Digital Workplace of the Future — Services & Solutions

Managed Mobility Services

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: UNISYS

October 2020
ISG Provider Lens™ Quadrant Report | October 2020

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 October 2020, 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 and the co-author is Rahul Basu. The editor is Ambrosia Sabrina and Stephen Lawson. The research analyst is Rahul Basu and the data analyst Bhanwar Chauhan. The enterprise context and global overview analyst is Rahul Basu. The Quality and Consistency Advisor is Dr. Linda Delbridge.
EXECUTIVE SUMMARY

Pandemic-Driven Accelerated Workplace Technology Adoption by U.S. Clients

The COVID-19 pandemic has affected and challenged U.S. clients in multiple ways. The most apparent, immediate and explicit impact may be that it has suddenly forced many of them to accept and facilitate remote working. Enterprises across the country were making progress in the journey toward enabling a digital workplace, and they were all at different stages of maturity in terms of enabling automation and focusing on managing the employee experience. The pandemic has accelerated these moves, and clients are undertaking many digital workplace transformation initiatives that otherwise would have taken many years.

From the workplace technologies side, this is an exciting and challenging time. Changing working models and modern remote work require technology to further improve and innovate like never before, and at a high pace. For service providers implementing and managing such technologies, the times couldn’t be more challenging, as they need to accelerate their workplace transformation initiatives, customize the technologies to unique business needs and maintain focus on employee engagement.

While there has been a lot of focus on managing the current remote working challenges, U.S. clients are also looking up to their technology and service partners to ensure that solutions and services take into account the future “new normal” way of working. It is now generally accepted that we may never go back to the old ways of working: A high number of clients are considering allowing more than 45 percent of their workforce to permanently work from home. This would require different technology outlooks for workers on campus, in offices and at home.

This year’s ISG Provider Lens report for Digital Workplace of the Future compares service providers and vendors for their solutions and services during these difficult times and positions them based on their current portfolios and their outlooks on the future. This report compares vendors and service providers across different quadrants that represent key workplace areas where COVID-19 has led to significant changes and development.

Digital Workplace Consulting:

- ISG has been comparing service providers that offer workplace advisory and consulting around digital transformation for many years now, even though workplace consulting was usually seen as a part of managed and implementation services and not a separate offering. The pandemic has ensured that consulting is always an integral part of workplace transformation and that clients always need proper guidance before attempting any technology adoption or business process change that could affect employee experience. Clients are looking for service partners that can provide consulting catered to their business processes, industry and changing customer and employee expectations in the remote working world.
Executive Summary

Technology adoption has become a key element in the time of COVID-19. Previously, clients would adopt new technologies at their own pace. The pandemic and the resulting remote work culture have elevated the importance of such initiatives, and clients need to make sure they implement the proper work culture and associated change management to make the best use of technologies for business outcomes.

Perhaps for the first time, workplace technology transformation initiatives are being seen as closely tied to visible business benefits. Many workplace service providers and global system integrators were developing their offerings to be able to measure employee experience with workplace technologies and quantify their abilities to influence the experience. The resulting key performance indicators (KPIs) would translate into managed services contracts commonly known as experience level agreements (XLAs). The XLA approach requires significant focus on prior consulting to determine key parameters that need to be part of the XLAs.

Managed Workplace Services

Service providers have been working with clients to help them adopt automated solutions to reduce incident tickets through technologies such as artificial intelligence (AI) and machine learning (ML). However, the level of adoption and implementation was not uniform throughout their client base. Because of the pandemic, end users cannot go to a tech café or support center and get in-person support. Neither can there be too much reliance on phone-based support, given high call volume from large users as everyone is working from home. The use of the latest technologies ensures employees perform self-help and tickets get automatically resolved so there is no interruption for the end user.

There are many KPIs that may be used in XLA-based contracts, ranging from enabling self-help to measuring users’ digital dexterity. In the current pandemic times, providers can extract the most important and most relevant KPIs for their clients based on their business and industry requirements. Client IT organizations are also beginning to understand the XLAs and are ready to implement some.

Many service providers have developed miniaturized versions of their comprehensive service offerings to help clients quickly adopt them to enable remote work. Service providers have been able to offer quick customization of their capabilities to rapidly enable and manage remote working.

There has been a strong focus on Microsoft 365 solutions that include Microsoft’s widely used office productivity suite, Windows 10 operating system and unified endpoint management solution. As it is easier to quickly integrate and upgrade within an existing Microsoft environment, multiple service providers have developed similar offerings for managed services around these technologies.
Managed Mobility Services

- With the pandemic, clients in the U.S. had to equip their large workforces to perform with minimal or no disruption. This included both devices and apps required by the end users. In addition to traditional computing devices such as PCs and laptops, clients also require managing multiple smartphones they issue to employees. In many cases where clients had logistical issues in sending devices to employees’ homes, they had to let employees work on their own personal devices and needed to ensure that access to apps and data was secured and managed without compromising the user experience.

- There has been a strong demand for and focus on the device-as-a-service model, where the service provider manages the entire device lifecycle. This involves providing users with devices at their own location and letting them enroll the devices in the enterprise device management system, which could be an enterprise mobility or a unified endpoint management solution. This model manages the entire device lifecycle from procurement to retirement and provides an opex-based operating model that is quite flexible for clients.

- After many years of anticipation, 2020 finally proved to be “the year of virtual desktop infrastructure (VDI)” where clients are adopting virtualized desktops at scale to enable their mobile and remote workforces. There has been less focus on on-premise VDI and more on the cloud-hosted virtual desktop solution also known as desktop-as-a-service (DaaS) (Not to be confused with device-as-a-service.). Microsoft's Windows Virtual Desktop (WVD), released late last year, proved to be the most sought-after solution by clients for enabling this technology.

- Predictive analytics and device/app health monitoring solutions are in high demand, as they can ensure end users don’t face challenges in remote working and there is no dip in employee experience. Device management usually forms a key aspect of XLA KPIs.

Unified Endpoint Management

- While UEM solutions are designed for managing all kinds of devices that employees of an enterprise use through a single pane of glass, we have seen U.S. clients mostly interested in co-management functionality, where they can manage both legacy client management tools (CMTs) such as Microsoft Endpoint Configuration Manager (earlier known as Microsoft System Configuration Manager or MSCCM) and modern mobility management tools. However, with COVID-19, there has been an accelerated shift towards modern management.

- UEM solutions are highly focused on secure access and increasing mobile security capabilities by implementing related technologies such as zero-trust mobile threat defense (MTD). As employees work from home, the threat of security breaches is paramount at both the data and the device level.

- UEM solutions are also extending their security capabilities at the application development level by providing protection for software development kits (SDKs). The solutions also provide app-wrapping and containerization to ensure workplace apps and data are protected regardless what device or network employees use.
There has been some increased focus on the use of AI and ML technologies to enhance threat detection and incident prevention. AI can be used to assess user behavior to preempt a breach and ensure safety.

**Enterprise Collaboration Solutions**

- Clients in the U.S. distinguish enterprise collaboration from the traditional unified communication and collaboration (UCC) space that also includes solutions that provide meeting and conferencing capabilities. These solutions focus on enabling collaboration around teams and content collaboration can also provide task and project management capabilities.

- In the pandemic times, clients initially preferred to get the most out of their existing productivity suite solutions, which usually include email, productivity, meeting, file storage, intranet and chat apps to provide collaboration. While this worked for some, others had to invest in another solution for the collaboration they needed. Among those who didn’t invest in a third-party solution, Microsoft Teams emerged as the single most widely used solution.

- Clients are looking for collaboration solutions that can be adopted quickly, require less training, ensure a high level of engagement and provide visible business benefits. Many popular and widely used solutions may fail to excel in all these areas. Though clients understand that it is not just the tool but the underlying company culture that enables collaboration, unfortunately, the pandemic has reduced the scope to the tool.

- Collaboration solutions have come to the forefront of the workplace technology ecosystem and can determine the effectiveness of remote working technology. Successful clients ensure optimal utilization of these solutions and innovative approaches to enhance user productivity and digital dexterity.

**Meeting And Conferencing Solutions**

- During the COVID-19 pandemic, enterprises have not been able to host physical meetings and travel for conferences. Instead, they have relied on videoconferencing software solutions that saved them crucial time and money while enhancing convenience for end users. For employees working remotely from the comfort of their homes, the adoption of video as a mode of communication increased significantly, and major videoconferencing software vendors reported spikes in their daily and monthly active users.

- Collaboration solution vendors have realized their interdependency and have started to focus on interoperability to enhance ease of use. This trend has been prevalent across both hardware and software solution vendors. Users have also started to prefer integrated collaboration tools to enhance productivity and reduce going back and forth from one software to another in an environment of multiple devices and software. Productivity can be boosted by combining a consistent user interface with interoperability of various platforms.
Deep integrations of videoconferencing solutions with productivity suites and CRM systems like Office 365, G Suite, Slack, Salesforce, Zendesk and ServiceNow have become a must to enable a seamless user experience. These vendors have started to support multiple integrations in addition to open APIs that allow enterprises and developers to customize their environment.

As remote working has soared due to the pandemic, the use of meeting and conferencing solutions has also skyrocketed, and this, in turn, has attracted cybercriminals to these platforms. Consequently, the focus on security has become stronger in the videoconferencing market space. Users were trained in locking down meetings to enhance security, and vendors now need to balance security with ease of use.

Innovation among videoconferencing vendors has accelerated and the focus on implementation of automation, smarter user experience with AI to eliminate mundane tasks and ease meeting fatigue has increased. Many software vendors have started to develop and implement speech-to-text, automated speech recognition, natural language processing, real-time transcription, sentiment analysis and facial recognition capabilities. The inclusion of 4K video meetings with enhanced audio capabilities has also become one of the focal points for many vendors.
Introduction

Definition

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

The digital workplace technology ecosystem encompasses software vendors offering solutions that provide secure device management, continuous access to apps and data over any device, next-generation collaboration and productivity. It also includes system integrators and service providers that act as partners for enterprises in their workplace transformation journey — helping to assess their workplace environment, suggesting best approaches, managing the entire technical environment and providing support to end users by leveraging the latest and emerging technologies.
As global enterprises grapple with the COVID-19 pandemic, they need to enable remote working at scale for a majority of their workforce. This requires employees to have seamless access to their workplace apps through the device they carry (personal or company-owned). It also requires an overarching technical environment that ensures connectivity and collaboration among globally dispersed employees anytime and anywhere. Also, enterprises must ensure that corporate data and applications remain secure and protected from cyberattacks. This requires significant investments in secure tools for remote working, along with meeting and collaboration solutions to ensure employee productivity.

**Definition (cont.)**

**Scope of the Study**

As part of this quadrant study, ISG is introducing the following seven quadrants on digital workplace services and solutions.

**Digital Workplace Consulting Services:** Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture and creating the roadmap for validating the business case around transformation. Consulting and workplace assessment are essential parts of the digital workplace offering and are offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the 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.

**Managed Workplace Services - Large Accounts:** Managed digital workplace services encompass all managed services related to the digital workplace. An IT service desk with level 1 / 2 support, in-person technical support and user self-help services are the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services and managed virtual desktop services.
Definition (cont.)

**Managed Mobility Services:** With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobility services include support for mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. They also include larger aspects of enterprise mobility management, such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

**Unified Endpoint Management Solutions:** Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets, laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a unified approach to managing desktops, PCs and mobile and smart devices through a single console. A UEM solution should support both on-premise and cloud deployments, remotely manage and configure devices and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.

**Meeting and Conferencing Solutions:**
Meeting and conferencing solutions provide calling, conferencing, messaging and audio and video meetings. Organizations use meeting solutions to collaborate for both informal and formal meetings such as external presentations, training sessions, webinars and town hall meetings. Some videoconferencing systems provide integration of marketing automation and customer relationship management (CRM) software to synchronize essential business data into specific conferences, allowing for seamless follow-up communications and updates for contact accounts. The meeting solutions should follow protocols to protect information online through encryption and compliance to internationally accepted security and privacy standards.

**Enterprise Collaboration Solutions:**
These are the new-age collaboration solutions that provide team-based collaboration that can extend to task management, project management, modern intranet, enterprise social networking and meeting solutions. They may or may not offer their own meeting and conferencing capabilities but can integrate with other solutions. The key focus area of these solutions are around enhancing user digital dexterity, digital adroitness, communication and collaboration, task and project management and productivity solutions.
Provider Classifications

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

**Leader**

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

**Product Challenger**

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

**Market Challenger**

“Market Challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have 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.
Introduction

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have 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 to 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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.
## Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 1 of 6

### Key Areas:
- **Digital Workplace Consulting Services**
- **Managed Workplace Services - Large Accounts**
- **Managed Mobility Services**
- **Managed Workplace and Mobility Services - Midmarket**
- **Enterprise Collaboration Solutions**
- **Unified Endpoint Management**
- **Meeting and Conferencing Solutions**

### Companies and Ratings:

<table>
<thead>
<tr>
<th>Company</th>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>42Gears</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
</tr>
<tr>
<td>8x8</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
</tr>
<tr>
<td>Accenture</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Adobe</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Alcatel-Lucent</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
</tr>
<tr>
<td>Atos</td>
<td>Leader</td>
<td>Leader</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Avaya</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>Baramundi</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
</tr>
<tr>
<td>Bell Techlogix</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Birlasoft</td>
<td>Not in</td>
<td>Contender</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>BlackBerry</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>领导人</td>
<td>不在</td>
</tr>
<tr>
<td>BlueJeans</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>领导</td>
</tr>
<tr>
<td>CA</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
<td>不在</td>
</tr>
<tr>
<td>Capgemini</td>
<td>Leader</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>不在</td>
</tr>
<tr>
<td>Cisco</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>领导</td>
<td>不在</td>
</tr>
</tbody>
</table>
## Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 2 of 6

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citrix</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Coforge</td>
<td>Not in</td>
<td>Contender</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Cognizant</td>
<td>Rising Star</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Compucom</td>
<td>Contender</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>CSS Corp</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Digital Workplace Group</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>DMI</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>DXC</td>
<td>Market Challenger</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>ezTalks</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Flock</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>Fujitsu</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Google</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
</tr>
<tr>
<td>HCL</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Hexaware</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Rising Star</td>
<td>Not in</td>
</tr>
<tr>
<td>Honeywell</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
</tbody>
</table>

© 2020 Information Services Group, Inc. All Rights Reserved.
## Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 3 of 6

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
</tr>
<tr>
<td>Igloo</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Infinite</td>
<td>Contender</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Infosys</td>
<td>Leader</td>
<td>Rising Star</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>ITC Infotech</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Ivanti</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
</tr>
<tr>
<td>Jamf</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Jive</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Kaspersky</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>Lifesize</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>LogMeIn</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
</tr>
<tr>
<td>Long View</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>LoopUp</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>LTI</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Rising Star</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Matrix42</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
</tbody>
</table>
### Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 4 of 6

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mattermost</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Microland</td>
<td>Contender</td>
<td>Contender</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
<td>Leader</td>
</tr>
<tr>
<td>Miro</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>MobileIron</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Mphasis</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>NTT DATA</td>
<td>Leader</td>
<td>Leader</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Pexip</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>PGI</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>Pivot</td>
<td>Contender</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Poll Everywhere</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>Pomeroy</td>
<td>Market Challenger</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Quest KACE</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
</tr>
<tr>
<td>RingCentral</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
<tr>
<td>Rocket.Chat</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Product Challenger</td>
</tr>
</tbody>
</table>

© 2020 Information Services Group, Inc. All Rights Reserved.
## Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 5 of 6

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>SAP</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Slack</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Smarp</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Snow Software</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Softtek</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Sophos</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>SOTI</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>StarLeaf</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Stefanini</td>
<td>Contender</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Tangoe</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>TCS</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>TeamViewer</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Tech Mahindra</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>TEK Systems</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
</tbody>
</table>
**Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 6 of 6**

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Managed Workplace Services - Large Accounts</th>
<th>Managed Mobility Services</th>
<th>Managed Workplace and Mobility Services - Midmarket</th>
<th>Enterprise Collaboration Solutions</th>
<th>Unified Endpoint Management</th>
<th>Meeting and Conferencing Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIBCO</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>UberConference</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
</tr>
<tr>
<td>Unisys</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>UST Global</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Product Challenger</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Visionet</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
</tr>
<tr>
<td>VMware</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
</tr>
<tr>
<td>Vox Mobile</td>
<td>Not in</td>
<td>Not in</td>
<td>Market Challenger</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Wipro</td>
<td>Leader</td>
<td>Leader</td>
<td>Leader</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Wire</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
</tr>
<tr>
<td>Workplace from Facebook</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Leader</td>
<td>Not in</td>
</tr>
<tr>
<td>Yash Technologies</td>
<td>Contender</td>
<td>Contender</td>
<td>Not in</td>
<td>Contender</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Zensar</td>
<td>Product Challenger</td>
<td>Leader</td>
<td>Rising Star</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Zoho</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Rising Star</td>
<td>Not in</td>
<td>Rising Star</td>
</tr>
<tr>
<td>Zoom</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Rising Star</td>
<td>Not in</td>
<td>Rising Star</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Rising Star</td>
</tr>
</tbody>
</table>

© 2020 Information Services Group, Inc. All Rights Reserved.
Digital Workplace of the Future — Services & Solutions Quadrants
ENTERPRISE CONTEXT

Managed Mobility Services, U.S.

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

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

Enterprises are continuing to expand the scope and geographic requirements for managed mobility services across the globe due to the COVID-19 pandemic. The basic requirement from enterprise clients is to ensure that mobile devices are operationally effective and managed at a competitive price. Some of the major challenges faced by enterprises involved equipping end users with the right devices embedded with the right technology while tackling the logistical issues in a global pandemic. The adoption of bring-your-own-device (BYOD) has increased among enterprises, which has led to the rise of anytime, anywhere, any device access for end users. Enterprises are looking to enhance user experience via seamless integration of mobility services.

Service providers are helping enterprise clients by offering the device-as-a-service model for managing the entire device life cycle with a unified endpoint management solution. Mobile application management with an emphasis on device security, also offered by service providers, has gained traction among enterprises. SaaS deployments and the adoption of cloud services for mobile devices have increased among enterprises.

Enterprises in the U.S. have started adopting virtual desktop infrastructure at scale and are focusing on device-health monitoring solutions to provide a consistent employee experience to remote workers.

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

Digital transformation professionals should read this report to understand how providers of managed mobility 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 mobility service providers in the U.S.

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

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

Definition

With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobility services include support for mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. It also covers larger aspects of enterprise mobility management, such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
Eligibility Criteria

- Support a large number of mobile phones, smartphones and smart devices (number will vary per country) in the respective countries with at least 25 percent of them managed outside the home region.
- Offer device sourcing and logistics, managed unified endpoint management (UEM), financial management, device security and mobility program management.
- Provide implementation and support for enterprise mobility, BYOD and mobility expense and asset management.
- Manage complete device lifecycle management, device-as-a-service (hardware-as-a-service, personal computer-as-a-service [PCaaS]).
- Develop industry-specific plug-and-play mobility solutions.
- Offer support for single sign-on (SSO), secure app access and smart devices.

Observations

- Managed mobility became a key ask for U.S. clients with the coming of the pandemic. Clients wanted their remote working employees to be quickly equipped with devices and apps wherever they were working. This resulted in unprecedented demand for both kinds of DaaS services: device-as-a-service and desktop-as-a-service. There was also demand for enabling mobile application management or a secure app access environment to enable BYOD where clients were not able to send traditional computing devices to users’ home.
- Unified endpoint management support became key for clients. While some clients were looking for a single pane of management for both mobile and computing devices, some were interested in co-management. The pandemic resulted in strong demand for secured app access and UEM support.
- HCL leads this market with its FlexSpace DaaS offering that is tied to user experience measurement. Acquisitions of BigFix and a stronger partner system further strengthen its position.
- Wipro offers its M2TA framework to determine the best way to mobilize business apps, and Unisys provides a dedicated focus on UEM and security through its StealthTM product.
- IBM leads with the scale of devices it manages and integration of Watson-based device health analytics capability. Accenture leads with its strong partner ecosystem and DaaS capability.
Cognizant has a dedicated device management component under its WorkNEXT offering with dedicated IPs, and has strong experience with U.S. clients in managing mobile enterprise ecosystems.

TCS has dedicated offerings with virtualized desktop services along with its Mobitio solution, which can be customized per client industry and needs.

DXC is a leader because of the scale of devices it manages, along with its strongly well-known DaaS services and industrialized mobility solutions.

Zensar has been identified as a Rising Star in this category because of its AI and analytics-powered managed mobility services, along with comprehensive solutions with dedicated IPs.
Accenture's managed mobility services portfolio covers the entire spectrum of mobility strategy in its implementation and support services. It provides mobility governance and solution design services along with services to source, procure and deploy devices. The company manages 847,993 laptops, 23,686 smartphones and 15,676 IoT devices in the U.S., an increase of 5–10 percent from last year.

**Strengths**

**Partnership ecosystem:** Accenture partners with key enterprise mobility management (EMM) vendors such as VMware, MobileIron, XenMobile, SOTI and Microsoft, along with identity and access management (IAM) vendors such as Okta, ForgeRock, SailPoint and Oracle. It leverages its strong partnership ecosystem for cross-OS management and BYOD solutions. Accenture’s Mobility Capability Framework (MCF) delivers technical and functional capabilities for enterprise mobility. It also assesses and measures mobile enterprise effectiveness by providing analytics for mobility usage and service reporting.

**Device-as-a-service:** Accenture offers device-as-a-service (DaaS) capabilities in partnership with HP, Dell and Lenovo. It also partners with Apple, ServiceNow, Intel and Nexthink to provide value-added offerings on top of DaaS. It integrates the device lifecycle services with its managed service desk, tech café and digital locker services. It has strong client references in the U.S. with DaaS for diverse computing devices such as HP laptops and Macs which are managed through Jamf Pro.

**UEM-focused services:** Accenture has recently enhanced its managed mobility services with a focus on providing UEM. This cloud-based management offering leverages Intune for mobile device management (MDM) and Windows Autopilot to enable cloud-based user enrollment.

Even though Accenture has developed strong capabilities in the Intune-enabled UEM offering, it still has to show more examples of enabling it for clients, especially around co-management. The company should also extend its capabilities to manage more smartphones, in addition to computing devices such as laptops, as compared with the competition.
Cognizant’s WorkNEXT™ service portfolio offers unified device services that cover managed mobility. The company manages 804,500 laptops, 678,100 smartphones and 229,300 IoT devices globally. It offers services around UEM and the DaaS model, providing clients an OPEX model with zero-touch provisioning capabilities.

Strengths

- **Strong partnership ecosystem:** Cognizant partners with leading EMM vendors such as VMware, Citrix, Microsoft, MobileIron, Google and IBM, and with IAM vendors such as Ping Identity. It partners with HP, Lenovo and Dell for DaaS and offers strong SLAs for this, covering asset and complete device lifecycle management.

- **IPs for device management:** Cognizant has its own set of IPs for diverse service delivery in device management and mobility management. It offers the WorkNEXT™ DigiHub for enterprise web portal, MAT for accelerated Windows 10 and Office 365 migration, and APA for its application packaging automation framework.

- **Strong implementation experience with U.S. clients:** Cognizant has strong case examples with clients from the manufacturing and life sciences industries for its unified device management services. The company has helped clients in the DaaS model with Windows 10 devices, leveraging Autopilot and managing Windows, Android and Mac-based systems.

Caution

Cognizant is focused on UEM and co-management capabilities. It should showcase more examples of managing mobile devices and smartphones in addition to traditional computing devices such as PCs and laptops.

Cognizant reports a small increment in the total number of devices managed compared to other leaders in this category.
DXC TECHNOLOGY

Overview

DXC offers modern device management as part of its MyWorkStyle™ offering that covers virtualized access to devices, device management, DaaS and software licensing management services. It manages 2 million laptops and 4 million smartphones in North America. Its mobility services include mobile consulting, app-building services and EMM services, including endpoint device and application management, risk mitigation and secured access to data and applications.

Strengths

**Modern management and UEM:** DXC offers modern management capabilities in partnership with Microsoft, VMware and Google to provide a unified user experience. Its UEM capability enables unified management of desktops, mobile devices and printers. This includes device provisioning, configuration management, Windows 10 migration and application lifecycle and licensing.

**DaaS:** DXC offers device lifecycle services that allow clients to own, lease, use and refresh devices. Through partnerships with leading OEMs, it helps clients in device procurement, managed services and device disposal. It can provide services to migrate thick clients to new operating systems and manage virtual desktops on thin clients. DXC charges clients on a per-device, per-month basis for this service.

**Workplace industry solutions:** DXC offers industry solutions to support mixed-reality-based devices such as HoloLens. It also provides services to support frontline workers via its mobile app. Its specific industry solutions for the aerospace, retail and healthcare verticals allow for domain-specific device management services.

Caution

DXC reports only a slight increase in the number of devices managed compared to other leaders in this quadrant. This could be due to the growing uncertainty of its workplace and mobility business.

DXC should showcase more examples of its UEM capabilities to support co-management and single-pane management for both smartphones and computing devices such as laptops, particularly in the U.S. market.

2020 ISG Provider Lens™ Leader

DXC’s massive scale and strong device management capability position it as a strong leader in the managed mobility space.
HCL offers managed mobility services as a key component of its digital workplace services portfolio. It manages 1.3 million laptops, 676,194 smartphones, and 213,746 IoT devices in the U.S., a 30 percent increase from last year. The company's portfolio covers UEM, identity security, application management and device lifecycle services.

**Strengths**

**FlexSpace:** HCL offers DaaS through its FlexSpace offering, providing complete device lifecycle management with predictable per-seat, per-month pricing. It provides persona-specific budget planning, assigning the most relevant devices based on an employee's persona. It also enables persona-aligned deployment and provisioning, along with round-the-clock support through its cognitive AI-enabled services, predictive analytics and proactive monitoring.

**OptiBOT™ and BigFix:** After acquiring IBM BigFix, HCL is leveraging it to manage more than 100 million endpoints globally. It has improved device support through the OptiBOT™ solution and BigFix platform, developing 400 new scripts to add multi-OS support and integrated LUCY and AIOps support.

**Partnership ecosystem:** HCL partners with key vendors in the EMM, IAM and UEM areas to bolster its managed mobility services. It partners with vendors such as IBM, Microsoft, VMware, Google, Citrix, Symantec and McAfee to provide a robust and vendor neutral ecosystem. It also partners with Dell, Lenovo, HP, Apple, Intel and Google (for Chromebooks) for the DaaS offering.

**Caution**

Though HCL reports a significant increase in the number of devices managed in the U.S. compared to last year, its corresponding revenue from managed mobility services has not increased at the same rate as other leaders in this space. HCL can benefit by developing industry-specific mobility solutions that address operational aspects in addition to IT.
IBM

Overview

IBM offers managed mobility services as part of its larger digital workplace services portfolio. The company manages 8.3 million devices globally and provides managed mobility services in on-premise, hybrid and public cloud environments.

IBM announced in early October it was spinning off its managed infrastructure services as a new company. Digital workplace services will be part of the new company.

Strengths

Device health with Watson®: This offering provides cognitive analytics that use new and existing data from within the organization to provide a health score for each device. The score is used to predict device refresh requirements, eliminating the need for time-based replacement (and potential failures) and allowing a shift to health-based refreshes. IT managers can track the health of all devices in the organization from a single dashboard to understand when and why devices underperform. The dashboard provides instant visibility of device status, code device information, device health history and device locations.

IoT device lifecycle management: IBM extends mobility management for edge and smart devices. It provides device selection and prototyping services along with device procurement, logistics and deployment. It provides continuous remote monitoring and device support maintenance services. It supports wired and wireless connectivity networks and gateways for IoT devices across multiple industries.

Vendor-agnostic approach: IBM supports multiple UEM solutions and offers its own MaaS360 UEM solution. It also supports VMware AirWatch, Citrix XenMobile, Microsoft Intune, Jamf Pro and MobileIron mobility environments. The firm partners with vendors such as Google, BlackBerry, Lakeside, Aternity, Tangoe, Samsung, Dell, Nokia and Lenovo for mobility services.

Caution

IBM does not report much change in the number of devices managed compared to last year. Though it still manages a large number of devices, other leaders in this space have reported significant increases in the U.S. market.

IBM targets the mid-market with its DaaS offering but has not been able to report significant client engagements within this market segment.

2020 ISG Provider Lens™ Leader

IBM manages a significant number of devices and has years of experience in this space. Its strong capabilities in device analytics using Watson® and a strong partnership ecosystem position it as a leader in this quadrant.
TCS

Overview

TCS’ managed mobility services are part of its digital workplace services and cover the entire spectrum of mobility consulting and mobile and application management services. It manages 5.5 million devices, more than 3 million laptops and 2 million smartphones globally.

Strengths

Comprehensive portfolio: TCS’ managed mobility services cover complete device lifecycle management, application and security management and mobility consulting services. Its innovation centers provide EMM offerings and accelerators to migrate mobile devices from diverse MDM tools. The company also provides strong Windows Virtual Desktop services, unified collaboration and IAM services.

Mobitio™ and ELF: TCS Mobitio mobile app is the gateway for end users to reach IT services like service desk and other end user computing requirements. TCS also provides proactive device health monitoring and unified endpoint compliance-monitoring capabilities.

Strong partnerships: TCS partners with Microsoft, VMware, Citrix, HP, Dell, Lenovo, Jigsaw 24, SOTI and MobileIron for MDM/EMM services, IAM, DaaS, OEM financing and mobility consulting services.

Caution

Although TCS offers certain industrialized solutions for a few industries, it needs to showcase more examples of ready-to-use industrialized mobility solutions for diverse sectors as other leaders in this space have done.

TCS should present more use cases of managing UEM and co-management scenarios, for both mobile and computing devices.

2020 ISG Provider Lens™ Leader

Mobitio offering integrated with EMM platforms and strong credentials in managing a high number of devices enable TCS strengthen its position in this space
Unisys provides strong capabilities in UEM, security and future-oriented managed mobility services, making it a strong leader in this space.

Unisys offers strong capabilities around UEM, co-management and mobile device support, but it has limited examples of these to showcase in the U.S. when compared to other regions. It is still known more for its managed workplace support services than for mobility management.

Unisys has strong credentials in providing industrialized mobility solutions. It should showcase more examples of implementation in the U.S. with these solutions.

**Overview**

Unisys provides managed mobility services as part of its overall digital workplace services and the UEM offering that the company tracks separately. It provides UEM services to 35 clients and managed mobility services to manage 2,020,145 laptops and 282,028 mobile devices or smartphones in the U.S.

**Strengths**

**UEM service:** Unisys UEM services cover key mobility services such as MDM, mobile application management (MAM), mobile content management (MCM), mobile lifecycle management (MLM) and other support services along with mobile security. The company provides AI-enabled provisioning and deprovisioning processes related to device and app management.

**Security-focused services:** Unisys leverages its Stealth™ platform to provide mobile security services, including biometric and multifactor authentication services. It recently upgraded the platform to provide the highest security levels to corporate apps running on mobile devices.

**InteliServe™ and InteliApp™:** Unisys provides analytics, AI-led automation with endpoint management through its InteliServe™ platform. It recently developed a native version of mobile app InteliApp, which brings AI and automation to mobile devices. Through InteliApp™, users can leverage NLP to communicate with intelligent virtual agents.

**Caution**

Unisys offers strong capabilities around UEM, co-management and mobile device support, but it has limited examples of these to showcase in the U.S. when compared to other regions. It is still known more for its managed workplace support services than for mobility management.

Unisys has strong credentials in providing industrialized mobility solutions. It should showcase more examples of implementation in the U.S. with these solutions.

**2020 ISG Provider Lens™ Leader**

Unisys offers strong capabilities in UEM, security and future-oriented managed mobility services, making it a strong leader in this space.
Wipro differentiates itself by adopting a consultative and mobile environment analysis approach. It has significantly improved its device management capabilities and is positioned strongly in the market. Wipro reports a significant increase in the number of devices managed from last year. It can further improve its device management capabilities for IoT devices to gain a competitive edge.

Though UEM is a key area for Wipro's managed mobility services, the company can showcase more examples of clients in the U.S. for co-management and managing both mobile devices and computing devices through a single console.

M2TA: Wipro recently introduced its M2TA framework, which stands for manage, monitor, transform and absorb. The framework helps to manage the client's existing mobility landscape and applications and monitor application usage. It then suggests mobile-first, cognitive-enabled applications to be created and absorbs commonly used apps within collaboration solutions.

Comprehensive portfolio: Wipro's managed mobility services include UEM, mobile app packaging services for telemetry, and enterprise security control. It also offers mobile user experience monitoring through benchmarking. The firm refactors business workflows based on design principles to create mobile-native workspaces through crowdsourcing and app marketplaces.

Strong partner ecosystem: Wipro has a strong partnership ecosystem for managed mobility services and offers a joint go-to-market approach. It partners with Microsoft, Centrify, VMware, Citrix and Okta for IAM; HP, Dell and Lenovo for DaaS; Microsoft, Citrix and VMware for EMM; and MDSL, Tango and Apptio for telecom expense management.

Wipro's managed mobility services are an integral part of its comprehensive digital workplace capability. The company reported a 26 percent increase in mobility services revenue over the past year. It manages 960,373 laptops, 1.36 million smartphones and 48,019 IoT devices in the U.S. a 31 percent increase from last year.

Strengths

M2TA: Wipro recently introduced its M2TA framework, which stands for manage, monitor, transform and absorb. The framework helps to manage the client's existing mobility landscape and applications and monitor application usage. It then suggests mobile-first, cognitive-enabled applications to be created and absorbs commonly used apps within collaboration solutions.

Comprehensive portfolio: Wipro's managed mobility services include UEM, mobile app packaging services for telemetry, and enterprise security control. It also offers mobile user experience monitoring through benchmarking. The firm refactors business workflows based on design principles to create mobile-native workspaces through crowdsourcing and app marketplaces.

Strong partner ecosystem: Wipro has a strong partnership ecosystem for managed mobility services and offers a joint go-to-market approach. It partners with Microsoft, Centrify, VMware, Citrix and Okta for IAM; HP, Dell and Lenovo for DaaS; Microsoft, Citrix and VMware for EMM; and MDSL, Tango and Apptio for telecom expense management.

Wipro differentiates itself by adopting a consultative and mobile environment analysis approach. It has significantly improved its device management capabilities and is positioned strongly in the market.
RISING STAR: ZENSAR

Overview

Zensar's managed mobility offering is an integral part of its digital workplace services portfolio and covers UEM, mobile content security management, mobility consulting device lifecycle management and administrative support. The company manages 482,007 laptops and 31,813 mobile devices in the U.S. That is 11 percent more than last year. Its revenue from these services are 24 percent more than last year in the U.S.

Strengths

Comprehensive offering: Zensar provides mobility consulting that includes assessment, recommendations across mobile use cases and ROI. It provides guidance around the customer experience journey and helps clients with build-vs.-buy decisions and technical architecture. It provides mobile device lifecycle management and application management. Zensar provides EMM platform architecture, design, UEM and 24x7 mobility support services.

AI and analytics powered services: Zensar provides AI, chatbots, mobile UX monitoring and analytics-based mobility solutions. Its WorkNXT solution provides a productized offering for BYOD users, a hybrid model for desktop virtualization assessment and a customized app store for persona-specific applications on mobile devices. Zensar also offers the WorkConnect solution, which provides white labeling for SaaS apps under enterprise mobility. Under its business KPIs, Zensar also has a mobility experience index that measures user experience with mobile devices.

Strong partner ecosystem: Zensar has a strong partner ecosystem working with key vendors in the UEM, workplace as a service, virtual desktop infrastructure (VDI) and EMM spaces. It partners with Microsoft, VMware, Citrix, Nexthink, Aternity and Lakeside, as well as Oracle, MobileIron, Good Technology, Jamf and Apple for managed mobility services.

2020 ISG Provider Lens™ Rising Star

Zensar provides strong device management capabilities backed by analytics and user experience monitoring. With a strong focus on mobile security and UEM, the company is positioned to become a leader in this space.

Caution

Zensar offers strong device management capabilities. The company could consider extending its offering to smart IoT devices to strengthen its capabilities for managing devices in this space.

Although Zensar has capabilities to support co-management for UEM, it should showcase more client examples of it.
Methodology
The research study "ISG Provider Lens™ Digital Workplace of the Future - Services & Solutions 2020" analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:


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 & 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

Mrinal Rai is the Principal analyst for Digital Workplace and Conversational AI. His area of expertise is digital workplace services and enterprise social collaboration both from a technology and business point of view. 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. He also focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms. He has been with ISG for last 8+ years and has more than 13 years of experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end user computing and service desk.

Rahul Basu, Co-Author
Senior Analyst

Rahul Basu is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital Workplace and Social Business Collaboration. His area of expertise is unified communication and collaboration, contact center and social media management. During his tenure, he has developed content for ISG Provider Lens™ in the areas of digital workplace, social media marketing and contact center customer experience. He is responsible for supporting research authors and authoring blogs, enterprise content and the Global Summary report with market trends and insights.
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 (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.