ISG Provider Lens™

Future of Work Services

A research guide to evaluate providers' strengths, challenges and differentiators in the modern workplace

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Computacenter

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Generative AI is a catalyst for the next technical wave of workplace transformation and empowers new ways of working

Generative AI (GenAI), though seemingly novel, has existed since the 1960s. But significant progress only came recently, starting with the advancements in this field in 2014. The current year marks a turning point with substantial improvements in GenAI capabilities, resulting in accelerated development and opening up numerous potential use cases. The ISG Provider Lens™ *Future of Work Services 2024* study delves into advancements in GenAI and large language model (LLMs) by various providers, highlighting specific use cases for deploying these features to clients and projected evolution over the next few years.

Early adopters of standard offerings, such as those utilising Microsoft 365 Copilot, are well-positioned to iterate and build new use cases and scenarios across their IT landscapes, enabling intelligent workforce engagements with technology. Leading providers already offer these capabilities to clients, with many conducting pilot deployments or other limited implementations for direct user feedback. This phase is vital as they prepare for the expected mass demand and implement governance measures to maintain control over the IT environment and prevent it from becoming unmanageable.

Leading providers are actively building support to leverage the potential of GenAI, aiming to drive unprecedented agility, flexibility and scalability. These efforts are set to achieve milestones that enterprises have long aspired to, now expected within the next 12-18 months.

Delivering effective hybrid working models

Hybrid working has become increasingly common in the U.K., with over half of recent job postings specifying office attendance requirements for between 1 and 4 days per week. This trend reflects the demand from workers seeking employers with flexible working arrangements. Enterprises need to establish guidelines to support hybrid working,

GenAI adoption is vital as enterprise clients expedite **workplace transformation.**

encompassing corporate policies, suitable remote workloads and technical infrastructure for seamless access to applications, data and people across different locations.

Unified communication and collaboration platforms like Microsoft Teams address technical aspects of hybrid working. However, many employees still view Microsoft Teams as primarily a replacement for Skype for Business, missing its full potential. Forward-thinking enterprises are exploring these platforms to enhance workforce productivity across internal teams, third parties and partners.

Outdated practices such as using email attachments, USB keys or unauthorised channels for collaboration should be left behind, especially in growing companies undergoing mergers and acquisitions. Leading providers and emerging challengers, as observed in the Managed End-user Technology Services and Continuous Productivity Services (including Next-gen Service Desk) quadrants, possess the expertise and tools to facilitate an exceptional hybrid working experience for organisations of all sizes.

Workforce engagement and adoption

The concept of experience management (XM) emerged in 2018, drawing attention from early adopters, primarily focused on device metrics. Only a few companies initially focused on holistic programmes to enhance EX, emphasising the availability of technology items such as devices, applications and networks. During this period, emerging technologies from digital employee experience (DEX) vendors were developed to identify and address underlying technical issues.

By 2024, the significance of EX has continued to grow. Every provider included in this current study recognises the importance of XM. This focus reflects in every quadrant, from Workplace Strategy and Enablement to Smart and Sustainable Workplace Services.

At its core, EX management involves deploying DEX tools and taking remedial actions across endpoint devices. Leading XM providers now offer a more comprehensive management layer, overseeing and evaluating interconnected systems. They can even identify and resolve employee issues that extend beyond technical challenges. By focusing on XM, organisations not only promote a happier and more productive workforce but also identify friction points and challenges in digital transformation initiatives. This, in turn, enhances the adoption of technology investments made by enterprises to benefit their workforce.

In an environment where costs are closely scrutinised, non-delivering technology spending can be easily terminated. Therefore, strategies promoting widespread employee adoption of technology prove invaluable. The imperative for experience also enables clients to move beyond traditional availability contracts — SLAs — with reactive and short-term behaviours to a modern, flexible and outcome-driven model — XLAs — making IT operations effective and valuable.

Workplace technology is bigger than IT alone

Over the past five years, the U.K. has witnessed a significant shift in technology perception, transforming from solely an IT concern into an integral part of business strategy. Previously viewed as a cost centre, IT has now evolved into a key enabler for businesses, with the potential to become a profit centre in the future. Enterprises recognise the importance of collaboration between IT, HR and facilities functions to tackle business challenges.

This emphasis on business collaboration has grown stronger since the COVID-19 pandemic and other market forces such as skills shortages, with a renewed focus on finding cohesive solutions that benefit all business aspects. The driving force behind these collaborations often remains as primarily potential cost savings. Smarter enterprises are realising that value delivered can be measured more effectively than just by the price tag. We also see clients seeking improved sustainability contributions, ROI and enhanced employee experience (EX) by streamlining complex processes and tasks.

Budget constraints persist

Global economic challenges and geopolitical uncertainty in Europe have caused budget concerns similar to those during the 2009 stock market crash. Increased spending on energy resources has significantly raised global inflation rates, including in the U.K.

Two years of workforce unrest, marked by widespread strikes for better pay and working conditions, have further destabilised the regional market.

These factors underline the importance of technology investments and innovation, with business clients carefully evaluating projected returns before committing to transformation projects. According to ISG Provider Lens™ *Future of Work Services* report, the top providers have successfully executed transformation initiatives, particularly those related to EX, as outlined in the Collaboration and Next-gen Experience Services quadrant analysis. Providers have the potential to deliver positive outcomes for companies and employees while controlling costs and some innovations may even become self-funding, which can be a win for procurement teams.

Sustainability requirements no longer taking a back-seat

Awareness of sustainability, environmental, social and governance (ESG) issues has grown in recent years across the business world. While often mentioned in passing in the footnotes of requests for proposals, these topics were frequently overlooked by provider and client delivery teams, particularly in the private sector

However, within the U.K. public sector tenders, there has been a noticeable emphasis on these areas for several years and this is now becoming an imperative for the broader Future of Work marketplace. This increased focus on sustainability and ESG has shifted technology investments and innovation, often making them expensive. Enterprise clients now diligently evaluate anticipated returns before committing to sustainability projects or green initiatives.

As a result, top providers in the ISG Provider Lens™ *Future of Work* report have made significant strides in implementing ESG initiatives, especially when these initiatives are tied to measurable outcomes, as highlighted in the Smart and Sustainable Workplace Services quadrant. Effective implementation of ESG initiatives enables providers to generate positive results for both enterprises and employees while controlling processes. Some of these innovations have even become self-funding, which resonates well with procurement teams and helps to avoid the pitfall of *greenwashing*.

This shift signals a broader transformation within the future of work marketplace, where sustainability and ESG considerations are increasingly becoming integral to decision-making processes.

U.K. clients are driving the demand for increased user productivity, sustainable initiatives and a strong focus on EX across all digital workplace services. The ongoing digital workplace transformation highlights a growing need to implement AI securely and efficiently. This approach accelerates workplace evolution and maximises client benefits.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Accenture	Leader	Leader	Leader	Not In	Leader	Leader
Atos	Product Challenger	Rising Star ★	Leader	Not In	Leader	Rising Star ★
Birlasoft	Not In	Not In	Not In	Not In	Contender	Not In
Capgemini	Leader	Leader	Leader	Not In	Leader	Leader
Capita	Not In	Not In	Contender	Leader	Not In	Not In
CGI	Not In	Not In	Product Challenger	Leader	Not In	Not In
Coforge	Not In	Not In	Contender	Not In	Not In	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
Computacenter	Market Challenger	Leader	Leader	Not In	Leader	Product Challenger

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In
DXC Technology	Leader	Leader	Leader	Not In	Leader	Leader
EY	Market Challenger	Not In	Not In	Not In	Not In	Not In
Fujitsu	Product Challenger	Product Challenger	Leader	Not In	Leader	Leader
GAVS	Not In	Not In	Contender	Contender	Not In	Not In
Getronics	Contender	Product Challenger	Product Challenger	Leader	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader	Not In	Leader	Leader
Hexaware	Contender	Product Challenger	Product Challenger	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Not In	Leader	Leader

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
ITC Infotech	Contender	Contender	Contender	Not In	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In
Kyndryl	Rising Star ★	Product Challenger	Product Challenger	Not In	Product Challenger	Leader
Lenovo	Market Challenger	Contender	Not In	Not In	Contender	Product Challenger
LTIMindtree	Contender	Contender	Product Challenger	Not In	Product Challenger	Product Challenger
Microland	Contender	Product Challenger	Rising Star ★	Not In	Product Challenger	Not In
Movate™	Not In	Not In	Market Challenger	Market Challenger	Not In	Not In
Mphasis	Contender	Contender	Product Challenger	Product Challenger	Product Challenger	Contender
NTT DATA	Product Challenger	Product Challenger	Market Challenger	Not In	Product Challenger	Contender

Provider Positioning

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Orange Business	Not In	Not In	Product Challenger	Not In	Not In	Not In
PwC	Market Challenger	Not In	Not In	Not In	Not In	Not In
SCC	Not In	Contender	Contender	Rising Star ★	Contender	Not In
Sopra Steria	Not In	Not In	Contender	Leader	Not In	Not In
SS&C	Not In	Not In	Contender	Not In	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Not In	Not In	Product Challenger	Contender
TCS	Leader	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Contender	Contender	Product Challenger	Not In	Product Challenger	Product Challenger
TET	Not In	Not In	Contender	Contender	Not In	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Unisys	Leader	Leader	Leader	Not In	Leader	Product Challenger
UST	Not In	Not In	Contender	Product Challenger	Not In	Not In
Vodafone	Not In	Not In	Contender	Contender	Not In	Not In
Wipro	Leader	Leader	Leader	Not In	Leader	Leader
XMA	Not In	Not In	Contender	Contender	Not In	Not In
YASH Technologies	Not In	Not In	Contender	Contender	Not In	Not In
Zensar Technologies	Contender	Product Challenger	Product Challenger	Not In	Market Challenger	Contender

This study evaluates providers' capabilities in delivering key **Future of Work services** across different regions.

Simplified Illustration Source: ISG 2024

- **Workplace Strategy and Enablement Services**
- **Collaboration and Next-gen Experience Services**
- **Managed End-user Technology Services – Large Accounts**
- **Managed End-user Technology Services – Local Specialists**
- **Continuous Productivity Services (including Next-gen Service Desk)**
- **Smart and Sustainable Workplace Services**

Definition

The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. The advancements in generative AI (GenAI) and the need to assimilate new business models to meet dynamic customer demands also contribute to the evolving future of work.

Enterprises no longer partner with service providers to provide laptops, mobiles, Wi-Fi and service desks and allow employees to work as they want. Instead, they embrace a flexible workplace open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction.

Employees seek the freedom to select both their workspace and the required technology. They need ubiquitous access to devices, applications, data, workflow, documents and processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to better manage back-end workplace technologies. Still, enterprises need expert help strategising, implementing and adopting this technology.

This report focuses on the approaches where next-generation thinking changes the future workplace landscape.

ISG's Future of Work Framework

- Encapsulates what enterprises are doing to design new ways of working plus the Future of Work / Workplace models and helps connect them to digital solutions
- Represents convergence of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services:

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services – Large Accounts
- Managed End-user Technology Services – Local Specialists
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace 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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

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 and Enablement Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the current market positioning of workplace strategy and enablement service providers and how each provider addresses the key regional challenges.

The U.K. workplace is undergoing a radical transformation driven by digital innovation, employee well-being and sustainability. Enterprises need strategic guidance and support to navigate this evolving landscape. Data-driven insights help businesses utilise space effectively, integrate technology seamlessly and develop talent acquisition strategies.

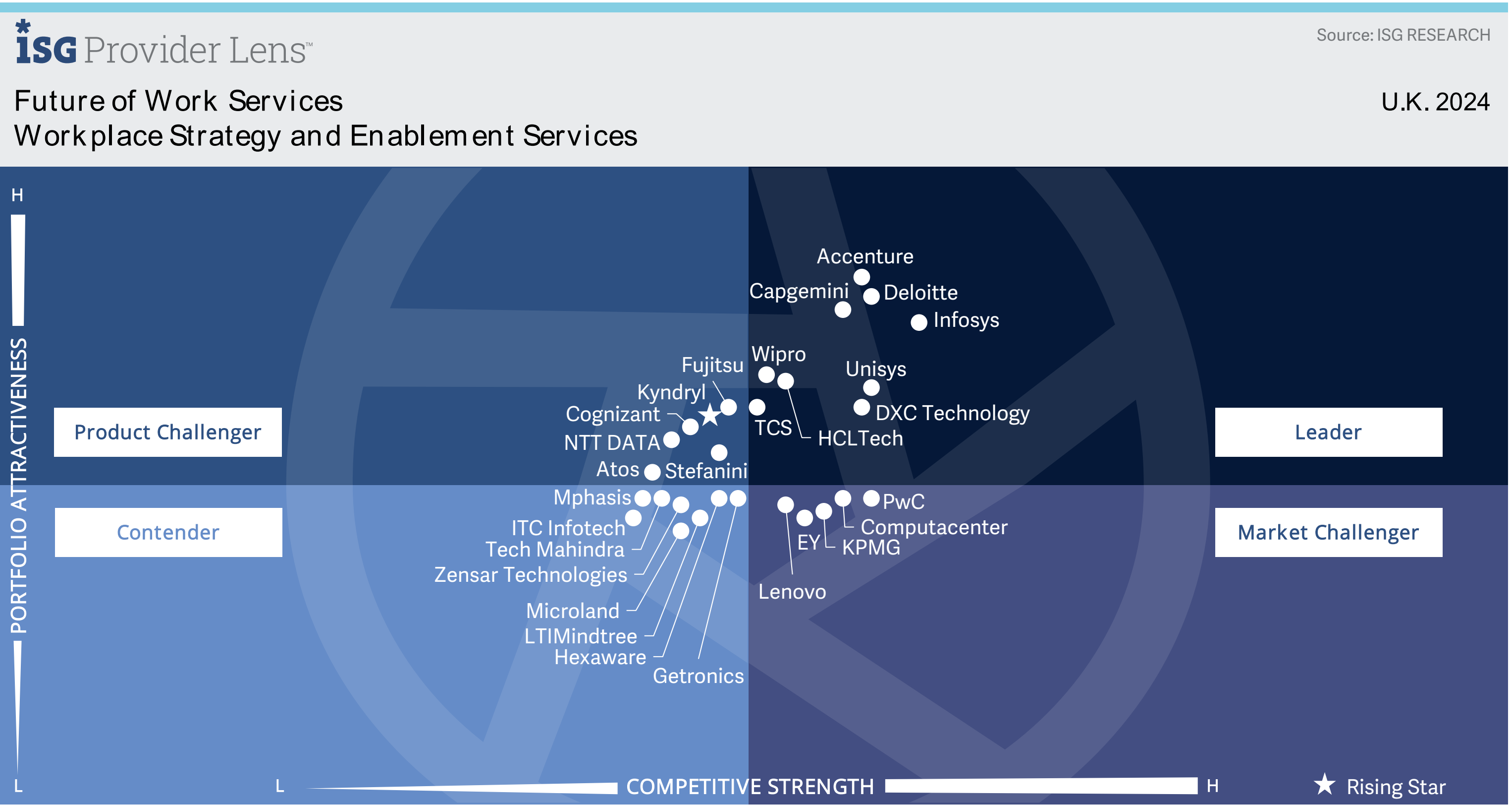
Transforming physical spaces for hybrid work is crucial. Providers offer services such as redesigning offices to foster collaboration and innovation and developing talent models that attract and retain top performers in a remote-friendly environment. Nowadays, enterprises seek to implement robust collaboration tools, secure cloud solutions and digital communication platforms. Sustainability is also integrated into workplace design, focusing on energy efficiency, resource management and employee well-being.

Key digital workplace trends in the U.K., such as automation and AI, reduce repetitive tasks and personalise employee experience (EX). A seamless and engaging digital experience and hybrid workforce enablement are also important. Leveraging these trends and comprehensive workplace strategy and enablement services, U.K. enterprises can create a future-proof workplace that drives productivity, attracts top talent and fosters a sustainable and positive work environment.

Strategy professionals should read this report to learn about the leading providers to prepare their workforces for the changing business models and dynamics in the post-pandemic world.

Digital professionals, including digital transformation leaders, should read this report to understand how EX transformation service providers align with their digital transformation initiatives.

Technology professionals should read this report to understand providers' positioning and capabilities to enhance workplace strategy and enablement services.



This quadrant evaluates **workplace strategy and enablement** service providers, offering **tailored advice** and **strategies based on region, market direction and organisational responsibility**, while providing **integrated services** to clients.

Kevin Turner

Definition

This quadrant evaluates providers offering workplace strategy and enablement services, including implementations, across industries. Organisations aiming to help clients navigate the complex strategies and regulations of the workplace landscape must be able to tailor advice and strategy by region, market direction and organisational responsibility. They must also provide strategic capabilities and services spanning several integrated areas related to enterprise-wide workplaces.

Workplace service providers must focus on considerations such as advanced business models and new talent models. These considerations require guidance, compliance and strategy suited to human, digital and physical workplaces and must be considered collectively instead of in silos. Newer aspects that should be included as part of workplace services are listed as follows:

- Market change and new business model design, including the creation of a circular business delivery model
- Guidance on digital capabilities that can impact human or physical workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategy

While some providers can develop strategies, the key to minimising potential issues is to work on procurement, project management, change, CX and workplace strategy delivery. Delivering these capabilities across several industries is crucial as the regulations vary by industry.

Eligibility Criteria

1. Provide **advisory services** and **new business model designs**
2. Have a vendor-neutral approach for **workplace transformation-led business delivery models**
3. Offer **advisory services for human, digital or physical workplace strategy**
4. **Adopt new talent models impacting workforces**. The models should integrate diversity, equity and inclusion and eliminate modern slavery risks
5. **Integrate local and remote physical workplaces** to ensure **experience parity**
6. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom line performance
7. Have **experience and references in delivering workplace-driven sustainability strategy**
8. Have **industry-wide case studies for workplace strategy** leading to human, digital and physical workplace benefits

Observations

The report emphasises the significant changes happening in the U.K. workplace strategy and enablement services market due to digital innovation, with a focus on employee well-being and sustainability. It highlights their importance for enterprises seeking strategic guidance to adapt effectively to this evolving landscape. It advises the use of data to optimize space, integrate technology and refine talent acquisition.

There is an emphasis on reconfiguring physical spaces for hybrid work, promoting collaboration and creating a conducive environment for remote work. The report also notes the increasing demand for collaboration tools, secure cloud solutions and digital communication platforms, while stressing the importance of sustainability in workplace design, particularly energy efficiency and resource management.

Key trends driving this transformation include automation and AI to reduce mundane tasks and enhance EX. The report advocates for a seamless digital environment and support for a hybrid workforce, suggesting that this alignment will help U.K. enterprises create a resilient, productive and sustainable workplace, attracting top talent and fostering a positive impact.

From the 49 companies assessed for this study, 28 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture is a Leader in this quadrant with a robust business strategy and advisory consulting services that provide clients with a clear human-centric focus to drive leading digital workplace transformations.

Capgemini

Capgemini excels in workplace strategy and enablement, creating efficient, productive and inspiring workspaces that assist clients in driving innovation and fuel growth.

Deloitte.

Deloitte's exceptional workplace strategy services empower clients to embrace a more flexible and human-centred work environment. For the company, future of work encompasses skills, ecosystems and technology, transcending traditional physical workplaces.

DXC TECHNOLOGY

DXC Technology delivers top-of-the-line workplace strategy and enablement services using advisory consultants and the state-of-the-art DXC UPtime™ platform. This integrated system harnesses the power of analytics and business strategy to deliver exceptional results.

HCLTech

HCLTech's workplace strategy services are backed by robust digital advisory consulting expertise and advanced technology capabilities. This allows the company to create cutting-edge AI-powered solutions for enhancing employee productivity and experience.

Infosys

Infosys brings extensive expertise, a strong partner ecosystem and innovative programmes to help clients modernise workplaces across all industries, transforming clients' workplaces with confidence and success.

tcs TATA CONSULTANCY SERVICES

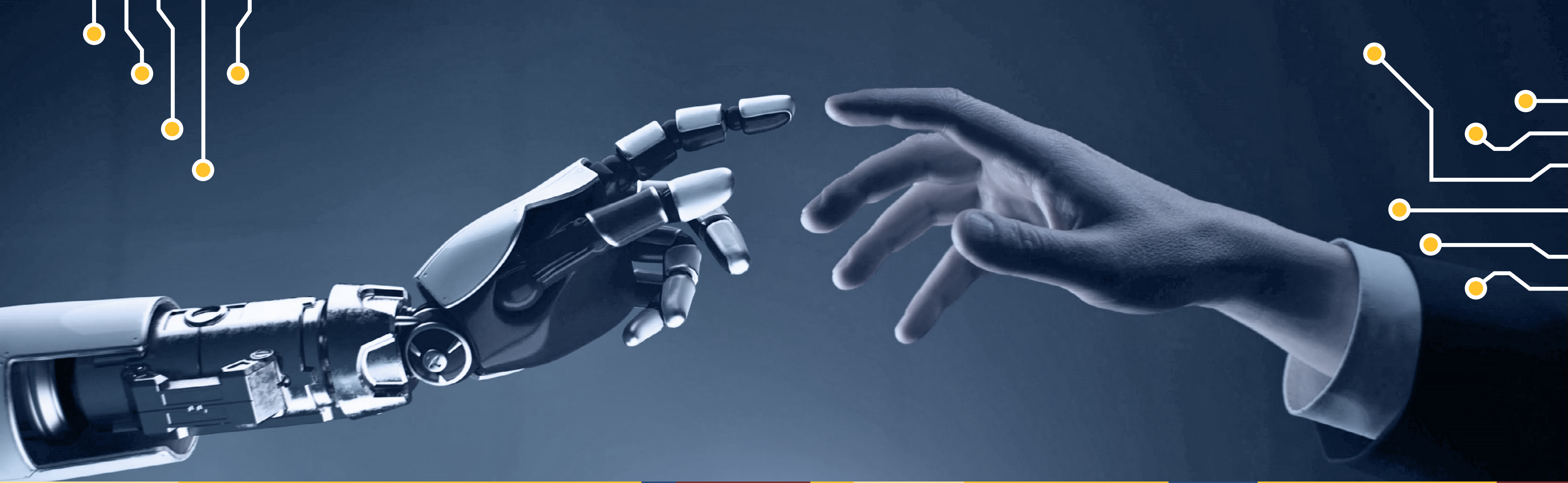
TCS' workplace strategy services offer an extensive AI-trained workforce to support clients. With over 3,500 patents granted, TCS has remarkably enhanced its innovation, fortifying advisory consulting across the digital workplace.

unisys

Unisys provides top-notch workplace strategy services to drive market-leading workplace transformation, focusing on improving employee engagement and productivity in both IT and business functions.

Wipro leads in workplace strategy services delivered through strong advisory consulting teams and leading technology in its Experience Nxt platform, offering modern digital workplace solutions across many industry sectors.

Kyndryl has emerged as a Rising Star in the Workplace Strategy and Enablement Services quadrant. Through its advisory, consulting and transformation services, its team is dedicated to delivering excellent modern workplace transformations.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the current market positioning of collaboration and next-generation experience service providers and how each provider addresses the key regional challenges.

The U.K.'s business landscape is undergoing a significant transformation. Due to the global pandemic and economic shifts, companies are prioritising collaboration, employee experience (EX) and digital transformation to navigate the new normal. Collaboration tools such as Microsoft Teams, Slack and Cisco Webex foster team communication and information sharing. Biometric logins and contextual settings further personalise this experience, while integration with IT service management (ITSM) ensures security compliance. Hot-desking arrangements in reimagined office spaces optimise real estate usage.

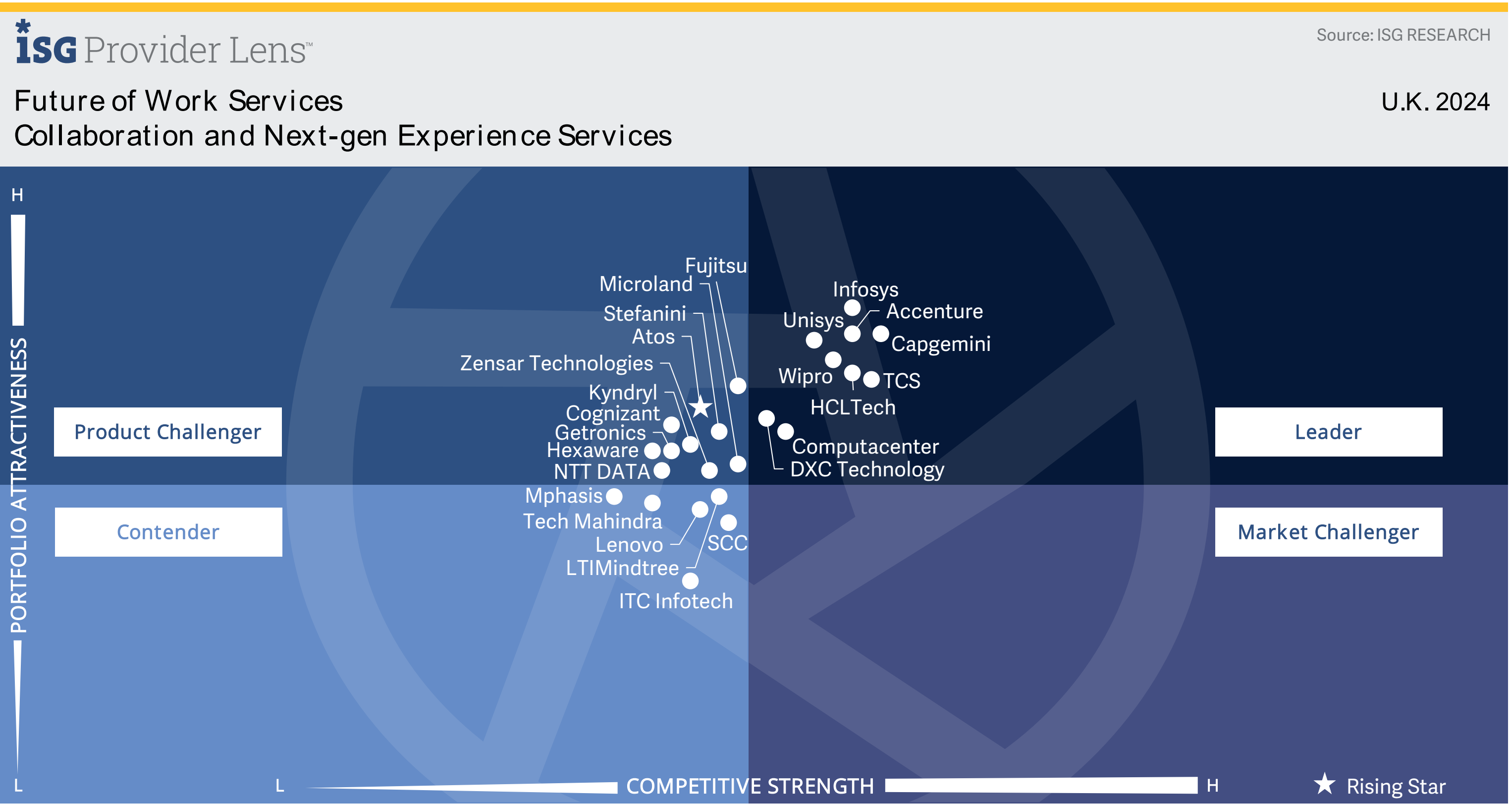
Enterprises in the U.K. are enhancing data security, GDPR compliance and persona-driven asset management to ensure a smooth and secure experience. Adopting new tools, including self-service application stores and GenAI-powered personalisation, empowers employees with the right resources and settings. XLAs go beyond simple SLAs and provide a holistic view of employee satisfaction and performance. Automating manual tasks streamlines workflows and frees employees to focus on higher-value activities.

Over 90 percent of U.K. enterprises prioritise EX, having realised its impact on employee well-being, productivity and talent retention. By embracing hybrid work enablement strategies and AI integration, service providers can help U.K. businesses create a future-proof workplace that prioritises employee satisfaction and fosters a thriving and competitive workforce.

Strategy professionals should read this report to learn about evolving business models, creating a future-proof workplace and maintaining organisational competitiveness.

Digital professionals should read this report to learn to leverage digital transformation acceleration and experience-based metrics to create a thriving DEX.

Technology professionals should read this report to understand the latest trends in digital workplaces, from AI integration and automation to GenAI's transformative potential.



This quadrant assesses providers that provide **managed UCC** and **EX-enhancement services**, leveraging the latest technologies to assist clients deliver hybrid workplaces and realise their **XLA vision**.

Kevin Turner

Definition

This quadrant assesses service providers' capabilities in enhancing end-to-end CX and EX and offering value-added managed services to enable workplace technology ecosystem and enhance end-user experience. Typically, providers offer services that enable business leaders, line-of-business (LoB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. Their services associate experience with measurable business results and help align the digital workplace transformation with human needs.

Next-generation experience extends beyond technology implementation, including professional services promoting technology adoption. Service providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data and analytics, sentiment analysis, ML and change management activities.

These providers enhance collaboration and support comprehensive communication, collaboration and productivity stacks using AI and GenAI technologies. They also extend their offerings to consulting and advisory services, addressing the requirements of various business functions such as HR and operations. They provide expert guidance on effective change management and technology adoption, using cutting-edge technologies to ensure seamless transitions. Additionally, these providers offer services promoting digital dexterity, thus fostering an environment conducive to learning and skill development essential for navigating the evolving workplace landscape.

Eligibility Criteria

1. Provide an **XLA-focused delivery approach** to enhance collaborative experience
2. **Leverage AI and GenAI technologies** to provide value-added experience transformation services
3. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage by monitoring analytics from deployed hardware
4. **Support unified communication, collaboration and productivity stack**
5. **Provide services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
6. Provide **services that enable proper change management and technology adoption,** leveraging the latest technologies such as Copilot
7. **Support XMO and associated services**
8. Provide **services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**

Observations

This latest ISG Provider Lens™ report on Future of Work Services features a new quadrant introduced to evaluate providers offering collaboration and next-generation experience services focused on managing EX. This evaluation is particularly significant for enterprise clients looking to integrate workplace services with large-scale digital transformations and are seeking providers that offer XLAs aligned with broader business objectives. The emerging technology within solutions, such as Microsoft Copilot and similar offerings by other UCC solutions has had a profound impact on overall business operations.

Providers positioned in this quadrant are known for offering both core and bundled workplace services. The Contenders in this quadrant stand out for their proactive incidence management and predictive analytics, which greatly assist workplace support functions and contribute to enhancing overall efficiency.

Meanwhile, the Market Challengers in this quadrant have a strong presence in the U.K. market and provide experience measurement services based on technology performance. They are significant players in this space.

On the other hand, the Product Challengers have demonstrated significant advancements in their XLA approach and also provide dedicated services for Microsoft Copilot and similar solutions.

Finally, the Leaders in this quadrant have established a strong market presence and follow a holistic XM and XLA approach that encompasses not only technology performance but also its impact on broader business objectives to deliver outcomes.

From the 49 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one Rising Star.

Accenture provides leading digital workplace collaboration and experience services for enterprise clients in the U.K. These services assist in integrating humans and machines to create all-encompassing connected experiences.

Capgemini is a pioneer in delivering workplace collaboration and next-generation experience services to U.K. enterprises. Clients can benefit from transformation outcomes that are efficient, productive and meaningful.

Computacenter provides advanced collaboration and next-generation experience services to companies seeking to create modern work environments that cater to the needs of hybrid workforces and meet flexibility and adaptability demands.

DXC Technology is a leading provider of collaboration and next-generation experience services focused on transforming clients' future visions for their modern workplaces into a cohesive, interoperable system, using the Uptime™ platform, underpinned by analytics.

HCLTech leverages technology and knowledge expertise to provide innovative collaboration and next-generation experience services through its XMO team, enhancing employee productivity and overall experience for enterprise clients.

Infosys is a leading provider of collaboration and next-generation experience services in the U.K. It combines the power of its expertise, partner ecosystem and leading creativity to expedite workplace transformation for large enterprise clients.

TCS is committed to collaborating with clients and providing next-generation experience services to empower workforces and facilitate digital workplace transformation. This allows clients to rapidly advance and equip their employees with modern workplace capabilities.

Unisys' leading collaboration and next-generation experience services deliver workplace transformation to clients with speed and quality. Especially suited to clients committed to employee engagement and productivity gains across the enterprise.

Wipro is at the forefront of collaboration and next-generation experience services, leveraging its robust Live Workspace platform to deliver human-centric, hybrid modern digital workplace solutions across diverse enterprises and industry sectors.

Atos, a Rising Star in this quadrant, provides collaboration and next-generation experience services built on a foundation of globally renowned workplace services and support. Enhancements made through the Experience Operations Centre will benefit clients and employees.

Computacenter

Leader

"Computacenter delivers collaboration and next-generation experience services to clients looking for modern workplace environments to satisfy hybrid workforces, keeping them productive and satisfied."

Kevin Turner

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. Computacenter leverages its extensive expertise in technology supplies to provide leading collaboration and next-generation experience services to enterprise clients. In the U.K., Computacenter is recognised for meeting client demands for modern workplace that support hybrid workforces.

Strengths

Alignment with business objectives: Computacenter ensures its digital workplace strategies and services closely align with organisations' overall business goals and priorities. By assessing the measurable impact on employee productivity, collaboration and business outcomes, Computacenter ensures that its solutions deliver value.

Data-driven insights: Computacenter enhances its service delivery through rigorous data analytics, including occupancy rates, air quality and space utilisation monitoring. Its delivery teams assess and leverage these insights to make informed, data-driven decisions to continuously improve the digital workplace for clients.

Scale and breadth: Computacenter's expertise spans workplace, applications and data, cloud and data centre, security and networking. With 18,000 resources, the company combines strength and depth, investing in workplace propositions and GenAI to enhance capabilities and features compatible with the latest operating systems. This approach is gaining traction among enterprise clients. Computacenter's 2030 vision aims to anticipate the long-term technical changes and adapt to evolving trends. It continually evaluates the road map and the approach to update the capabilities to stay relevant and future-proof.

Caution

Computacenter is a recognised Leader in this quadrant. It could attract new clients and further increase its market share by showcasing more case studies of U.K.-based clients benefiting from its transformative services, rooted in its hardware supply heritage.

Managed End-user Technology Services — Large Accounts

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the current market positioning of managed end-user technology service providers and how each provider addresses the key regional challenges.

The U.K. workforce is significantly shifting towards hybrid and flexible work models, necessitating a fundamental change in how businesses manage and support their IT infrastructure. Traditional office-centric IT setups are no longer sufficient. Enterprises now require a robust managed end-user technology services frameworks to empower a dispersed workforce.

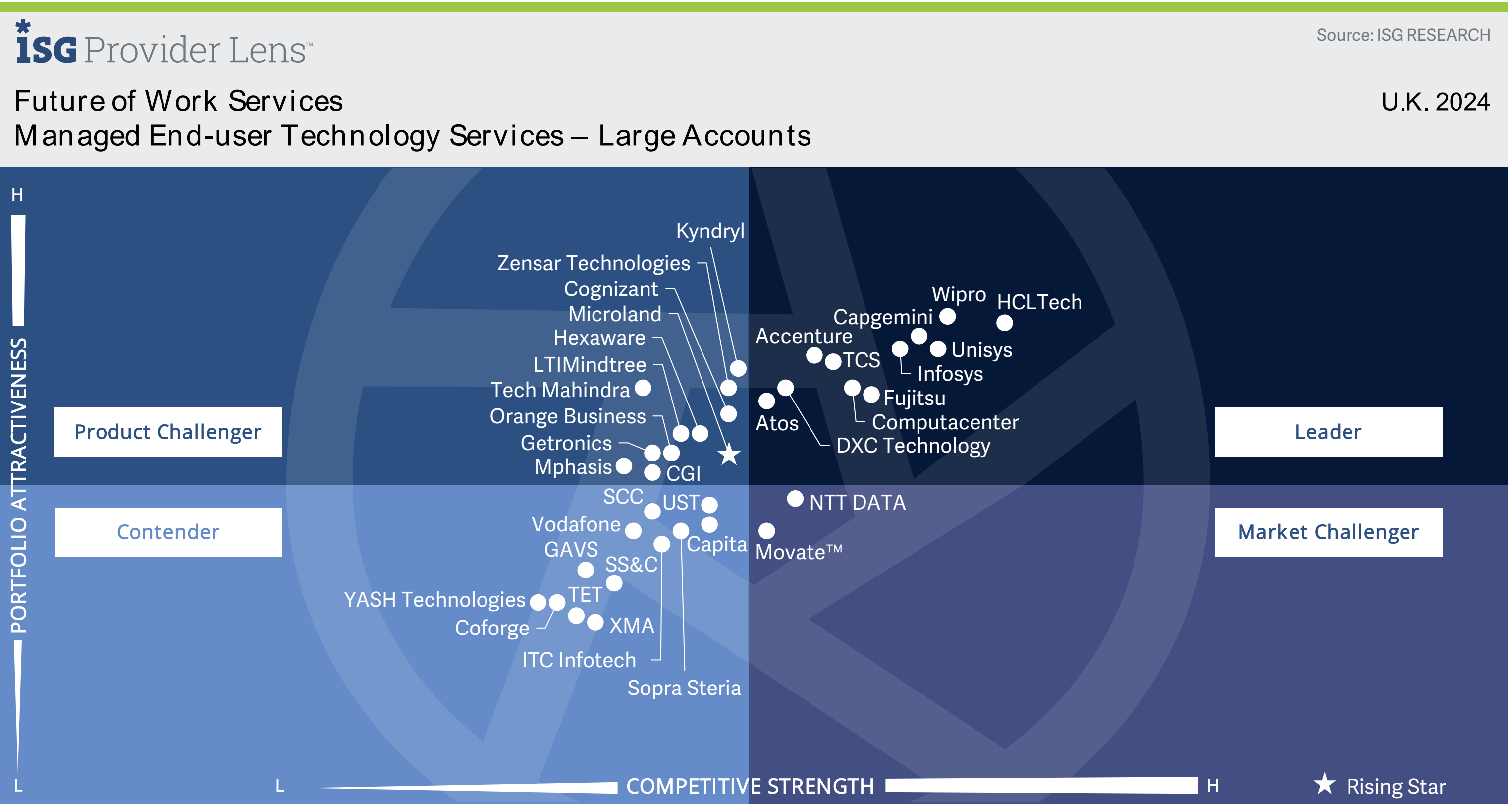
Enterprisers in the U.K. seek technologies such as unified endpoint management (UEM) and enterprise mobility management to secure and manage diverse employee devices and ensure consistent access to corporate resources. Services, such as application provisioning and lifecycle management, streamline software deployment and updates, minimising disruption and enhance UX.

The increasing adoption of cloud-based solutions such as desktop as a service (DaaS) aligns with the Anytime, Anywhere, Any Device work philosophy. This, coupled with the rise of digital employee experience (DEX) solutions, fosters a productive and secure work environment regardless of location. However, these advancements necessitate a heightened focus on cybersecurity and data privacy. Managed IT SOC services with 24/7 support and rapid incident resolution are paramount for safeguarding sensitive information.

Strategy professionals should read this report to understand key trends such as XLA and automation to optimise UX and drive business outcomes for an efficient hybrid workforce.

Digital professionals should read this report to gain insights into how providers can empower a dispersed workforce and enhance digital transformation initiatives.

Technology professionals should read this report to identify opportunities for leveraging automation and self-healing technologies to improve efficiency and reduce downtime.



This quadrant assesses service providers offering **managed services** associated with technologies that large enterprise IT departments **deploy, provision** and **secure** for end users and employees to deliver complete **end-user computing (EUC)** services.

Kevin Turner

Definition

This quadrant assesses service providers offering managed services associated with technologies that enterprise IT departments deploy, provision and secure for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security. Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualised desktop access and device lifecycle management.

Their service portfolio extends to support BYOD initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing and securing the devices remain the first primary step to enabling a digital workplace and providing devices with integrated collaboration and productivity capabilities to employees.

The increasing focus on experience through endpoints has transformed services and helped providers cater to clients' respective industries. While these services are typically associated with traditional computing devices and tablets, their scope can be expanded to include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Eligibility Criteria

1. **Provide connected, always-on and updated end-user devices** for secure collaboration and productivity
2. **Support unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**
3. **Offer complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. **Provide DEX solutions for automated issue resolution**
5. **Demonstrate experience in providing virtual desktop services on-premise and on the cloud** (desktop as a service)
6. **Offer related field services**, IMAC and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **At least 75 percent of regional contracts must include end-user technology services management**

Observations

This quadrant evaluates service providers that offer managed services for the technologies used by enterprise IT departments to support end users and employees. These managed infrastructure services in the digital workplace encompass various end-user enablement services, including device management, application provisioning, cloud workspaces and endpoint security. The providers assessed in this quadrant deliver comprehensive EUC services at the core of the digital workplace. Their service offerings range from device and patch management to virtualized desktop access and device lifecycle management. They also provide support for BYOD initiatives, mobility and telecom expense management, as well as proactive experience management and DEX support.

The provisioning, management and security of devices play a crucial role in enabling a digital workplace and ensuring that employees have access to integrated collaboration and productivity tools. The growing emphasis on delivering a superior user experience through endpoints has driven service transformation and enabled providers to better meet the unique needs of clients across various industries. While these services typically focus on traditional computing devices and tablets, they can also be tailored to support industry-specific scenarios, such as point-of-sale or handheld devices for frontline workforces, as well as medical equipment devices for healthcare and, of course, traditional office workplace environments.

From the 49 companies assessed for this study, 36 qualified for this quadrant, with eleven being Leaders and one Rising Star.

Accenture’s managed workplace services leverage the innovative myWizard® platform to provide seamless and rapid support to users, prioritising agility and scalability. The company has demonstrated its capabilities in significantly enhancing overall EX within clients’ workplaces.

Atos is a top provider of managed end-user technology services in the U.K. The company is committed to delivering exceptional service desk and support services, backed by a modernised portfolio, to meet the evolving needs of enterprise clients.

Capgemini excels in providing top-tier managed end-user technology services, positioning itself as a Leader in this quadrant. Its services are supported by cutting-edge technology and adaptable frameworks and deliver outstanding performance for enterprise clients in the U.K.

Computacenter is a leading provider of managed end-user technology services to clients across the U.K. market. The company leverages its strong technology foundations to provide modern digital workplace solutions, empowering businesses with cutting-edge transformation.

DXC Technology is a leader in managed end-user technology services in the U.K. It delivers through its UPtime™ platform, which ensures exceptional EX and enhances productivity across workforce.

Fujitsu is a leading provider of managed end-user technology services in the U.K., supported by its HX Workspace platform. This platform facilitates the provision of human-centric solutions, aimed at enhancing the overall EX for U.K. clients.

HCLTech is a leader in managing end-user technology services, known for its strong presence both globally and in the U.K. market. Its services are powered by a wide array of IP and productised solutions, supported by a global team of experts.

Infosys is a renowned leader in comprehensive managed end-user technology services. It is dedicated to delivering personalised and innovative experiences for its enterprise clients, focusing on building resilient and empathetic solutions.

TCS is a leading provider of managed end-user technology services in the U.K. The services it offers are underpinned by its cutting-edge Cognix™ for workspace solution, which aims to enhance EX and boost productivity.

Unisys is a prominent supplier of managed end-user technology services in the U.K. These services are delivered using a successful blend of automation, AI and analytics to offer clients cutting-edge, modern device management solutions throughout their workplaces.

Wipro is a leading provider of managed end-user technology services in the U.K. It leverages innovation to empower enterprise clients to meet the evolving needs of their employees in the future of work. The company enables clients to succeed with workplace transformations.

Microland is establishing itself as a leading provider of managed end-user technology services, which it delivers through a comprehensive end-to-end management platform and addresses all end-user devices, applications and data within hybrid workplaces for clients.

Computacenter

Leader

"Computacenter is a prominent provider of managed end-user technology services to clients across the U.K., leveraging its strong technology supply heritage to empower enterprises with modern digital workplace solutions."

Kevin Turner

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. Computacenter builds upon a long heritage in technology supplies to provide managed end-user technology services across enterprise clients with a focus on frictionless services for employees. In the U.K., Computacenter is both recognised and trusted to enhance the modern, hybrid workplace needed to support changing workforce requirements.

Strengths

Scale and breadth: Headquartered in the U.K., Computacenter possesses a wide range of skills in workplace, applications and data, cloud and data centre, security and networking. With more than 20,000 resources, the company demonstrates significant strength and depth. In the U.K., there are 1,000 dedicated experts at Computacenter for delivering managed end-user technology services to clients.

Large enterprise fleet: Computacenter's number of devices under management in the U.K. is approximately 3 million devices as of the year end 2023. Globally, the company managed 6 million devices, reflecting the importance of the U.K. market.

Proactive service delivery: Computacenter's service delivery model has shifted from reactive to proactive. The use of device lifecycle insights drives benefits across device management, contract renewals and inventory forecasting, aiming for a proactive service delivery model. Computacenter assists clients in evaluating metrics for improved efficiency, cost savings and better UX for employees. The benefits of this change are increased productivity and increased budget controls while maintaining or even improving EX.

Caution

Computacenter is a leading provider of managed end-user technology services in the U.K. market. It could attract new clients and further increase its market share by showcasing more examples of its experienced focus delivery and cloud-based virtual desktop solution in the region.

Managed End-user Technology Services — Local Specialists

Who Should Read This Section

This report is relevant to local specialists across industries in the U.K. for evaluating the current market positioning of managed end-user technology service providers and how each provider addresses key regional challenges.

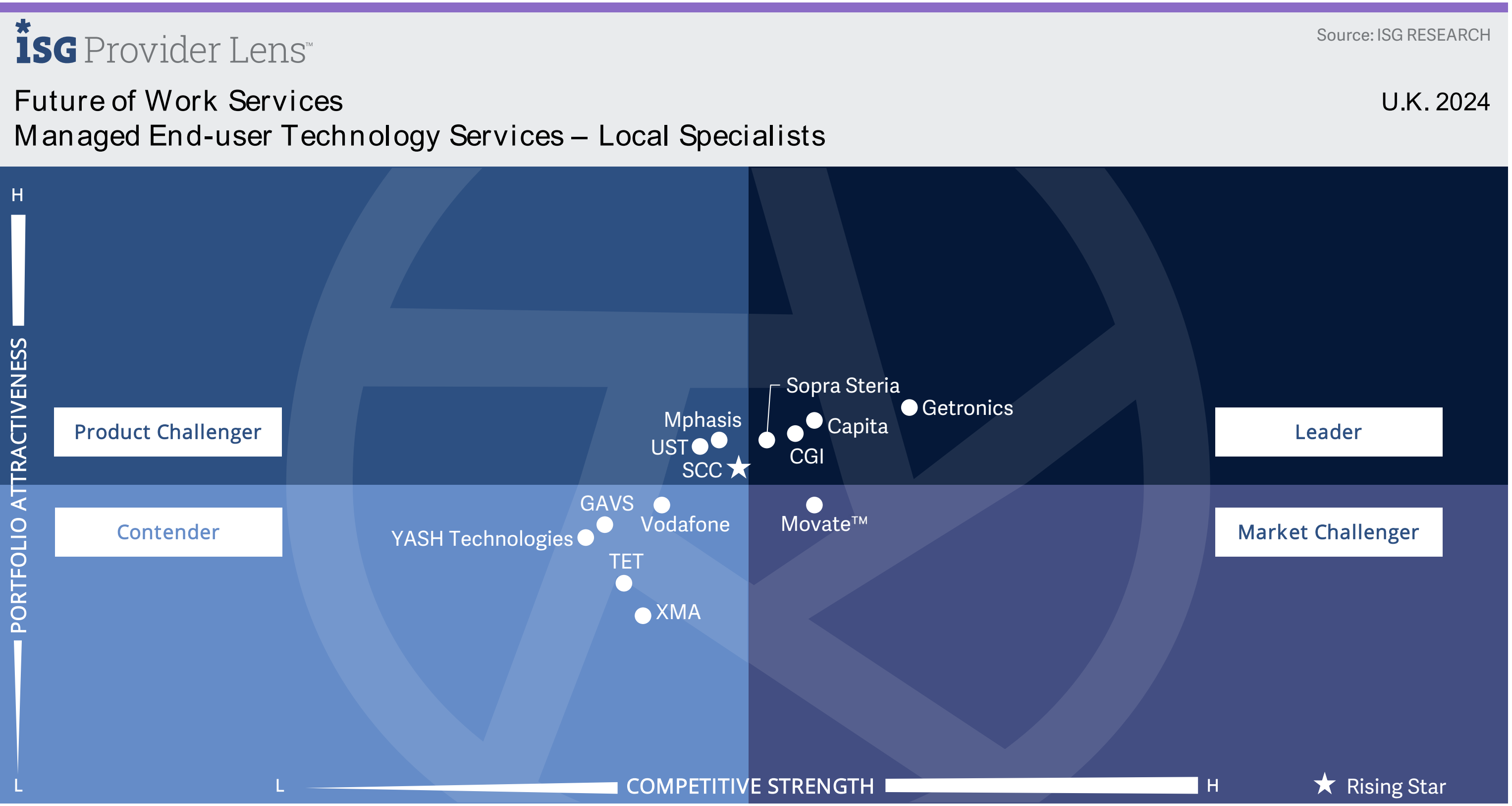
The U.K.'s midmarket is undergoing a significant shift towards the future of work, with an increasing demand from local specialists for flexible and secure working environments. Leading providers today focus heavily on improving EX by leveraging strong consulting practices and assisting clients understand the skills required for digital best practices. They also focus on minimising tech stress and promoting complaint-free environments to improve employee well-being.

The report also emphasises robust data loss prevention strategies, fostering talent retention in the era of agile working and protecting company data and assets. Effectively managing widely distributed and localised user populations is critical for seamless operations across diverse teams. This includes managing devices, collaborative tools and fixed/mobile infrastructure to create a frictionless work experience. Providers acknowledge the increasing focus on social value and ESG. The report analyses providers with a focus on AI-powered service desk modernisation. Providers also ensure access to applications, data, personalised desktops or BYOD options, which support talent retention through agile working policies and enhance remote work.

Strategy professionals should read this report to understand agile working and strong consulting practices to improve business outcomes for an efficient hybrid workforce and talent retention.

Digital professionals should read this report to gain insights into how providers can empower a dispersed workforce and enhance digital transformation initiatives.

Technology professionals should read this report to identify opportunities for leveraging automation and self-healing technologies to improve efficiency and reduce downtime.



This quadrant assesses providers specialising in managing the **end-user technology** environment for enterprise clients. They **deploy**, configure and **secure** technology for **end users** and employees, delivering a more local service for clients with a regional presence.

Kevin Turner

Definition

This quadrant assesses service providers specializing in managed services associated with technologies that enterprise IT departments deploy, provision and secure for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security. Providers assessed in this quadrant specialize in complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolio extends to support BYOD initiatives and mobility and telecom expense management. While transformative services such as XLAs and consulting are desirable, they are not mandatory to consider inclusion in this quadrant.

While these services are typically associated with traditional computing devices and tablets, their scope can include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Local and midmarket clients often use these providers to manage their end-user computing estate. Local enterprise clients that want to keep the management of their EUC environment in-house or closely monitored engage with these specialized providers as they are not very keen on larger XLA or transformation engagements.

Eligibility Criteria

1. Provide support for the complete **EUC environment**
2. Support unified endpoint management (UEM), **enterprise mobility management, application provisioning and patch management**
3. Offer complete **device lifecycle management services** such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Demonstrate experience in providing **virtual desktop services** on premises and on the cloud (desktop as a service). **Offer related field services, IMAC and break/fix services.** Provide remote and onsite field support and in-person technical assistance.Generate either 30 percent or more revenue from the midmarket or SMB market and/or have 30 percent or **more digital workplace clients** in the U.S. from the midmarket segment (end users 5,000 or less)

Observations

In recognition of the diversity and scale of enterprise clients in the U.K., ISG has introduced a new quadrant for evaluating providers with a significant local presence specailising in managing end-user technology services for midsize businesses. The providers in this quadrant are dedicated to managing end-user devices, endpoint management, device lifecycle and virtual desktop services. With a strong presence in the U.K., these providers typically serve smaller enterprise clients that seek nationwide coverage. Providers in this quadrant can deliver services comparable to those in the previous quadrant, Managed End-user Technology Services – Large Accounts, but they offer a higher level of flexibility and adaptability that better aligns with the scale and needs of midsize enterprise clients.

Contenders offering end-user computing management and device management services enjoy a strong presence in the U.K. market. Product Challengers focus on device management for enhanced UX and full device lifecycle management or desktop as a service offering. Leaders in this quadrant have significant experience with midmarket and SMB clients in the U.K. and provide focused end-user technology services targeted at that optimise cost and enhance end-user experience. This capability enables SMBs to concentrate on their core business and growth objectives.

From the 49 companies assessed for this study, 13 qualified for this quadrant, with four being Leaders and one Rising Star.

Capita

Capita stands out as a respected leader in providing end-user technology services for the U.K. midmarket. Its expertise includes consulting, transformation and digital services across diverse industries and the public sector.

CGI

CGI has established itself as a leader offering managed end-user technology services in the U.K. and is known for delivering workplace and support services across the public sector. Its reputation is built on its commitment to technological excellence, CSAT and innovation.

getronics

Getronics stands as a top-tier provider of managed end-user technology services, catering to a global midmarket clientele. The company's expertise in delivering customised solutions across various industry sectors truly adds value.

Sopra

Sopra Steria specialises in offering managed end-user technology services specifically tailored for SMBs. It is committed to facilitating transformative change, sustainability and social responsibility and prioritises meeting people's needs throughout its service delivery process.

SCC

SCC is a Rising Star in the U.K. that specialises in catering managed end-user technology services to midmarket clients. The company focuses on enhancing employee productivity and helps clients achieve their business goals and foster seamless technology experiences and adoption.

Continuous Productivity Services (including Next-gen Service Desk)

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the current market positioning of continuous productivity service (next-gen service desk) providers and their approach to addressing key regional challenges.

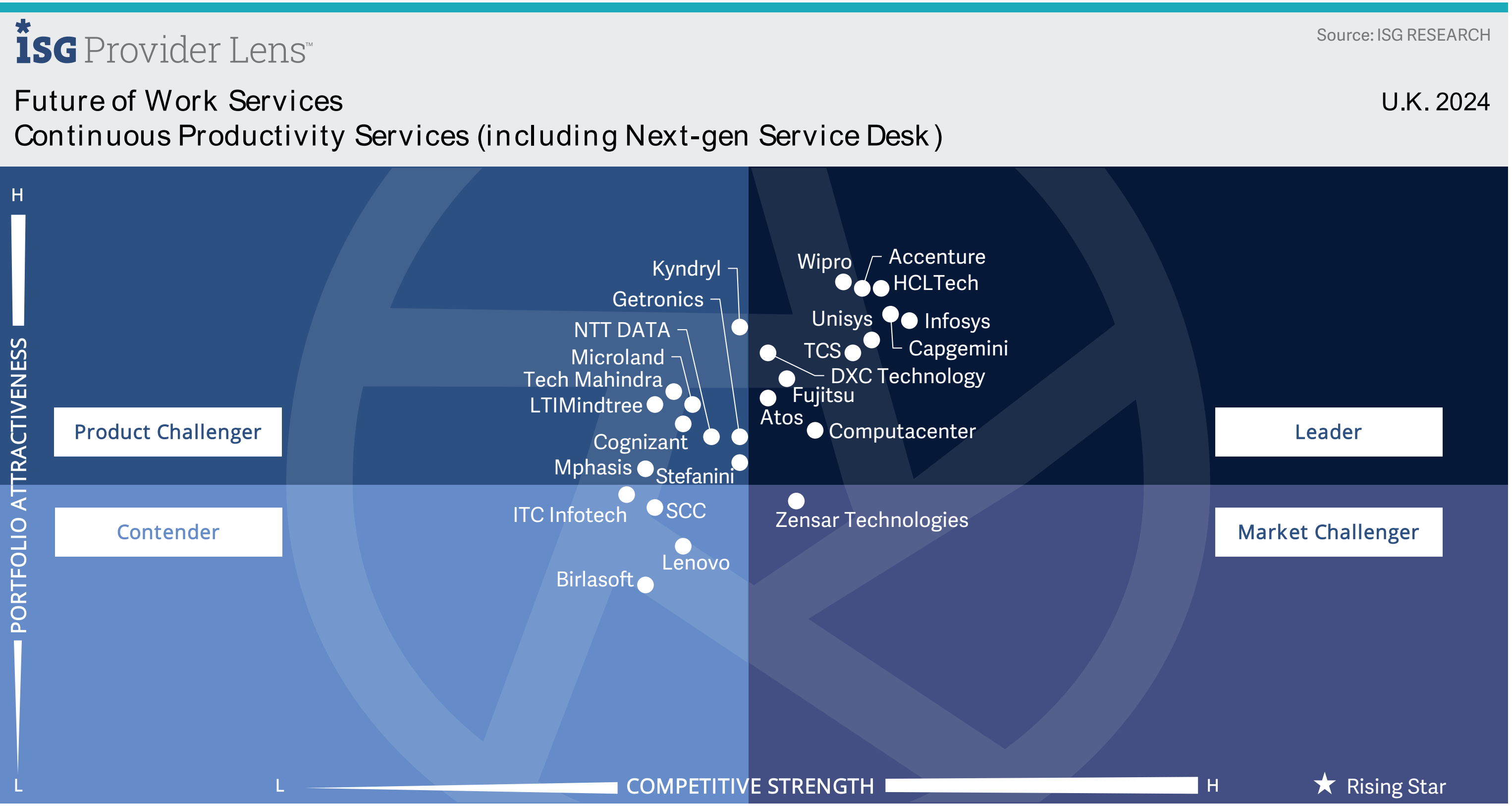
The U.K. workforce is undergoing a significant transformation with the rise of hybrid and remote work models, coupled with advancements in automation and AI. As a result, enterprises need to adapt their service desk solutions accordingly. Continuous productivity services, powered by a next-generation service desk, are emerging as a critical element in this evolving landscape. Autonomous support features, such as self-help kiosks, tech bars, IT vending machines and digi lockers, empower employees to resolve minor issues independently. Service desk augmentation utilises AI and XLAs to automate resolutions, predict problems proactively and personalise the support experience.

Nevertheless, U.K. enterprises face challenges in implementing these solutions. One of the primary obstacles is quantifying the value of workplace support. Measuring the impact on employee productivity and overall business outcomes requires robust data analysis. Fostering employee engagement through these new service channels also necessitates targeted communication and training initiatives. By addressing these challenges and embracing the trends of unified omnichannel support, proactive problem resolution, experience management and flexible work models, U.K. enterprises can harness next-generation service desks to empower their workforce and unlock continuous productivity in the future of work.

Strategy professionals should read this report to understand the evolving workplace dynamics and the service desk landscape to improve efficiency and productivity.

Technology professionals should read this report to understand emerging technologies, such as AI, automation and self-service solutions, to integrate them into their existing IT infrastructure.

Digital professionals, including digital transformation leaders, should read this report to understand how EX transformation service providers align with their digital transformation initiatives.



This quadrant assesses service providers' capabilities in supporting the **continuous productivity** needs of enterprise clients' **next-generation, human-centric workplaces and fully integrated hybrid working patterns**.

Kevin Turner

Definition

This quadrant assesses service providers' capabilities in supporting the continuous productivity needs of next-generation workplaces, human workplaces and fully integrated hybrid working patterns.

For today's workforce, being productive means having the ability to work from anywhere, anytime. Users require a different IT operating model, driven by the changes in business models and market channels, which they must operate and support. The current workforce needs autonomy and constant connectivity to ensure productivity regardless of location, work pattern or device. Meeting these needs requires providers to offer enhanced support capabilities, rendering typical service desk offerings less appealing yet available. Next-generation services include sentiment analysis and automated DEX triage to ensure always-on IT is managed, AI-powered health monitoring for managed services and emerging devices such as AR and VR. These services encompass automated and proactive technical support and cloud platforms to offer always-on systems. Providers leverage AI and cognitive technologies for user-facing tasks, achieving significant cost savings.

Success is measured through XLAs linked to business outcomes rather than SLAs. Providers can enhance business outcomes by offering advanced productivity support. Previously, these services included field and onsite support requiring expert technicians to visit user locations. Currently, providers leverage automation and use more remote and self-service options such as AR self-fix, workplace support, service desk, tech bars and cafés, DigiLockers, omnichannel chat and voice support.

Eligibility Criteria

1. **Provide deliver-anywhere autonomous workplace support**
2. **Offer fully integrated analytics and automation** for issue resolution
3. **Deliver contextualised AI support** for workplace
4. **Provide service desk augmentation**
5. **Offer XLA-driven support** instead of SLA-driven decisions
6. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
7. **Provide automated and contextualised support for end users** based on their roles and work
8. **Quantify workplace support function performance** beyond traditional service metrics
9. **Have a robust local presence** with most workplace engagements around service desk services

Observations

This quadrant represents an advanced iteration of the Digital Service Desk and Workplace Support Services quadrant from the previous year. Although many service providers maintain their positions as Leaders, slight shifts on the two axes reflect their expanded regional market presence and deepened service portfolios. The emergence of GenAI and Microsoft Copilot has significantly influenced service providers' automation and contextual support capabilities, thus enhancing their delivery of next-generation service desk and support services to clients.

GenAI and Microsoft Copilot play crucial roles in automating tasks, providing contextual support and enriching support knowledge bases. They enable ticket categorisation, real-time translations and consolidate information from automated systems, empowering human desk agents to make informed decisions and assisting end-users with self-help services.

Contenders in this quadrant specialise in offering automated service desk and support services, while Product Challengers heavily rely on GenAI technology to support service desk agents. Market Challengers focus on end-user technology services and automated support, boasting a strong market presence. Finally, Leaders in this quadrant harness GenAI-enabled insights from multiple sources to provide consolidated information that supports agents.

From the 49 companies assessed for this study, 25 qualified for this quadrant, with eleven being Leaders and one Rising Star.

Accenture offers cutting-edge continuous productivity services to enterprise clients. By clearly emphasising on addressing employee issues, it ensures a top-notch EX and enhanced productivity.

Atos is a leading provider of continuous productivity services to clients, now with a renewed emphasis on delivering modern service desk and support services to enhance the overall EX.

Capgemini's leading continuous productivity services empower clients to create seamless, efficient work environments that boost productivity and enhance EX.

Computacenter is a leading provider of continuous productivity services in the U.K. It specialises in offering customised service desk solutions to meet the needs of clients with hybrid workforces, ensuring employees remain productive and enjoy a great overall work experience.

DXC Technology is a top provider of continuous productivity services, strategically integrating diverse service offerings into the seamless and interoperable DXC UPtime™ platform. This cutting-edge system is supported by powerful analytics and operational excellence.

Fujitsu is a prominent provider of continuous productivity services to clients in the U.K. The company offers modern workplace solutions and human-centric services designed to enhance EX and boost productivity.

HCLTech stands out as a leading provider in this quadrant, showcasing exceptional technology capabilities, such as advanced AI-powered solutions, to enhance employee productivity and experience.

Infosys' continuous productivity services are acknowledged for their innovative capabilities and scalability. These services play a crucial role in assisting clients of various sizes in modernising their workplaces across all industry sectors.

TCS is a leading provider of continuous productivity services designed to help enterprise clients develop and maintain modern workplaces for their employees. The company has made substantial advancements in innovation through the use of GenAI, rapidly enhancing its capabilities.

Unisys' continuous productivity services are at the forefront of the market, built on a rich heritage of traditional workplace enablement and support. Its modernised capabilities deliver excellent hybrid experiences for clients.

Wipro specialises in offering continuous productivity services based on its robust Live Workspace platform to provide human-centred, hybrid digital workplace solutions across diverse industry sectors.

Stefanini provides continuous productivity services catering to the needs of global and demanding clients. As a Rising Star in this quadrant, the company anticipates to register an ongoing growth and expanded portfolio coverage in the near future.

Leader

"Computacenter is a leader in the U.K. market for continuous productivity services, specifically in service desk solutions for clients looking to satisfy hybrid workforces, ensuring sustained productivity with improved EX."

Kevin Turner

Computacenter

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. Computacenter builds upon its long heritage in technology supply to provide continuous productivity services across enterprise clients, designed to eliminate friction for employees. In the U.K., Computacenter is widely recognised and trusted to enhance the modern hybrid workplace essential for supporting evolving workforce requirements.

Strengths

Service management integration: Computacenter has embedded service management and especially the Service Now platform, into its approach for the entire device lifecycle management to deliver a comprehensive and integrated solution for clients. Its Smart Hub provides clients with real-time visibility and control over contracts, assets and lifecycle management. The end-to-end coverage of the entire device lifecycle, from procurement and deployment through to retirement, highlights the breadth of their services. This enables the further ability to manage complex scenarios, such as multicompany and multicontract environments much more readily due to the integration of services.

Proactive service delivery: Computacenter has shifted to a proactive service delivery model, leveraging insights to drive benefits across device management, contract renewals and inventory forecasting all drive towards a proactive service delivery model. This approach assists clients to evaluate metrics for improved efficiency, cost savings and enhanced UX for employees. The benefits of this change are high productivity and increased budget controls but with maintained and improved EX.

Caution

Computacenter is a leading provider in this quadrant. It could attract new clients and further increase its market share by showcasing more examples of productivity and experience benefits delivered to U.K.-based clients through its device lifecycle management.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.K. for evaluating the current market positioning of smart and sustainable workplace service providers and how each provider addresses regional challenges.

The U.K. workforce is undergoing a significant transformation of traditional office spaces, driven by trends including remote and hybrid work models. There is an increasing emphasis on sustainability due to growing regulatory pressure to meet ESG and reduce carbon emissions. These changes in the U.K. market landscape present both opportunities and challenges for enterprises. Technologies such as IoT and workplace analytics offer the potential to create smart, efficient and adaptable office spaces. Hot desking and smart building solutions can optimise resource allocation, while automation can streamline facility management.

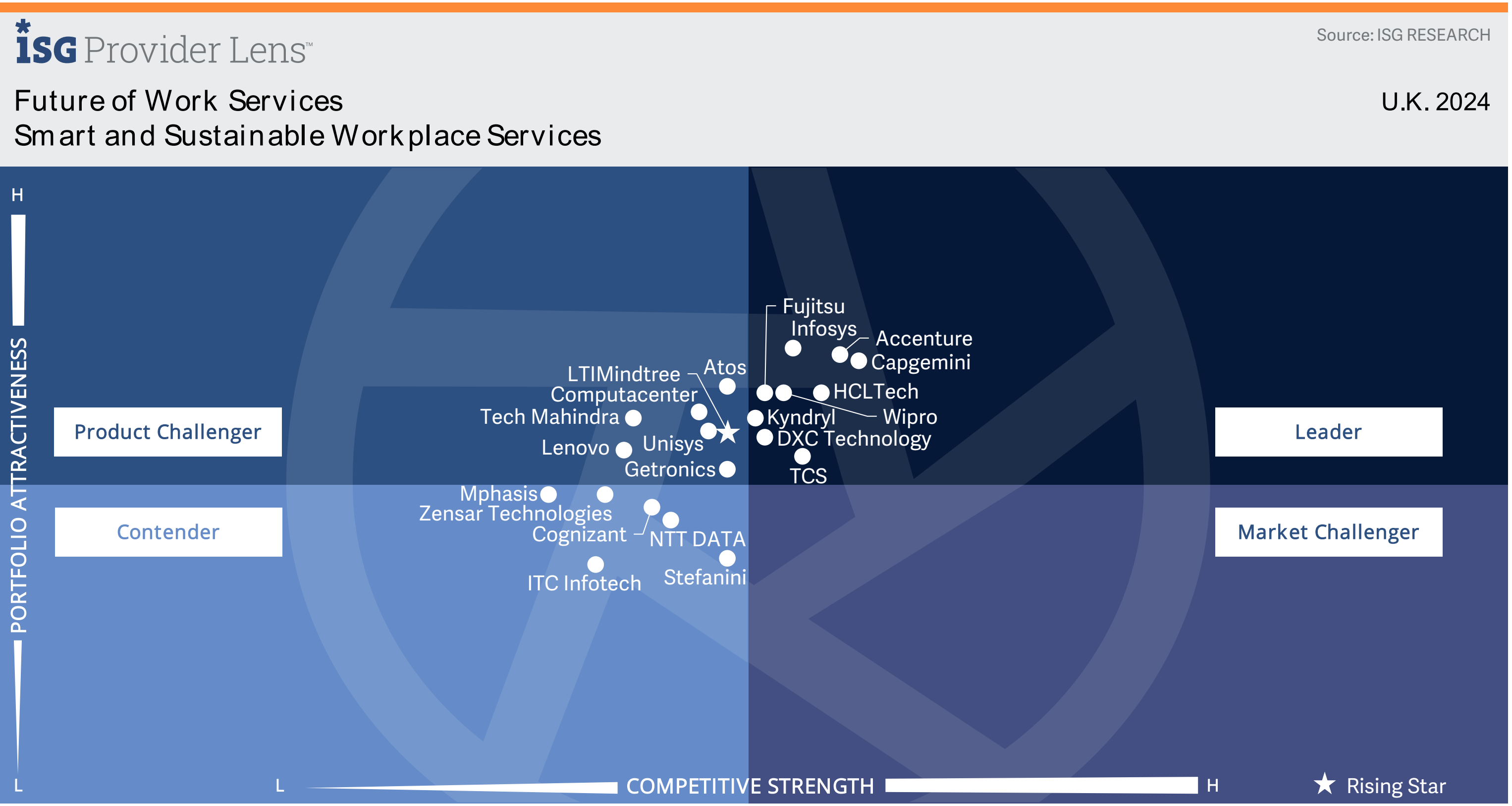
However, implementing these changes poses challenges. Integrating new technologies and ensuring data security require careful planning and investment. Shifting to a hybrid work model necessitates robust communication strategies and tools to foster collaboration across dispersed teams. Additionally, the circular economy emphasises resource efficiency and waste reduction and requires businesses to re-evaluate their supply chains and procurement practices.

In conclusion, U.K. enterprises face a dynamic workplace landscape where embracing smart technologies, sustainability practices and agile work models can drive success. Navigating challenges such as integrating new systems, fostering a connected workforce and aligning with the evolving regulatory frameworks will be critical for success.

Strategy professionals should read this report to understand sustainability trends and efficiency goals to obtain data-driven decision-making and reduce carbon footprint.

Digital professionals should read this report to learn about integrating user-friendly digital solutions seamlessly and enhancing EX.

Technology professionals should read this report to learn about smart building technology, IoT and workplace analytics for optimising energy consumption.



This quadrant evaluates service providers supporting workplaces by incorporating **human, digital and physical elements** to facilitate **remote, hybrid or in-person** collaboration and productivity while assisting clients achieve **sustainability goals**.

Kevin Turner

Definition

This quadrant assesses service providers that support smart, IoT-enabled physical workplaces and assist clients in achieving sustainability goals. The modern workplace combines human, digital and physical workplaces to enable remote, hybrid or in-person collaboration and productivity. Buildings and spaces must be integrated, inclusive and sustainable, offering users a purpose to attend.

With commercial retail facing major occupancy issues, workplace service providers must collaborate with enterprise leaders and create a holistic office strategy. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As organisations focus on a return-to-office strategy, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an adaptive, efficient, inclusive and responsible environment. These help create spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

Providers must also integrate experience parity capabilities into their offerings, with tangible outcomes irrespective of remote, virtual or hybrid models. They must incorporate unified communications and collaboration capabilities and offer smart collaborative workspaces. Their services include IoT-enabled functionality to control the environment, resulting in a smart campus with an intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. **Support smart office spaces by leveraging IoT and the latest technologies** to provide workplace analytics, hot desking, smart building and facility management
2. **Offer support for asset efficiency and address energy management requirements**
3. **Provide inclusive, adaptable and integrated hybrid working solutions** and spaces
4. **Provide services to reduce carbon emissions** from workplaces
5. **Assist in aligning client strategies and metrics for reporting the ESG aspects,** particularly focusing on workspace utilisation within the social and governance dimensions

Observations

The current edition of the ISG Provider Lens™ Future of Workplace report features a new quadrant highlighting U.K. enterprises' increasing focus on sustainability within their ESG strategies, particularly managing digital workplace technologies. Many device management approaches now include measures to reduce carbon footprint and achieve sustainability goals through comprehensive lifecycle management initiatives.

Clients are turning to technology service providers to assess the impact of carbon emissions from their buildings and facilities as they implement their return to office policies. Adopting flexible working arrangements, these clients are reducing commuting, thus lowering overall carbon emissions. Beyond environmental impact, clients are also looking for support to enhance physical workplaces and promote collaboration among employees.

The companies identified as Contenders in this quadrant are offering experience-focused services and leveraging device lifecycle management to reduce carbon footprint. Product Challengers are acknowledged by their strong focus on ESG and sustainability, with initiatives supporting diversity, equity and inclusivity. Market Challengers have a robust digital workplace service portfolio but are less focused on sustainability. Meanwhile, the Leaders in this quadrant have successfully implemented sustainable workplace solutions for their clients, enabling smart return to office strategies.

From the 49 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture stands out as a leading provider of innovative and sustainable workplace solutions. It brilliantly integrates business and strategy consulting, placing a strong emphasis on sustainability for workplace transformation in the U.K.

Capgemini

Capgemini offers intelligent and environment-friendly workplace solutions to help clients adapt to a future in which workspaces are both efficient and productive, all while assisting clients meet corporate sustainability goals.

DXC TECHNOLOGY

DXC Technology provides intelligent and environment-friendly workplace services, including consulting with enterprise clients. These services aim to create plans and aspirations necessary for ESG management and reporting to help clients achieve business objectives.

Fujitsu uvance

Fujitsu's intelligent and environment-focused workplace services, supported by its Uvance™ methodology, are designed and proven to help enterprise clients achieve their smart sustainability goals.

HCLTech

HCLTech is a leading provider of intelligent and sustainable workplace services. It leverages robust digital advisory consulting capabilities and employs the ACE methodology — Assess, Consult, Engage — to help clients operate more sustainably.

Infosys

Infosys' smart and sustainable workplace services leverage its global footprint, comprehensive partner ecosystem and innovation programme to assist clients achieve ESG objectives and targets across various industry sectors.

kyndryl

Kyndryl is at the forefront of delivering innovative and sustainable workplace solutions, driving modern workplace transformations for clients in the U.K. and beyond.

TCS provides smart and sustainable workplace services that involve a global workforce to help clients achieve their ESG targets. The company demonstrates a strong commitment to innovation, further enhancing its ability to provide expert advisory consulting.

Wipro leads the intelligent and sustainable workplace services space. It leverages robust advisory consulting teams and cutting-edge technology to enable the delivery of contemporary digital workplace solutions across various industry verticals.

LTIMindtree is a provider of innovative and sustainable workplace services with the support of expert advisory consulting teams and leading technology. Reporting an impressive growth rate of over 25 percent in the past year, it is truly a Rising Star in this quadrant.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till June 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Future of Work Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Region

▲ **Most satisfied**
Western Europe

▼ **Least satisfied**
Eastern Europe

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Insurance

Industry Average CX Score

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 980

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.7%
Offshore	22.1%

Appendix

The ISG Provider Lens 2024 – Future of Work Services study analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Analyst

Kevin Turner
Principal Analyst

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.

Research Analyst

Ayushi Gupta
Senior Research Analyst

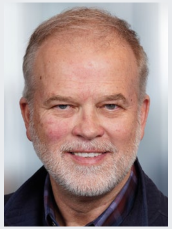
Ayushi is a Senior Research Analyst at ISG. She is responsible for supporting Provider Lens™ studies on the Future of Work. Ayushi has 3 years of experience conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure, and Finance. Along with a rich understanding of various business verticals, she has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape, and evolving needs of the potential target audience.

She is good at collaborating seamlessly with stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualisation, storyboarding, and analysis.

Study Sponsor

Iain Fisher
Director

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.



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

ISG Provider Lens™

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.

ISG Research™

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ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the 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 AI and 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 1,600 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 isg-one.com.

ISG Provider Lens™

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