ISG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

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UK clients' Future of Work holds the key to business success

U.K. enterprises are revising their plans for transforming their workplace in response to the difficult events of the past two years, including Brexit, the pandemic and the conflict in Ukraine. According to numerous surveys, businesses believe that remaining flexible by enabling some of their personnel to work remotely is the best way to respond to and close gaps created by the current talent shortage. As clients continue to reopen their office spaces and adjust to the hybrid standards, employees are choosing to return to the workplace, mostly for effective personal interactions and social connections.

According to the Microsoft New Future of Work Report 2022, an increasing number of U.K. business clients are adopting the hybrid working style. While employees are experiencing both the positive and negative effects of working outside an office space, hybrid working is already a reality. The benefits of face-to-face interaction with co-workers may be reduced when working remotely. Multiple studies have found that U.K. workers, in general, agree that working from a place of their choosing increases comfort and productivity.

The primary causes of the Great Resignation in the U.K. are said to be opportunity availability and burnout rather than location related challenges. In the middle of 2021, many U.K. workers changed jobs in search of improved wellbeing and for better work/life balance, which includes work-from-home opportunities. As individuals switched

Experience and wellbeing are vital for Future of Work strategy to companies that could provide greater flexibility and openness with a hybrid work style, some referred to it as the great reshuffle. This wide-scale resignation, combined with the reduction in non-national U.K. workforce, also contributed to the country's severe skill shortage.

To recruit and retain talent, U.K. businesses have started to provide flexible and collaborative work environments, with a strong emphasis on employee wellbeing and experience. U.K. unemployment is at an all-time low; yet unfilled job vacancies remain high, and the search for suitably skilled resources continues throughout the labour market.

During the first year of the pandemic, economic inactivity was largely driven by those in the age group 16 to 24 years. However, recent increases in this area have been attributed to those in the age group 50 to 64 years, with 70 percent of the increase in inactivity since the onset of the pandemic being driven by this age group. This indicates that a wealth of experience and knowledge is leaving the workforce.

Workers from Generation Z (born in the late 1990s and early 2000s) are either about to enter or have already entered the workforce, and they currently constitute about 19 percent of the workforce in the U.K. This number is expected to grow to about 27 percent by 2025.

Gen Z workers developed a strong comfort level with social media and the virtual world even before entering employment, therefore, transitioning to a virtual and remote working environment during the pandemic was not particularly difficult for this workforce. It was an extension of their current social media existence; here they collaborated and connected with colleagues who were located remotely. This generation is attempting to acclimatise to the governance and limitations imposed within an enterprise that has adopted a hybrid working environment. Collaboration with colleagues and associates who are little older (Gen X or Gen Y) presents another obstacle for the technical readiness and adaptability of the younger workers.

As these younger workers enter the workforce, there is a growing emphasis on areas related to an organisation's bigger purpose, which is different from profit generation. This generation seeks employment in organisations that offer equal representation and is focussed on inclusivity. It is also outspoken and sensitive to social issues. The younger generation wants organisations to focus more on projects such as carbon footprint reduction; sustainability; and environmental, social, and governance (ESG) efforts towards a truly circular economy.

Organisations that are focussed on these aspects can anticipate high employee retention. The UK presidency of COP26 further highlighted the goals and aspirations of the Gen Z workforce to limit global warming to 1.5c as a part of the growing emphasis on sustainability and environmental issues.

Enterprise IT and workplace executives are now at the forefront of transformation because of the growing focus on employee retention, a tech-savvy workforce, sustainability, remote work and hybrid working. To meet these challenges, enterprise IT, which was traditionally only recognised for being reactive and resolving issues, will redefine the business and operating models of organisations across the U.K. Many of the aforementioned issues could be resolved by modern technologies, therefore, company IT and workplace leaders are looking for ways to leverage the same to get the results they want.

Nonetheless, ISG has noticed a decline in the market for transactions that are solely focussed on technology or end-user computing; businesses are increasingly including digital workplace initiatives into the scope of their overall company and digital transformation. The fact that global organisations are re-evaluating their economic models in the post-pandemic environment has made this more obvious. This does not imply that customers are no longer looking for traditional technology-focussed services. Actually, a broader need for transformation services has been combined with these services, with a strong emphasis on outcomes, including employee experience and retention.

Initiatives in the U.K. on the future of employment have revealed the following trends in demand:

- Businesses are requesting support more frequently as they develop their plans for workplace change. Whether an employee works remotely or in an office, clients want to create a workplace technology experience that fits their changing employee or user profile. Additionally, customers want to develop their strategy in a way that supports and facilitates the gig economy and contingent workforce.
- ISG has also noticed a refocus on traditional technology-focussed managed services outsourcing to support a remote and hybrid workforce. Enterprise IT leaders and workplace leaders are strategically investing in technologies to enhance employee experience and find ways to measure it as people work from places of their choice. This entails putting special emphasis on end-user technology, in terms of device and digital workspace experiences, as well as expanding the use of automation-enabled service desk support functions. Additionally, continuous monitoring and analysing device application performance will support sustainability targets and empower adoption by the modern workforce.
- For increased productivity and digital enablement, frontline employees providing key services need access to better technology. U.K. clients are exploring digital solutions to improve workers' experience and foster a feeling of inclusion to limit attrition, attract talent and drive productivity for these roles.
- Throughout the pandemic, employee wellbeing and empathy have become a top priority. When U.K. employees feel that their employers are concerned about their welfare, they are more likely to stay with those companies. Dealing with problems such as digital burnout and inadequate work-life balance has shown to be a vital strategy to support employee wellbeing and demonstrate empathy in the era of hybrid and remote working.
- There is a need to modify the experience of working in an office setting since many companies have already reopened their offices and are requesting that their employees come at least a few days each week. It necessitates making investments in smart workplaces that enable technology, improve experience, and contextualise that experience based on employee needs.
- Clients are considering extending and exploring their use of cutting-edge technologies such as virtual reality (VR) for training and onboarding. Thorough understanding of many different company activities will enhance employee experience considerably.

These trends have expanded the scope of traditional digital workplace technologies; these technologies interact with diverse business functions to provide high employee experience. This is explained in figure 1 below.

Experience management and productivity are increasingly important measures of the success for technology adoption, specifically in response to hybrid work. Clients in the U.K. realise that by providing an agile, sustainable and scalable experience today, their workplace will evolve to meet demands in the coming months and years.

Figure 1: Expanding scope of digital workplace technologies and interaction with other business roles

Digital Workplace Technologies

Human Resources	Facilities Management	Lines of Business/ Chief Digital officer	CXO
Focus on enhancing experience of current workforce, retaining, and attracting talent	Focus on enhancing experience of physical office premises, adapting to new working model and taking sustainability initiatives	Focus on providing business-level differentiation by supporting frontline workers, improving business processes, enhancing collaboration and digital literacy and improving productivity	Focus on adopting corporate level sustainability initiatives, enhancing corporate communications, integrating diversity and inclusiveness, improving company brand image, events

Source: ISG, 2022

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Product Challenger	Not In	Leader	Market Challenger
Atos	Product Challenger	Product Challenger	Not In	Product Challenger	Market Challenger
Birlasoft	Not In	Product Challenger	Not In	Contender	Contender
Capgemini	Leader	Leader	Not In	Leader	Leader
Capita	Not In	Market Challenger	Leader	Contender	Not In
CGI	Not In	Not In	Leader	Product Challenger	Not In
Claranet	Contender	Not In	Not In	Not In	Not In
Coforge	Not In	Contender	Not In	Contender	Not In
Cognizant	Contender	Rising Star ★	Not In	Market Challenger	Not In
Computacenter	Leader	Leader	Not In	Leader	Market Challenger

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Digital Workplace Group	Contender	Not In	Not In	Not In	Not In
DXC Technology	Leader	Product Challenger	Not In	Product Challenger	Product Challenger
Fujitsu	Leader	Leader	Not In	Leader	Leader
GAVS	Not In	Contender	Contender	Contender	Not In
Getronics	Product Challenger	Leader	Leader	Market Challenger	Market Challenger
HCL	Leader	Leader	Not In	Leader	Leader
Hexaware	Market Challenger	Market Challenger	Leader	Market Challenger	Product Challenger
Infosys	Leader	Leader	Not In	Leader	Leader
ITC Infotech	Not In	Contender	Not In	Contender	Not In
Kyndryl	Product Challenger	Product Challenger	Not In	Product Challenger	Not In

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
LTI	Market Challenger	Market Challenger	Not In	Market Challenger	Rising Star ★
Microland	Market Challenger	Contender	Not In	Market Challenger	Product Challenger
Movate	Not In	Product Challenger	Leader	Contender	Product Challenger
Mphasis	Not In	Product Challenger	Product Challenger	Rising Star ★	Not In
NTT DATA	Market Challenger	Market Challenger	Not In	Product Challenger	Not In
Orange Business Services	Product Challenger	Product Challenger	Not In	Product Challenger	Not In
Sopra Steria	Not In	Not In	Rising Star ★	Contender	Not In
SS&C	Not In	Contender	Not In	Contender	Not In
Stefanini	Not In	Not In	Not In	Not In	Product Challenger
TCS	Leader	Leader	Not In	Leader	Leader

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Tech Mahindra	Rising Star ★	Leader	Not In	Leader	Product Challenger
TET	Not In	Not In	Contender	Not In	Not In
Trianz	Contender	Not In	Not In	Not In	Not In
Unisys	Leader	Leader	Not In	Leader	Leader
UST	Product Challenger	Contender	Contender	Contender	Product Challenger
Vodafone	Not In	Contender	Product Challenger	Contender	Not In
Wipro	Leader	Leader	Not In	Leader	Leader
XMA	Not In	Not In	Market Challenger	Not In	Not In
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar	Market Challenger	Market Challenger	Not In	Market Challenger	Product Challenger

This study focuses on what ISG perceives as most critical in 2022 for **Future of Work**.

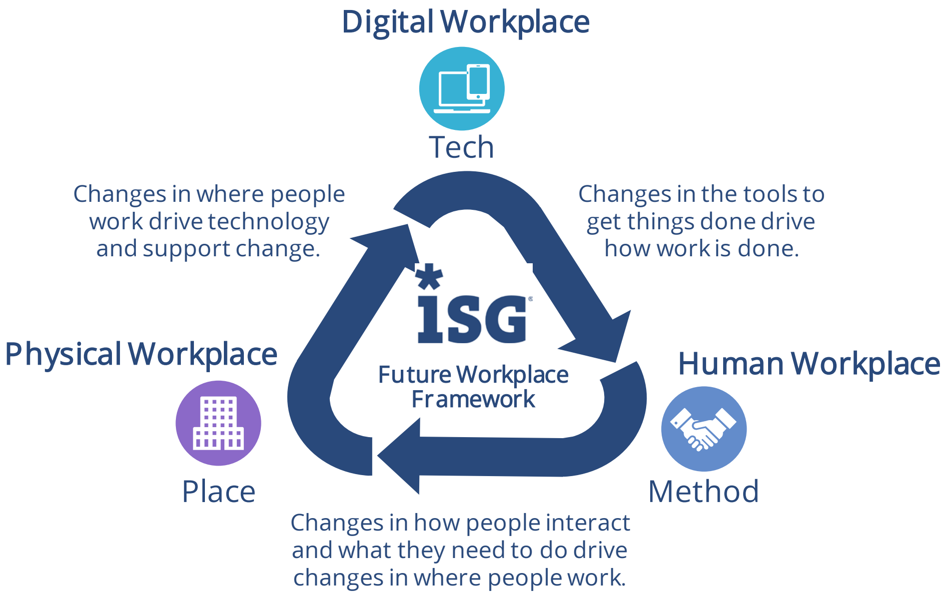
- Workplace Strategy Transformation Services
- Managed Workplace Services – End-user Technology (Large Accounts)
- Managed Workplace Services – End-user Technology (Midmarket)
- Digital Service Desk and Workplace Support Services
- Managed Employee Experience Services

Simplified Illustration Source: ISG 2022

Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and the future of work is hybrid. The hybrid future of work, as defined by ISG, is characterised by three kinds of workplaces (Figure 2): the Digital Workplace, which includes the underlying technology; the Physical Workplace, which defines the location of work that could be both on-premises and remote; and the Human Workplace, which describes the methods, processes and cultural aspects.

Figure 2: ISG Future Workplace Framework



Source: ISG, 2022

A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace). It is now omnipresent, integrated and connected with multiple "spaces" that can be accessed from any location, anytime and over any network. New and upcoming technology developments such as the metaverse are influencing this trend in their own ways.

Clients will also be expecting more from their service desk and workplace support service providers in terms of leveraging a high level of automation and analytics to ensure employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers and are including requirements for it in the form of measurable experience level agreements (XLAs).

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five 5 quadrants: Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology (Large Accounts), Managed Workplace Services – End User Technology (Midmarket), Digital Service Desk and Workplace Support Services, Managed Employee Experience Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider that ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

(Continues on next page)

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Workplace Strategy Transformation Services

Who Should Read This

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

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

The hybrid working model is here to stay, and enterprises in the U.K. look to maintain enterprise culture, meet employee expectations, and transform the way people work with workplace strategy transformation services. These enterprises strive to deliver seamless and intuitive user experiences and manage employee well-being, for which they are working with providers that have a dedicated digital workplace consulting portfolio.

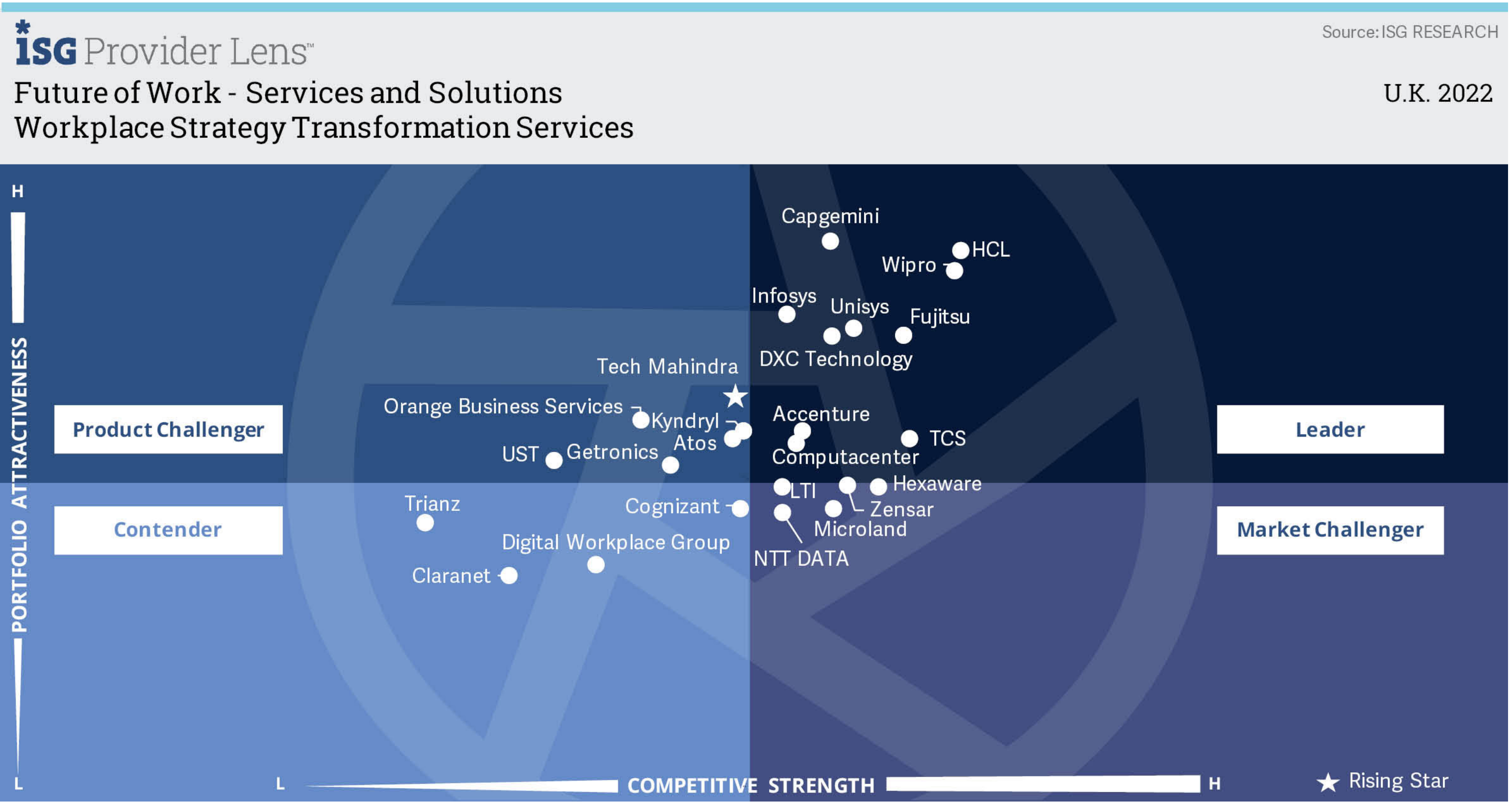
Enterprises in the U.K. are seeking providers with expertise and knowledge in workplace roadmap creation and strategy building. They are looking for providers that can better support enterprises in terms of reducing the implementation time and cost. Thus, they are focusing on business-led workplace transformation strategies for creating a flexible and collaborative workspace. Enterprises in the U.K. are increasingly being mature in terms of XLAs and are focusing on deploying change management services for ensuring innovative, productive, and flexible working practices, eventually ensuring business continuity.

Technology professionals, including infrastructure, IT, and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers to help them plan and select workplace services. The report also shows how the technical and integration capabilities of a provider are compared in the market.

Digital professionals, including digital transformation and facility management leaders, should read this report to understand how the providers of workplace strategy transformation services fit their digital transformation initiatives and how they are compared with one another.

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

Cybersecurity professionals 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 workforces.



This quadrant assesses providers that deliver workplace transformation services. Providers support enterprises with **design, implementation and realisation** of a digital workplace – providing businesses with a **modern, hybrid workplace** on demand.

Kevin Turner

Definition

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

Eligibility Criteria

1. Providers should have a vendor-neutral approach for **transformation consulting** and workplace assessment services. The ability to provide associated managed or implementation/integration services can be an added value but is not a requirement
2. Providers should be able to define and visualise **clients' future of work** environment, covering areas such as hybrid working, involving remote and in-office workers, uberisation of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX), associating CX with employee experience (EX), while also enhancing end-user experience
3. Providers should support **technology adoption** and organisational change/ behaviour management services through their consulting portfolio
4. Providers should offer solutions to address **employee empathy** and **wellbeing**

Observations

Managed service providers are continuously developing and enhancing their capabilities in consulting and strategy services to improve their positioning in this space. This quadrant continues to evolve from the Digital Workplace Consulting quadrant that ISG released in 2020 for the U.K. and includes specific elements of remote work enablement, including a transition towards the hybrid workplace model.

Providers positioned as Contenders in this quadrant offer strong service implementation capabilities. They focus on further developing their portfolios to be viewed as strategic partners for the future of work model and showcase adequate number of client examples in the U.K.

Product Challengers have strong consulting, benchmarking, business-outcome oriented service capabilities but lack an adequate number of clients for their strategy services.

Market Challengers are well positioned in workplace strategy services but should further develop their offerings to address transformation in operating models around continuity and sustainability.

Leaders provide comprehensive consulting and benchmarking, along with strong client case stories for workplace strategy consulting services.

From the 40 companies assessed for this study, 25 have qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture offers business strategy and consulting services that focus on customer experience (CX) and employee experience (EX). Aligned with future of work trends, its design-thinking approach supports clients in realising benefits rapidly.

Capgemini

Capgemini has a transformation focus, along with gamification techniques and a strong market presence. Combining continuous improvement with a detailed analytic foundation, it supports clients in their transformation to modern workplaces.

Computacenter

Computacenter, well-known provider in the U.K., has extensive experience in the finance and retail sectors and the public sector. It has a growing consulting business, which assists clients with digital transformation and strategy through a co-innovation approach.

DXC

DXC is a globally recognised brand that offers a design-thinking, data-driven approach for workplace strategy and transformation. Its combination of analytics and design helps clients define strategy and digital transformation.

Fujitsu

Fujitsu's consulting services utilise a proven methodology, Journey Builder and Result Chain, to offer workplace strategy consulting services. The approach is user-centric and assists clients with mapping a full transformation, from design through planning to execution and success.

HCL

HCL's consulting services continue to expand to provide support for clients with digital transformation. It focuses on journey mapping, user experience measurement and persona segmentation with an intellectual property-led approach to ensure that the expected benefits are realised from the strategy.

Infosys

Infosys' consulting services include a design-led, human-centric approach to enhance employee experience through digital strategy and transformation. Its strong consulting capabilities make it one of the leading providers in the market.

TCS

TCS' consulting services team utilises a proven methodology to provide clients with a digital assessment framework for workplace services. Beyond the IT aspects, its consulting services extend to focus on reskilling and recruiting of the workforce in order to make the adoption of the transformation more effective.

Unisys

Unisys consulting services offer clients with a design-thinking, user-centric approach to support the transformation to a modern workplace. It focuses on workplace equality, offering business and technology consulting that include organisational change management services ensuring that users are fully engaged regardless of their location.

Wipro

Wipro consulting services include an experience-led approach to ensure user benefits from strategy and transformation initiatives. Wipro has a global footprint and brings a wealth of experience to build upon its well-recognised presence in the U.K.

Tech Mahindra

Tech Mahindra, Rising Star, with its strong presence in the U.K. and Microsoft partnership, has been identified as a Rising Star in this quadrant. Its co-creative and innovative approach with clients is not limited to IT in scope. It is already delivering value to support clients towards sustainability and green targets for 2025 and beyond.

Computacenter

Leader

"Computacenter co-innovates with clients and has a consulting team to convert ideas into reality."

Kevin Turner

Overview

Computacenter offers workplace strategy transformation services under its Digital Me offering. Its consulting proposition is focussed on supporting clients in achieving their business objectives by empowering employees with leading digital tools and ecosystems. The company leverages 1,600 consultants to provide technology-agnostic advisory services and has partnerships with leading workplace technology vendors.

Strengths

Growing consulting revenue: In recent years, Computacenter has increased revenue from its workplace consulting services by about 50 percent. It continues to invest and expand its consulting offering in the U.K. in response to the growing demand for advisory services.

Comprehensive approach: Computacenter provides workstyle and employee analytics, and assesses business objectives and maturity to design digital roadmaps. With the goal to maximise business outcomes, it engages with clients on making the hybrid working model a delivered reality.

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

Caution

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

The company should showcase more examples of its work beyond IT functions to highlight the value of its consulting services for U.K.-based clients.

Managed Workplace Services - End User Technology - Large Accounts

Who Should Read This

This report is relevant to large enterprises across industries in the U.K. for evaluating the providers of managed workplace services – end user technology.

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

Large enterprises in the U.K. continue to invest heavily in digital workplace services to meet the transformational needs and employee requirements for more agile and innovative services. These enterprises are looking for managed service providers that can accelerate their journey towards a modern workspace and enable them in achieving delivery through a human-centric approach.

Large enterprises in the U.K. are also seeking providers that offer entire device lifecycle management services, including procurement, deployment, support, and security updates, to simplify IT operations and ensure effective device usage.

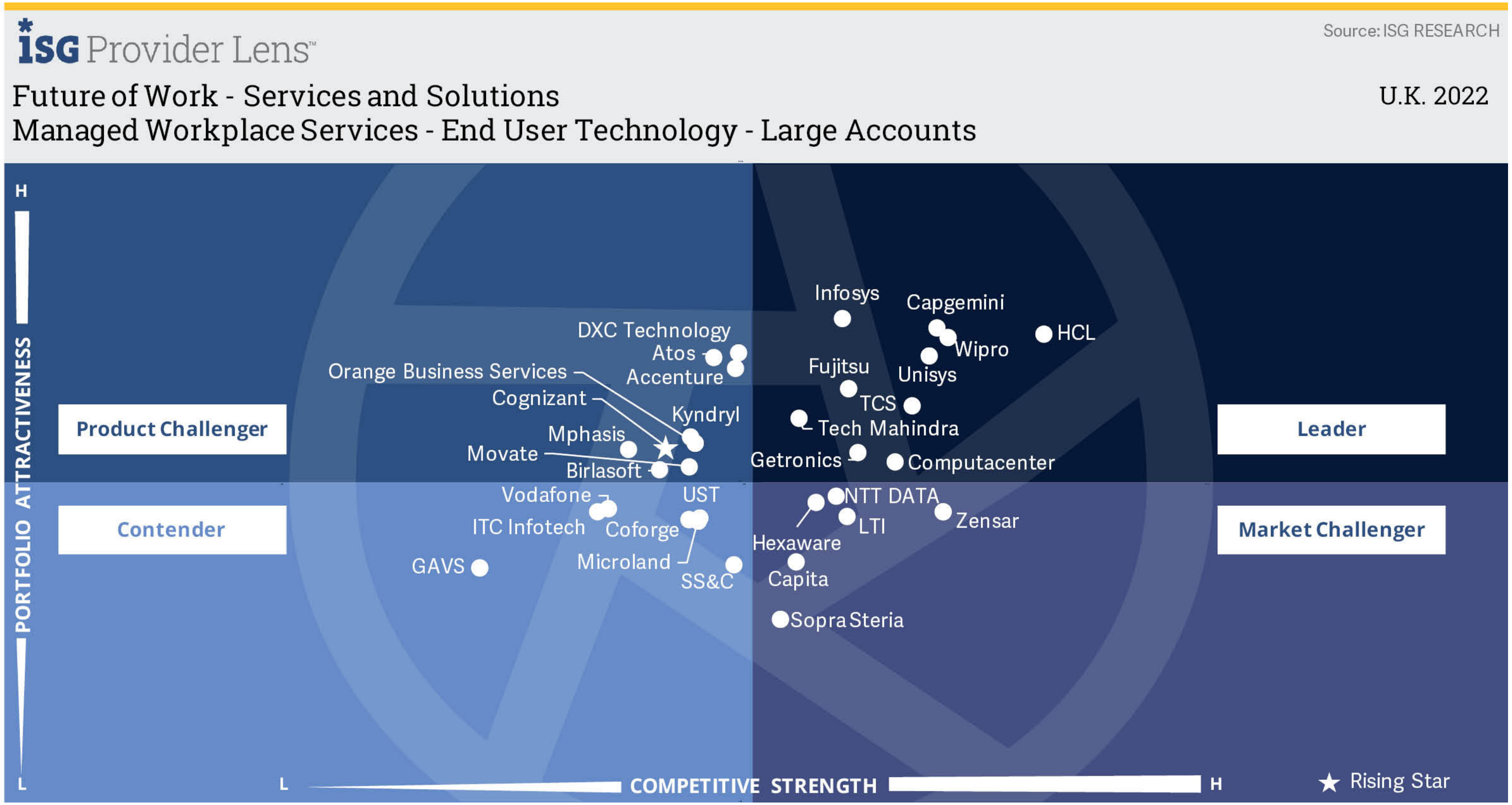
Large enterprises in the U.K. are now focusing more on creating sustainable workplaces by reducing energy consumption, going paperless, and adopting green office and solar energy initiatives. The adoption of workplace security services with Zero Trust capabilities is also increasing among enterprises in this region to meet compliance and data security needs.

Technology professionals, including infrastructure, IT, and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services.

Digital professionals, including digital transformation and facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives and how they are compared with one another.

Cybersecurity professionals 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 workforces.

Procurement professionals, including sourcing, procurement, and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed workplace service providers in the U.K.



This quadrant assesses providers that deliver managed workplace services, supporting large enterprises with the **end-user technology** aspects of a digital workplace, thus providing business users with a **modern, hybrid workplace** on demand.

Kevin Turner

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users/employees. These services include end-user enablement through related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide **endpoint management** and security services supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management
2. Provide complete **device lifecycle management** services, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud
4. **Manage devices** in the respective countries in the study, with at least 25 percent of the devices managed outside the provider’s home region
5. Support **endpoint security** services with technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support modern network and unified communication as a **foundation for a digital workplace**

Observations

This year, the Managed Workplace Services quadrant focusses on end-user technologies, with service desk and support now forming a separate quadrant in 2022. Providers offering complete device lifecycle management portfolio are positioned in this quadrant, which includes all devices — physical, virtual, mobile, company-owned and BYOD — along with all aspects of enablement through the entire lifecycle.

Contenders in this quadrant offer strong managed services portfolios around the end-user technology ecosystem. They should develop capabilities for further automation and integration, while showcasing a better market presence with client stories and revenue.

Product Challengers have strong portfolios that leverage automation, AI and machine learning technologies, along with augmented and virtual reality (AR and VR) capabilities. These providers also have frameworks and platforms for managed services, and offer device lifecycle management services. They should pursue the U.K. market aggressively to acquire an increasing number of clients and expand their local presence.

Market Challengers offer traditional workplace support and service desk services, and are well established in the market with large client bases. They should continue to develop their capabilities.

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

From the 40 companies assessed for this study, 33 have qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Capgemini

Capgemini offers managed workplace services with its Connected Employee Experience Hub platform. It drives a frictionless employee experience for users and clients, enabling enterprises to operate smoothly. The value realisation with Capgemini has translated to strong growth in the U.K.

Computacenter

Computacenter is a reputed brand in the UK and provides clients with strong managed workplace services. It creates value for clients through automation and analytics solutions as components of its DigitalMe portfolio.

Fujitsu

Fujitsu's managed workplace services capabilities in the U.K. are well recognised; the company is seen as a proven provider over many years. It has continued to improve its managed services portfolio and supports the modern workplace demanded by clients for hybrid working.

Getronics

Getronics, an established provider of managed workplace services in the U.K., offers a strong support model, underpinned with automation and analytics features to provide the desired support to the modern workforce in hybrid workplaces.

HCL

HCL delivers leading managed workplace services through the platform, Fluid Workplace. It addresses the current and future needs of clients across sectors with the hybrid, future working model by leveraging an optimum combination of proprietary solutions.

Infosys' managed workplace services are driven by a human-centric approach and strong consulting capabilities, leading to co-creation and innovative solutions for the modern workplace. Infosys has a global footprint and brings the appropriate expertise to the U.K., making it one of the leading providers in the market.

TCS is a well-known provider of managed workplace services in the U.K. and globally. It leads with its Cognix™ solution, to provide a comprehensive suite of managed services, designed to improve employee experience (EX) through experience level measurement for the modern workforce.

Tech Mahindra provides managed workplace services through its FLEX platform, which offers clients comprehensive managed device services with improved employee experience, while also supporting the business sustainability targets.

Unisys has a strong local presence in the U.K. as a managed services provider. The company's digital workplace services portfolio is already strong and continues to evolve to meet future workplace demands.

Wipro is a reputable global provider, offering market-leading managed workplace services through its LiVE Workspace™ platform. It has an array of other proprietary solutions such as VirtuaDesk™ that include leading support services. The company has a strong market presence in the U.K.

Cognizant, a Rising Star, is a global provider of managed workplace services that is beginning to establish a footprint in the U.K. Its WorkNEXT™ suite delivers personalised, seamless experiences for the employees of enterprise clients, anywhere, anytime, and on any device.

Leader

"Computacenter delivers DigitalMe, its managed workplace services portfolio, in the U.K."

Kevin Turner

Computacenter

Overview

Computacenter offers managed digital workplace services through DigitalMe. It provides device lifecycle management from Nottingham, Sheffield and Milton Keynes. The company manages 1.6 million users and 2.7 million devices, supporting 145 clients in the managed services space in the U.K.

Strengths

Strong portfolio: The DigitalMe service focuses on endpoint management, and includes a portfolio of applications and Windows evergreen services. Computacenter also offers productivity collaboration support for enterprise voice, video and smart spaces, as well as remote support services such as intelligent assistance, proactive engagement and self-healing. Computacenter asset lifecycle management services offer asset intelligence, real-time tracking and financing for DaaS. The company also provides onsite support, covering field and kiosk services in addition to content community services for content and social communities.

Well established in the U.K.: Computacenter has a strong base of U.K.-based clients across sectors and a large sales operation backed by a robust partner ecosystem. It has many client references from the retail, banking and financial services industries for its managed digital workplace services.

Device growth: The number of devices under management by Computacenter increased by 30 percent in 2021, as the hybrid working model became more widely adopted.

Caution

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

Managed Workplace Services - End User Technology - Midmarket

Who Should Read This

This report is relevant to midmarket enterprise clients across industries in the U.K. for evaluating the providers of managed workplace services – end user technology.

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

Midmarket enterprises in the U.K. are looking for hybrid work style concepts to respond to new normal ways of working. These enterprises continue to face challenges around business continuity, employee productivity, well-being, growth, and ways of working. Hence, they are looking for service providers that can help them in achieving business resiliency to better address these challenges.

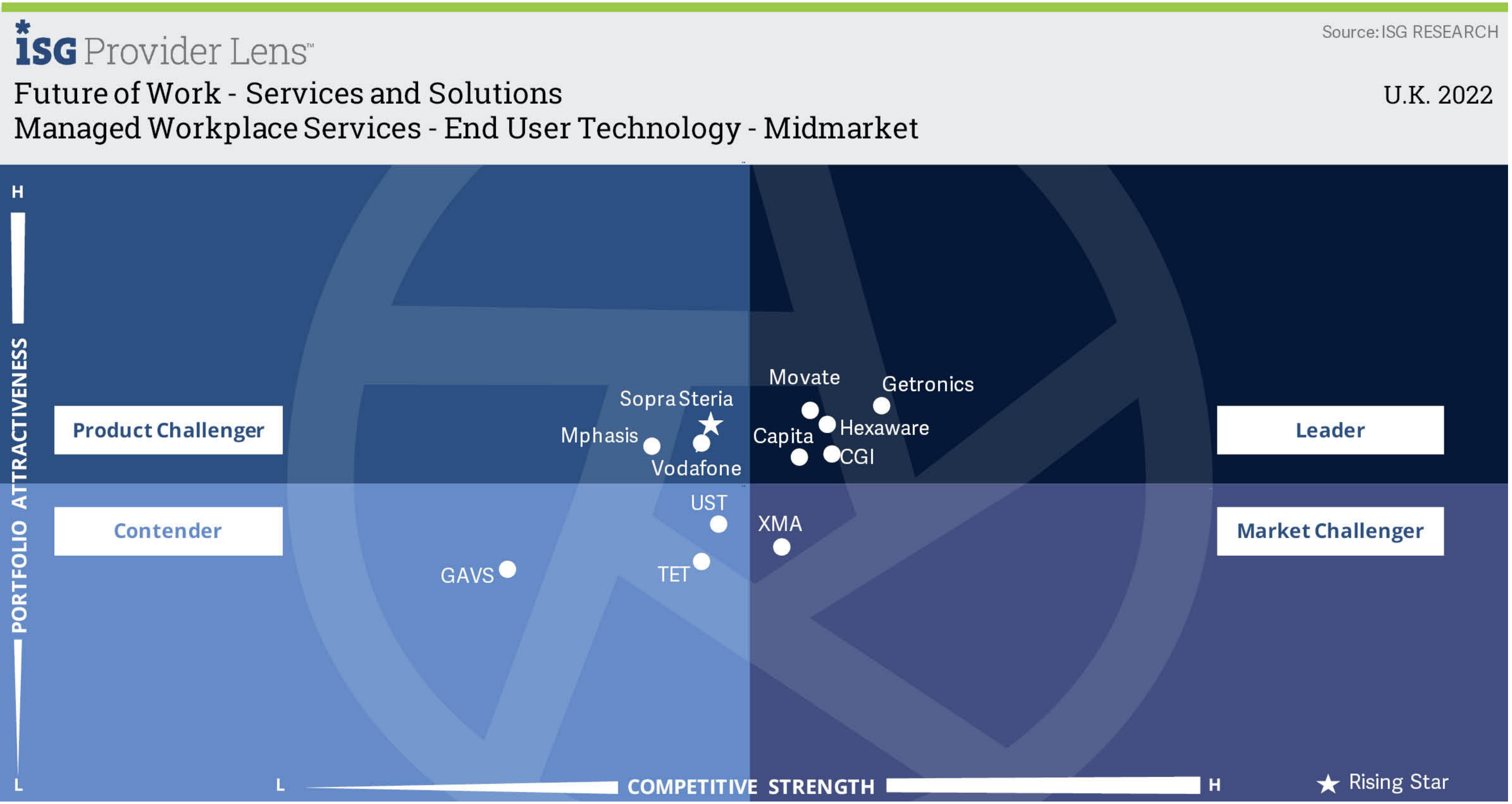
Midmarket enterprises in this region are also investing in sustainability initiatives and are incorporating eco-friendly practices into their workplaces to cut costs and improve employee well-being. Other focus areas for midmarket enterprises in this region are endpoint security, virtual desktop infrastructure (VDI), device as a service, and services supporting unified communication and collaboration.

Technology professionals, including infrastructure, IT, and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services.

Procurement professionals, including sourcing, procurement, and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed workplace service providers in the U.K.

Digital professionals, including digital transformation and facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives and how they are compared with one another.

Cybersecurity professionals 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 workforces.



This quadrant assesses providers that deliver managed workplace services, supporting midmarket enterprises with the **end-user technology** aspects of a digital workplace, thus providing business users with a **modern, hybrid workplace** on demand.

Kevin Turner

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are deployed, provisioned and secured typically by enterprise IT department for end users/employees.

These services include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide **endpoint management** and security services supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management
2. Provide complete **device lifecycle management** services, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, Device as a Service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud
4. **Manage devices** in the respective countries in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support **endpoint security** services by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support modern network and unified communication as a foundation for a **digital workplace**

Observations

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

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

Product Challengers in this quadrant offer strong capabilities in AI and automation-enabled workplace support. A few also have some capabilities in device management. They need to be more aggressive in increasing their market share.

Market Challengers in this space have a strong local presence but lack sufficient capabilities to address the changing needs of midmarket clients.

Leaders in this quadrant offer automation and analytics-enabled capabilities, and they have a sizeable client base in the midmarket.

From the 40 companies assessed for this study, 12 have qualified for this quadrant, with five being Leaders and one a Rising Star.

Capita

Capita, a leading provider of managed digital workplace services in the U.K., is focussed on supporting clients by managing the wellbeing of the workforce across the midmarket. This is delivered with a seamless workplace experience that includes providing secure access from anywhere, and on any device.

CGI

CGI provides managed digital workplace services for midmarket clients across the region. The company has a strong presence in the public sector and is building a list of clients in other industries in the U.K. It is known for supporting clients in achieving social value targets and sustainability goals.

movate

Movate is a global provider of managed digital workplace services with a growing offering portfolio for clients in the U.K. midmarket. Its vision is to be the service provider of choice with leading next-gen digital workplace solutions and services, enabling organisations to strategically manage employee experiences and work across functions by orchestrating workforce ecosystems.

Getronics

Getronics' managed digital workplace services are ideally suited to the midmarket in the U.K. It offers plug-and-play industrialised solutions and a productised offering, designed to provide benefits to frontline workers for clients across the U.K.

Hexaware

Hexaware, last year's Rising Star in this quadrant, has continued to strengthen and improve its managed digital workplace services for clients in the U.K. through deeper automation and an improved focus on experience management. The company has reported a growth of over 36 percent in the U.K. since 2021.

Sopra Steria

Sopra Steria, Rising Star, delivers managed digital workplace services in the U.K., notably in the public sector. Globally, it has over 3,000 technology experts.

Digital Service Desk and Workplace Support Services

Who Should Read This

This report is relevant to the enterprises across industries in the U.K. for evaluating the providers of digital service desk and workplace support services.

In this quadrant, ISG highlights the current market positioning of digital service desk and workplace support service providers in the U.K. and how each provider addresses the key challenges faced in the region.

Transforming the IT service desk remains one of the top priorities for enterprises in the U.K. to meet the remote working requirements and be more responsive towards incidents when they occur. Standalone IT service desk, inefficiencies, and higher cost are a few other areas of concern for enterprises in the region. Thus, the demand for modern, automated service desk and workplace support services among enterprises is increasing in the region to ensure consistent end-user satisfaction by providing support 24*7 and freeing up the IT agents from mundane tasks.

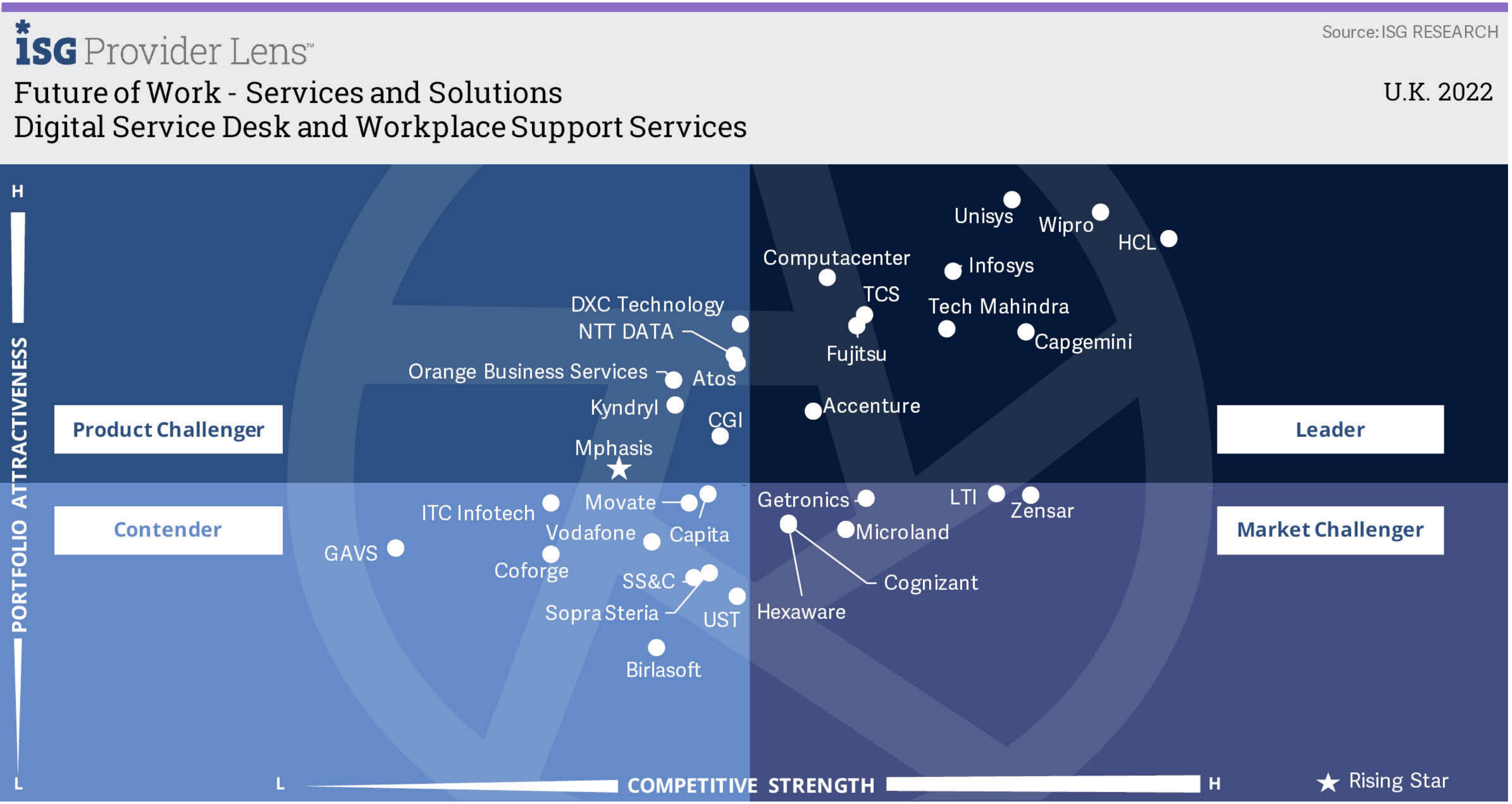
Enterprises in this region are looking for modernising their IT service desk and reducing the burden on helpdesk agents by leveraging the combination of chatbots, virtual agents, and human agents. These enterprises are, hence, turning to service providers that can help them build an end-to-end service model and run proactive operations, resulting in enhanced end-user experiences.

Technology professionals, including infrastructure, IT, and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them in modernising service desk and workplace support services.

Digital professionals, including digital transformation and facility management leaders, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives and how they are compared with one another.

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

Procurement professionals, including sourcing, procurement, and vendor management professionals, should read this report to develop a better understanding of the current landscape of the digital service desk and workplace support service providers in the U.K.



This quadrant assesses providers that deliver Digital Service Desk and Support workplace services, thereby supporting large enterprises with **service desk** skills, experience, and operations and delivering on **well-operated workplace** business users' demand.

Kevin Turner

Definition

This quadrant assesses service providers that offer modernised support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, DigiLockers, uber-style field support, and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere at any time and include device support that encompasses automated, proactive technical support and cloud platforms to provision always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks, and they help achieve significant cost savings.

Eligibility Criteria

1. Ability to provide managed **service desk** and **workplace support** services through a hybrid workforce, including virtual agents
2. Offer **remote** and **onsite field support** plus in-person technical assistance, leveraging augmented reality and/or virtual reality (AR/VR)
3. Capability to set up and support **self-help kiosks, tech bars,** IT vending machines and DigiLockers
4. Data-driven **enriched analytics** to support self-service, automatically resolve tickets and generate actionable insights among users
5. Provide **automated** and contextualised support for end users, based on their roles and work
6. Ability to quantify **workplace support** function performance beyond traditional service metrics

Observations

The Digital Service Desk and Workplace Support Services quadrant this year focusses on service desk and support, having been separated from the Managed Workplace Services quadrant as reported in 2021. Providers offering service desk and support services portfolio are positioned in this quadrant, which includes service desk, remote and in-person support, tech kiosks, and field services.

Contenders in this quadrant offer a strong managed services portfolio around the Microsoft technology ecosystem. At the same time, they should develop capabilities for further automation and integration, while showcasing a better market presence with client stories and revenue.

Product Challengers have a strong portfolio that leverages automation, AI and machine learning plus augmented and virtual reality (AR and VR). These providers also have frameworks and platforms for managed services and offer **Information Technology Infrastructure Library (ITIL)** management services. They should be more aggressive in acquiring clients and expanding a local presence in the U.K.

Market Challengers offer traditional workplace support and service desk services, and they are well established in the market with large client bases. They should further develop their capabilities.

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

From the 40 companies assessed for this study, 32 have qualified for this quadrant, with 10 being identified as Leaders and one as a Rising Star.

Accenture's digital service desk and workplace support services are provided as full next-generation capabilities. Workplace Experience (WX) is an experience-centric offering and underpinned with automation, benefitting users with improved productivity and ease of use.

Capgemini is a leading provider of service desk and support services across the U.K. It delivers consistent and comprehensive managed services with its Connected Employee Experience Hub, which uses automation and AI to provide a modern, hybrid workplace for clients.

Computacenter

Computacenter digital service desk and support services are well- recognised in the U.K. encompassing several clients and sectors. It provides next-generation capabilities through the DigitalMe platform, which includes automation, self-healing, and analytics capabilities.

Fujitsu

Fujitsu is an established provider of service desk and support services in the U.K. It has a broad technical portfolio and, in recent years, has improved its managed services portfolio. The company demonstrates a strong regional presence in the move towards improved employee experience (EX).

HCL is a leading global provider of digital service desk and support services that also has a strong U.K. footprint. The services, which are delivered with its Fluid Workplace platform, address the changing enterprise future working model by leveraging an optimum combination of its proprietary offerings/solutions.

Infosys service desk and support services are delivered through its Cortex platform. Underpinned by analytics and automation, Infosys also utilises the platform to support clients in achieving sustainability targets, while making operational savings. This combined approach makes it one of the leading providers in the market.

TCS offers service desk and support services through its Cognix™ platform. Embedded automation and AI make the platform scalable and flexible to drive clients towards hybrid, modern ways of working. Transforming the management approach to an XLA perspective also helps with engagement and adoption among users.

Tech Mahindra provides service desk and support services through its FLEX platform, designed to offer clients with comprehensive support services and improved EX. This improvement is reflected in a CSAT score of 4.8 across the U.K. and by the increasing number of users.

Unisys, a global provider of digital service desk and support services, has a strong U.K. presence. Leading with experience management, Unisys supports clients in their move to the hybrid workplace with an approach that benefits clients and users alike.

Wipro digital service desk and support services lead the market through LiVE Workspace™, VirtuaDesk™ and other proprietary solutions. Its experience-led approach delivers value for a range of new and existing clients in the UK.

Mphasis

Mphasis, Rising Star, has a strong global footprint and has established a foundation in the U.K. for service desk and support services. A growth of over 50 percent in the U.K. illustrates that the Mphasis service management blueprint resonates in the region. It also leverages global partnerships and offers modern automated services.

Computacenter

Leader

"Computacenter delivers its service desk and support services, DigitalMe in the U.K."

Kevin Turner

Overview

Computacenter is an established service desk and support provider in the U.K., where it offers full managed digital workplace services through its DigitalMe service. It provides service desk support from 13 locations around the world, including 3 in the UK - Nottingham, Sheffield and Milton Keynes. The company supports over 1.6 million users, across 145 clients in the U.K.

Strengths

Automation capabilities: Computacenter AIMY is a digital delivery platform, powered by AI, automation and analytics. It offers a self-help knowledge base, a reusable automation posture library, and a hosted chatbot solution for AI services. It can auto-resolve up to 20 percent of incidents and up to 15 percent through user self-help.

Well established in UK: Computacenter has major U.K.-based clients across sectors, and a large sales operation backed by a robust partner ecosystem. It has many client cases, for its managed digital workplace services, from retail, banking and financial services sectors.

Strong portfolio: The DigitalMe service focusses on endpoint management, providing applications and Windows evergreen services. It offers inbuilt productivity collaboration support for enterprise voice, video, and smart spaces, as well as remote services for intelligent assistance, proactive engagement, and self-healing. Its asset lifecycle management services offer asset intelligence, real-time tracking and financing for DaaS. The company also provides onsite support for field and kiosk services, in addition to content community services.

Caution

Computacenter could showcase more examples of improved employee experience management use cases, enabled through DigitalMe, to promote its leadership position in this quadrant.

Managed Employee Experience Services

Who Should Read This

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

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

The COVID-19 pandemic continues to be the catalyst for global as well as U.K.-based enterprises to re-evaluate their workplace model and boost employee productivity and collaboration. Employee experience services remain one of the top priorities for enterprises in this region, as employee engagement is critical in terms of driving business outcomes. Hence, these enterprises are looking for service providers that can help them in managing their employee experience holistically.

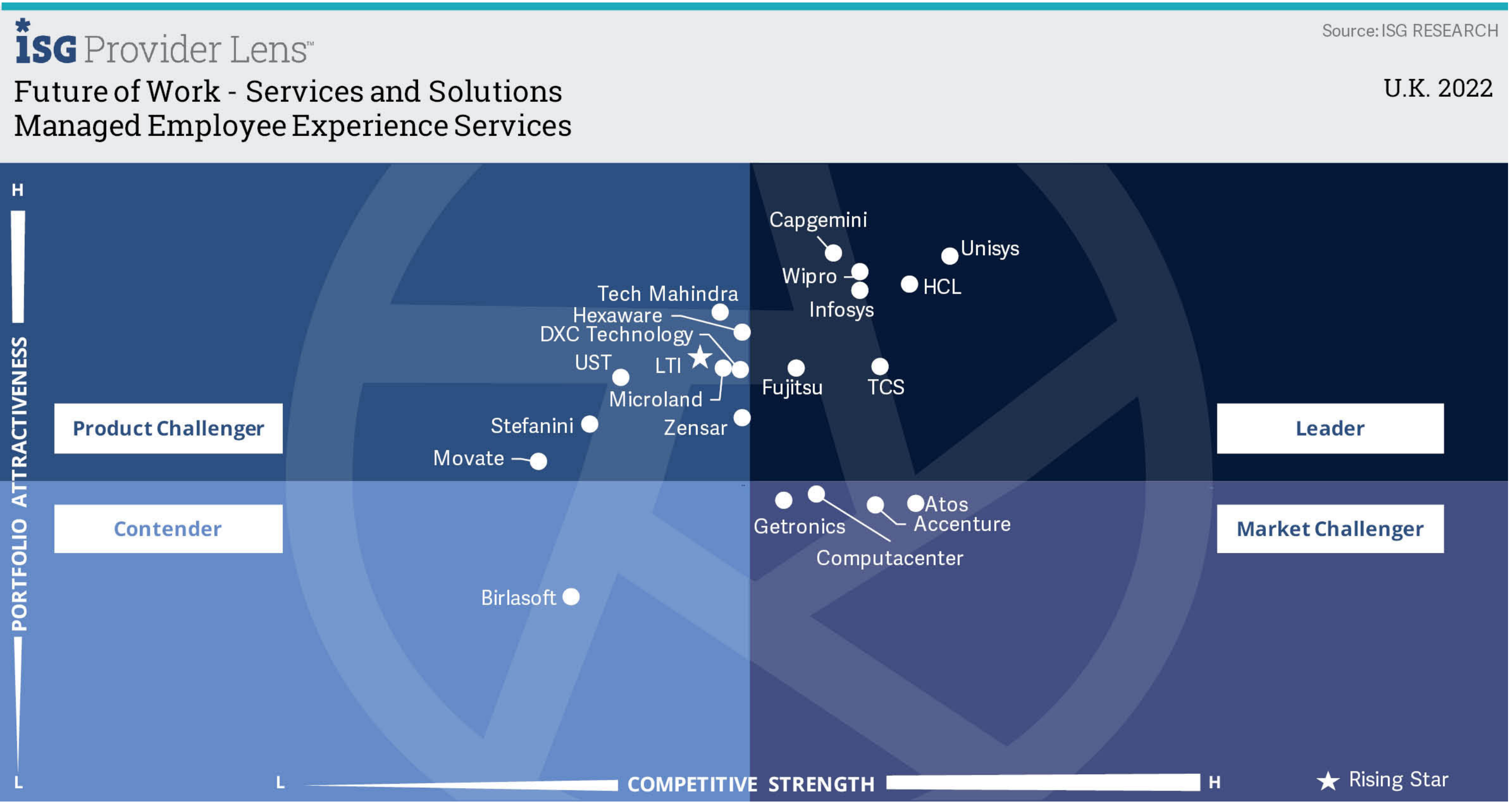
Attracting and retaining top-notch talent, creating personalised user experience, productivity from anywhere, and avatar-based collaboration are a few other focus areas for enterprises in this region. Enterprises in this region are looking for an integrated approach and are also focusing on adopting emerging technologies, in addition to cloud and automation, to achieve digital dexterity.

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

CHRO leaders should read this report to know which providers are leading in managing experience for employees in this new age of hybrid working, from the talent retention, upskilling, and recruitment perspectives.

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

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



This quadrant assesses providers that deliver managed employee experience services, supporting enterprises with **experience management,** analytics and insights for the **best possible workplace** experience.

Kevin Turner

Definition

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

Eligibility Criteria

1. Ability to provide services that directly correspond to **user experience** associated with device and app access, plus team collaboration and human augmentation to a digital workforce. Services cover virtual agents, employee experience, **user productivity** and **digital dexterity**
2. Offer a **seamless experience** for remote-working employees and part-time workers that include innovative engagement services
3. Should have at least 50 percent of their clients leveraging key performance indicators (KPIs) related to experience level agreements **(XLAs)** and at least 10 percent of clients globally with XLA-based actual pricing (risk and reward) engagements
4. Provide managed unified communications and collaboration (UCC), **user behaviour analysis** and user experience measurement beyond workplace technology, extending smart workplace services to other business functions such as HRO and operations
5. Offer services to enhance **employee digital dexterity** and support technology democratisation initiatives such as low code/no code development

Observations

This is an emerging quadrant that ISG has carved out from the managed services space to differentiate providers offering value-added services on top of regular digital workplace capabilities. Providers in this space have a strong focus on employee experience (EX) and other services and are woven around experience. In this space, technologies and methods are developing rapidly, with market positions changing accordingly.

Providers positioned as Contenders offer basic EX services, powered by basic automation and analytics. They should further develop and provide hyper-personalised capabilities and establish their market presence in terms of experience.

Product Challengers in this quadrant have comprehensive capabilities, covering EX through technology performance, physical workplace and enterprise application integration.

Market Challengers are well-established providers in the EX space. At the same time, they should showcase specific capabilities in enabling and enhancing experience for specific areas in the future of work model.

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

From the 40 companies assessed for this study, 22 have qualified for this quadrant with seven being Leaders and one a Rising Star.

Capgemini's managed employee experience services include a proven methodology and tools to provide clients with the benefits expected from a transformational approach. Its services are especially suited to the hybrid workplace and are continually improved with further deployments. Experience analytics and citizen developer services are its key differentiators.

Fujitsu

Fujitsu delivers managed employee experience services through co-creation, providing clients with tailored services to fit their workforce, culture and business demands. Personas, journey mapping and outcomes form the basis for detailed experience services and are backed by a strong partner ecosystem.

HCL is a leader in EX services in the U.K. It has a range of comprehensive capabilities to move the modern workforce towards a zero-touch IT operation — driving experience improvements and cost reductions.

Infosys takes a human-centric approach to EX services and combines the same with strong consulting capabilities, making it one of the leading providers in the market. Its innovations moves beyond IT, supporting clients in adjacent areas such as HR (for onboarding) and facilities (smart office).

TCS's managed employee experience service offerings encompass its proprietary offerings and digital nudging capability. It provides consulting services to establish journey roadmaps and detailed experience expectations so that management services can be established to deliver the required improvement for users.

UNISYS

Unisys, an early adopter of digital experience monitoring tools, delivers employee experience managed services for U.K.-based clients, covering diverse business functions and global operations. Unisys offers next-generation XLAs that are holistic and not device measurements.

wipro

Wipro provides managed employee experience services through a comprehensive portfolio of technology capabilities as a part of its Digital Experience Platform (DXP), including TopCoder and myUniHub, which are aimed at improving employee experience services.

LTI
Let's Solve

LTI, Rising Star, has a global footprint for the delivery of managed employee experience services. It supports over 1 million users worldwide, including the ones in the U.K. The company has grown in Europe by 40 percent since 2020.

Appendix

The ISG Provider Lens 2022 – Future of Work - Services and Solutions 2022 analyses the relevant 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

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2022, for providers who actively participated as well as for providers who did not. ISG recognises that many M&A 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 study was divided into the following steps:

1. Definition of Future of Work - Services and Solutions 2022 market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Author

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Principal Consultant

Kevin Turner brings more than 35 years of experience spanning digital advisory, IT sourcing, technology and industry research. He is a digital expert at ISG, responsible for authoring thought leadership papers and ISG Provider Lens™ reports around Future of Work. Kevin's remit includes advising senior executives on digital strategy, product planning, emerging tech, and IT procurement. Kevin has authored research reports in the realm of the Future of Work and IT outsourcing.

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Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions and Cybersecurity Solutions and Services. Sonam comes with five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting on research projects.

IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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 partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this webpage.

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ISG

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ISG Provider Lens™

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