Digital Workplace of the Future
UK 2019

A research report comparing provider strengths, challenges and competitive differentiators
About this Report

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The research and analysis presented in this report includes findings from the ISG Provider Lens™ program and 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 was current as of September 8, 2018. 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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EXECUTIVE SUMMARY

Mobility, connectivity and collaboration are key drivers for the digital workplace:
The smartphone and tablet revolution has changed business models across all industries. Companies are now looking to implement mobile productivity solutions. The next step is increased connectivity among devices. Users expect the same information to be delivered on different interfaces. Finally, true collaboration across boundaries will be delivered. With the technology in place, ISG expects collaboration to empower faster idea generation, rapid product development and reduced risk on a wide scale in the coming years.

Consulting requirements for the digital workplace, based on design-thinking, are rising: Companies increasingly engage external advisers for defining the optimal digital workplace transformation. Design-thinking, a method that takes end-user concerns as the starting point, is now widely adopted. It is used to define parameters affecting the end-user experience and to measure the end-users' effectiveness based on those parameters.

Digital workplace services are no longer the prerogative of the IT department: A digital workplace transformation brings fundamental changes beyond IT cost reduction. Business function professionals, particularly in human resources (HR), are becoming proactive stakeholders in workplace transformation initiatives. Bring your own device (BYOD) policies are a common practice in the U.K., and HR managers realize the profound impact it can have on talent acquisition and retention.

Managed digital workplace services become broad and automated: Requests for proposals (RFPs) for workplace services are bundled broadly. Packages include the service desk; lifecycle management; user management; enterprise mobility management (EMM) and unified communications and collaboration (UCC) services; install, move and change (IMAC) services; hardware and software maintenance; kiosk services; change management; and transition management. Different forms of automation, analytics and artificial intelligence (AI) are commonly being included in these services. Automation and analytics reduce ticket volumes and helpdesk costs. AI-based virtual agents are coming of age. Chatbots provide “human-like” support to end users. AI is being successfully deployed for predictive analytics and incident resolution, which lets agents focus support on more complex issues.

Enterprise mobility management services are shaped by content security and diversification of user devices: Securing mobile content takes precedence over securing devices. The new stringent European law for data protection forces new thinking about access to personal data related to employees or customers. Emerging technologies enable administrators to secure access to information, rather than locking devices. Companies want to extend mobility management to wearable and IoT devices, including business policy implementation and secure application distribution.
The midmarket for digital workplace and mobility services is cost sensitive and still expects the latest technologies: Service providers need to develop standardized services while keeping up technology refreshes. Midmarket companies are looking for solutions to optimize user experience and business transactions much like bigger companies are doing. But while they expect to benefit from innovation like artificial intelligence, their budgets are smaller.

UCC is leading to change activities triggering digital workplace transformation: No workplace solutions are used more than email, telephony and Web conferencing. Voice platforms are undergoing shifts for companies seeking to replace session initiation protocol (SIP) trunking costs. While considering to upgrade telephony, many consider Microsoft Office 365 as a collaboration platform integrating with Skype and full-fledged IP telephony platforms. On top of that, the integration of social collaboration is a game changer to enhance productivity. Change management is a crucial ingredient to successful UCC transformation. The demand for professional change management services is on the rise.

Virtual desktops are well adopted in the U.K. banking sector and are taking off in other verticals: London’s financial district has been an early adopter for virtual desktop services for years. Other sectors are now starting to embrace that model, too. More British companies are planning partial migrations of their workplace infrastructure into the cloud. A hybrid model allows the combination of different technologies, like fat clients and virtual desktops, under one roof. This soft migration approach is becoming the preferred route, especially for larger and more complex multinational organizations.

WaaS is making its impact on the U.K. market: Organizations in sectors as varied as financial services, marketing, education, manufacturing and retail have implemented Workplace-as-a-Service (WaaS) for some of their staff in the U.K. WaaS implementations reduce the capital expenditure and increase the flexibility for managing desktops. The number of providers offering WaaS has increased over the last 12 months. These cloud-based offerings are provided in a “pay-as-you-go” or “pay-per-user” model.

Unified endpoint solutions are in high demand: Unified endpoint management (UEM) combines the previously separate functionalities of mobile device management and desktop management. That translates into securing and controlling desktop computers, laptops, smartphones and tablets from a single console. As companies seek to reduce their administrative overheads, the demand for centralized solutions for all devices is on a steep rise.
Enterprise mobility management moves from managing devices to managing mobile content: In a few years, office content will be seamlessly available on numerous devices. Companies will manage enterprise content distribution, and employees will pick their favorite devices on the consumer market. Leading providers offer prepackaged, role-based workplace services with modular components.

The future mobile workspace enhances collaboration and automation: The workplace will profoundly change in the coming years. One of the drivers for this change is true collaboration across departmental and corporate boundaries. In addition, there is a fundamental technology shift finally occurring. Three key technologies likely to have a significant impact on the future workspace in the next five years are virtual reality (VR), augmented reality (AR) and artificial intelligence (AI).
Introduction

Definition

Providing a digital workplace has become a central cornerstone in the overall employment strategy. Enterprises look for answers to equip the workforce with the best technology to sustain and enhance their competitive edge. Collaboration, mobility, cloud and social networking have had a great impact on the modern workplace. The graphic below highlights recent and future workplace evolution.

**Mobility, connectivity and collaboration are the main drivers for shaping the digital workplace:** As many top decision makers have recognized, the smartphone and tablet revolution, together with apps, has changed business models across practically all industries. But the lack of integration with workflows and back-end systems has always been a barrier for mobile productivity. Enterprise mobility continues to be a major contributor to business productivity beyond devices and communication. To get the full benefit, companies have to start digitizing, mobilizing and automating workflows. Increasingly, clients are now looking to their vendors for strategic advice on implementing productivity solutions.
We already see a greater amount of connectivity with back-end systems and among devices: As noted, users expect to get the same information delivered to them in different interfaces on different devices. These devices are starting to communicate with each other. The most important innovation topic will be device-specific usability that is combined with voice and data input options.

The next big trend is true collaboration across boundaries: We are already working far more in global teams and projects rather than in static departments. There are increasing examples for collaboration through crowdsourcing, and technology is enhancing it. A collaborative work environment and culture have long been talked about. With the technology in place, ISG expects collaboration to be the next big thing to enhance faster idea generation, collective thinking, rapid product development and reduced risk for the launch of a new service, product or concept.

The digital workplace is an integral part of the business strategy: Digital workplace management is not just enterprise IT's prerogative. Providers need to do far more today than offer digital workplace technology solutions. Creating a productive and enriching workspace is an integral part of the business strategy involving human resources, marketing and each line of business concerned. It is a holistic business requirement starting from business strategy and involves participation from human resources, marketing and operations as well. Legacy end-user computing, service desk services, IT support, enterprise mobility, desktop virtualization, enterprise unified communication and collaboration and increasing connectivity among people, devices and business applications are part of the social collaboration and have all culminated in the sphere of digital workplace.

Cloud-based desktops and virtualization are taking off very differently in different regions. Whereas demand has been more sluggish in continental Europe, activity levels have been high for years in the United Kingdom. Concepts such as unified endpoint management and automated helpdesk services are also in high demand. The same is true for the integration of LAN services and UCC into the digital workspace. The underlying trend is a shift in the workplace implementation drivers from IT optimization and cost considerations to business relevance and end-user requirements.
Introduction

Digitalization and automated workflows are key to the workplace strategy:
The introduction of further automation and artificial intelligence is in the cards. As noted, virtual reality, augmented reality and artificial intelligence are likely to have a significant impact on the future workspace in the next five years. VR is already shaping the workspace for specific professionals, such as architects who design virtual models of office buildings. AR, by contrast, will shape a more general workspace environment. Artificial intelligence will have evolved to a point where a smart watch will provide complete access to the work schedule.

Digital workplace services and solutions enable the client's end users to access their enterprise data and applications irrespective of their physical location or the device being used. The concept involves an upgrade from classic IT workplaces and desktops to include mobile device and application management, role-based application deployment and accessibility, email, peer-to-peer messaging, unified communication and collaboration services, Level 1 and 2 technical service desk support, desktop virtualization/desktop-as-a-service, remote support, VIP and executive support, software distribution, patch updates, software upgrades and migration, IT asset analytics, automation capabilities for self-help, and other services for enhancing the end-user experience.

Scope of the Report

This ISG Provider Lens™ study analyzes the following market categories, divided by services and solutions:

- **Digital Workplace Consulting Services** centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and roadmap, and validating the business case for transformation.

- **Digital Workplace Managed Services** encompass a range of services, including the service desk; lifecycle management; user management; install, move and change (IMAC); break-fix; hardware and software maintenance; kiosk services; troubleshooting; change management; and transition management.

- **Enterprise Mobility Management (EMM) Services** focus on lifecycle management, user administration, troubleshooting, change management, transition management and support.

- **Virtual Desktop Services** involve hosting clients' desktops in the providers' data centers. These could be delivered through all types of cloud infrastructure, including public, hybrid and private models.
Definition (cont.)

- **Unified Communication and Collaboration (UCC) Services** include managed services for collaboration, enterprise telephony and communication, social media-style community building, enterprise content management, crowdsourcing and productivity suites.

- **Workplace-as-a-Service (WaaS)** 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.

- **Unified Endpoint Management (UEM) Solutions** are converging to encompass device and application distribution management for smartphones, tablets, laptops and PCs.

- **Enterprise Mobility Management (EMM) Solutions** combine mobile device management (MDM), mobile application management (MAM) and mobile information management (MIM) to provide a management platform for operating and using smartphones, tablets and mobile applications.
Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

**Leader**

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

**Product Challenger**

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

**Market Challenger**

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders”. Often, the market challenges are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

**Contender**

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.
Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the “Rising Star” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “Rising Star” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
### Digital Workplace of the Future Cross-Quadrant Provider Listing 1 of 6

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## Digital Workplace of the Future Cross-Quadrant Provider Listing 6 of 6

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- **L** – Leader / **PC** – Product Challenger / **C** – Contender / **MC** – Market Challenger / **RS** – Rising Star
Digital Workplace of the Future Quadrants
Digital workplace consulting centers on workplace optimization strategies. Modules include the support for defining a workplace strategy, designing the architecture and roadmap, and validating the business case for transformation. ISG asks for a standardized methodology for segmenting and optimizing requirements based on personas, both for devices and for applications, to support digital and mobile workflows.
Consulting requirements for the digital workplace are rising: Many companies have come to realize that they need to engage external advisers to prepare for the optimal digital workplace transformation. Digital workplace consulting includes alignment with the business strategy, a workplace environment assessment and an understanding of where there are digital technology gaps.

Automation is used to optimize the definition of personae: A core component of digital workplace consulting is to define different personae, which are then provided with optimized authorities, devices and applications for their tasks. Automated agents are increasingly deployed in consulting engagements to collect relevant usage information to create the right definitions. This automation is replacing traditional methods based on focus group discussions and interviews.

The design-thinking method becomes standard for consulting: A relatively new method that takes end-user concerns as the starting point, called design thinking, is widely adopted. It is used to define the parameters affecting end-user experience and to measure solution effectiveness and return on investment based on those parameters.

Digital workplace consulting is no longer the prerogative of the IT organization: A digital workplace transformation brings fundamental changes to the business beyond IT cost reduction. Digital workplace consulting requires interaction with business functions other than enterprise IT. Enterprises increasingly involve business functions like human resources (HR) in workplace transformation initiatives. In addition, any U.K. business with customers, suppliers or employees in continental Europe must align any change in its identity management structure with the E.U. GDPR, regardless of Brexit. That requires involving the legal department.
Digital Workplace Consulting Services

Observations (cont.)

- **Accenture** commits global expertise to its consulting practice to build a highly strategic and change-orientated proposition for the future workplace.

- **Atos** centers on the end user and ties future workplace consulting to collaboration, change management and the rising influence of millennials.

- **Computacenter** provides a structured consulting approach based on end-user roles. It supports clients in defining roles and workflows before rolling out the architecture for the digital workplace.

- **Dimension Data** has strengthened its end-user consulting unit in the U.K. and advises clients on business logic, technology architecture and role-based workflow optimization.

- **DXC** has a dedicated consulting group to leverage its Microsoft alliance to advance the use of workplace technologies.

- **IBM** has a strong future workplace consulting business underpinned with an innovative approach to unified endpoint management and trend issues such as artificial intelligence and integration of IoT capabilities.

- **TCS** has developed a sophisticated consulting capability for future workplace transformation. It has a strong foothold in the U.K., particularly in the public sector.

- **Digital Workplace Group** has been identified as a Rising Star. It offers a pragmatic and highly strategic future workplace consulting proposition independent of service integration or operations.
Definition

Managed Digital Workplace Services encompass a range of services, including the service desk; lifecycle management; user management; install; move and change (IMAC); break-fix; hardware and software maintenance; kiosk services; troubleshooting; change management; and transition management. Innovation and automation in the service desk domain based on artificial intelligence are of particular importance. Consulting services, managed mobility and desktop-as-a-service (DaaS) offerings are explicitly excluded.
Observations

Service desk and onsite support are sources for innovation:
Advances in automation technologies are changing the way service desks handle incidents and problems. Automated solutions are lowering the cost of software testing.

Automation and analytics drive down tickets and help desk costs:
Managed workplace services adopt strategies that reduce overall incident tickets and associated service desk costs. Proactive monitoring of systems, devices and applications supports predictive analytics and proactive incident resolution. Automation enables self-service features. The potential reduction for service desk tickets for simple requests can be enormous. Automation can be applied so only higher-complexity tickets are routed to agents. The agents can now spend more time providing focused support for difficult issues.

AI-based virtual agents are deployed as part of the service: Chatbots aim to provide a “human-like” support experience to end users. An intelligent chatbot can record issues with devices or applications. Subsequently the chatbot can provide an automated fix or send an automated request to the help desk on the user’s behalf. Chatbot agents can perform a sentiment analysis to pass on the end users’ feelings, judged by the text the user entered.

Experience level agreements (XLAs) replace traditional SLAs:
Traditional service level agreements (SLAs) on technical parameters are being replaced by end-user experience level agreements. Continuous monitoring of systems, network, devices and application performance can generate measurable parameters for denoting the end-user experience level.
Atos offers the adaptive workspace as a solution, including unified endpoint management (UEM) services and role-based packages for access, device lifecycle management and content distribution.

Avanade, the joint venture of Accenture and Microsoft, has a strong presence in the U.K. Its offering includes comprehensive integration of Office 365, enterprise mobility management (EMM), enterprise resource planning (ERP) and collaboration via Skype.

Computacenter offers Digital Me, a future workplace offering with a very strong focus on end-user requirements and features in its home market.

With the merger of CSC and HP Enterprise, the future workplace offering from DXC has become more customer value-centric. It includes strong integration and change management support.

Fujitsu pursues an innovative approach by addressing the human-centric intelligent society. The focus of development is very user-centric, looking at optimized devices and applications to support business processes.

Getronics is a strong and very experienced player in the U.K. midmarket for unified communications, workplace services and the delivery of virtual desktop services.

IBM has completed the reinvention of its workplace service offering, using best-of-breed solutions integrated with IBM Watson.

Unisys is one of the early pioneers for unified endpoint management services. The company is increasingly active in bidding for U.K.-based future workplace services contracts.
Unisys offers managed digital workplace and field services powered by analytics, intelligent automation and AR/VR. Its approach is focused on end-user experience management (EUEM).

**Overview**

Unisys is a global leader for innovative managed digital workplace services with a strong presence in the U.K., deploying automation and analytics.

**Strengths**

**Focus and global leadership:** Unisys has a very sizeable global future workplace services business. Unisys is a global force in workplace management. It administers services for 4 million fixed devices and 5.3 million mobile users worldwide.

**Improvement efforts yield client benefits:** Unisys continues to strive through innovation. Unisys has already deployed very innovative AI technologies to its global help desk infrastructure and reports achieving 30 percent incident resolution through automation.

**Enviable references:** Unisys has a strong position in the U.K. marketplace. Unisys has a well-established U.K. client base for digital workplace services and some very compelling case studies, including improving employee productivity for Constellium, a large British aluminum manufacturer.

**Caution**

Unisys could benefit from more local support in the U.K. Unisys may need to enhance its local delivery capabilities for administration and help desk services in the wake of Brexit.

The company has not significantly grown its number of customers in the last three years. Unisys needs to promote its global cutting-edge capabilities to its existing traditional end-user computing services clients in the U.K.

Unisys is a global leader for innovative managed digital workplace services with a strong presence in the U.K., deploying automation and analytics.
ENTERPRISE MOBILITY MANAGEMENT SERVICES

Definition

Enterprise mobility management (EMM) services focus on lifecycle management, user administration, troubleshooting, change management, transition management and support. The core proposition enables mobile users with single sign-on features to securely access productivity apps and data anytime and anywhere. It also includes mobile policy configuration and mobile security.
ENTERPRISE MOBILITY MANAGEMENT SERVICES

Observations

**Mobile workflow automation requires backend integration:** Establishing mobile workflow productivity has been a goal for years. The major challenge remains the deep integration with data from backend systems. Seamless mobile workflow digitalization and automation is another vital prerequisite. The mobile enterprise will become a major contributor to business productivity once these challenges are surmounted. Therefore, enterprise clients are increasingly looking to service providers as partners for workflow automation.

**Customers look to integrate wearables via device management:** Innovative mobile devices like wearable smart IoT devices have entered the business arena. Enterprise are looking for ways to securely manage diverse devices through technologies like MDM, EMM and UEM. The related managed services include business policy implementation, device configuration and secured application distribution.

**Securing content takes precedence over securing devices:** Mobile content distribution technologies like identity and access management have become a cornerstone for mobile data security. The new European data protection legislation enforces new thinking on access and authorization to personal data concerning employees or customers. Content security takes top priority. Technologies such as application refactoring and containerization ensure secure content distribution across differing mobile devices. Service providers are proposing enterprise app stores with policy-enabled secured mobile access to approved applications.

**There are new use cases for analytics with EMM services:** Analytics are now applied for telecom expense management and for measuring mobile strategy effectiveness. Other services include virtual agents to be accessed via any device.
**Observations (cont.)**

- **Atos** is an integrated enterprise mobility player with a strong managed services presence in the British financial services industry.

- **Computacenter** was one of the early providers winning mobile device management services contracts with large enterprise clients and has a rich services portfolio.

- **DXC** provides an innovative EMM services portfolio backed with a strong global support infrastructure and a high degree of technology innovation.

- **Fujitsu** provides a differentiated enterprise mobility management offering with strong integration capabilities.

- **Getronics** has achieved a leadership position with an encompassing EMM service proposition, a broad portfolio, a long history and a large customer base in the U.K.

- **IBM** is a global powerhouse for enterprise mobility management and is very relevant to global clients with distributed international operations.

- **Vodafone** is the leading mobile communications operator in the U.K. and provides a differentiated offering that includes 4G services, managed messaging services and telecom expense management.
Unified communication and collaboration (UCC) services are an integral part of the digitized workplace. UCC services include managed services for collaboration, enterprise telephony and communication, social media-style community building, enterprise content management, crowdsourcing and productivity suites.
Observations

- **UCC has become an integral part of the digital workplace:** No other workplace solutions are used as much as email, telephony and Web conferencing. Enterprise social collaboration has transformed from being just a company intranet-centric service to becoming a connected, engaging, device-independent, cloud-enabled, productivity-oriented capability service.

- **UCC services enable end-user collaboration:** The integration of social collaboration platforms is the real game changer leading to faster idea generation, crowdsourcing and gamification to enhance productivity.

- **Collaboration services become the face of the future workplace:** As mentioned above, social collaboration has already become a source of cloud-enabled and productivity-orientated services. This collaborative workplace should also provide platforms for idea generation, crowdsourcing and gamification, all of which will enhance productivity.

- **UCaaS is in high demand as many U.K. organizations already moved telephony into the cloud:** The movement toward the cloud is in full swing. Many British companies have moved parts of their telephony offering into the cloud. This trend is likely to accelerate.

- **Smart offices and meeting rooms appeal to innovative companies:** Start-up companies, as well as the innovation departments of established multinationals, are looking for innovative office environments. Motivating and keeping key staff members has gained strategic importance. In this context, service providers are investing in smart digital office environments for an appealing collaborative experience.

- **Change management is a crucial ingredient to transformation:** The time and education it takes to change an office culture to embrace collaboration is often underestimated. Thus, providers now propose professional change management services as a standardized component of their UCC offerings. Training includes the right business-focused application of gamification and crowd sourcing.
Atos has a rich UCC services portfolio based on its own solution platforms Unify for IP telephony and its own platform for social collaboration.

BT combines a broad UCC services portfolio service with a powerful services support and monitoring infrastructure in the U.K.

Damovo offers a business-orientated, flexible choice for cloud-based UCC services based on its strong heritage managing IP telephony platforms.

Dimension Data is a well-established integration provider for communication services with a long history in the British market.

DXC is strong in Microsoft environments and has partnerships that help it deliver a broad range of services.

Getronics brings long-standing telephony integration expertise as well as an innovative proposition for collaboration to its U.K. clients.

Vodafone is successfully leveraging its very large mobile enterprise client base to a highly standardized UCC cloud service with a strong support infrastructure.

CANCOM has become the Rising Star for its commitment to the U.K. market. The German service provider acquired UCC specialist Ocean Intelligence and IT integrator OCLS to strengthen both its UCC portfolio and its delivery capability in the U.K.
Virtual desktop services involve hosting clients’ desktops in the providers’ data centers. Desktops could be delivered through all types of cloud infrastructure, from public via hybrid to private models. Service providers provide managed services in a user-based license model.
VIRTUAL DESKTOP SERVICES

Observations

Very high demand continues to fuel the market for virtual desktops in the U.K.: After a rapid adoption of virtual desktop services in the London financial district, other sectors are now starting to embrace VDI. Most multinational firms already have experience with virtual desktop implementation. Many are looking to widen the appeal to their end users.

Many companies seek a hybrid model to combine services: The hybrid model provided by most large infrastructure service providers different technologies to be combined to enable fat client- and virtual desktops to run under one roof. The soft migration approach is becoming the preferred route for multinational clients with complex requirements.

Analytics allow failover contingency on virtual desktops: End-user analytics are deployed to predict device failure and trigger emergency provisioning of authorized terminals and to transfer workloads to them. Device and monitoring services can extend to cloud-based virtual desktop infrastructures and can predict downtime situations.

Service providers now offer virtual desktop trials with advanced workflow design features: Some service providers provide cloud-based desktop solutions from their websites for a free trial period. These offerings are intended to stimulate adoption and allow users to design their own workflows with click-and-drop functions. Users can download and configure workflows themselves without having to master a programming language. Providers hope that more users will experience good service quality in this way. In the U.K., IT departments are embracing these capabilities and seeking help from providers to engage with line-of-business executives.
VIRTUAL DESKTOP SERVICES

Observations (cont.)

- Atos provides a proven virtual desktop services portfolio with a range of flexible delivery options to its British clients and prospects.

- DXC’s Virtual Desktop and Applications Services (VDA) provide virtualized Windows/Linux applications and desktops from the security of a data center or from the cloud.

- Getronics provides virtual desktop services with a focus on delivery to mobile clients. The portfolio includes hosting from a private cloud and delivery from the client’s data centers.

- HCL gains much market traction for its cloud-based future workplace service propositions named LibreDesk and LibreSpace.

- IBM has a highly standardized virtual desktop services proposition optimized for delivery to mobile devices. That makes the provider a strong contender for U.K. clients of all sizes.

- Wipro is a very established player for virtual desktop services combining a public cloud service with a full business-grade services support to its U.K.-based clients.
WORKPLACE AS A SERVICE

Definition

Workplace-as-a-Service (WaaS) is a highly standardised and productized offering delivered through the public cloud and provided on a pay-as-you-go or pay-per-user basis. The cloud-based offerings give users cloud-based “workspaces” as a single interface to access their data and applications. Typically, the offering includes a mobile version, a virtual assistant and a service desk function.

Digital Workplace of the Future

Workplace as a Service

Source: ISG Research 2018
**WORKPLACE AS A SERVICE**

**Observations**

**The WaaS market is established and expanding in the U.K.:** Leading providers have promoted fully standardized workspace packages over the public internet for some time, and with effect. Organizations in sectors as varied as financial services, marketing, education, manufacturing and retail have implemented WaaS for some of their staff in the U.K. WaaS implementations reduce the capital expenditure and increase the flexibility for managing desktops. Broadband availability coupled with the maturity of homeworking have added to the appeal in the U.K. The number of providers offering WaaS has increased over the last 12 months. Their cloud-based offerings are billed by a pay-as-you-go or pay-per-user model. The former refers to usage-related payment with the possibility to reduce or increase the number of seats ad hoc. The latter refers to payment models based on the number of users, as opposed to charging for each device in use.

More productized WaaS offerings are coming onto the market: Thus far, only a few providers offer full-fledged WaaS. ISG research indicates that several providers of virtual desktop services have high ambitions and are preparing to enter this market.

- **AWS** is an early pioneer in highly standardized WaaS for enterprise clients and has just invested significantly in building up a local data center infrastructure to support these services in the U.K.

- **TechQuarters** provides desktops as a service through a reliable system hosted on Microsoft Azure, using Citrix and RDS from Windows-based laptops or PCs.

- **Google** provides a highly standardized and highly price competitive WaaS, claiming to have the lowest price in the industry.

- **Dimension Data** has gained the position of a Rising Star for its 3D Workplace. The offering consists of an easily set up, flexible and scalable WaaS.
**UNIFIED ENDPOINT MANAGEMENT SOLUTIONS**

**Definition**

Unified endpoint management (UEM) solutions are converging to encompass device and application distribution management for smartphones, tablets, laptops and PCs. Centralized solutions include the following features, functions and services:

- Integration of key ITIL processes across all physical, virtual, mobile and cloud-based workplaces. This includes incident management, problem management, change management, request fulfillment, service asset and configuration management, service level management, service portfolio management and IT service catalog management.

- Self-provisioning with an integrated approval process and internal enterprise app store.

- Provisioning of essential mobile device management (MDM) features.
Observations

**Regional consistency:** The U.K. trends for UEM are very much the same as in other European markets.

**Device management has evolved beyond mobility:** UEM is combining previously separate functionalities of mobile device management (MDM) and desktop management. That translates into securing and controlling desktop computers, laptops, smartphones and tablets in a connected, cohesive manner from a single console.

**UEM is in high demand:** UEM typically relies on the MDM application program interfaces (APIs) in desktop and mobile operating systems. The demand for centralized solutions for all devices, such as smartphones, tablets, PCs, laptops (including Macs), is on a steep rise. Many client organizations also consider the inclusion of smart IoT devices. The ability to manage devices remotely is critical.

**One-stop shop catering for enterprise IT, mobility expectations and end-user requirements:** Because of enterprise IT’s requirement to manage all devices from one solution and end-users’ expectation for self-service, a UEM solution is expected to provide end-user self-service, device lifecycle management and endpoint mobility management.

**UEM deploys machine-learning and AI:** Technologies like artificial intelligence and machine-learning are applied to monitor traffic at each endpoint. That also allows threat recognition in the device ecosystem. Only those issues not resolved automatically are escalated to human administrators.
UNIFIED ENDPOINT MANAGEMENT SOLUTIONS

Observations

- **IBM** provides a cognitive UEM solution based on a combination of its mobile offering SaaS 360 and its AI engine Watson.

- **Ivanti** provides a strong and integrated unified endpoint solution portfolio combining a strong heritage in mobile security with desktop management.

- **Microsoft** is starting to seriously disrupt this market, providing digital workspace management across multiple devices, including Android and iOS devices via Intune and an increasingly sophisticated feature set.

- **MobileIron** built its leadership position on the back of the very strong market-standing of its mobile device and security solutions. These are now broadened to devices that run Windows 10.

- **VMware** has become a leader by leveraging its strength as a leading virtualization vendor, one of the best-established global mobility suites and a consultative approach based on white papers and studies.

- **Matrix 42** is identified as a Rising Star. Matrix 42 provides UEM by consolidating the Silverback mobile cloud solution, which it acquired in 2016, with its core endpoint and asset management administration suite.
**ENTERPRISE MOBILITY MANAGEMENT SOLUTIONS**

**Definition**

Enterprise mobility management (EMM) solutions combine mobile device management, mobile application management and mobile information management, providing a management platform for operating and using smartphones, tablets and mobile applications.
SOCIAL ENTERPRISE NETWORKING

Observations

Companies move from managing devices to managing mobile content: In a few years, enterprise content will be seamlessly available on numerous devices. Companies will manage enterprise content distribution, and employees will pick their favorite devices from the consumer market. Leading providers will offer prepackaged and role-based workplace services with numerous modular components.

Personal data protection becomes a primary concern in Europe: A comprehensive framework for data protection legislation has just become binding for companies of any size in Europe. It forces companies to treat customer data with the utmost care. This fundamental shift is shaping the way companies have to think about mobile distribution of business applications and data.

Devices must be managed until all content can be secured centrally: Despite good technology advances for securely isolating enterprise content through containers, it will take a few years before companies can cease to manage end-user devices. Defense against attacks on devices, such as geofencing spoofs, still requires device management capabilities to address overall mobile content and device security. But the weight is switching to content. With BYOD well established in the U.K., it will soon be possible to concentrate on securing content, allowing access to authorized users with any device.

Device management is incomplete without looking at the lifecycle: EMM must encompass more than steering devices through MDM, or content through EMM. Device purchase, configuration, break-fix and retirement are vital components of a full-service package. Customers are increasingly asking for device lifecycle management.
Observations

The future mobile workspace enhances collaboration and automation: The workplace will profoundly change in the coming years. One of the drivers for this change is desire for true collaboration across boundaries. In addition, there is a fundamental technology shift finally occurring. Three key technologies likely to have a significant impact on the future workspace in the next five years are: virtual reality (VR), augmented reality (AR) and artificial intelligence (AI).

- **BlackBerry** has regained a stronger market position after launching a device-independent EMM solution suite based on the acquisition of Good Technology. Innovation includes integrating IoT devices.

- **Citrix** XenMobile was created on the back of the Zenprise acquisition in 2013. It has one of the strongest feature sets in the market and an established client base.

- **IBM** built its EMM portfolio around the MaaS360 mobile security offering and is now integrating the AI capabilities of Watson. The offering is cloud-based and quickly deployable.

- **Microsoft** is offering its own EMM proposition, Intune, bundled into Windows. The software giant could become a seriously disrupting force for EMM solutions.

- **MobileIron** has established itself as one of the leaders and is now by far the largest independent pure-play EMM solution provider worldwide.

- **VMware** is a clear leader for EMM solutions with a strong portfolio, very high market awareness and a strong motivation to innovate.
Methodology
The research study “ISG Provider Lens™ 2019 – Digital Workplace of the Future” analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Define the “Digital Workplace of the Future” market

2. Conduct questionnaire-based surveys with service providers/vendor across all trend topics

3. Hold 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. Analyze and evaluate services and service documentation based on the facts and figures received from providers and other sources.

6. Evaluate based on the following key 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

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Mr. Dransfeld is a thought leader regularly publishing on trends related to the mobile enterprise, the digital workspace and IoT markets. As an analyst, ICT strategist and go-to market expert he has developed deep insights into portfolio development and changing customer requirements. Through his experience as analyst and marketing strategist, he is in a strong position to support the definition and execution of go-to-market strategies for ICT services.

Henning is a known expert in the evaluation of supplier strategies, competitive landscapes and differentiation with over 20 years of experience in the ICT sector. In addition, Henning advises providers on key messages in marketing and sales communications. In the context of in-depth market analyses on the German supply side through vendor benchmarks, he derives sustainable strategies for the digital transformation. Henning is an experienced trilingual speaker on international conferences.

Henning holds a Ph.D. from the University of Wales, Swansea College in management science and wrote his theses on “Interactive TV and its potential for retailing in the luxury car industry”; he also holds a Diplôme d’Etudes Superieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.
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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 75 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; technology 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 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.