pace of vaccinations has increased and living with the pandemic has become the new normal, U.S. firms need to adopt similar technologies to provide seamless experience for employees whether working from the office or from home.

With the hybrid work model, the U.S. firms are not expecting the entire workforce to work from home but are aiming for reduced office occupancy. The average office occupancy in major U.S. metro cities had fallen from 95 to 100 percent in March 2020 to 20 to 30 percent in August 2021 according to a study by the facility management company Kastle Systems. However, only 19 percent of workforce has returned to office. According to Statistica, ensuring physical social distancing and availability of tools to use during the COVID outbreak such as PPE kits remain a top priority for the U.S. firms. Statistica also reveals that the investments in virtual collaboration tools are a top priority for 72 percent of U.S. firms, followed by IT infrastructure for secured virtual connectivity.

With these developments, U.S. firms are considering stronger partnerships with their service providers to help them prepare for the new hybrid mode of working. This involves support in framing their future workplace strategy for transformation and managing the diverse technology ecosystem with respect to workplace support, device management and security, while ensuring seamless experience for employees whether they work in-office or remotely. Many U.S. firms were already focusing on enhancing their employee experience within the workplace even before the pandemic. Because of the pandemic, this aspect has become crucial to ensure that they are developing workplaces that attract, retain and upskill their talent. This report compares many service providers offering these services for the U.S. clients around four key areas, which are summarized below.

Workplace Strategy and Transformation Services

- Clients were seeking help from their service provider partners for reimaging their workplace strategy even before the pandemic. With the pandemic, the need to support remote work transition, user enablement, cultural and performance change management, future workforce and an adaptable workplace is increasing.
- Between 20 and 50 percent of existing U.S. clients have shown enhanced engagement in their consulting and strategic-level discussions for workplace transformation with their managed service provider.
- Many service providers have increased the percentage of their consulting workforce to provide this service. In the U.S., service providers have increased their local consultants by an average of 25 percent.
- Many service providers have successfully transitioned capabilities of their U.S.-based innovation and design thinking workshop centers to a virtual setup to support clients in remote mode.
- The U.S. clients are now having serious discussions about the experience level agreements (XLAs) and how to best strategize them as per business outcome expectations.

Managed Digital Workplace Services

- The scope of managed services for the U.S. clients has widened. Clients are not just looking at efficient service desk operations but rather at enhanced usage of AI and automation for predictive support. Clients are also seeking device provisioning and lifecycle management services.
- CIOs, operations, procurement and technical leads still direct the buying decisions for managed services in the U.S.
- Portals surpass phones as the most preferred channel to raise support incidents according to an annual survey by HappySignals. The highest level of satisfaction continue to come from in-person walk-ins, followed by phone communication with service desk agents.
- Although, on average, 50 percent of the U.S. clients are still managing on-premises virtual desktop infrastructure (VDI), 35 percent are now migrating or already migrated toward a public cloud device-as-a-service model.
- Many providers are developing capabilities to secure and enhance physical on-premises office capabilities to improve and foster collaboration.
- Managed digital workplace services are still being sought separately in the U.S. and not as part of the overall digital transformation or end-to-end IT infrastructure services.
- For large U.S. clients, service providers are providing virtual tech-bars, kiosks and remote support, while mid-market clients are considering DaaS capabilities where pre-packaged devices are shipped to their home locations.

Managed Employee Experience Services

- Only 15 to 30 percent of U.S. clients sign managed service contracts with XLAs that center around specific digital experience of end users.
- For U.S.-based end users, the main driving factors for working remotely or from home are safety and work-life balance. Service providers that focus on improving user digital dexterity, reskilling and productivity are considered as experience enhancers.
- Automated ticket resolution and predictive analytics are now table stakes and commoditized offerings. To provide real managed employee experience services, providers demonstrate correlation between employees with high digital experience and business performance.
- Culturally, U.S. end users report an average level of experience and happiness with a score of 79 out of 100 with workplace technologies, according to HappySignals.

Managed Digital Workplace Services for Public Sector Clients

- Between 2019 and 2021, ISG recorded fewer contracts signed between managed service providers and the U.S. public sector clients, but the value of these transactions has increased.
- According to General Dynamics, on an average, around 30-35 percent of the U.S. public sector and government agency clients use or plan to leverage a managed service provider for their IT landscape.
- Public sector clients in the U.S. are considering ways to utilize COVID-specific grant received from state and federal governments to invest in technology.
- There is a growing interest in adopting virtual desktop technology among the public sector clients to quickly enable remote workforce.
- The U.S. public clients are most interested in adopting a flexible and selective engagement model with managed service providers, where they can pick and choose areas managed by service providers and for co-management.

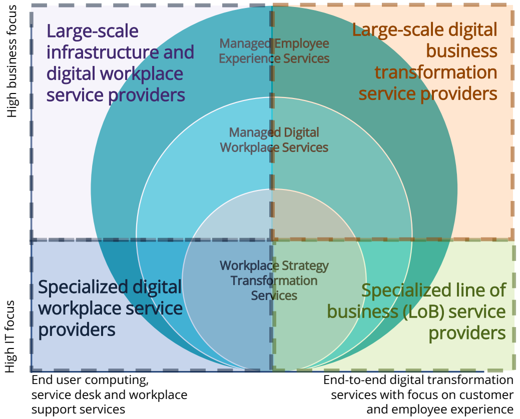
Global outlook applicable for U.S.: Overall, the global managed service providers are at the crucial juncture of defining the future strategy. This space was previously dominated by large-scale IT infrastructure managed service providers that would offer technical end-user computing services. With time, these providers evolved their services to provide automated issue resolution and IT vending machine and kiosk services. With the introduction of mobility, service providers enhanced their capabilities by supporting mobile device and enterprise mobility management initiatives. With these newly acquired capabilities, they started to characterize themselves as "digital workplace service providers." As these services increasingly started to become end-user-focused, providers started to provide experience level measurements and develop their XLA strategy.

The pandemic has accelerated the shift toward thinking beyond traditional end-user computing elements and considering workplace and work-related technologies as key business enabler that can make or break employee experience. A high-level employee experience is a key requirement to ensure a happy and satisfied customer. As enterprises are increasingly considering technologies and expert help in designing their employee experience strategy, service providers are transforming themselves from traditional technology implementation and managed service providers to cross-industry experts providing strategy, consulting and transformation services. Providers' consulting service portfolios that usually focus on as-is state assessment closely tied with their own implementation services are now increasingly defined by their strategy transformation services to prepare both client workplace and workforce for future of work.

As workplace technologies become increasingly business centric, these permeate the business functions, and line-of-business heads (LoBs) get involved in decision-making related to the work technologies that employees use. The rise in modern low-code/no-code development, democratization of IT and emphasis on digital dexterity and reskilling has led to laser focus on managed services that can enhance and improve the experience of end users and prepare them for changing ways of working.

Many service providers that were traditionally not strong in the IT infrastructure managed services space but were considerably stronger in terms of understanding business nuances and focused on applications and strategy transformation services are now increasingly getting involved in providing these digital workplace or future of work services. It has become a challenge for traditional EUC or modern digital workplace service providers, as they have to invest heavily to differentiate with their consulting and transformation abilities. Managed services that include desktop engineering, predictive analytics and automated service desk are now becoming table stakes. In addition, support for the Microsoft 365 environment is becoming commonplace. Providers with diverse strengths are now competing in the future of work services market with strategy transformation services at the core, supported by managed workplace services and an overarching focus on managing employee experience. This has led to the development of a competitive landscape comprising of four different set of providers as explained in Figure 1.

Figure 1: Global Future of Work Managed Service Provider Competitive Landscape



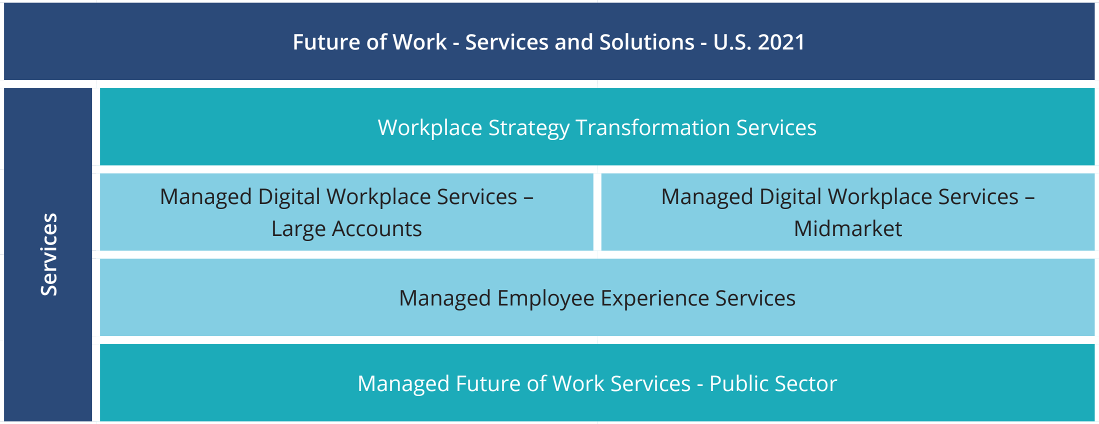
Source: ISG

- Digital workplace services no longer stay in siloes. Changing business models and pandemic induced effects are cascading to these services as they become more business value focused
- Diverse set of managed service providers compete in the new Future of Work services market leveraging their specialization and scale.
- Three key set of services: workplace strategy transformation, managed digital workplace services and managed employee experience are offered by every managed service provider. However, the degree of focus, dedicated vision and coverage depth differs.

Developments in user experience measurement approaches include, but are not limited to, only applications and device usage. It also includes elements of employee learning, talent management and leveraging automation and AI for human+ workforce that is challenging for both traditional workplace service providers and application-focused providers. Hence, the competition to be a leader in the employee engagement and experience space is intensifying, and the only one to benefit from this competition is the enterprise client.

Introduction

Simplified illustration



Source: ISG 2021

Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to a remote-working model was expected in the coming years, but the crisis has accelerated its adoption at a significant pace. Enterprises that have changed their business culture and technological adoption due to the ongoing situation have learned to iterate, adapt and overcome. This has led to new ways of increasing both productivity and engagement for employees. While ISG had equated the term “future of work” with “digital workplace,” the pandemic has led to an understanding that the future of work is more than just technology and support functions performed by enterprise IT functions. ISG’s new Future Workplace Framework comprises three workplace ecosystems, namely Digital Workplace, Physical Workplace and Human Workplace, as described in the following illustration:

Definition (cont.)

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but will also cover aspects of human empathy and will drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms of tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of future workplace will differ and have specific nuances for different geographic regions, but the requirements will generally revolve around a few key themes. In each region, client expectations will involve establishing relationships with service providers that offer future workplace strategy transformation services such as cultural enablement and office-vs.-remote workforce planning. Clients will also partner with service providers that can manage and support the entire workplace technology ecosystem for remote employees, while also managing and measuring the experience of both in-office and remote workers. At a global level, the pandemic has led enterprises to invest in workplace technologies that can secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this to continue in the coming years.

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

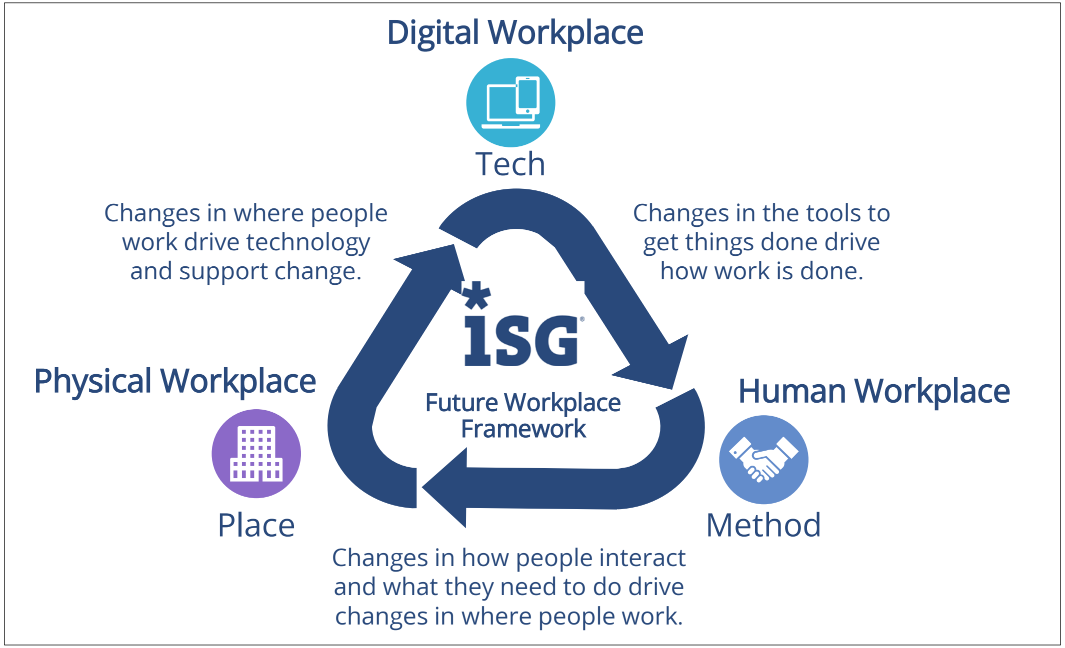
- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including U.S., Global, Germany, U.K., Nordics, Australia and Brazil.

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

The heart and soul of the Future Workplace Great Collaboration and Experience



Source: ISG

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Future of Work – Services and Solutions - Quadrant Provider Listing 1 of 3

	Workplace Strategy Transformation Services	Managed Future of Work Services – Public Sector	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
Accenture	Leader	Not in	Leader	Not in	Market Challenger
ActioNet	Not in	Product Challenger	Not in	Not in	Not in
Atos	Product Challenger	Product Challenger	Leader	Not in	Leader
Bell Techlogix	Not in	Product Challenger	Product Challenger	Rising Star	Not in
Birlasoft	Not in	Not in	Contender	Not in	Contender
Capgemini	Leader	Not in	Product Challenger	Not in	Product Challenger
Coforge	Not in	Not in	Contender	Contender	Not in
Cognizant	Contender	Not in	Leader	Not in	Not in
Compucom	Market Challenger	Not in	Product Challenger	Leader	Product Challenger
Computacenter	Not in	Not in	Contender	Not in	Product Challenger
CSS Corp	Not in	Not in	Product Challenger	Product Challenger	Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 2 of 3

	Workplace Strategy Transformation Services	Managed Future of Work Services – Public Sector	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
DXC	Leader	Product Challenger	Leader	Not in	Product Challenger
GAVS	Not in	Not in	Contender	Contender	Not in
HCL	Leader	Leader	Leader	Not in	Leader
Hexaware	Product Challenger	Not in	Product Challenger	Leader	Leader
IBM	Not in	Product Challenger	Leader	Not in	Not in
Infosys	Leader	Not in	Product Challenger	Not in	Leader
Insight	Not in	Not in	Market Challenger	Market Challenger	Not in
ITC Infotech	Not in	Not in	Contender	Not in	Not in
LTI	Product Challenger	Not in	Product Challenger	Leader	Product Challenger
Microland	Contender	Not in	Contender	Not in	Product Challenger
Mphasis	Not in	Not in	Product Challenger	Not in	Not in

Future of Work – Services and Solutions - Quadrant Provider Listing 3 of 3

	Workplace Strategy Transformation Services	Managed Future of Work Services – Public Sector	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
NTT DATA	Leader	Product Challenger	Leader	Not in	Not in
Pomeroy	Not in	Not in	Market Challenger	Market Challenger	Not in
Stefanini	Market Challenger	Not in	Product Challenger	Not in	Contender
TCS	Leader	Not in	Leader	Not in	Leader
Tech Mahindra	Not in	Not in	Rising Star	Not in	Product Challenger
TEKSystems	Not in	Not in	Market Challenger	Not in	Not in
Unisys	Leader	Leader	Leader	Not in	Leader
UST	Contender	Not in	Contender	Product Challenger	Contender
Wipro	Leader	Not in	Leader	Not in	Leader
Yash Technologies	Not in	Not in	Product Challenger	Product Challenger	Not in
Zensar	Product Challenger	Contender	Product Challenger	Leader	Product Challenger

Future of Work – Services and Solutions Quadrants

ENTERPRISE CONTEXT

Workplace Strategy Transformation Services

This report is relevant to enterprises across industries in the U.S., for evaluating providers of workplace strategy transformation services.

In this quadrant report, ISG highlights the current market positioning of providers of workplace strategy transformation services to enterprises in the U.S., and how each provider addresses the key challenges faced in the region.

In the last two years, the demand for workplace services has changed significantly, with the pandemic changing the landscape drastically, making it a challenge for enterprises to meet the demands of their current workforce. A few of the notable challenges U.S. enterprises faced include optimizing talent management, maintaining employee productivity while working remotely, ensuring the health and safety of employees and ensuring the use of secure collaboration tools. These needs have increased the requirement for professional consulting services for workplace strategy transformation in the U.S., especially to prepare enterprises for future needs of workplace and workforce.

Enterprises in the U.S. have already started leveraging modern workplace solutions and services, and consider workplace strategy transformation as a catalyst for business growth. These enterprises are more focused on experience level agreements (XLAs) and are adopting hybrid work models for flexibility in the post pandemic workplace. Enterprises in the region are looking for experienced and trustworthy consulting teams that can support them in their digital transformation journey and help them in rethinking future workforce management.

Infrastructure, IT, and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select workplace-related services and solutions. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of workplace strategy transformation services fit with their digital transformation initiatives, and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of workplace strategy transformation service providers in U.S.

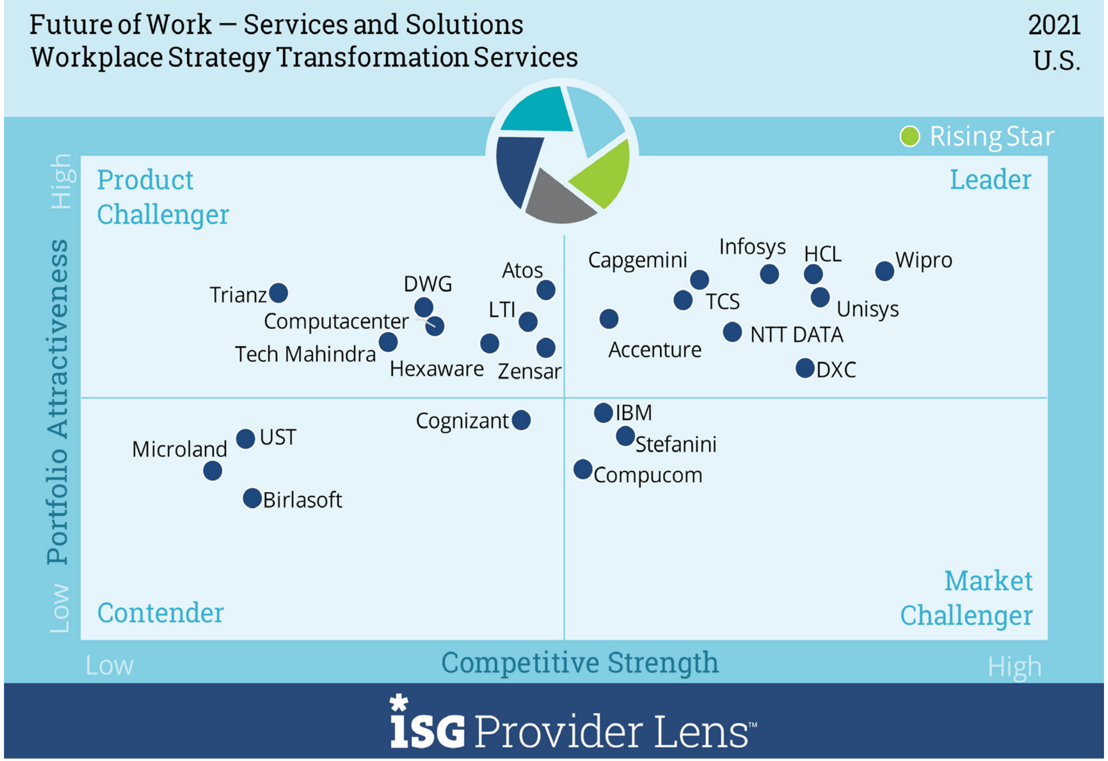
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for those working remotely. HR leaders should read this report to know about leading providers that assist in developing strategies for future workforce and talent management.

Facility managers should read this report to know about the providers helping clients develop strategies for the future needs for physical office campuses.

WORKPLACE STRATEGY TRANSFORMATION SERVICES

Definition

This quadrant evaluates service providers that offer professional and transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are offered independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating model and enable the desired organizational changes.



Source: ISG Research 2021

WORKPLACE STRATEGY TRANSFORMATION SERVICES

Eligibility Criteria

- Ability to provide consulting and workplace assessment services that are independent of the associated managed services and offer a vendor-neutral approach for assessing the best technology partner.
- Define and visualize the post-pandemic workplace environment, covering areas such as workforce segmentation into remote and in-office workers, uberization of the workforce, innovative talent models and cultural adoption, while also enhancing end-user experience.
- Provide technology adoption and change management services in the consulting portfolio.
- Provide solutions to address employee empathy and well-being is a plus.

Observations

Managed service providers are continuously developing and enhancing their capabilities in consulting and strategy services to improve their positioning in this quadrant. The quadrant is an evolved version of the Digital Workplace Consulting quadrant that ISG released last year for the U.S. It includes specific elements of enabling remote work and preparing clients to transition to hybrid work model.

Providers positioned as Contenders in this quadrant offer strong service implementation capabilities and must further develop their portfolio to be viewed as strategic partner for the future of work model and showcase enough U.S. client examples for the same.

The Product Challengers have strong consulting, benchmarking and business outcome-oriented service capabilities, although not many clients are engaged for theirstrategy services.

Market Challengers in this space are well-positioned in the U.S. for workplace strategy services, although they must further develop their offerings to address post-pandemic induced changes in organization’s future of work model.

Leaders in this quadrant provide comprehensive consulting and benchmarking, along with strong client case stories, for workplace strategy consulting services as explained below:

WORKPLACE STRATEGY TRANSFORMATION SERVICES

Observations (cont.)

- **Accenture** focuses on combining employee and customer experience for better ROI through its strategy consulting services.
- **Capgemini** offers comprehensive services with its ADKAR change management model and connected experience focus.
- **DXC** focuses on analytics and Microsoft VIVA for consulting services, while leveraging its acquisition of Virtual Clarity.
- **HCL** provides dedicated consulting approach for workplace transformation and XLA approach.
- **Infosys** addresses business-specific needs with workplace transformation and client-centric approach.
- **NTT DATA** offers digital and technology consulting services with focus on organization change management.
- **TCS** focuses on employee reskilling and recruitment and offers design thinking studio approach for workplace strategy transformation.
- **Unisys** has increased its consulting capabilities with the acquisition of Unify Square.
- **Wipro** is leading the quadrant with its focus on workplace transformation and by leveraging its partnerships.

ENTERPRISE CONTEXT

Managed Digital Workplace Services – Large Accounts

This report is relevant to large enterprises across industries in the U.S., for evaluating providers of managed digital workplace services.

In this quadrant report, ISG highlights the current market positioning of providers of managed digital workplace services to large enterprises in U.S., and how each provider addresses the key challenges faced in the region.

With the easing of COVID-19-related restrictions, several enterprises in the U.S. have started planning a return to office for employees, with safety and security as the topmost priority. Large enterprise with a considerable number of employees are finding it a challenge to ensure a safe return to office and growth post pandemic. Thus, enterprises are looking for hybrid work models and more collaborative approaches, while focusing on maintaining the highest security for employees working on-site as well as remotely.

Large enterprises in the U.S. are focusing on minimizing their operating expenses (OPEX) and investing in innovative solutions, which is creating demand for managed digital workplace services. Workspace management solutions, field support and on-site IT support, chatbots, virtual assistants, digital lockers, IT kiosks, meeting room booking solutions, cognitive virtual assistants and formulation of a unified communications and collaboration (UCC) strategy are some of the major demands of enterprise clients.

Service providers in this region are combining the power of intelligent automation, AI, machine learning and analytics to help enterprises reduce workplace-related complexities.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of IT support services providers that can help them in effective planning and vendor selection. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit with their digital transformation initiatives, and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed digital workplace service providers in the U.S.

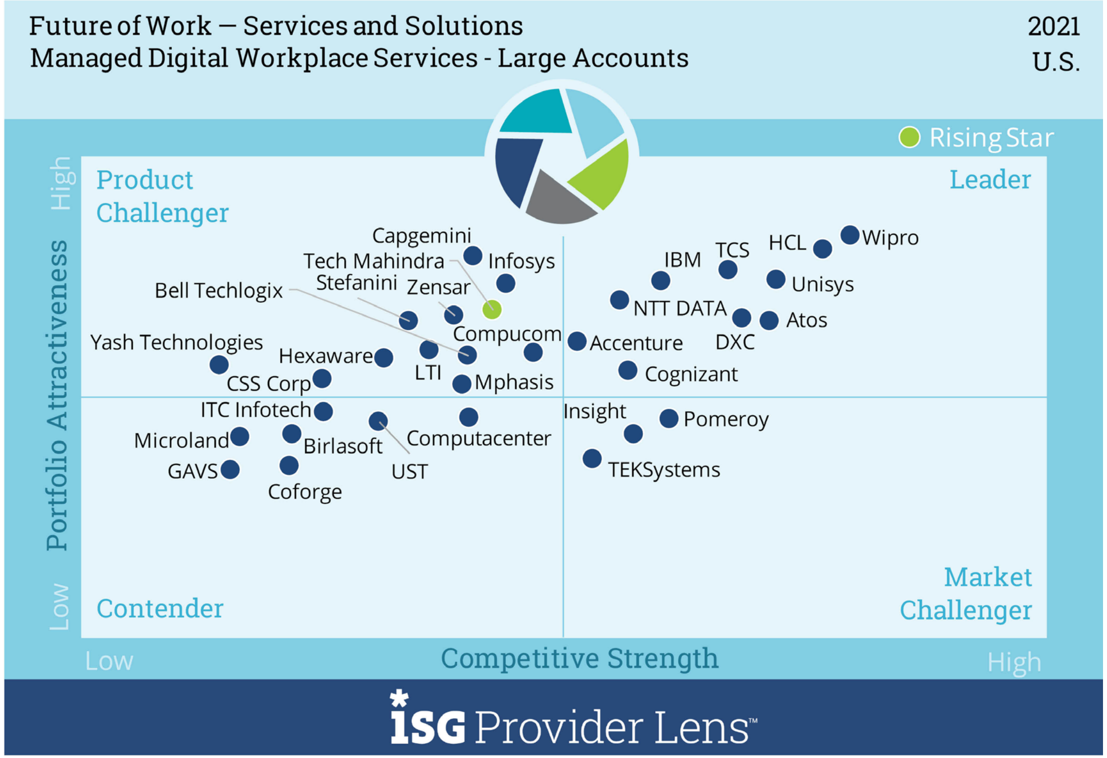
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for the ones working remotely. HR leaders should read this report to know about leading providers that assist in developing strategies for future workforce and talent management.

Admin and field services managers should read this report to understand how service providers implement and expand the workplace services to better manage field service operations.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualized workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services provide the ability to work from anywhere/anytime, device support, including automated proactive technical support and cloud platforms to provision always-on systems. They leverage artificial intelligence (AI)/cognitive technologies for end-user facing tasks and help achieve significant cost savings.



Source: ISG Research 2021

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents.
- Offer on-site field support and in-person technical assistance.
- Set up and support self-help kiosks, tech-bars, IT vending machines and digital lockers
- Offer managed services for collaboration and communication over diverse platforms
- Provide device support, predictive analytics and proactive monitoring services
- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud
- Offer managed mobility services in the respective countries with at least 25 percent of the devices managed outside the home region
- Offering complete device lifecycle managed services is a plus, covering device sourcing and logistics, DaaS for device security, support for unified endpoint management (UEM) and mobility program management
- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations

The Managed Digital Workplace Services quadrant this year includes the Managed Workplace and Mobility Services for which ISG had separate quadrants last year. Providers offering the combined portfolio are positioned in this quadrant. Providing Microsoft 365 and Microsoft Teams enablement is now a commonplace service, and leveraging AI and automation to eliminate low-level incidents such as password resets is also not a major differentiator.

The Contenders in this quadrant offer strong managed services portfolio around the Microsoft technology ecosystem, although they must develop capabilities for further automation and integration and showcase more market presence with client stories and revenue.

The Product Challengers in this quadrant have stronger portfolios, leveraging automation, AI, machine learning, and augmented and virtual reality. They also develop frameworks and platforms for managed services and offer device lifecycle management services. They need to pursue the U.S. market more aggressively by acquiring more clients and increasing local presence.

The Market Challengers provide strong traditional workplace support and service desk services and are well-established in the market with huge client based. They need to further develop their capabilities.

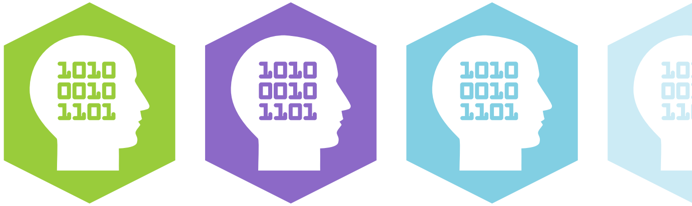
Leaders in this quadrant provide differentiated workplace services powered by contextual AI technologies and further integration with business functions. They also have strong and growing client based in the U.S.

- **Accenture**, with its experience measurement framework and mobility services, is increasing its presence in the U.S. managed services space.
- **Atos** is steadily increasing its market share in the U.S. market with its strong managed services, focusing on data-driven approach.
- **Cognizant** leverages its WorkNEXT solution portfolio and partnerships to compete strongly with other leaders.
- **DXC** leverages its strong automation and the U.S. market strength, along with its Uptime offering, to compete.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations (cont.)

- **HCL's** Fluid Workplace addresses the current and future needs of managed future working model, leveraging optimum combination of its IPs and solutions.
- **IBM** benefits from its brand name, IBM, and offers strong workplace support services and device analytics powered by Watson.
- **NTT DATA's** Dynamic Workplace offering leverages automation analytics and its automation and AI solution, Nucleus.
- **TCS**, with its Cognix for Workspace solution, leads the market and has a strong focus on experience level measurement.
- **Unisys** benefits with its strong local presence and enhanced portfolio and emerges as a strong leader in the market.
- **Wipro** leads the market with its LiVE workspace, VirtuaDesk and other IP-led solutions and has a strong presence in the U.S.
- **Tech Mahindra** (Rising star), with its strong growth, WorkNXT portfolio, TeXLA and other frameworks, emerges as a Rising Star in this quadrant.



ENTERPRISE CONTEXT

Managed Digital Workplace Services – Midmarket

This report is relevant to midmarket enterprise clients across industries in the U.S., for evaluating providers of managed digital workplace services.

In this quadrant report, ISG highlights the current market positioning of providers of managed digital workplace services to midmarket enterprises in the U.S., and how each provider addresses the key challenges faced in the region.

Like in any other part of the world, enterprises in the midmarket in the U.S. has been adversely impacted by the COVID-19 pandemic. Declining revenue, reduction in workforce size and the massive shift to remote work are among the challenges these enterprises face. Scalability, cost reduction and the need to accelerate workplace modernization are a few other workplace-related challenges faced by these enterprises.

Midmarket enterprises in the U.S. have started focusing on automation and self-help to reduce costs and empower employees to independently resolve several issues. These enterprises are also focusing on a shared services model, a unified communications and collaboration (UCC) strategy and cognitive solutions to transform their business processes seamlessly. Midmarket enterprises in this region are adopting new operating models for addressing the rapid and sudden shift to remote working. Service providers are presenting miniaturized version of their offerings to these enterprises, at reasonable cost, empowering enterprises to create a secure and effective remote/hybrid working environment for employees.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit with their digital transformation initiatives, and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed digital workplace service providers in the U.S.

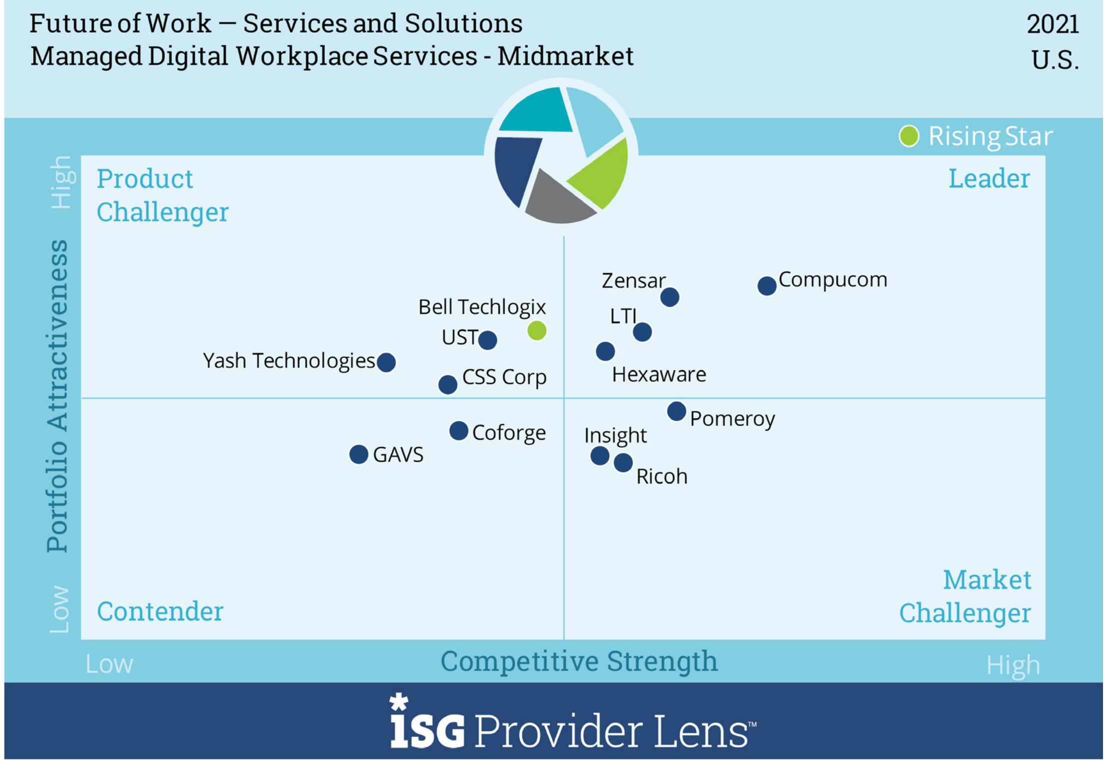
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for the ones working remotely. HR leaders should read this report to know about leading providers that assist in developing strategies for future workforce and talent management.

Admin and field services managers should read this report to understand how service providers implement and expand workplace services to better manage field service operations.

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Definition

This quadrant assesses service providers that offer end-to-end managed services for mid-market clients. Mid-market clients in U.S. have 5000 or less end users. Providers servicing these clients offer packaged and as a service model functionality, including workplace support, desktop engineering, managed mobility services and virtualized workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services provide the ability to work from anywhere/ anytime, device support, including automated proactive technical support and cloud platforms to provision always-on systems. They leverage artificial intelligence (AI)/ cognitive technologies for end-user facing tasks and help achieve significant cost savings.



Source: ISG Research 2021

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents.
- Offer on-site field support and in-person technical assistance.
- Set up and support self-help kiosks, tech-bars, IT vending machines and digital lockers
- Offer managed services for collaboration and communication over diverse platforms
- Provide device support, predictive analytics and proactive monitoring services
- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud
- Offer managed mobility services in the respective countries with at least 25 percent of the devices managed outside the home region
- Offering complete device lifecycle managed services is a plus, covering device sourcing and logistics, DaaS for device security, support for unified endpoint management (UEM) and mobility program management
- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management.

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Observations

Although many providers positioned in the Managed Digital Workplace Services – Large Accounts quadrant also have clients in the midmarket segment, they are omitted from this evaluation as they form a small percentage. Providers with strong local presence and ability to offer services in a pay per use or consumption-based model are leading this market.

Contenders in this quadrant offer strong capabilities in managed services, although support only one portion or aspect of services. They would need to invest more in developing their capability and increasing market share.

The Product Challengers offer strong capabilities in AI and automation-enabled workplace support. Some also offer decent capabilities in device management. These providers need to pursue market more aggressively to increase their market share.

The Market Challengers in this quadrant have strong local presence, but their abilities to address the changing needs of mid-market clients during the pandemic are not adequate.

The quadrant Leaders offer automation, analytics-enabled capabilities and a sizeable client-base in the midmarket segment.

- **Compucom** benefits from its strong local presence, device lifecycle management and user experience-focused services.
- **Hexaware** transitioned from a Rising Star (last year) to a Leader, with its automation approach and additional IPs and tools.
- **LTI** is a Leader in this quadrant due to its Canvas offering, midmarket focus and analytics-powered services.
- **Zensar** is a Leader in this quadrant owing to its strong focus on mid-market and compelling portfolio of services, covering business focus and SaaSOps.
- **Bell Techlogix** (Rising Star) offers Accelerate solution with analytics capabilities. It is growing its presence in the mid-market.

HEXAWARE

Overview

Headquartered in Mumbai, India, Hexaware provides managed digital workplace services through its productivity and support enablement services. It generates 30 percent of its managed services revenue from the U.S. midmarket. It provides workplace support services through service desk services from Atlanta, Herndon, New Jersey and Chicago in the U.S. plus offshore locations in India and nearshore locations in Mexico.

Strengths

Midmarket specific offerings: Hexaware focuses on user experience with nearshore experience hubs, user-facing customized portals, automated office and on-site support. It offers cloud-ready flexible service offerings and managed services with a cloud consumption model. Its platform-driven service approach offers automated assessment, migration and support for Office 365, AVD and virtual assist bots. In addition, it offers strong focus on measurable XLAs.

Digital Resolver concept: Hexaware follows an automation-first approach to manage the shift to AI and machine learning-led service automation in a flexible manner. Through its Digital Resolver concept, it commits contractually to a percentage of incidents being resolved through automation. It also offers innovative commercial models that are outcome-driven with greater flexibility to satisfy client requirements. The company reports 35 percent ticket resolution through automation and 14 percent through enabling user self-help.

Additional tools and IPs: Hexaware offers additional tools for user self-support such as ART for account recovery and password reset, DOCK IT for incident management and device health status, and COCO, a virtual agent available for Microsoft Appstore.

Caution

Hexaware still needs to enhance its brand value in the U.S. midmarket for standalone managed digital workplace services.

2021 ISG Provider Lens™ Leader

Hexaware offers strong mid-market focused services portfolio, along with strong automation, frameworks and IPs for the U.S. clients.

ENTERPRISE CONTEXT

Managed Employee Experience Services

This report is relevant to enterprises across industries in the U.S., for evaluating providers of managed employee experience services.

In this quadrant report, ISG highlights the current market positioning of managed employee experience services providers to enterprises in the U.S., and how each provider addresses the key challenges faced in the region.

The shift to remote working model has compelled enterprises in the U.S. to rethink and redesign the workplace. They want to ensure a seamless experience to their employees, irrespective of where they work, which is the major reason they are focused on measuring experiences level. These enterprises are focused on creating sustainable workplaces by offering continuous remote support and automation-led self-help services to their employees.

To meet the expectations around remote work flexibility and retain the best talent, enterprises are accelerating their employee experience services strategies. They are looking for smart facilities services and creation of post COVID-19 physical workspaces for encouraging activity-based working. These requirements have increased the demand for managed employee experience services among enterprises keen on transforming and optimizing employee experiences.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed employee experience services. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of managed employee experience services fit with their digital transformation initiatives, and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed employee experience service providers in the U.S.

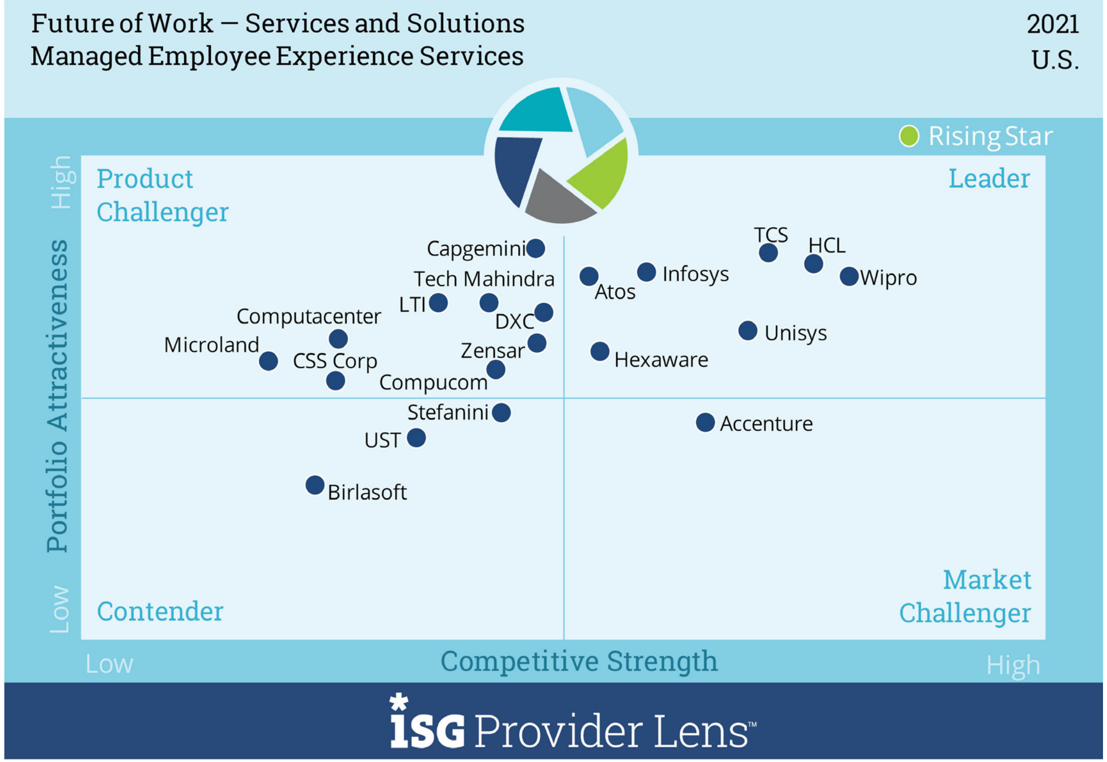
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for the ones working remotely. HR leaders should read this report to know which providers are leading in managing experience for employees in this new age of hybrid working, from the perspective of talent retention, upskilling and recruitment.

CXO leaders should read this report to know about leading providers offering services that can help better prepare a workforce for the changing business dynamics in the post-pandemic world.

MANAGED EMPLOYEE EXPERIENCE SERVICES

Definition

This quadrant assesses providers that offer value-added managed services not only for enabling the workplace technology ecosystem but also for enhancing the end-user experience. These providers typically deal with business leaders and line-of-business representatives in addition to the CIO office. They offer services that associate employee experience with measurable business results. Their services help align the digital and physical facets of the future workplace with the human aspect.



Source: ISG Research 2021

MANAGED EMPLOYEE EXPERIENCE SERVICES

Eligibility Criteria

- Ability to provide services that directly correspond to user experience associated with device and app access, as well as team collaboration, human augmentation with digital workforce, line of business (LoB) employee experience, user productivity and digital dexterity
- Offer a seamless experience for remote-working employees and part-time workers as well as provide work-from-home support and innovative engagement services/solutions for the respective country/region
- Should have a sizeable client base in the respective country/region with XLA engagements that span beyond IT enablement.
- Provide managed unified communications and collaboration (UCC), analysis of user behavior and measurement of user experience beyond workplace technology, extending smart workplace services to other business functions such as HRO and operations.
- Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces.
- Offer smart facilities services, physical workspaces with services to ensure COVID-appropriate behavior and tracking.

MANAGED EMPLOYEE EXPERIENCE SERVICES

Observations

This is a new quadrant that ISG has carved out from the managed services space to differentiate providers offering value-added services on top of their regular digital workplace capabilities. Providers positioned in this have strong focus on employee experience, and other services are weaved around experience.

Providers positioned as Contenders offer basic employee experience services powered by basic automation and analytics. They need to further develop their capabilities to provide hyper-personalized capabilities and to grow market presence with experience differentiation.

The Product Challengers provide comprehensive capabilities, covering employee experience through technology performance, physical workplace and enterprise application integration.

A Market Challenger in this quadrant is a well-established provider in the employee experience space; however, it should showcase its specific capabilities in enabling experience for specific areas in future of work model.

Leaders in this space have differentiated themselves from regular managed service providers with visible experience enhancing services and actual client implementations.

- **Atos** is the only firm that aspires to be distant employee experience leader and offers strong capabilities with implementation examples in U.S.
- **HCL's** ability to support diverse technology ecosystem be it collaboration or other workplace areas places them highly with employee experience approach.
- **Hexaware** offers strong case study examples in the U.S. along with its experience accelerator capability.
- **Infosys** leverages its automation, AI and reskilling/ upskilling services to provide managed employee experience services.
- **TCS'** focus on digital nudging and reskilling and recruiting are key differentiators in this space.
- **Unisys'** capabilities and its recent acquisition of Unify Square places it in a strong position in this space.
- **Wipro** is an established provider in the U.S. and has successful implementation of its DExA and TopCoder solutions.

HEXAWARE

Overview

Headquartered in Mumbai, India, Hexaware offers managed employee experience as part of its digital workplace services. It offers managed employee experience for 20 percent of its clients, although approximately 90 percent of its clients are engaged through XLAs related to automation.

Caution

Hexaware can further enhance its capabilities to include elements of employee reskilling, upskilling and enhancing digital dexterity.

Strengths

Service portfolio: Hexaware's portfolio includes experience-centric consulting, transformation framework, XLA measurements and its accelerators. It leverages its "anywhere" employee orbit platform to define the entire employment lifecycle, from before being hired to separation, and offers services at each stage to enhance experience. Its employee experience-focused services include an employee-friendly service portal, advanced tools enablement, service packaging, XaaS-enabled service catalog and automated request provisioning.

Experience accelerators and XMF: Hexaware leverages both direct and indirect experience measurement methods that involve employee survey, speech and sentiment analysis. Its experience measurement framework (XMF) measures experience via multiple methods such as key experience indicators, employee surveys and automated data collection across employee interaction points. Hexaware also leverages experience accelerator solutions across various domains such as communication, collaboration, support, productivity, device management, social interaction and automation.

Strong use case examples: Hexaware showcases strong examples of helping its U.S. clients with employee experience services covering diverse areas such as enhanced productivity, increased employee happiness scores, process improvements and collaboration. It also offers COCO, a virtual agent available from Microsoft AppStore, which provides solutions such as productivity calculator and integration with other enterprise apps.

2021 ISG Provider Lens™ Leader

Hexaware offers comprehensive managed employee experience services powered by analytics, measurement and framework with strong success stories.

ENTERPRISE CONTEXT

Managed Future of Work Services – Public Sector

This report is relevant to the public sector enterprises in the U.S. for evaluating providers of digital workplace services.

In this quadrant report, ISG highlights the current market positioning of digital workplace services providers to public sector organizations in the U.S., and how each provider addresses the key challenges faced in the region.

Public sector organizations often face challenges in terms productivity and efficiency, alongside several others including changing working culture due to the pandemic. To respond to these challenges and create more effective working environments, public sector organizations in the U.S. are adopting digital workplace services to meet the needs of employees and citizens and deliver enhanced public services.

With focus on managed services, these organizations have already adopted several cloud-based solutions and services during this crisis. Creating digital workplaces, anticipating employee needs and ensuring exceptional user experiences are the key success factors for public sector organizations in the U.S. They are focused on delivering optimal services to citizens and achieving their business goals. Remote collaboration solutions, workplace consulting, workplace automation, device-as-a-service, and AI- based virtual assistants are a few of the other demands of public sector organizations in the U.S.

Public sector leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select digital workplace services. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of digital workplace services fit with their digital transformation initiatives, and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of digital workplace service providers in the U.S.

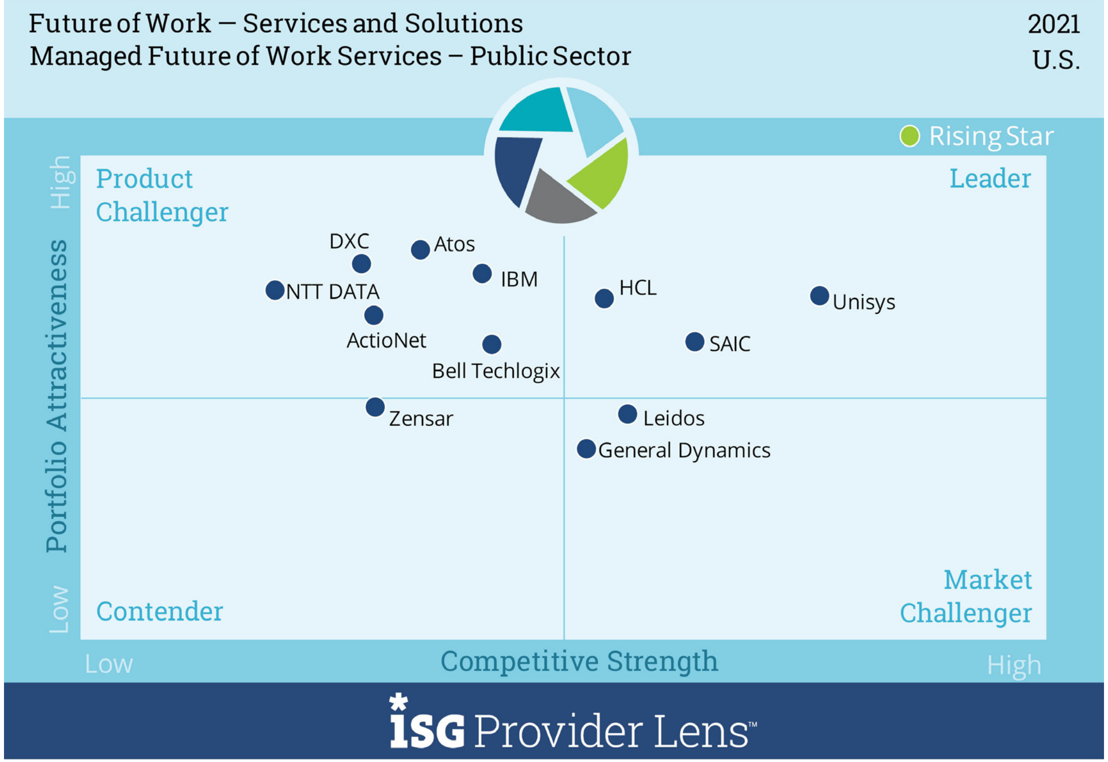
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for the ones working remotely. HR leaders should read this report to know about leading providers that assist in developing strategies for future workforce and talent management.

Admin and field services managers should read this report to understand how service providers implement and expand workplace services to better manage field service operations.

MANAGED FUTURE OF WORK SERVICES – PUBLIC SECTOR

Definition

This quadrant assesses providers that have experience in managed workplace services for public sector clients. The requirements of clients in this segment are different from those of commercial enterprises. These clients tend to be more conservative while complying with regulations and security requirements. The service provider should offer security over devices, applications and user identity, which are paramount for public sector clients. The pandemic has pushed public sector clients to accelerate their adoption of public cloud and digital workplace services. Some of these clients across regions could not implement mass remote working due to regulation restrictions or lack or resources. For a public sector client, transforming and managing workplace services while maintaining credibility and ensuring employee experience are critical.



Source: ISG Research 2021

MANAGED FUTURE OF WORK SERVICES – PUBLIC SECTOR

Eligibility Criteria

- Demonstrate experience with public sector clients in the respective region/country; should have active clients from this sector or historic client engagements not spanning over two years.
- Provide device lifecycle management and device support services for public sector client employees along with managed mobility services.
- Provide secure digital workplace services, services desk, modern support and field support services while complying with regulation and security requirements.
- Demonstrate experience in supporting public sector clients with modern workplace technologies such as cloud-based virtual desktop infrastructure (VDI), enterprise mobility, BYOD enablement, identity access and content management.
- Provide transparency in demonstrating compliance with country regulations, with credentials for participating in public sector bidding processes.
- Have experience in complex procurement processes for public sector clients, providing assistance for change management, improving employee experience, developing technology frameworks and providing training for IT staff.

MANAGED FUTURE OF WORK SERVICES – PUBLIC SECTOR

Observations

This is a new quadrant introduced this year in the workplace domain to differentiate providers offering strong capabilities and having market presence in the public sector. Providers positioned in this quadrant offer strong capabilities to deal with nuances associated with a public sector client and can manage their complex workplace environment while adhering to regulations and compliance requirements.

Contender in this space offers strong managed services capabilities and have minor market presence.They must invest to further enhance their abilities to deal with sector-specific nuances and gain market share.

Product Challengers in this space have strong portfolios of services and certifications required to work for clients in the U.S. public sector. However, they need to showcase more local examples.

The Market Challengers in this quadrant are popular and have won public sector workplace contracts. They need to further develop their capabilities to address changing technology requirements in the future of work model.

Leaders in this quadrant offer strong digital workplace services and have larger market share in the U.S. public sector.

- **HCL** has recently won key workplace services contracts with public sector clients in the U.S. Its strong capability with Fluid Workplace makes it a leader in this market.
- **SAIC's** strong presence among the U.S. government clients and its recent purchase of Unisys federal business contribute to its leadership position.
- **Unisys,** with its strong heritage and capabilities to deal with public sector and government clients, along with strong workplace services, is a leader in this quadrant.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Future of Work – Services and Solutions, U.S." analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Future of Work – Services and Solutions, U.S. 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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ISG Provider Lens™ | Quadrant Report
September 2021

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