



**\*ISG** Provider Lens™

2019

Digital Workplace of the  
Future -  
Services and Solutions 2019

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 70 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit [www.isg-one.com](http://www.isg-one.com).



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# Definition

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

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

Augmented and virtual reality reduces and eliminates needs for in-person tech support, and its relevance and use is growing in onsite and remote support. Through use of interactive virtual agents and analytics running on systems and tracking resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There is also an increasing interest in transforming workplace management to a more operating expense model through device leasing or device-as-a-service approach where OEMs and service providers handle the complete device lifecycle management and the client pays per month per device usage. There is a growing interest among enterprises in desktop virtualization in cloud or DaaS (Desktop-as-a-service) and also in unified endpoint management. There also has been a huge interest in various collaboration solutions and platforms because they are becoming the face and focal point for digital workplace enablement and provide visible benefits in end user productivity and business benefits.

However, while enterprises are trying hard to catch up with changing user expectations, they are still unable to match the pace at which technology is changing and attracting the new-generation workforce.

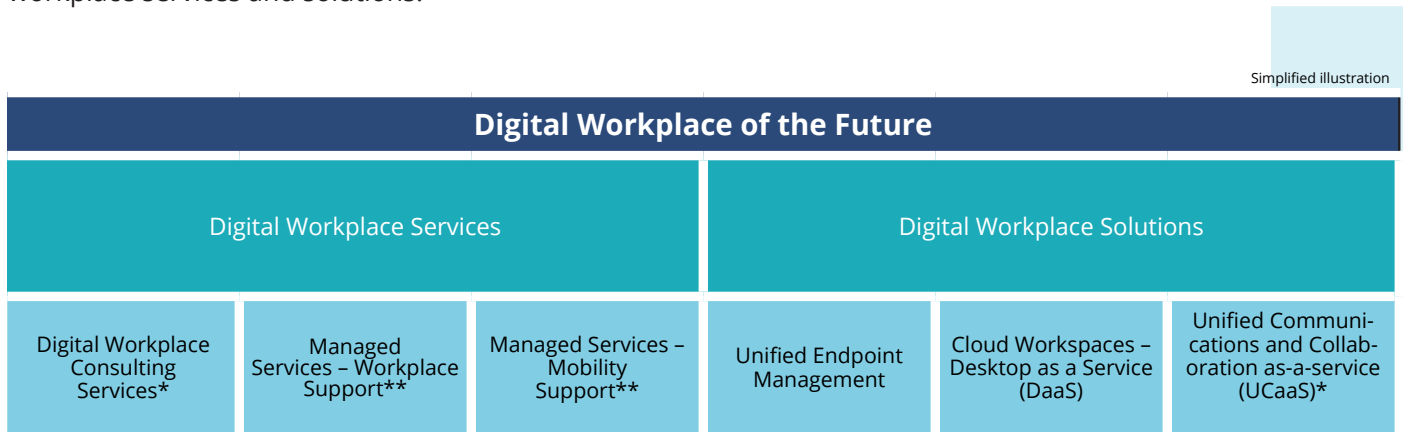
The ISG Provider Lens™ study offers IT-decision makers:

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

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

# Quadrant Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following six quadrants on digital workplace services and solutions:



\*\*Segmented into mid- and large- market at country level  
 \* Providers evaluated at country level as well

Source: ISG, 2019

## Digital Workplace Consulting Services

Digital workplace consulting centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and creating the roadmap and for validating the business case for transformation. These advisory services are specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing end user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end user personas, providing a roadmap for implementation, enabling technology adoption and change management.

### Eligibility criteria:

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

## Managed Services – Workplace Support

Managed digital workplace services are comprised of all managed services related to the digital workplace. An IT service desk with Level ½ support, along with in-person technical support and user self-help services form core part of the managed services offering. The quadrant includes next-generation service desk services, field support, automation enabled predictive analytics, IT kiosks, self-help, chatbots, managed EUC and UC services and managed virtual desktop services.

### Eligibility Criteria:

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support, automated virtual agent;
- Ability to offer onsite field support and in-person technical assistance;

- Ability to setup self-help kiosks, tech-bars, IT vending machines, digital lockers;
- Ability to offer managed services for collaboration and communication over diverse platforms;
- Ability to offer device support, predictive analytics and proactive monitoring services;
- Ability to offer and experience in providing remote virtual desktop services both on-premise and on cloud.

## Managed Services – Mobility Support

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

### Eligibility Criteria:

- Support at least 500,000 mobile and smart devices with at least 25 percent of them managed outside the home region;
- Ability to offer device sourcing and logistics, managed UEM, financial management, device security and mobility program management;
- Ability to offer implementation and support for enterprise mobility, support for BYOD, mobility expense and asset management;
- Ability to manage complete device lifecycle management, device-as-a-service (hardware-as-a-service, PCaaS);
- Ability to develop industry specific plug and play mobility solutions;
- Ability to offer support for single sign-on, secured app access, support for smart devices.

## Unified Endpoint Management

Unified endpoint management solutions are converging to encompass smartphones, tablets laptops and PCs. At a minimum, a UEM solution must provide complete enterprise mobility management, which includes mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). UEM provides a unified approach to managing desktops, PCs and mobile and smart devices using a single console.

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

### Eligibility Criteria:

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

## Cloud Workspaces – Desktop as a service

The cloud workspace is a highly standardized and productized offering that is delivered through the public cloud and provided on a pay-as-you-go or pay-per-user basis. It constitutes delivering a complete desktop as a single interface along with required applications, security, identity and endpoint management mechanism. With a DaaS solution, end users can access their workspace, desktop, apps on any device anywhere.

### Eligibility criteria:

- Solution that offers a multi-tenant architecture, where organizations can purchase the service through a subscription model — typically based on the number of virtual desktop instances used per month;
- The DaaS provider sells the solutions either directly to enterprise or through service provider/MSP channel. This does not include system integrators or managed service provider that offer DaaS as part of their managed services offerings;
- The DaaS provider manages the back-end responsibilities of data storage, backup, security and upgrades;
- The DaaS provider also offers a complete wrapper of endpoint management services to secure the desktop or workspace delivery over cloud.

## Unified Communications as a service (UCaaS)

Unified Communications as a Service (UCaaS) is a delivery model in which a variety of communication and collaboration applications and services are outsourced to a provider and delivered over an IP network, usually the public Internet. The market is evolving toward UC(C)aaS, and even former IP centric providers have added unified communications services to their portfolio to also be able to service customers with more complex communications and collaboration requirements.

### Eligibility criteria:

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

# Quadrants by Region

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following six quadrants (market) research on Digital Workplace of the Future - Services and Solutions 2019 by region:

Quadrants	Global	USA	Germany	UK	Brazil	LATAM	Nordics	Europe	ANZ
Digital Workplace Consulting	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Managed Services – Workplace Support*	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Managed Services – Mobility Support*	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Unified Endpoint Management	✓							CPQ	CPQ
UCCaaS	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Cloud workspaces - DaaS	✓							CPQ	CPQ

\*Split up into mid- and large- market

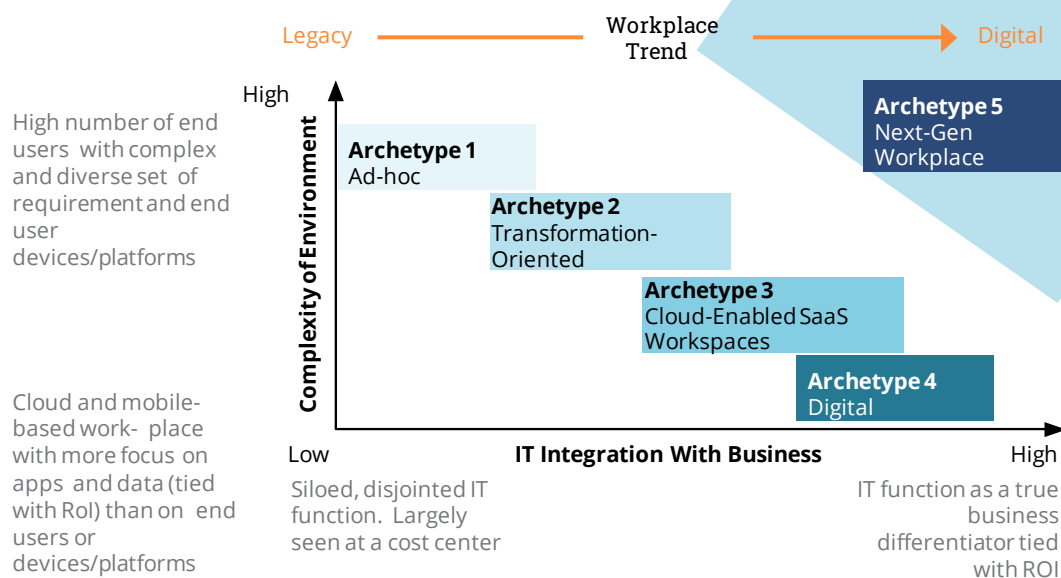
**Note:** We have highlighted some regions that do not have a quadrant report. The data for these regions is being collected for the Candidate Provider Qualification (CPQ) program.

## Archetype Report

In this report, we identify and classify the typical buyers of digital workplace of the future services, which nowadays include transformational capabilities.

Different enterprises aspire to transform their workplace environments exhibit different characteristics according to their digital maturity. Based on the workplace environment complexity and level of enterprise IT integration with business, ISG classifies five types of enterprise behavior toward workplace transformation. They are shown in Figure 1.

**Fig 1 Digital Workplace Archetypes in Context.**





# Schedule

The research phase falls in the period between **June and August 2019**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **Nov 2019**.

<b>Milestones</b>	<b>Beginning</b>	<b>END</b>
Survey Phase	June 26, 2019	July 26, 2019
Sneak previews	September 15, 2019	October 15, 2019
Content provisioning	October 30, 2019	
Press release	November 16, 2019	

Please refer to the link below to view/download the ISG Provider Lens™ 2019 research agenda:  
[https://isg-one.com/docs/default-source/default-document-library/isg-provider-lens-annual-plan-2019.pdf?sfvrsn=c323cc31\\_0](https://isg-one.com/docs/default-source/default-document-library/isg-provider-lens-annual-plan-2019.pdf?sfvrsn=c323cc31_0)

## Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

# Contacts for this study

## Analysts



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**Nikhil Kumar**  
Global Project Manager - Secondary

### **Do you need any further information?**

If you have any questions, please do not hesitate to contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).

# List of companies being invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

42Gears	bluuend	Digital Workplace Group
8x8	BMC	Dimension Data (NTT)
Accelerite	British Telecom	DMI
Accenture	BT Group	DXC
Acronis	CA	Elisa Oyj
Advania	Campaingery (für wen)	Enghouse Interactive
AirWatch	CANCOM	Ericsson
Alcatel-Lucent	Capgemini	ESNA
Algar Tech	CBTS	Evolve IP
AppSphere	CenturyLink	Evry
AppTec 360	CGI	FireEye
Arkadin	Cipher	FIT
arvato Systems	Cisco	Forcepoint
AT&T	Citrix	Fujitsu
Atea	Clearbox	Fuze
Atos	Cloud Jumper	G&P
Avanade	CMTech	GEMA
Avaya	Cognizant	Genesis 10
AWS	CompuCom	Genpact
Axians	Computacenter	Getronics
Baramundi	Cortado	GISA
Bechtle	Damovo	Google
Bell Canada	Dataone	HCL
Bell Techlogix	Desk Top Publishing Micro Systems Limited	Hexaware Technologies
BlackBerry		Honeywell

HP	Mitel	Scopevisio
HPE	MobileIron	Secu Sys
Huawei	Mphasis	Snow Software
IBM	MSG Systems	Softtek
Infosys	NationSky	Sonda
Innofactor	NEC	Sophos
Insight	NetApp Deutschland	SOTI
Intelecom Group	Netia	Sprint
Intermedia	Nextiva	Star2Star Communications
ITC Infotech	nfon	Stefanini
Ivanti	NIIT Technologies	Stefanini IT Solutions
Jamf	NorCom	SVA
Kaspersky Lab	NTT	Tangoe
KEA Company	NTT DATA	TCS
Komsa	Nutanix	TDC Group
KPN	OneNeck IT Services	Tech Mahindra
Liferay	Orange	TechQuarters
LogMeIn	Penso Tecnologia	Techstep
Long View Systems	Pexip	TECJUMP
LTI	PGi	Tecnocomp
Luxoft	PhDsoft	TEKsystems
ManageEngine	QSC	Tele2
Masergy	Redpill Linpro	Telefonica
Materna	Requestia	Telenor
Matrix42	Ricoh	Telia-Sonera
Microsoft	RingCentral	Telstra
Mindsmash	SANTO DIGITAL	TIETO

TIVIT	Windstream Communications
Tocario	Wipro
TopLink	WIT Planejamento Tecnologia da Informacao
TrendMicro	WITTEL
Trianz	Workspot
Trio	Xelos
T-Systems	Yash Technologies
Unify (Atos)	YKP
Unily	ZALTS
Unisys	Zensar
United Planet	
UOL DIVEO	
UST Global	
USU	
Verizon	
Vexia	
VITA	
VMware	
Vodafone	
Vonage	
Votacall	
VoxMobile	
WatchGuard	
Wincor-Nixdorf	