

***ISG** Provider Lens™

Future of Work – Services and Solutions

U.K. 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



October 2021

About this Report

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

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

The lead author for this report is Mrinal Rai. The editors are Ambrosia Sabrina and John Burnell. The research analysts are Sidhanth Prasad and Sonam Chawla and the data analyst is Anirban Choudhury. The Quality and Consistency Advisor is Jim Kane.



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

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



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

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



- 1** Executive Summary
- 6** Introduction
- 18** Workplace Strategy Transformation Services
- 23** Managed Digital Workplace Services – Large Accounts
- 29** Managed Digital Workplace Services – Mid-market
- 33** Managed Employee Experience Services
- 37** Methodology

© 2021 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG’s judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

UK Trying to Adjust With the New Normal Future of Work

Like other parts of the world, the UK has experienced a sudden shift to remote working during the COVID-19 pandemic. Amid the looming threat of more waves of the virus, UK-based firms are now evaluating options about home office and hybrid working. Approximately 32.5 million employees were working from home between January and December 2020 and 82.4 percent of on-site workers transitioned to a remote work model due to the pandemic, according to the Office for National Statistics. About 42.4 percent of those surveyed had worked from home in London alone in 2020. The data shows most of those in managerial and senior positions shifted to this model, while those in low-level jobs operated from the workplace. In major cities, industries such as banking and finance and IT witnessed a high volume of remote working or a home-office setup while those that housed more manufacturing plants and units had comparatively lower numbers.

Apart from the surge in new norms of working, the pandemic bought a challenge for employers in the UK. The underlying work design of jobs didn't change much despite the shift according to research by Chartered Institute of Personnel and Development (CIPD) UK. While the pandemic forced many global businesses to change their business models and ways of working, data shows that UK-based enterprises were not quick enough to accept this change.

In 2020, the government announced the Coronavirus Job Retention Scheme (CJRS) to support firms affected by the pandemic. Under this scheme, a furloughed employee can receive 80 percent of his or her wages or up to £2,500 a month. Employers are also entitled to the associated National Insurance Contribution (NIC) and an automatic enrollment for pension contributions on the subsidized wage. The scheme was slated to expire in September 2021, leading to business disruptions and changes in the working model. There is a growing concern of job loss for employees that have been on furlough for long periods. With these arrangements in place, workplace outsourcing activities in the UK have seen a slight dip in 2020 from the previous year even though workplace and remote working technologies were in high demand amid the pandemic onslaught.

At the same time, remote working in the UK is taking a toll on workers, especially those with family, with rising reports of mental distress and work-related stress. Various surveys showed that young workers were increasingly disconnecting with their peers and sought opportunities to work in office environment. Whilst governments across the world are encouraging cities to open up and organizations to reopen offices, UK-based firms are carefully evaluating these options with social distancing norms and smart office spacing. Multiple studies suggest that employees in the UK were satisfied with the remote working tools and associated support provided by their organizations.

In light of these trends, there has been new and improved reliance on managed service providers to not only support the changing business strategy but also support a safe return to office. This report positions different service providers for diverse workplace technology and strategy services for the UK market. Key findings for each quadrant are summarized below.

Workplace Strategy and Transformation Services

- As government aid expires, businesses would have to rethink their operating models. In the UK, organizations would need support to adjust to the changing business requirements and leverage modern workplace technologies for better outcomes. This calls for enhanced collaboration with service providers for workplace strategy and transformation services.
- On average, for managed service providers, approximately 40 percent of existing UK-based clients have improved their engagements at the consulting and strategic-level discussions for workplace transformation.
- Many service providers have upped the size of their consulting workforce to provide this service. In the UK, service providers have reported an average of 17 percent increase in their local consultant pool.
- Many service providers have successfully transitioned the capabilities of their UK-based innovation and design-thinking workshop centres to a virtual setup to support clients remotely.

- UK-based 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 UK clients has widened. Clients are increasingly looking for workplace solutions that enable them to attract the best talent and provide a strong security wrapper.
- CIOs, operations, technical leads and procurement still lead all buying decisions in the UK for managed services. Some providers report increased interaction with human resource functions.
- 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.
- From the service providers' perspective, approximately 33 percent of UK-based clients are still managing on-premises virtual desktop infrastructure (VDI). About 27 percent are now migrating or have already shifted towards a public cloud desktop-as-a-service model.
- Many providers are developing capabilities to secure and enhance physical on-premises office capabilities to enhance and foster collaboration for UK-based firms.

- For clients in the UK, workplace services outsourcing is part of a larger outsourcing contract covering many other services, including application services.
- For large accounts in the UK, clients, service providers are providing virtual tech bars, kiosks and remote support. Midmarket clients are considering device-as-a-service capabilities where pre-packaged devices are shipped to their home locations.

Managed Employee Experience Services

- Only 15-30 percent of UK-based clients are signing managed services contracts under XLAs that centre around the specific digital experience of end users.
- For UK-based end users, the biggest factor for remote working is work-life balance. Service providers that focus on offering a seamless technology experience for home users to work efficiently without interruptions will lead the market.
- Automated ticket resolution and predictive analytics have become commoditised offerings. To provide real managed employee experience services, providers are driving correlation among employees with a high digital experience and business performance.
- Culturally, UK-based end users report an average level of experience and happiness with a score of 72 out of 100 with workplace technologies, according to HappySignals.

Global outlook applicable for UK: Overall, global managed services providers are at a crucial juncture of defining their future strategy. This space was earlier dominated by large IT infrastructure managed service providers that offer technical end-user computing services. These providers have evolved their services to provide automated issue resolution, IT vending machines and kiosk services. They are enhancing their capabilities by

supporting mobile device and enterprise mobility management (EMM) initiatives and have started to characterise themselves as digital workplace service providers. As these services are increasingly focusing on end users, providers have begun to prioritise experience-level measurement and develop XLA strategies.

The pandemic has accelerated the shift towards thinking beyond traditional end-user computing elements while pushing organisations to consider workplace and work-related technologies as key business enablers that can make or break the employee experience. A satisfied employee with high experience can deliver a strong customer service. 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 enterprises are increasingly leveraging technologies and expert help in designing their employee experience strategy, service providers are transforming themselves from traditional technology implementation and managed service providers into cross-industry experts for providing strategy, consulting and transformation services. In addition, workplace technologies are increasingly permeating business functions and helping line-of-business heads (LoBs) drive decision making. The rise of modern low-code/no-code development, democratisation of IT and digital dexterity coupled with a focus on reskilling have further enhanced the focus on managed services for improving the end-user experience and preparing them for the new norms of working.

Many service providers that were traditionally not strong in IT infrastructure managed services but rather focused on understanding business nuances and on applications and strategy transformation services are increasingly getting involved in providing digital workplace or future of work services. At the same time, traditional end user computing (EUC) or modern digital workplace service providers should invest heavily to differentiate their consulting and transformation abilities. Managed services that include desktop engineering, predictive analytics and automated service desk are now becoming table stakes. Even support for Microsoft 365 is becoming commonplace. Providers with diverse strengths are now competing in the future of work services 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.

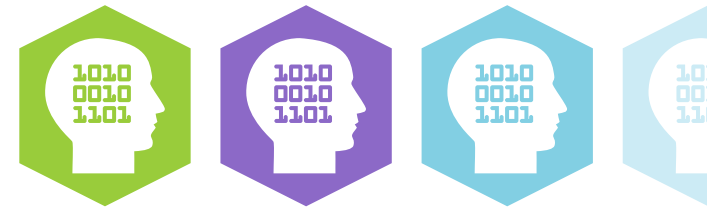
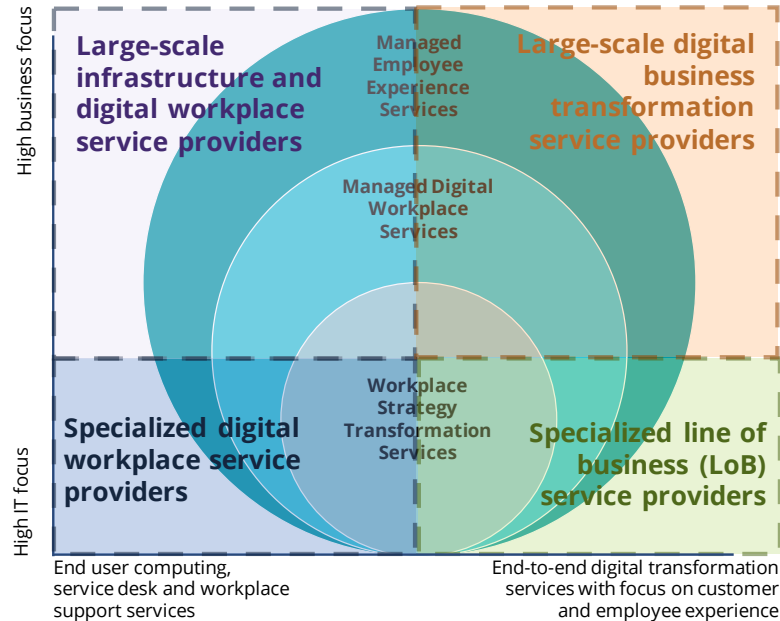


Figure 1: Global Future of Work Managed Service Provider Competitive Landscape



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.

An interesting area of development in user experience measurement approaches includes application and devices usage. It is increasingly covering elements of employee learning and talent management while leveraging automation and AI for a human workforce, making it a challenge for both traditional workplace service providers and application-focused providers. Hence, the competition in the employee engagement and experience space is intensifying while benefiting only the enterprise client.

Introduction

Simplified illustration



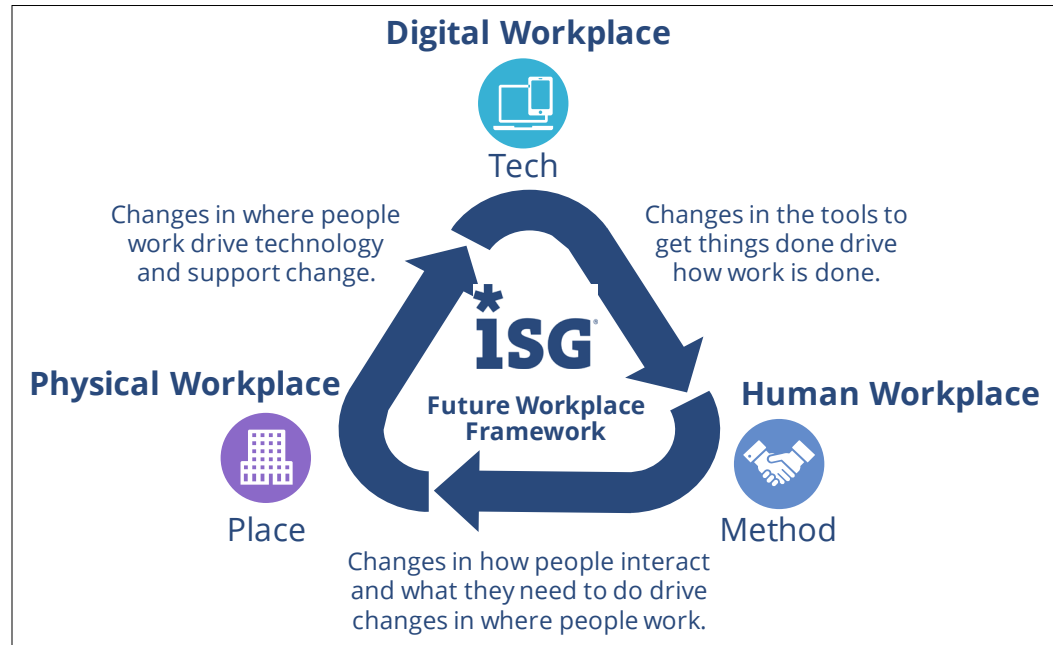
Source: ISG 2021

Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to the 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 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.)

Figure 4: ISG Future Workplace Framework



Source: ISG

Definition (cont.)

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but also will cover aspects of human empathy and drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms for tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of a 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 strategies transformation services such as cultural enablement and office versus 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 help secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this trend to continue over the years.

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 the Global, UK, U.S., Germany, Nordics, Australia and Brazil

The 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.

The following illustrates the scope from the brochure as well as quadrants as applicable to this report:

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 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
Accenture	● Leader	● Product Challenger	● Not in	● Market Challenger
Atos	● Leader	● Leader	● Not in	● Leader
Birlasoft	● Not in	● Contender	● Not in	● Contender
Capgemini	● Leader	● Leader	● Not in	● Leader
Capita	● Not in	● Market Challenger	● Product Challenger	● Not in
CGI	● Market Challenger	● Not in	● Leader	● Not in
Claranet	● Contender	● Not in	● Not in	● Not in
Coforge	● Not in	● Contender	● Not in	● Not in
Cognizant	● Contender	● Product Challenger	● Not in	● Not in
Computacenter	● Leader	● Leader	● Not in	● Leader

Future of Work – Services and Solutions - Quadrant Provider Listing 2 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
CSS Corp	● Not in	● Contender	● Contender	● Product Challenger
DWG	● Product Challenger	● Not in	● Not in	● Not in
DXC	● Leader	● Leader	● Not in	● Product Challenger
Fujitsu	● Leader	● Leader	● Not in	● Not in
GAVS	● Not in	● Contender	● Contender	● Not in
Getronics	● Rising Star	● Leader	● Leader	● Leader
HCL	● Leader	● Leader	● Not in	● Leader
Hexaware	● Product Challenger	● Product Challenger	● Rising Star	● Product Challenger
IBM	● Market Challenger	● Product Challenger	● Not in	● Not in
Infosys	● Product Challenger	● Product Challenger	● Not in	● Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 3 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
ITC Infotech	● Not in	● Contender	● Not in	● Not in
LTI	● Contender	● Product Challenger	● Not in	● Not in
Microland	● Contender	● Contender	● Not in	● Product Challenger
Mphasis	● Not in	● Product Challenger	● Product Challenger	● Not in
NTT DATA	● Market Challenger	● Leader	● Not in	● Not in
Orange Business Services	● Leader	● Product Challenger	● Not in	● Not in
Sopra Steria	● Not in	● Market Challenger	● Contender	● Not in
SS&C	● Not in	● Market Challenger	● Not in	● Not in
TCS	● Leader	● Leader	● Not in	● Leader
Tech Mahindra	● Product Challenger	● Product Challenger	● Not in	● Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 4 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
TET	● Not in	● Not in	● Market Challenger	● Not in
Trianz	● Product Challenger	● Not in	● Not in	● Not in
Unisys	● Product Challenger	● Leader	● Not in	● Leader
UST	● Contender	● Contender	● Contender	● Contender
Vodafone	● Not in	● Product Challenger	● Leader	● Not in
Wipro	● Leader	● Leader	● Not in	● Leader
XMA	● Not in	● Not in	● Market Challenger	● Not in
Yash Technologies	● Not in	● Not in	● Product Challenger	● Not in
Zensar	● Product Challenger	● Product Challenger	● Not in	● 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 UK for evaluating providers of workplace strategy transformation services.

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

The outbreak of COVID-19 in the U.K. has altered workplace technology and user expectations, compelling enterprises to navigate and adopt new working models. Some of the key concerns during the pandemic were the well-being, health and safety of employees, work-life balance and job and financial security. These challenges have led UK enterprises to seek a consulting-led approach to maintain business and operational excellence.

Enterprises in this region are seeking end-to-end workplace transformation services, spanning from evaluating the existing workplace to defining the roadmap for a modern digital workplace. They are also focussing on deploying change management services to ensure innovative, productive and flexible working practices, eventually bolstering business continuity. Clients in this region are becoming more mature in terms of experience level agreements (XLAs) when compared to traditional SLAs.

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 differ from the rest in the market.

Digital transformation professionals should read this report to understand how providers of workplace strategy transformation services fit their digital transformation initiatives and how they compare 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 the UK.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while maintaining seamless employee experience for a remote workforce. HR leaders also should read this report to know the leading providers that can assist in developing strategies for future workforce and talent management.

Facility managers should read this report to know the providers that can help clients develop strategy for future needs of physical office campuses.

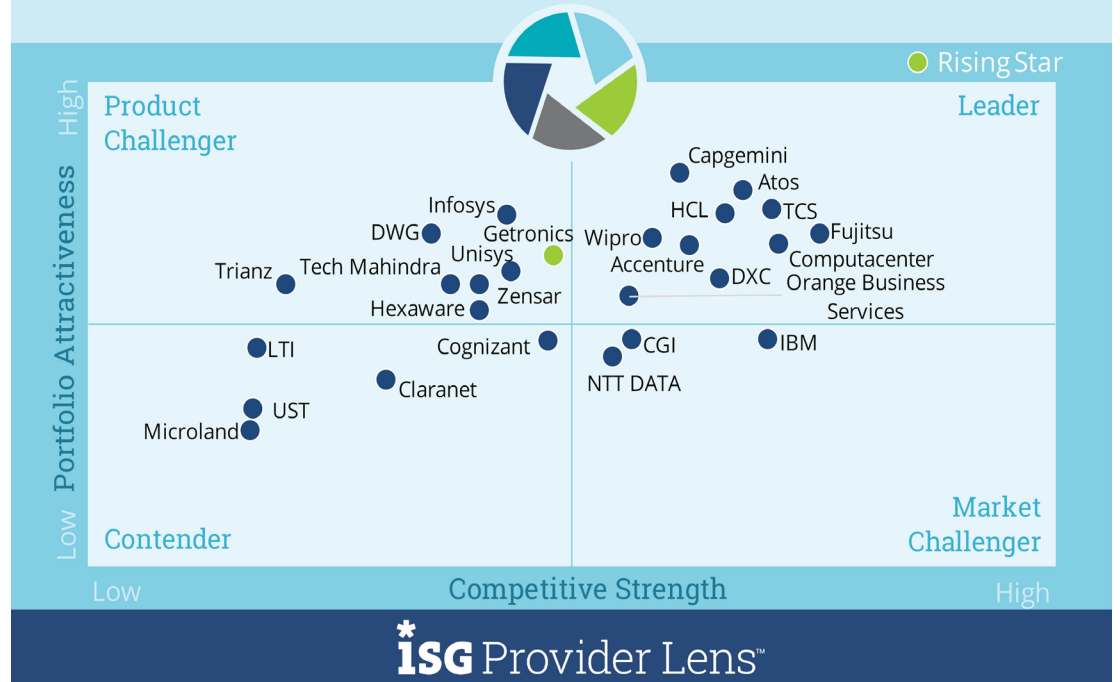
WORKPLACE STRATEGY TRANSFORMATION SERVICES

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 also assist clients in transforming their business and operating model and enabling the desired organisational changes.

Future of Work – Services and Solutions
Workplace Strategy Transformation Services

2021
U.K.



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 visualise the post-pandemic workplace environment, covering areas such as workforce segmentation into remote and in-office workers, “uberisation” of the workforce, innovative talent models and cultural adoption while also enhancing the end-user experience
- Provide technology adoption and change management services in the consulting portfolio
- Provide solutions to address employee empathy and wellbeing as a plus

Observations

As explained in the Executive Summary, managed service providers are continuously developing and enhancing their capabilities in consulting and strategy services to improve their positioning in this space. The quadrant is an evolved version of the Digital Workplace Consulting quadrant that ISG released last year for the UK, and includes specific elements of remote work enablement and for preparing clients to transition to the hybrid work model.

Providers positioned as Contenders in this quadrant offer strong service implementation capabilities. They focus on further developing their portfolios to be viewed as strategic partners for the future of work model and showcase enough client examples in the UK for the same. Product Challengers have strong consulting, benchmarking, business-outcome oriented service capabilities but lack an adequate number of clients for their strategy services. Market Challengers in this space are well positioned in workplace strategy services but should further develop their offerings to address the post-pandemic induced changes in an organisation’s future of work model. Leaders provide comprehensive consulting and benchmarking along with strong client case stories for workplace strategy consulting services, as summarized below.

WORKPLACE STRATEGY TRANSFORMATION SERVICES

Observations (cont.)

- **Accenture** offers business strategy and customer experience (CX)- and employee experience (EX)-focused strategy consulting services.
- **Atos** offers a human-centric approach and strong consulting capabilities, making it one of the leading providers in the market.
- **Capgemini** has a transformation focus along with gamification techniques and strong market presence, positioning it strongly in the market.
- **Computacenter** has a growing consulting business and offers a co-innovation approach for clients.
- **DXC** offers IT as a service (ITaaS) and a design-thinking approach for workplace strategy and transformation.
- **Fujitsu's** Journey Builder and Result Chain offer client-centric strategy consulting services.
- **HCL** focuses on user experience measurement and persona segmentation with an intellectual property-led approach.
- **Orange Business Services (OBS)** offers business and technology consulting along with return-to-office transition strategy services.
- **TCS's** digital assessment framework and focus on reskilling and recruiting are some of its key differentiators.
- **Wipro** leads with a well-recognised presence in the UK and offers an experience-led approach.
- **Getronics** (Rising Star), with its strong presence in the UK and Microsoft partnership, has been identified as a Rising Star in this quadrant.

COMPUTACENTER

Overview

Headquartered in Hatfield, Computacenter offers workplace strategy transformation services under its Digital Me offering. Its consulting proposition is focused on supporting clients in achieving their business objectives by empowering employees with leading digital tools and ecosystems. The company leverages 1,500 consultants to provide technology-agnostic advisory and has partnerships with leading workplace technology vendors.

Strengths

Growing consulting revenue: Computacenter has reported increased revenue shares from its workplace consulting services. The company has witnessed close to a 50 percent revenue increase in advisory services in just three years. It is continuing to invest and expand its consulting offering in the UK.

Approach: Computacenter provides workstyle and employee analytics along with business objectives and maturity assessment to design the digital roadmap. With a goal to maximise business outcomes, it engages with clients on key areas of new hybrid ways of working.

Co-innovation with clients: Computacenter develops new services and products based on client needs to deliver a quantifiable impact, reduce cost, streamline operations and improve the end-user experience. It works with clients in a workplace council for sharing and ideas prioritising. It also works with partners and clients to provide enhanced values.

Caution

Computacenter can further enhance its capabilities in workplace transformation services by including elements on employee reskilling, learning and wellbeing.

The company should showcase more examples of working with non-IT business functions to highlight the value of its consulting services for UK-based clients.



2021 ISG Provider Lens™ Leader

Computacenter leads with its growing consulting services and co-innovation approach with clients.

ENTERPRISE CONTEXT

Managed Digital Workplace Services – Large Accounts

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

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

With changing lockdown rules in the UK, enterprises are planning to bring employees back to the office, which is one of the challenges for enterprises to overcome. To achieve this, they are focussing on hybrid work strategy, employee safety, organisational culture and the workplace value proposition. Enterprises are also looking forward to implementing chatbots, virtual assistants and self-service technologies to automatically resolve ticket queries and reduce the number of tickets landing to service desks.

Managed digital workplace services are empowering large enterprises in creating a compelling environment to bring employees back to the workplace and ensure digital success. 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 service desk and IT support service providers to help them in effective planning and vendor selection. The report also shows how the technical and integration capabilities of a service provider differ from the rest in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit their digital transformation initiatives and how they compare 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 UK.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while maintaining seamless employee experience for a remote workforce.

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

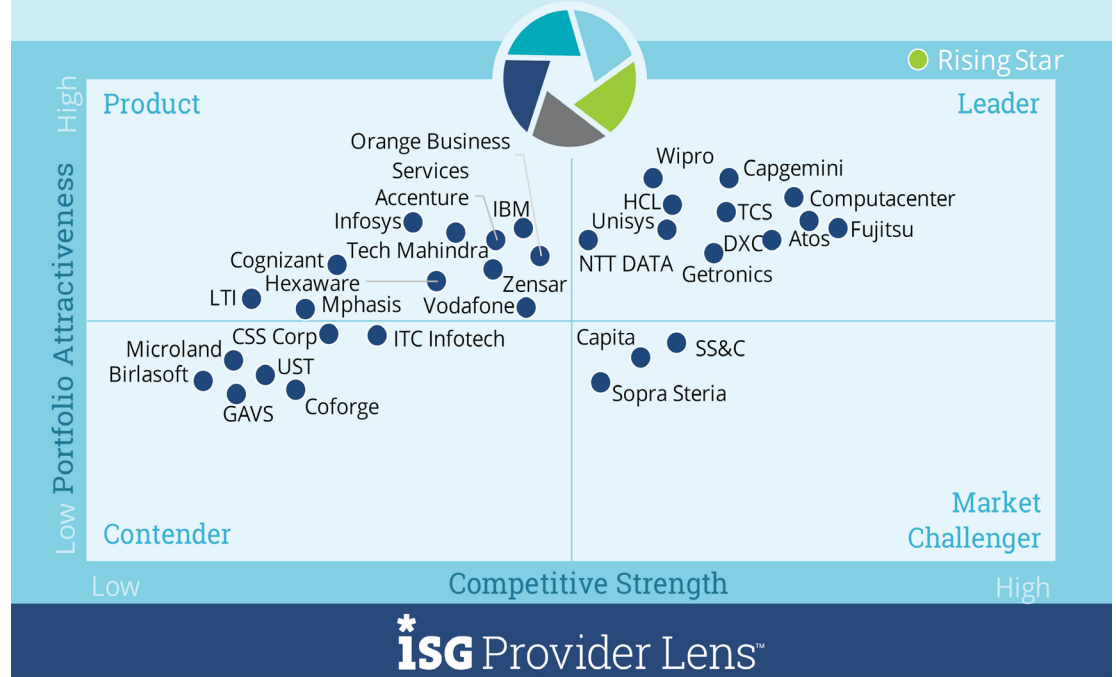
MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualised 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 AI and cognitive technologies for end-user facing tasks and help achieve significant cost savings.

Future of Work – Services and Solutions
Managed Digital Workplace Services - Large Accounts

2021
U.K.



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
- Offer complete device lifecycle managed services as a plus, covering device sourcing and logistics, device as a service (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.

Contenders in this quadrant offer strong managed services portfolio around the Microsoft technology ecosystem. At the same time, they should develop capabilities for further automation and integration while showcasing a better market presence with client stories and revenue. Product Challengers have a stronger portfolio that leverages automation, AI and machine learning technologies plus augmented and virtual realities capabilities. These providers also have frameworks and platforms for managed services and offer device lifecycle management services. They should pursue the UK market aggressively to acquire more clients and expand their local presence. Market Challengers offer

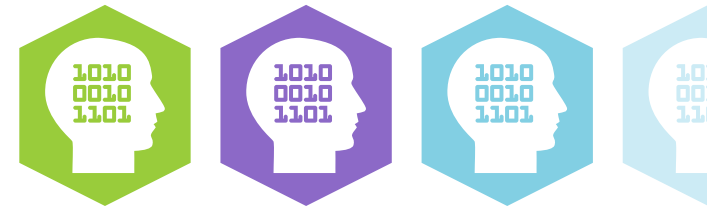
traditional workplace support and service desk services and are well established in the market with large client bases. They should further develop their capabilities. Leaders in this quadrant provide differentiated workplace services powered by contextual AI technologies and further integration with business functions. They also have strong and growing client bases in the UK.

- **Atos** is strongly positioned in the UK with its managed services focused on a data-driven approach.
- **Capgemini** offers a strong connected employee experience service portfolio and leads with strong growth in the UK.
- **Computacenter** considers UK as its home turf and offers strong capabilities with automation and analytics solutions through its DigitalMe approach.
- **DXC** has a wide presence in the UK and adopts a collaboration automation-oriented approach.
- **Fujitsu** has improved its managed services portfolio and demonstrates a strong regional presence.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations (cont.)

- **Getronics** offers a strong support model with an automation analytics capability to provide managed services to enterprise clients.
- **HCL's** Fluid Workplace addresses the current and future needs of the managed future working model by leveraging an optimum combination of its IPs and solutions.
- **NTT DATA** offers the Nucleus platform, dynamic workplace services and an ability to extend to other business functions.
- **TCS** leads with its Cognix™ solution and experience-level measurement approach.
- **Unisys** benefits from its strong local presence and a solid portfolio, making it a well-established leader in the market.
- **Wipro** leads the market with its LiVE Workspace™, virtuadesk™ and other intellectual property-led solutions. The company has a strong market presence in the region.



COMPUTACENTER

Overview

Headquartered in Hatfield, Computacenter offers managed digital workplace services through its Digital Me service. It provides service desk support from Nottingham, Sheffield and Milton Keynes. The company manages 1.5 million users and 1.9 million devices and supports 145 clients in the managed services space in the UK.

Strengths

Strong portfolio: Digital Me is a strong portfolio of services around endpoint management, providing application portfolio and Windows evergreen services. It also offers productivity collaboration support for enterprise voice, video and smart spaces. Its remote support services include intelligent assistance and proactive engagement and self-healing services. Its asset lifecycle management services offer asset intelligence, real-time tracking and financing for DaaS. It also offers onsite support covering field and kiosk services in addition to content community services for content and social communities.

Automation capabilities: Computacenter AIMY is a digital delivery platform powered by AI, automation and analytics. It offers a self-help knowledgebase, a reusable automation posture library and a hosted chatbot solution for AI services. Through its automation capabilities, it can auto resolve up to 17 percent of incidents and up to 8 percent through user self-help.

Well established in UK: Computacenter has a strong portfolio of major British clients across many different sectors. It also has a large sales operation backed by a robust partner ecosystem. The company has many client case examples from the retail, banking and financial services industries for its managed digital workplace services.

Caution

The company should share more examples of UK-based clients for its cloud-based virtual desktop solution.



2021 ISG Provider Lens™ Leader

Computacenter has a strong presence in the UK with its user and persona-centric managed workplace services. portfolio.

ENTERPRISE CONTEXT

Managed Digital Workplace Services – Mid-market

This report is relevant to midmarket enterprise clients across industries in the UK for evaluating managed digital workplace service providers.

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

Midmarket UK enterprises are stressed with the rapid shift in remote workforce, decline in revenues and reduction in workforce size. With the COVID-19 pandemic, UK midmarket enterprises have faced several challenges in terms of creating a secure and effective remote or hybrid working environment for their employees. Scalability, cost reduction and accelerating workplace modernisation are few other workplace-related concerns. These challenges have increased the demand among midmarket enterprises for managed digital workplace services to support workplace collaboration and communication.

The midmarket enterprises in the UK are mainly seeking shared services model, and mobile consulting. Device lifecycle management, 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 from midmarket clients. Service providers are offering flexible services and pricing to attract midmarket clients.

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 managed digital workplace services. The report also shows how the technical and integration capabilities of a service provider differ from the rest in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit their digital transformation initiatives and how they compare 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 UK.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while maintaining seamless employee experience for remote workforce.

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

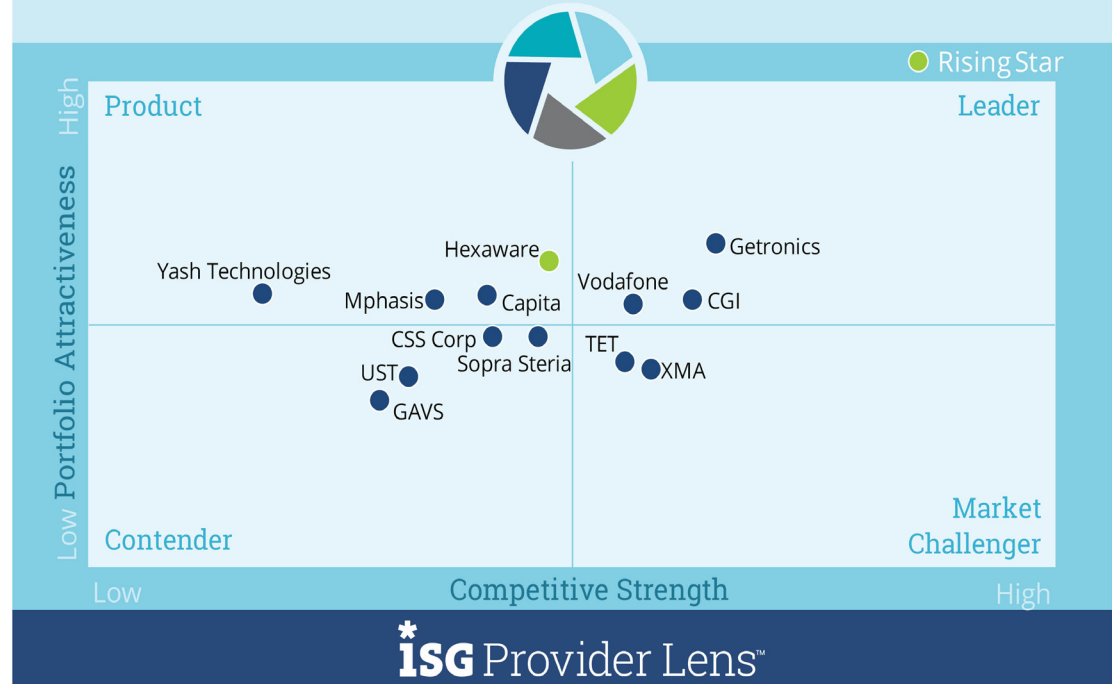
MANAGED DIGITAL WORKPLACE SERVICES – MID-MARKET

Definition

This quadrant assesses service providers that offer end-to-end managed services for midmarket clients. In the UK, midmarket clients have 250 or less end users. Providers servicing these clients offer packaged and as-a-service models, including workplace support, desktop engineering, managed mobility services and virtualised workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services enable the ability to work from anywhere and anytime along with device support, automated proactive technical support and cloud platforms to ensure always-on systems. They leverage AI and cognitive technologies for end-user facing tasks and help achieve significant cost savings.

Future of Work – Services and Solutions
Managed Digital Workplace Services - Mid-market

2021
U.K.



Source: ISG Research 2021

MANAGED DIGITAL WORKPLACE SERVICES – MID-MARKET

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
- Offer complete device lifecycle managed services as a plus, covering device sourcing and logistics, device as a service 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 – MID-MARKET

Observations

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

Contenders in this quadrant have strong capabilities in managed services but support only a portion or aspect of these offerings. They should focus more on capability development and increasing their market share in the UK.

Product Challengers in this quadrant offer strong capabilities in AI and automation-enabled workplace support. Some also offer decent capabilities in device management. They need to pursue the market more aggressively to increase their market share. Market Challengers in this space have a strong local presence but lack sufficient capabilities to address the changing needs of midmarket clients. Leaders in this quadrant offer automation, analytics-enabled capabilities and have a sizeable client base in the midmarket.

- **CGI** provides service desk and digital workplace services. The company has a strong presence in the public sector among other client industries in the UK.
- **Getronics** offers plug-and-play industrialised solutions and a productised offering to serve midmarket clients in the UK.
- **Vodafone's** managed mobility services help midmarket clients enable managed devices and managed UCC service for employees.
- **Hexaware** (Rising Star) has adopted an automation and market approach through partnerships with UK-based telcos. The company is a Rising Star in this quadrant.

ENTERPRISE CONTEXT

Managed Employee Experience Services

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

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

The COVID-19 pandemic has brought several challenges for the enterprises worldwide. Many employees are feeling stressed in terms of connecting and engaging with their work. Increased workplace complexities, dispersed workforces, increased security risks and digital exhaustion are some of the concerns for enterprises in the U.K. To tackle these challenges, accelerate modern collaboration and optimise their employee experiences, enterprises in the region have started adopting managed employee experience services.

Enterprises in the UK are seeking an integrated approach and focussing on adopting emerging technologies to achieve digital dexterity. In addition to IT support, they want to ensure superior employee experiences across every touchpoint, including personal devices, desktops, laptops, facilities and HR applications. They are also looking for driving employee well-being and leveraging gamification engagements to boost employee morale.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers to them effectively plan and select managed employee experience services. The report also shows how the

technical and integration capabilities of a service provider differ from the rest in the market.

Digital transformation professionals should read this report to understand how managed employee experience services providers fit their digital transformation initiatives, and how they compare 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 UK.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while maintaining seamless employee experience for remote workforce. HR leaders should read this report to know the providers that lead in managing employee experience in this new age of hybrid working from talent retention, upskilling and recruitment perspectives.

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

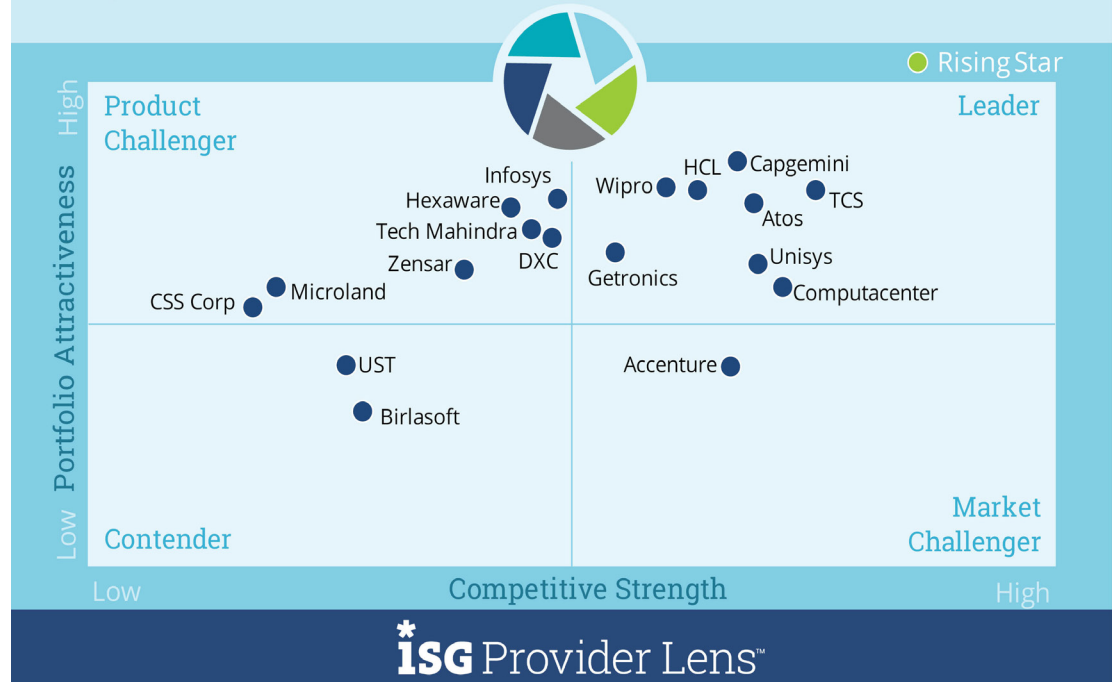
MANAGED EMPLOYEE EXPERIENCE SERVICES

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.

Future of Work – Services and Solutions
Managed Employee Experience Services

2021
U.K.



Source: ISG Research 2021

MANAGED EMPLOYEE EXPERIENCE SERVICES

Eligibility Criteria

- Ability to provide services that directly correspond to user experience associated with device and application access, as well as team collaboration, human augmentation with digital workforce, line-of-business 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 behaviour 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 virtualised workspaces
- Offer smart facilities services, physical workspaces with services to ensure COVID-appropriate behaviour 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 regular digital workplace capabilities. Providers in this space have a strong focus on employee experience and other services and are weaved around experience.

Providers positioned as Contenders offer basic employee experience services powered by basic automation and analytics. They should further develop their capabilities to provide hyper-personalised capabilities and establish their market presence in terms of experience. Product Challengers in this quadrant have comprehensive capabilities covering employee experience through technology performance, physical workplace and enterprise application integration. Market Challengers are well-established providers in the employee experience space. At the same time, they should showcase specific capabilities in enabling experience for specific areas in the future of work model. Leaders in this space have differentiated themselves from regular managed service providers with their experience in enhancing services and carrying out actual client implementations.

- **Atos** leads with its focus on employee experience, wellbeing, citizen development support and experience centres.
- **Capgemini's** employee experience analytics and citizen developer services are key differentiators in the market.
- **Computacenter** differentiates itself with the employee experience elements of its Digital Me offering for UK-based clients.
- **Getronics'** UXP and support for home users are aimed at enhancing the employee experience for UK-based enterprises.
- **HCL** offers a range of comprehensive capabilities to provide employee experience services for the UK market.
- **TCS** offers strong employee experience-focused offerings leveraging its IP and digital nudging capability.
- **Unisys** has experience in delivering employee experience managed services for UK-based clients, covering diverse business functions.
- **Wipro's** TopCoder and myUniHub are aimed at enhancing employee experience services.

COMPUTACENTER

Overview

Headquartered in Hatfield, Computacenter provides managed employee experience as part of its Digital Me capability. With its people-centric and outcome-focused approach, Computacenter provides source, transform and managed services for digital technologies across the workplace domain. It has XLA contracts with 12 percent of its existing client base in the UK.

Strengths

Experience-focused services: Computacenter provides experience-centric services that include frictionless support with strong technology integration, accessibility of information from any device anywhere, and intuitive technology solutions that have a faster learning curve and with minimal gaps in the work-home operating environments.

Empowered workplace: Computacenter provides gamification services to harness employee creativity, encourage engagement and solve business problems. It also offers content and community services that provide business process automation, enterprise content management and enterprise social networking.

Client examples: Computacenter has many client examples in the UK. Some of them involve transforming the employee experience through services such as automation, digital lockers and vending self-serve solutions as well as providing digital journey support via virtual assistance.

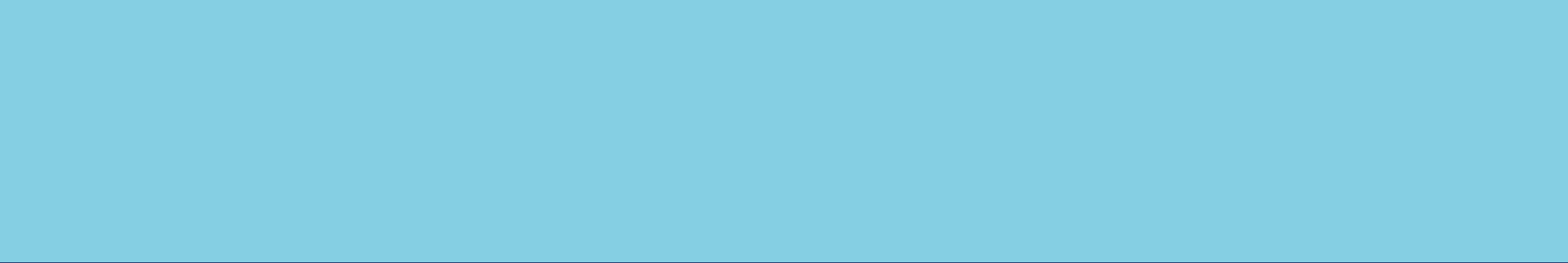
Caution

Most of Computacenter's examples of enabling employee experience revolve around workplace support services. It should further enhance its capabilities to support technologies that empower digital upskilling and reskilling.



2021 ISG Provider Lens™ Leader

By offering employee experience focused services, Computacenter leads with its Digital Me offering.



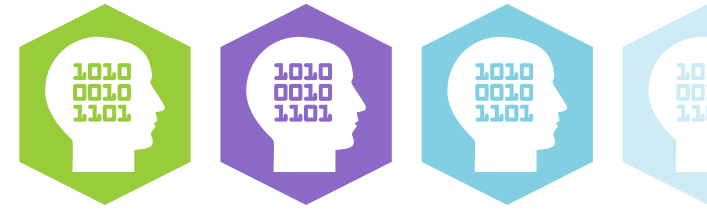
Methodology

METHODOLOGY

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

The study was divided into the following steps:

1. Definition of Future of Work – Services and Solutions market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy and Vision
 - Innovation
 - Brand Awareness and presence in the market
 - Sales and partner landscape
 - Breadth and Depth of portfolio of services offered
 - Technology Advancements



Authors and Editors



Mrinal Rai, Author

Principal Analyst, Senior Manager

Mrinal Rai is the Principal Analyst at ISG and responsible for creating research reports for Digital Workplace, Enterprise Collaboration, and intelligent automation. He is also the official ISG spokesperson for media relations in India. His area of expertise is Digital Workplace services, modern Unified Communication, Collaboration, conversational artificial intelligence (AI) both from a technology and business point of view. He is the US lead quadrant and global archetype analyst for digital workplace and social collaboration in the ISG Provider Lens (IPL) program. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture, enterprise social software, content collaboration and team collaboration. In intelligent automation space, he focuses on conversational AI and intelligent virtual agents. He has been with ISG for last 9 years and has more than 13.5+ years of industry experience.



Sidhant Prasad, Enterprise Content and Global Overview Analyst

Research Analyst

Sidhant is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital workplace, retail software and services and healthcare and life sciences digital transformation services. His area of expertise lies in ecommerce, future of workplace and virtual care. During his tenure, he has developed content from an enterprise perspective and authors the global summary report.

Authors and Editors



Sonam Chawla, Enterprise Content and Global Overview Analyst Senior Research Analyst

Sonam Chawla is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Future of Work - Services and Solutions. Her area of expertise is Conversational AI and Digital Workplace. During her tenure, she has supported research authors and authored enterprise context and the global summary report with market trends and insights.



Jan Erik Aase, Editor Partner and Global Head – ISG Provider Lens/ISG Research

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

ISG Provider Lens™ | Quadrant Report October 2021

© 2021 Information Services Group, Inc. All Rights Reserved



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