ISG Provider Lens™

Digital Workplace Services

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

NTT DATA

October 2017

About this Report

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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 was current as of August 31, 2017. ISG recognizes that many mergers and acquisitions have taken place since that time and that those changes are not reflected in this report.

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ISG Provider Lens™

ISG Provider Lens™

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EXECUTIVE SUMMARY

- **Digital workplace is increasingly defined by end users:** Enterprises are moving away from a “one size fits all” approach when it comes to defining workplace strategy. With the consumerization of IT, end user preferences increasingly play the decisive role in workplace transformation initiatives. End users expect a consumer-like experience from their enterprise IT. They use the same devices and, in some cases, the same applications for both personal and office work. End-user behavior toward these assets form the periphery of the digital workplace, which affects end-user behavior within the core enterprise workplace. In the modern digital workplace, the periphery defines the core.

- **Consulting for workplace digital transformation is gaining importance:** Enterprises increasingly are looking for advisory and consultative approaches to adopt new and emerging technologies in their workplace environment. It is easy to be taken by the promises modern technologies like augmented and virtual realities offer. Dedicated consulting will assess the current enterprise environment and advise on the viability of the technology implementation. Consulting also helps identify key end user behaviors, called personas, within an organization. These personas should not be predefined by the organization but should be assessed according to the user’s role in the organization and his or her behavior, motivation and pain points.

- **Mobility goes beyond mobile:** Mobile strategy is no longer a separate element of the overall digital workplace strategy but is an integral part of it. Enterprises are acknowledging that offices other than sales and marketing can benefit from a defined mobility strategy. Field worker enablement is a key focus area in many enterprises. Mobility spans beyond just mobile phones. It also covers all handheld and remote assets, including tablets, Internet of Things (IoT) devices and industry-specific field equipment like point of sale (POS) stations in retail and patient record systems in healthcare. Defining an enterprise mobility strategy now goes beyond mobile device management, remote wipe and VIP support. It also covers larger aspects of enterprise mobility, such as mobile application management, business process mobilization, mobility effectiveness assessment and enterprise app stores.

- **Traditional workplace services are becoming line-of-business-centric:** Traditionally, basic workplace services or end-user computing has been considered a siloed and disjointed IT function. However, with mobility penetrating different business functions, workplace services is becoming industry focused and a line-of-business rather than only a CIO responsibility. Service providers are deemphasizing their pride in the scale of devices managed and instead focusing on how well the workplace integrates with the rest of the business.

- **Service desk consolidation is on the rise:** ISG has observed an increase in contracts related to IT service desk consolidation. More and more, large enterprises are trying to consolidate and standardize their IT support and service desk functions. As service desk jobs that require lower-level skills are automated, demand for higher-skilled onsite support is increasing. Enterprises are looking to consolidate their many geographically dispersed service desks into fewer service desks that are more efficient and more easily managed. At the same time, service providers are augmenting their on-site support with solutions like tech cafés.

- **Automation and analytics play key roles in the shift-left approach:** Automation and analytics can reduce the volume of low-level incident tickets and may lead to their complete elimination. Many service providers have developed their own automation platform solutions that can be applied to workplace support functions. These solutions can help reduce and eventually eliminate level 0 and 1 incidents through auto-healing and self-help functionality. Millennial end users would like to solve their IT problems themselves rather than reaching out to service desks, and automation enables this end user behavior. Analytics that can predict system failure based on device or application usage are key to automatic self-healing systems. Automation enables the shift-left approach, helping reduce cost and improve service desk efficiency.

- **Increasing use of intelligent and conversational agents:** Automation powers virtual agents to assist end users. Many services providers deploy intelligent conversational agents or chatbots to interact with and assist end users. An intelligent chatbot can understand end users' problems with devices or applications and can self-heal or send an automated request to the help desk on a user's behalf. It interacts with end users like a human service desk agent and can help in all workplace activities, from on-boarding to off-boarding. Chatbot agents can include "sentiment analysis" to help them gauge end users' feelings by their text entry. Sometimes these automated agents are integrated with other business processes and applications so they can trigger application output or function based on a user's suggestion. It is like conversational commerce where the system directs end users to relevant applications based on the content of the conversations.

- **The digital workforce is growing:** With the increasing use of robotic process automation (RPA), some service providers are offering virtual workers that can handle complete end-to-end tasks. These digital workers can replace low-skilled jobs in many business and IT processes. Using RPA for workplace services support is a growing trend and is expected to pick up pace.

- **Windows 10 and Office 365 help companies move toward the digital workplace:** Windows 10 allows enterprises an approach to unified endpoint management. The new Windows operating system has advanced security mechanisms and is specifically suited for enterprises deploying an any-device-anytime strategy. Most Windows-using enterprises have either already migrated to Windows 10 or are in the process. Similarly, Microsoft's Office 365 suite provides cloud-based tools to improve productivity and collaboration irrespective of device and location. Microsoft's Skype for Business is another popular tool for unified collaboration in the digital workplace. The rapid improvement of features on Windows 10 and Office 365 is accelerating enterprise movement toward a digital workplace environment.

- **BYOx:** The bring-your-own-device (BYOD) policy is now a commonplace phenomenon with almost every organization adopting it in one form or another. Enterprises allow employees to use their own devices, applications and platforms to get their work done. A similar concept of BYOx, in which x can mean an asset or service, also is gaining traction, and the concept of BYOA, in which A means asset, is now prevalent. Technologies like application refactoring or containerization provide ways to securely access applications over any platform or device.

- **Involvement of non-CIO office is enabling the digital workplace:** With increased support for BYOD and increased focus on improving the user experience, enterprises are reexamining how they can empower employees via technology to increase productivity. Many organizations believe they can achieve positive ROI from such enablement. As a result, we see different business offices other than the CIO getting involved in projects related to workplace transformation. For example, the HR department may get involved by developing policies to enhance the user experience, which has benefits for morale and for employee on-boarding and off-boarding. ISG has observed increased involvement of non-IT departments in transformation initiatives. Some organizations may call it workplace transformation while others call it digital strategy.

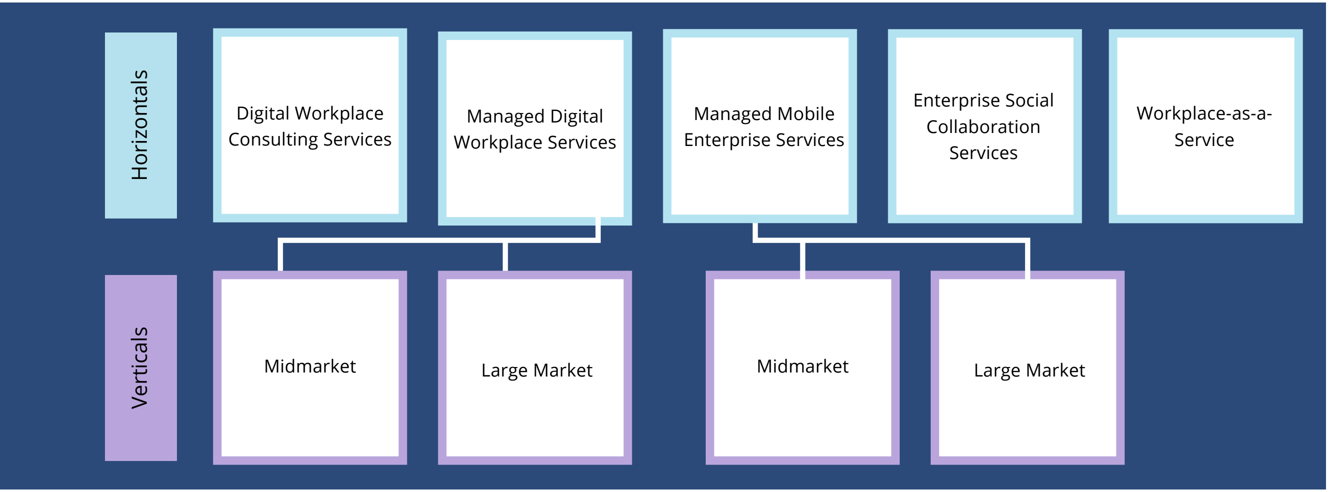
- **VDI is on the rise:** Sophisticated and highly regulated industries have always gravitated to the desktop virtualization approach for the tighter control it enables. With the growing popularity of digital workplace technologies and increasing use of mobility, virtual desktop infrastructure (VDI) has gained more adopters from different industries.

- **Productized offerings gain popularity:** Many service providers are moving toward a productized offering in digital workplace services. These offerings are generally cloud based and are offered in a “pay-as-you-go” or “pay-per-user” model. Users get cloud-based “workspaces,” which can be a single interface for the end user to access all their workplace data and applications. Other managed services around workplace will form the back-end support system of such productized offerings. Many services providers are already offering a mobile version, most of which include a virtual assistant and service desk function at the minimum.

- **Cloud-based content management enables collaboration:** Cloud-based applications for the workplace environment are on the rise. Many organizations are encouraging rather than prohibiting shadow IT to improve productivity. Enterprise IT is seeing cloud-hosted applications as an opportunity instead of a challenge. Enterprise-controlled use of cloud-based collaboration tools like Dropbox and Box can provide an efficient way to support collaboration within a group or organization.

- **Enterprise social collaboration expands:** Enterprise social collaboration has gone beyond the days of Yammer and SharePoint and expanded to include team collaboration elements like those offered by Slack and HipChat. The goal is to offer a comprehensive solution that contains all productivity elements, including productivity apps, social communities, enterprise applications and enterprise IT. “Kill the email” is the philosophy behind increasing team-based collaboration. Mobile applications and accessibility is the key driver in this space. Many service providers are offering consulting and implementation services for tools and technologies that enable enterprise social collaboration. They know it is the next step to reach the digital workplace stage. To reap all the benefits of a digital workplace, enterprises must invest in collaboration through social, wiki, knowledgebase, content management, gamification and microblogging channels.

Introduction



Definition

Digital workplace is the defining model for how end users access and collaborate on their work-related data and applications. It is the conceptualized view of a connected, always-on, collaborative workplace environment that is device- and platform-independent. Digital workplace services cover consulting and managed services around mobility, service desk, enterprise social collaboration and workspace-as-a-service.

Our research studies the investigation efforts and buying decisions of typical enterprise clients. When contemplating a significant strategy transformation, implementing agile practices or incorporating automation into its environment, an enterprise client will benefit from a study that examines an entire ecosystem for an individual service line. Whether that is ADM, workplace services, contact center services,

Definition (cont.)

data center or IoT, each of these focus areas is typically made up of consulting and advisory services, system integration, development and support. Therefore, the ISG studies will be comprised of an analysis of multiple quadrants that cover a variety of services. Vendors are classified into one of four quadrants, but there are multiple quadrant areas included in this report.

This study on digital workplace services includes seven quadrants that represent key services in this space. It includes one quadrant on consulting services and two quadrants on managed services, covering managed workplace services and managed mobile services. The managed services quadrants are further broken into mid- and large-market quadrants. There are also quadrants for enterprise collaboration services and VDI on cloud or cloud workspaces. These quadrants are further defined as follows.

- **Digital workplace consulting:** This quadrant assesses firms that provide consulting services for analyzing the workplace environment and defining a roadmap to transform it.

- **Managed workplace services:** This quadrant assesses providers that deliver managed services around IMAC, service desk and desktop management. It is further divided into two quadrants:
  - **Managed workplace services: Midmarket** assesses providers that deliver managed workplace services to clients with a user base of not more than 2,000.
  - **Managed workplace services: Large market** assesses providers that deliver managed workplace services to clients with a user base larger than 2,000.

Definition (cont.)

- **Managed mobile enterprise services**: This quadrant evaluates providers that deliver managed services related to mobile device management, enterprise mobility and related services. It is further divided into two quadrants:
  - **Managed mobile enterprise: Midmarket** assesses providers that deliver managed mobility services to midmarket clients with a user base of less than 2000.
  - **Managed mobile enterprise: Large market** assesses managed mobility services providers to clients with more than 2000 users.
- **Enterprise social collaboration:** This quadrant assesses providers that deliver consulting and implementation services for enterprise social collaboration.
- **Workspace-as-a-Service:** This quadrant assesses providers that deliver workplace service via VDI or a public/private/hybrid cloud platform.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix that categorizes services providers into the following four segments.

Leader

The "leaders" among the companies in the category have highly attractive products and services and very strong market and competitive positions; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders that are providing strategic impulses to the market. They also ensure their innovative strength and stability.

Product Challenger

While "product challengers" offer a product and service portfolio that provides above-average coverage of corporate requirements, they are not able to provide the same resources and strengths as the leaders. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market challengers" are very competitive, but they still have significant portfolio potential and clearly lag the "leaders." Market challengers often are established vendors that have been somewhat slow to address new trends, perhaps due to their size and company structure, and therefore still have some potential to optimize their portfolios and increase their attractiveness.

Contender

"Contenders" are lacking mature products and services or sufficient depth and breadth of their offering, while they also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

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

Rising Star

Companies that receive the "Rising Star" award have a promising portfolio, including the required roadmap, and an adequate focus on key market trends and customer requirements. Rising Stars are mostly product challengers with high future potential. A "Rising Star" also has excellent management and understanding of the local market. This award is given only to vendors or service providers that have made substantial progress toward their goals within the last 12 months and are on target to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovation.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Digital Workplace Cross-Quadrant Provider Listing 1 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
Accenture	Leader	Not In	Not In	Not In	Leader	Leader	Not In
Atos	Product Challenger	Not In	Leader	Not In	Product Challenger	Leader	Product Challenger
AWS	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Bearing Point	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Capgemini	Product Challenger	Not In	Market Challenger	Not In	Rising Star	Rising Star	Not In
Cognizant	Rising Star	Leader	Leader	Leader	Product Challenger	Product Challenger	Market Challenger
CompuCom	Market Challenger	Leader	Leader	Leader	Market Challenger	Not In	Not In
CSS Corp	Not In	Contender	Contender	Not In	Not In	Not In	Not In
Deloitte	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Dimension Data	Contender	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Rising Star
DXC	Leader	Not In	Leader	Not In	Leader	Leader	Not In
Fujitsu	Product Challenger	Leader	Rising Star	Not In	Product Challenger	Not In	Not In

Digital Workplace Cross-Quadrant Provider Listing 2 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
Genpact	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Not In	Market Challenger
HCL	Leader	Not In	Leader	Not In	Leader	Leader	Rising Star
Hexaware	Product Challenger	Leader	Product Challenger	Rising Star	Product Challenger	Product Challenger	Contender
IBM	Leader	Not In	Leader	Rising Star	Leader	Leader	Leader
Infinite Computer Solutions	Contender	Contender	Contender	Contender	Contender	Not In	Not In
Infosys	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
ITC Infotech	Product Challenger	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In
KPIT	Contender	Market Challenger	Contender	Contender	Contender	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Mphasis	Not In	Market Challenger	Contender	Not In	Not In	Not In	Not In
NIIT	Not In	Contender	Contender	Contender	Contender	Not In	Not In

Digital Workplace Cross-Quadrant Provider Listing 3 of 3

	Digital Workplace Consulting	Midmarket - Managed Digital Workplace Services	Large Market - Managed Digital Workplace Services	Midmarket – Managed Mobile	Large Market – Managed Mobile	Enterprise Social Collaboration	WaaS
NTT DATA	Leader	Not In	Leader	Not In	Market Challenger	Market Challenger	Leader
Pomeroy	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Stefanini	Contender	Leader	Market Challenger	Market Challenger	Contender	Not In	Not In
TCS	Leader	Not In	Leader	Leader	Leader	Leader	Market Challenger
Tech Mahindra	Not In	Market Challenger	Contender	Not In	Not In	Not In	Contender
Unisys	Leader	Not In	Leader	Not In	Leader	Product Challenger	Market Challenger
UST Global	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
VMware	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Wipro	Leader	Not In	Leader	Leader	Leader	Market Challenger	Leader
Zensar	Product Challenger	Rising Star	Product Challenger	Product Challenger	Contender	Contender	Contender

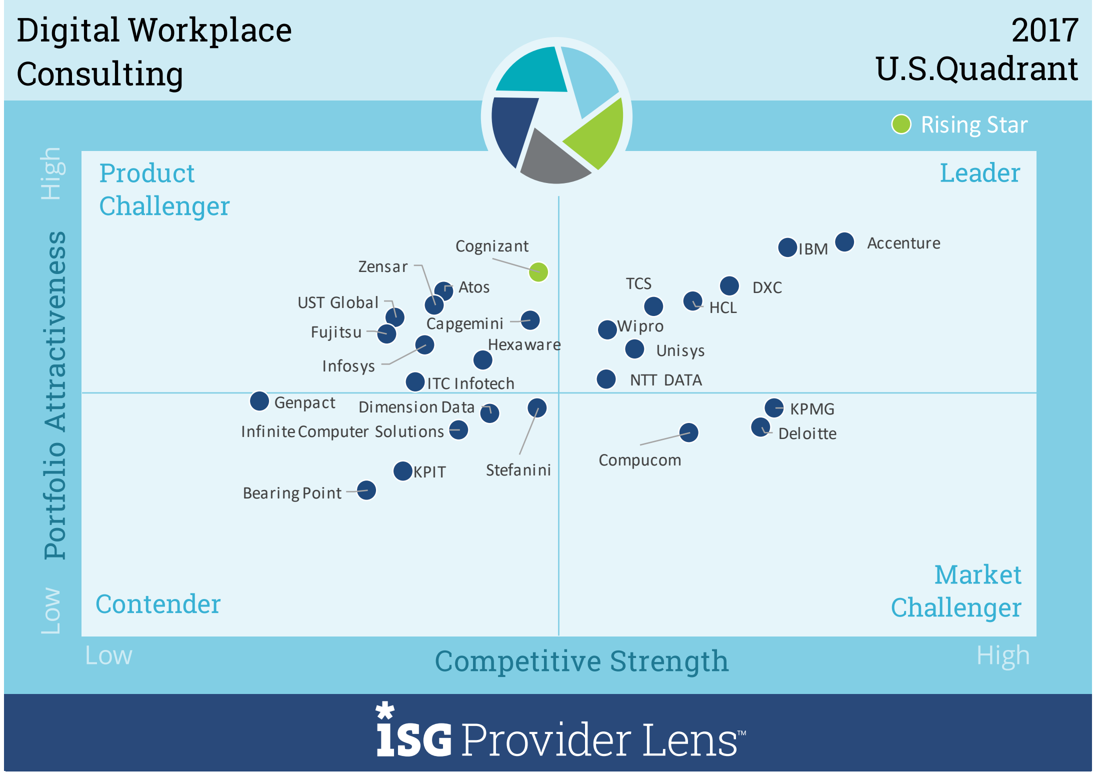
Digital Workplace Quadrants

DIGITAL WORKPLACE CONSULTING SERVICES

Definition

Digital workplace consulting services are advisory services specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing a workplace strategy, defining the business case and return on investment (ROI) and providing a roadmap for digital transformation.

Digital workplace consulting has gained prominence in recent years. Previously, workplace transformation targeted cost reduction in end user computing as its main goal, and consulting was confined to fit end users to enterprise defined uniform personas. With the advent and popularity of mobility, enterprises started to buy consulting services to help define their mobile strategy specifically for field work, such as sales. In the BYOx era, workers can use multiple devices, applications and platforms irrespective of their work domain. The introduction of smart IoT assets, artificial intelligence, virtual reality devices and related apps has increased the scope of digital workplace consulting.



Source: ISG Research 2017

DIGITAL WORKPLACE CONSULTING SERVICES

Definition (cont.)

More than ever, enterprises are in need of workplace consulting services. They need to assess the current workplace environment and select appropriate digital technologies that will help achieve business goals and enhance the end user experience. Change management also has become an integral part of this service. Enterprises are no longer buying separate consulting services for improving the end-user services function and for enabling mobility. A holistic digital workplace consulting service is expected to address both change management and the assessment of the current environment, as well as recommending the adoption of cutting-edge technologies for the workplace environment.

The consulting services space traditionally has been dominated by large independent consulting firms. However, many technology service providers have also developed consulting capabilities to wrap around their managed workplace service offerings.

"One size doesn't fit all" is the mantra for almost all service providers. Their consulting capabilities focus on creating end-user personas based on roles, preferences, devices, platforms and sometimes geographies. A consulting service also analyzes the ticket history and support services repository to assess the incidents and issues that can be automatically resolved. Mobility consulting services includes advisory on the complete device lifecycle, mobile business case, operating system and platform selection. Consulting services also include assessing the viability of implementing a virtual desktop environment.

Service providers offering value-added services in their consulting offerings, lead the market. These services include design thinking, innovative workshops with clients, HR interaction and the application of analytics and cognitive computing in persona identification. Value-added services for mobility strategy consulting include consulting on Apple product strategy, IoT devices and mobile strategy implementation assessments.

DIGITAL WORKPLACE CONSULTING SERVICES

Observations

- Accenture, with its well-known consultancy and technology partnership through Avanade, leads this market. It is followed closely by IBM, which has a mobility-specific consulting practice and Watson-enabled persona identification methodology.
- DXC, with its well-defined practice and Microsoft product-specific advisory framework, is also a leader in this space.
- HCL and TCS are key players through their Kaleidoscope methodology and Digital Reimagination Studio offerings, respectively.
- Wipro leverages its experience in different industries with turnkey projects in its consulting services.
- Unisys takes a big-data-and-analytics approach for persona definition and provides consulting services focused on Microsoft products.
- NTT DATA takes a pragmatic approach when it comes to choosing digital workplace consulting, which positions it as a leader.
- Cognizant is currently a Product Challenger and the Rising Star of this quadrant. It has achieved fast growth in North America, has a robust mobility strategy and is emerging as a leader in this space.

NTT DATA

Overview

NTT DATA's digital workplace consulting services are oriented to its own managed services. It has approximately 100 digital workplace services consultants in North America.

Strengths

Pragmatic focus: NTT DATA's engagement with clients takes a pragmatic approach that assesses technological opportunity against business viability. Its consulting vision is focused on saving the client from "shiny object syndrome" in the digital era. The company's consulting services assess the practical viability of key digital workplace technologies like VDI, social collaboration and BYOD in the client's environment.

Innovation framework for key stakeholders: NTT DATA's digital workplace consulting defines IT, business and workforce as key stakeholders. Technology innovation implemented in its consulting approach is assessed against four key parameters: business empowerment, workforce experience, need for continuous improvement and risk compliance.

Consulting specific to digital workplace needs: NTT DATA offers a dedicated consulting practice around digital workplace requirements. It provides consulting to enable businesses to migrate to Windows 10 and for adopting a desktop-as-a-service and desktop virtualization approach.

Caution

NTT DATA does not market its digital workplace consulting, which is generally wrapped within its managed workplace services. It should communicate its differentiation in technology pragmatism.

NTT DATA can leverage capabilities of its sister companies in NTT Group to include elements of mobile strategy and enhance its consulting portfolio.

2017 ISG Provider Lens™ Leader

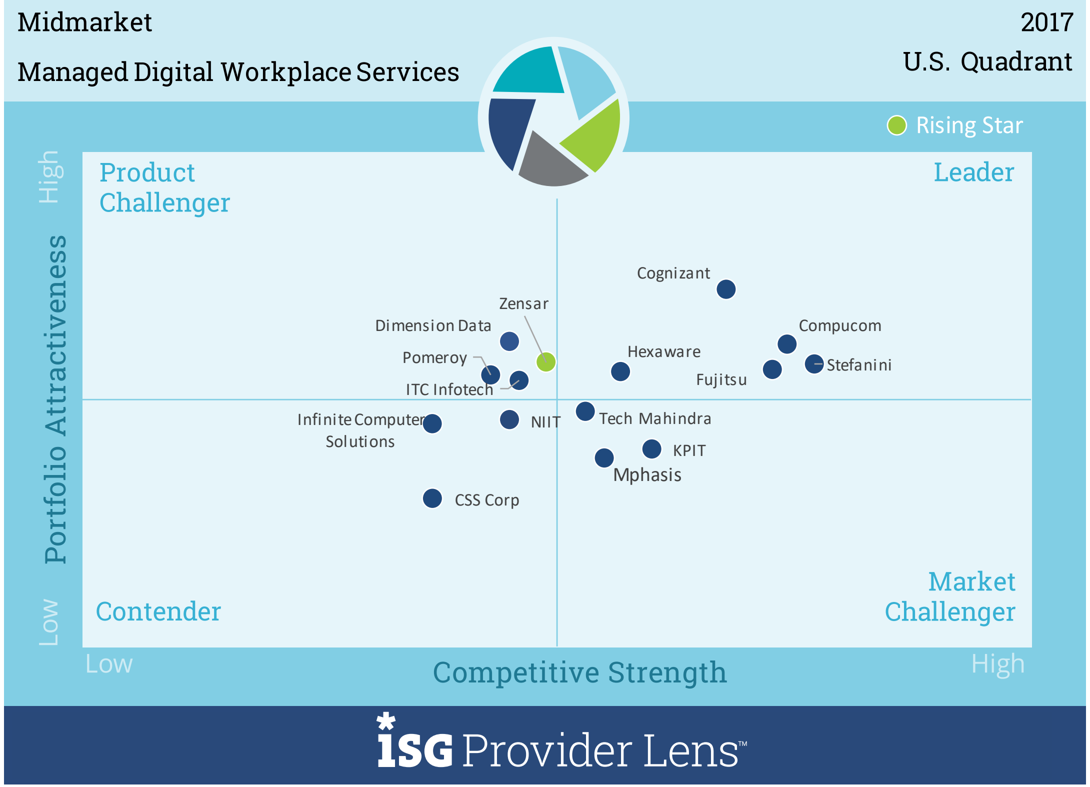
NTT DATA is an experienced service provider in managing infrastructure transformation. Its integration with Dell Services has enhanced its consulting abilities.

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Definition

Managed digital workplace services are comprised of all managed services around the digital workplace. It includes operational services such as service desk, IMAC, break-fix, self-help, hardware and software maintenance, user administration, troubleshooting, change management and transition management.

Enterprises are looking for ways to adopt “shift-left” self-service strategies to manage incident tickets through the service desk. Service providers are providing automation-enabled workplace support services to reduce or eliminate the need for human intervention. The more tasks a provider can automate with managed services, the higher its degree of competitive differentiation. The inclusion of robotic process automation, artificial intelligence and cognitive capabilities adds value in this category.



Source: ISG Research 2017

MANAGED DIGITAL WORKPLACE SERVICES – MIDMARKET

Definition (cont.)

The midmarket segment is price sensitive but open for innovative and customized offerings. These clients would be interested in embracing completely digital and automated solutions for workplace services. Service providers that combine collaborative workplace services with cognitive- and AI-enabled automation will lead this market. Clients in this segment look for a single vendor to provide workplace services strategy, design and deployment services.

Observations

- Among the large players, Cognizant emerged as a leader in this space. The company's Constantly Ready Infrastructure service is a key driver for this positioning.
- CompuCom and Stefanini are strong in the U.S. and have extensive services in managing workplace and service desk operations. They also offer extensive onsite and field support.
- Hexaware is a leader in this segment because of its automation-focused workplace services and center of excellence that is oriented to emerging technology.
- Fujitsu is providing automation-focused workplace services in this segment. Its RPA digital workforce offering is a differentiator.
- Zensar offers digital workplace services that use automation and analytics to measure end-user satisfaction and reduce ticket volumes. Its growth rate for winning contracts in North America is quite impressive, which is why it has been identified as the Rising Star in this segment.

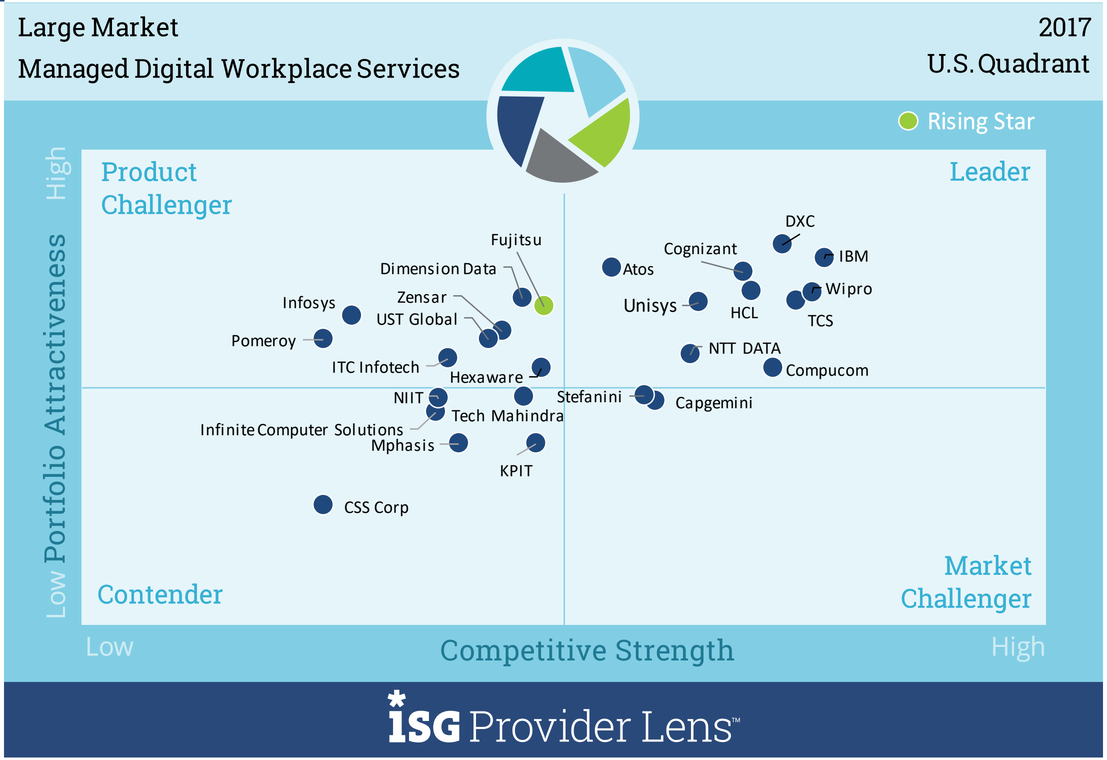
MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Definition

Managed digital workplace services consist of all managed services around the digital workplace, including all relevant operational services such as service desk, hardware and software maintenance, user administration, troubleshooting, change management, transition management and others.

Enterprises are looking for ways to adopt "shift left" strategies in managing incident tickets through the service desk. Service providers are offering automation-enabled workplace support services to eliminate the need for human intervention for many tasks. The more tasks a service provider can automate with managed services, the greater it can differentiate itself from its competitors. Service provider inclusion of robotic process automation, artificial intelligence and cognitive capabilities each represent a value add in this category.

Large enterprises often have complex workplace environments. Many are looking to reduce IT support costs and enhance the end-user experience via automation. In addition, because of the



Source: ISG Research 2017

MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Definition (cont.)

complexity of their end-user personas and workplace environment, scale-based parameters like device management and onsite presence also remain important criteria. Large enterprises form the next-generation sourcing clients that need to align their workplace services with their business objectives to create cost advantage and improve productivity.

Observations

- DXC, IBM and Wipro emerge as leaders in this segment. They each have huge operational scale and strong presence in the North America. IBM and Wipro offer highly automated solutions for workplace support services. DXC is focused on digital workplace and has a strong partner base in this domain.
- Cognizant is increasing its market presence with new wins and its future-oriented Constantly Ready Infrastructure services model.
- TCS and HCL have been strong market players in North America. TCS, with its Ignio platform, and HCL, with its DRYiCETM platform, provide agile and automated solutions for workplace management.
- NTT DATA also is a leader in this space because of its scale of operations and strong regional presence from its Dell Services acquisition.
- Unisys is a strong player in managed workplace services. Its onsite support and Tech Café are already popular services in the region.
- CompuCom has a strong presence in the U.S. and North America. Traditionally, it has been a key player in end-user computing. With recent acquisitions, it has developed automation capabilities specific to service desk services.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE MARKET

Observations (cont.)

- Atos is a strong global player in digital workplace services. It has recently acquired and partnered with companies in the artificial intelligence and collaboration space. It has augmented and enhanced its overall digital workplace offering.

- Fujitsu has enhanced its workplace services by including RPA and other digital workforce elements. Although the company has a strong presence in the midmarket, it is positioned as the Rising Star for the large market segment.

NTT DATA

Overview

NTT DATA's digital workplace practice emphasizes assessing the viability of latest digital technology for meeting its large enterprise clients' current workplace needs. The company delivers customized, end-to-end user experiences after assessing each customer's needs for technology adoption. It has more than 30 years of experience providing end-user services ranging from desktop support to client virtualization, cloud and mobility.

Strengths

End-to-end workplace transformation services: NTT DATA manages approximately 7 million end users in North America. Besides traditional EUC services, it offers context-aware end-user analytics across devices to enable predictive management and self-healing.

Automation of IT support: NTT DATA has a modular and deployable enterprise architecture for IT infrastructure services automation, called Services Automation and Governance Ecosystem (SAGE). The intent is to understand the customer's environment and assess how to reduce human intervention for ticket resolution. SAGE can reduce costs and enhance user experience by improving Level 1.5 and Level 2 support through self-healing and end-user analytics. NTT DATA's use of new cognitive systems is transforming the service desk function from a low-skilled operation to a data-rich component of workplace strategy.

Expanded presence in North America: NTT DATA has an extensive geographic presence, especially in North America, thanks to its Dell Services acquisition. Twenty six percent of the NTT DATA's global workforce for managed digital workplace services is in North America.

Caution

NTT DATA has sister companies under the NTT Group banner, all servicing the global market. In a few infrastructure disciplines, duplication exists. This creates confusion for potential clients and calls for a combined go-to-market approach in the U.S.

2017 ISG Provider Lens™ Leader

NTT DATA's workplace services are targeted at enabling the digital workforce with a user-centric consumption-based model. Its dynamic workplace services provide context-aware support, content provisioning, self-service, automation and flexibility.

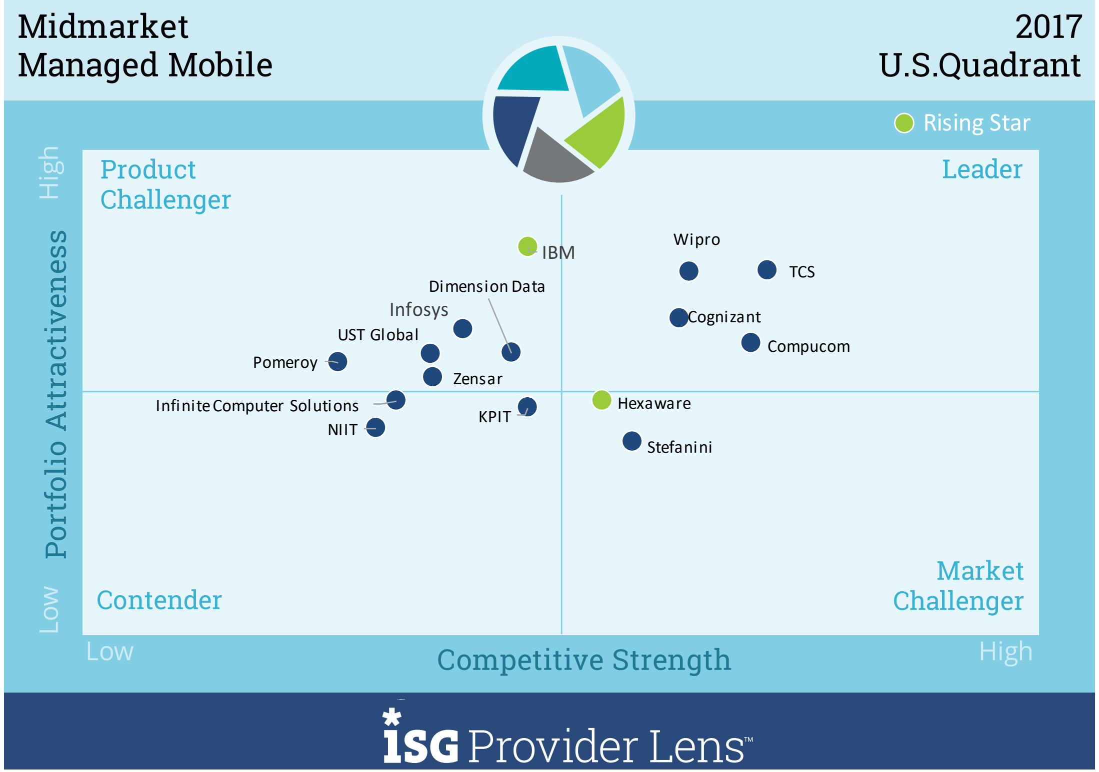
MANAGED MOBILE ENTERPRISE SERVICES - MIDMARKET

Definition

Managed mobile enterprise services includes, at the minimum, mobile device management (MDM), policy configuration, device configuration, device knitting, device lifecycle and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

Increasingly, the mobile enterprise is interested in cloud-based office productivity suites like Office 365, Google Suite and team collaboration tools. Managed enterprise mobility revolves around enabling mobile users with single sign-on features to securely access productivity apps and data anytime and anywhere. With the introduction of smart, wearable devices, the scope of these services has extended to include elements of IoT.

The midmarket is cost-sensitive but is also looking for innovative approaches with a quantifiable business impact. Ideally, managed mobile enterprise services for this segment should be highly



Source: ISG Research 2017

MANAGED MOBILE ENTERPRISE SERVICES - MIDMARKET

Definition (cont.)

standardized and provide innovative components. The midmarket client would be willing to adopt a 100 percent BYOD strategy and would encourage end users towards a BYOx environment (where x includes applications, data and services).

Observations

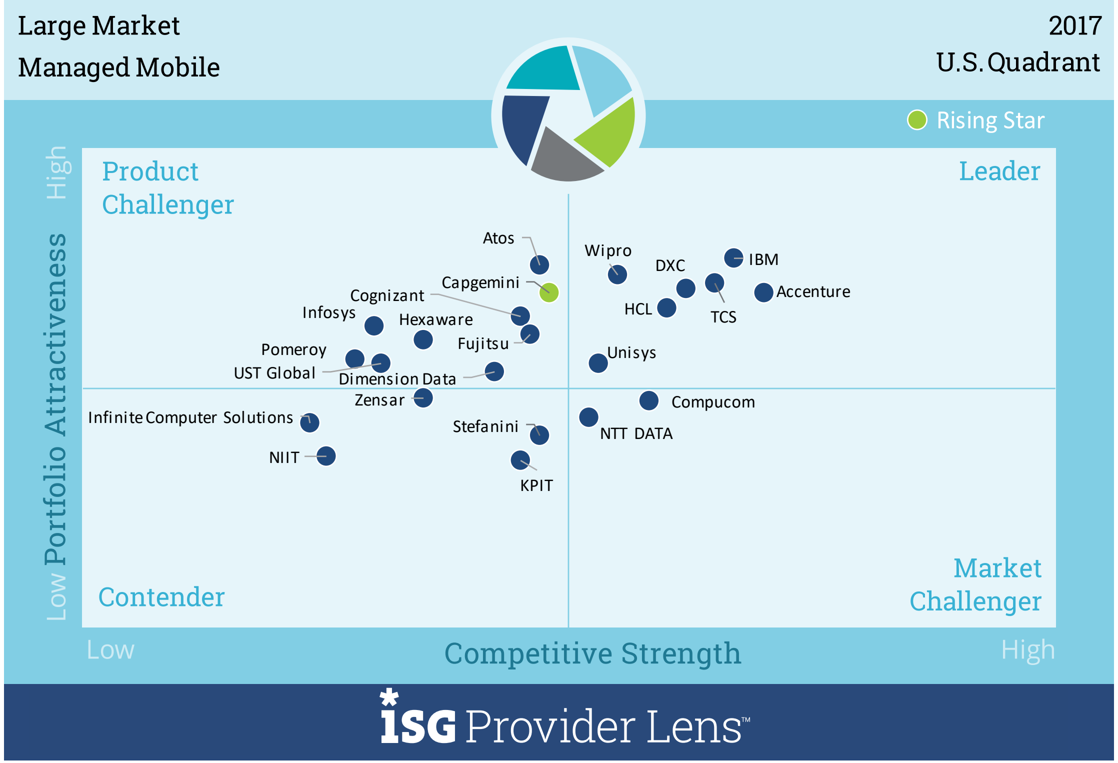
- Wipro and TCS are generally strong in the large enterprise market, but they also target mobility services clients in the midmarket. Enterprises looking for a complete BYOD approach prefer them for their innovative solutions.
- Cognizant is also a leader in this segment because its services focus on a digital experience and close collaboration with their development team.
- CompuCom has been very strong in this region and offers the basic mobility managed services.
- Hexaware's enterprise mobility services offer support for enabling BYOD and shadow IT management. The company's consulting-led approach can be beneficial for midmarket clients.
- IBM, with its unparalleled mobility services, is also targeting the midmarket segment with its cognitive and analytical offerings.

MANAGED MOBILE ENTERPRISE SERVICES - LARGE MARKET

Definition

Managed mobile enterprise services include, at the minimum, mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

The mobile enterprise is seeing popularity and acceptance grow for cloud-based office productivity suites like Office 365, Google Suite and team collaboration tools. Managed enterprise mobility revolves around enabling mobile users with single sign-on features to securely access productivity apps and data anytime from anywhere. With the introduction of smart wearable devices, the scope of these services has extended to include elements of IoT.



Source: ISG Research 2017

MANAGED MOBILE ENTERPRISE SERVICES - LARGE MARKET

Observations

- Accenture and IBM lead the market with their innovative services and focus on digital user experience.
- DXC has a strong presence because of its strategic partnerships with mobility vendors and services that measure mobility initiative effectiveness.
- TCS has the strongest growth in mobility revenue and client wins, while Wipro is a leader because of its experience in unique, mobility-focused turnkey projects.
- HCL’s DRYiCETM platform provides collaboration and automation capabilities related to mobile managed services.
- Unisys is holding its market share for basic mobility management services and has a strong market presence.
- Capgemini has a strong product portfolio focused on end-user experience and is rapidly gaining market share.

ENTERPRISE SOCIAL COLLABORATION SERVICES

Definition

Enterprise social collaboration services enable end-user collaboration within the workplace. The category includes consulting and implementation services for social media-style community building, enterprise content management, crowdsourcing, productivity suites, employee engagement, file sync-share and microblogging.

Collaboration services increasingly are seen as the face of the connected and automated future workplace. Enterprise social collaboration has transformed from just being a company intranet-centric service to becoming a connected, engaging, device-independent, cloud-enabled, productivity-oriented service. In an end-user-defined environment, a user should be able to access his or her complete workspace in one place and be able to engage with peers and support services from any device, anywhere. This collaborative workplace should provide platforms for idea generation, crowdsourcing and gamification, all of which should enhance productivity.

Source: ISG Research 2017

ENTERPRISE SOCIAL COLLABORATION SERVICES

Definition (cont.)

Irrespective of their size, enterprises large and small need collaboration services to make the best value in their workplace environment.

Enterprise social collaboration services are usually embedded within the service provider's digital workplace services value proposition and are not offered separately. Service provider consulting capabilities play a key role in this space. Providers with experience assessing workplace readiness for collaboration, change management and ROI consulting will lead the market. Many service providers offer dedicated solutions for enterprise collaboration that were either developed in-house or acquired from a company specializing in this space.

Observations

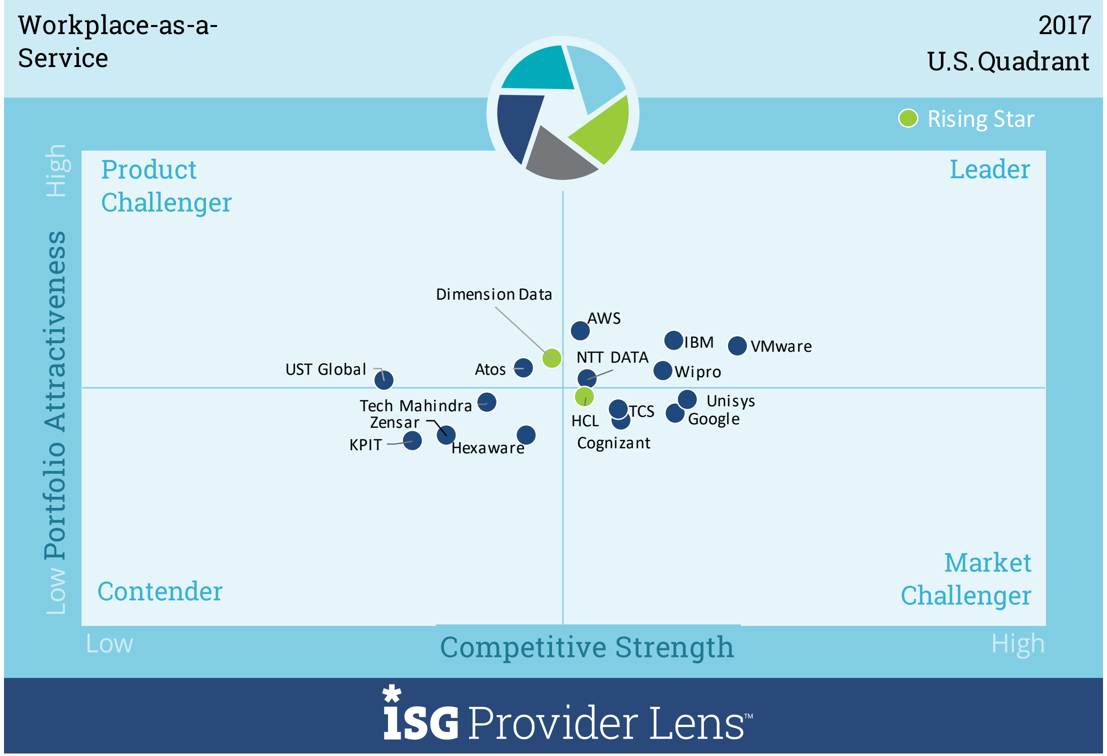
- IBM is a leader here because it has services to support collaboration initiatives and offers its own solutions.
- TCS has experience delivering enterprise collaboration services to clients in North America. Its Knome collaboration platform has a gamification engine to enable and support crowdsourcing.
- Accenture has a dedicated consulting practice for social media collaboration for both the end customer and the internal employee.
- HCL provides different social collaboration platforms and services for its clients' end customers and internal workforces.
- Atos, with its acquisition of Unify, has a strong value proposition in the social collaboration space.
- DXC's enterprise collaboration services leverage its strong partnerships with vendors like Microsoft and Google.
- Capgemini offers consulting services for enabling mobility and collaborative productivity. It's My Workspace is a cloud-based platform with integrated collaboration and productivity applications.

WORKSPACE-AS-A-SERVICE

Definition

Many service providers are moving toward a productized offering for digital workplace services that is cloud based and offered as a "pay-as-you-go or pay-per-user model. These cloud-based "workspaces" are single interface platforms where end users can access all their workplace data and applications. Other managed workplace services will form the back-end support systems for such productized offerings. In this quadrant, ISG assesses providers that deliver a cloud-based workplace service via virtual desktop infrastructure or public/private/hybrid cloud. Also known as Desktop-as-a-Service and Workplace-as-a-Service, it is abbreviated as WaaS.

Nearly all service providers offer customized VDI but often fall short of creating a transparent, flexible, user-centric pay-as-you-go model in standardized packages. Market leaders like VMware define this space, and most service providers are developing solutions based on their platforms. Many other service providers with platform-agnostic approaches and strong partnership and alliance ecosystems are offering a productized solution in this market.



Source: ISG Research 2017

WORKSPACE-AS-A-SERVICE

Observations

- VMware, Amazon Web Services (AWS) and IBM have years of experience providing VDI solutions, have strong market presence and are leading this space.
- NTT DATA, with its strong services portfolio and success stories, is also a market leader.
- Wipro's VirtuaDesk™ is a VDI solution that also provides platform-independent workspace services in the cloud.
- Dimension Data offers hosted desktop solutions and 3-D workspaces. It is a product challenger and is emerging as a Rising Star.
- Through its productized offering and its DryICE™ enabled MyWorkplace solution, HCL provides an all-inclusive DaaS. It is a market challenger and is emerging as a Rising Star.

NTT DATA

Overview

NTT DATA has a strong virtualized, cloud-based workplace services practice. It provides services to deploy WaaS in a public, private or hybrid cloud on the VMware, Citrix, Microsoft and Nutanix platforms.

Strengths

Strong portfolio of services: NTT DATA presents a full-fledged SaaS proposition for workplace services that is transparent and flexible. Different modular options are competitively priced on a per-month/per-user basis.

Innovative support: The WaaS offering is backed with a sophisticated and innovative support system that includes self-healing, self-service and a third-tier support with 24/7 availability.

Successful executions: NTT DATA is showcasing early examples of differentiated transformation projects that resulted in highly standardized cloud-based virtual desktop environments.

Seamless experience for legacy operating systems: NTT DATA provides an open web-test link to assess its capabilities in deploying virtualized access to older Windows operating systems on new devices and platforms.

Caution

With its WaaS proposition, NTT DATA is up against competitors like VMware and AWS that are better known in the market and have greater traction in North America.

The transformation to WaaS represents a major shift for many organizations. NTT DATA must strengthen its market position to be trusted as a provider.

2017 ISG Provider Lens™ Leader

NTT DATA combines solid engineering and support services with a full-fledged SaaS proposition for workplace services. The company's flexible, transparent pricing is another asset.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2017 - Digital Workplace Services" analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of the Digital Workplace Services target market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leveraging of ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy and Vision
   - Innovation
   - Brand Awareness and presence in the market
   - Sales and partner landscape
   - Breadth and Depth of portfolio of services offered
   - Technology Advancements

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