ISG Provider Lens™

Future of Work – Services and Solutions

Managed Digital Workplace Services – Large Accounts

U.K. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

October 2021

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

UK Trying to Adjust With the New Normal Future of Work

Like other parts of the world, the UK has experienced a sudden shift to remote working during the COVID-19 pandemic. Amid the looming threat of more waves of the virus, UK-based firms are now evaluating options about home office and hybrid working. Approximately 32.5 million employees were working from home between January and December 2020 and 82.4 percent of on-site workers transitioned to a remote work model due to the pandemic, according to the Office for National Statistics. About 42.4 percent of those surveyed had worked from home in London alone in 2020. The data shows most of those in managerial and senior positions shifted to this model, while those in low-level jobs operated from the workplace. In major cities, industries such as banking and finance and IT witnessed a high volume of remote working or a home-office setup while those that housed more manufacturing plants and units had comparatively lower numbers.

Apart from the surge in new norms of working, the pandemic bought a challenge for employers in the UK The underlying work design of jobs didn't change much despite the shift according to research by Chartered Institute of Personnel and Development (CIPD) UK. While the pandemic forced many global businesses to change their business models and ways of working, data shows that UK-based enterprises were not quick enough to accept this change.

In 2020, the government announced the Coronavirus Job Retention Scheme (CJRS) to support firms affected by the pandemic. Under this scheme, a furloughed employee can receive 80 percent of his or her wages or up to £2,500 a month. Employers are also entitled to the associated National Insurance Contribution (NIC) and an automatic enrollment for pension contributions on the subsidized wage. The scheme was slated to expire in September 2021, leading to business disruptions and changes in the working model. There is a growing concern of job loss for employees that have been on furlough for long periods. With these arrangements in place, workplace outsourcing activities in the UK have seen a slight dip in 2020 from the previous year even though workplace and remote working technologies were in high demand amid the pandemic onslaught.

At the same time, remote working in the UK is taking a toll on workers, especially those with family, with rising reports of mental distress and work-related stress. Various surveys showed that young workers were increasingly disconnecting with their peers and sought opportunities to work in office environment. Whilst governments across the world are encouraging cities to open up and organizations to reopen offices, UK-based firms are carefully evaluating these options with social distancing norms and smart office spacing. Multiple studies suggest that employees in the UK were satisfied with the remote working tools and associated support provided by their organizations.

In light of these trends, there has been new and improved reliance on managed service providers to not only support the changing business strategy but also support a safe return to office. This report positions different service provider for diverse workplace technology and strategy services for the UK market. Key findings for each quadrant are summarized below.

Workplace Strategy and Transformation Services

- As government aid expires, businesses would have to rethink their operating models. In the UK, organizations would need support to adjust to the changing business requirements and leverage modern workplace technologies for better outcomes. This calls for enhanced collaboration with service providers for workplace strategy and transformation services.
- On average, for managed service providers, approximately 40 percent of existing UK-based clients have improved their engagements at the consulting and strategic-level discussions for workplace transformation.
- Many service providers have upped the size of their consulting workforce to provide this service. In the UK, service providers have reported an average of 17 percent increase in their local consultant pool.
- Many service providers have successfully transitioned the capabilities of their UK-based innovation and design-thinking workshop centres to a virtual setup to support clients remotely.
- UK-based clients are now having serious discussions about the experience-level agreements (XLAs) and how to best strategize them as per business outcome expectations.

Managed Digital Workplace Services

- The scope of managed services for UK clients has widened. Clients are increasingly looking for workplace solutions that enable them to attract the best talent and provide a strong security wrapper.
- CIOs, operations, technical leads and procurement still lead all buying decisions in the UK for managed services. Some providers report increased interaction with human resource functions.
- Portals surpass phones as the most preferred channel to raise support incidents according to an annual survey by HappySignals. The highest level of satisfaction continue to come from in-person walk-ins, followed by phone communication with service desk agents.
- From the service providers' perspective, approximately 33 percent of UK-based clients are still managing on-premises virtual desktop infrastructure (VDI). About 27 percent are now migrating or have already shifted towards a public cloud desktop-as-a-service model.
- Many providers are developing capabilities to secure and enhance physical on-premises office capabilities to enhance and foster collaboration for UK-based firms.

- For clients in the UK, workplace services outsourcing is part of a larger outsourcing contract covering many other services, including application services.
- For large accounts in the UK, clients, service providers are providing virtual tech bars, kiosks and remote support. Midmarket clients are considering device-as-a-service capabilities where pre-packaged devices are shipped to their home locations.

Managed Employee Experience Services

- Only 15-30 percent of UK-based clients are signing managed services contracts under XLAs that centre around the specific digital experience of end users.
- For UK-based end users, the biggest factor for remote working is work-life balance. Service providers that focus on offering a seamless technology experience for home users to work efficiently without interruptions will lead the market.
- Automated ticket resolution and predictive analytics have become commoditised offerings. To provide real managed employee experience services, providers are driving correlation among employees with a high digital experience and business performance.
- Culturally, UK-based end users report an average level of experience and happiness with a score of 72 out of 100 with workplace technologies, according to HappySignals.

Global outlook applicable for UK: Overall, global managed services providers are at a crucial juncture of defining their future strategy. This space was earlier dominated by large IT infrastructure managed service providers that offer technical end-user computing services. These providers have evolved their services to provide automated issue resolution, IT vending machines and kiosk services. They are enhancing their capabilities by supporting mobile device and enterprise mobility management (EMM) initiatives and have started to characterise themselves as digital workplace service providers. As these services are increasingly focusing on end users, providers have begun to prioritise experience-level measurement and develop XLA strategies.

The pandemic has accelerated the shift towards thinking beyond traditional end-user computing elements while pushing organisations to consider workplace and work-related technologies as key business enablers that can make or break the employee experience. A satisfied employee with high experience can deliver a strong customer service. Providers' consulting service portfolios that usually focus on as-is state assessment closely tied with their own implementation services are now increasingly defined by their strategy transformation services to prepare both client workplace and workforce for future of work.

As enterprises are increasingly leveraging technologies and expert help in designing their employee experience strategy, service providers are transforming themselves from traditional technology implementation and managed service providers into cross-industry experts for providing strategy, consulting and transformation services. In addition, workplace technologies are increasingly permeating business functions and helping line-of-business heads (LoBs) drive decision making. The rise of modern low-code/no-code development, democratisation of IT and digital dexterity coupled with a focus on reskilling have further enhanced the focus on managed services for improving the end-user experience and preparing them for the new norms of working.

Many service providers that were traditionally not strong in IT infrastructure managed services but rather focused on understanding business nuances and on applications and strategy transformation services are increasingly getting involved in providing digital workplace or future of work services. At the same time, traditional end user computing (EUC) or modern digital workplace service providers should invest heavily to differentiate their consulting and transformation abilities. Managed services that include desktop engineering, predictive analytics and automated service desk are now becoming table stakes. Even support for Microsoft 365 is becoming commonplace. Providers with diverse strengths are now competing in the future of work services with strategy transformation services at the core, supported by managed workplace services and an overarching focus on managing employee experience. This has led to the development of a competitive landscape comprising of four different set of providers as explained in Figure 1.

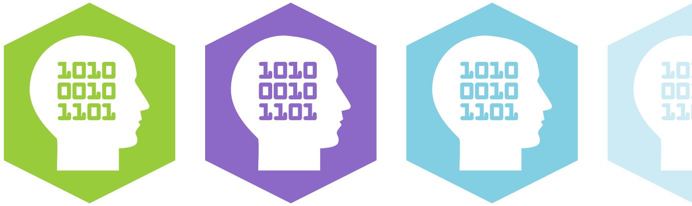
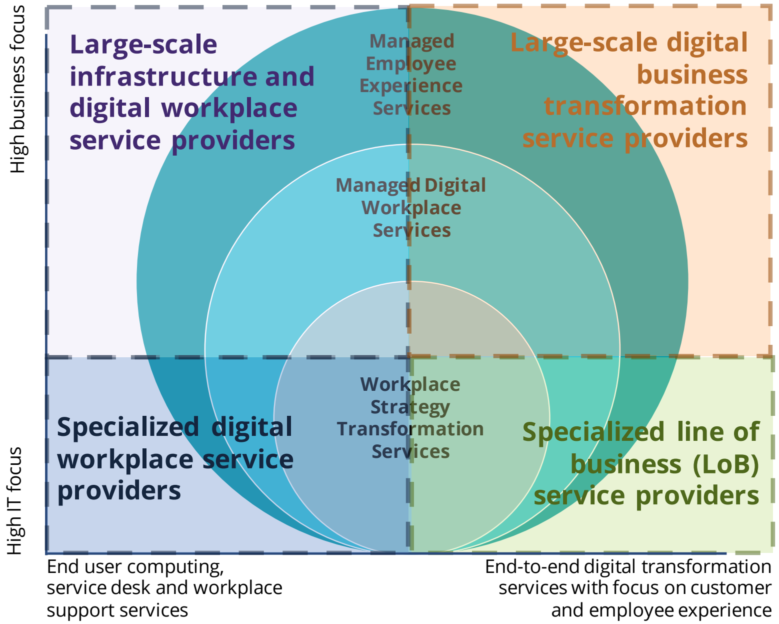


Figure 1: Global Future of Work Managed Service Provider Competitive Landscape



Source: ISG

- Digital workplace services no longer stay in siloes. Changing business models and pandemic induced effects are cascading to these services as they become more business value focused
- Diverse set of managed service providers compete in the new Future of Work services market leveraging their specialization and scale.
- Three key set of services: workplace strategy transformation, managed digital workplace services and managed employee experience are offered by every managed service provider. However, the degree of focus, dedicated vision and coverage depth differs.

An interesting area of development in user experience measurement approaches includes application and devices usage. It is increasingly covering elements of employee learning and talent management while leveraging automation and AI for a human workforce, making it a challenge for both traditional workplace service providers and application-focused providers. Hence, the competition in the employee engagement and experience space is intensifying while benefiting only the enterprise client.

Introduction

Simplified illustration

Future of Work - Services and Solutions – U.K. 2021

Workplace Strategy and Transformation Services

Managed Digital Workplace Services – Large Accounts

Managed Digital Workplace Services – Mid-market

Managed Employee Experience Services

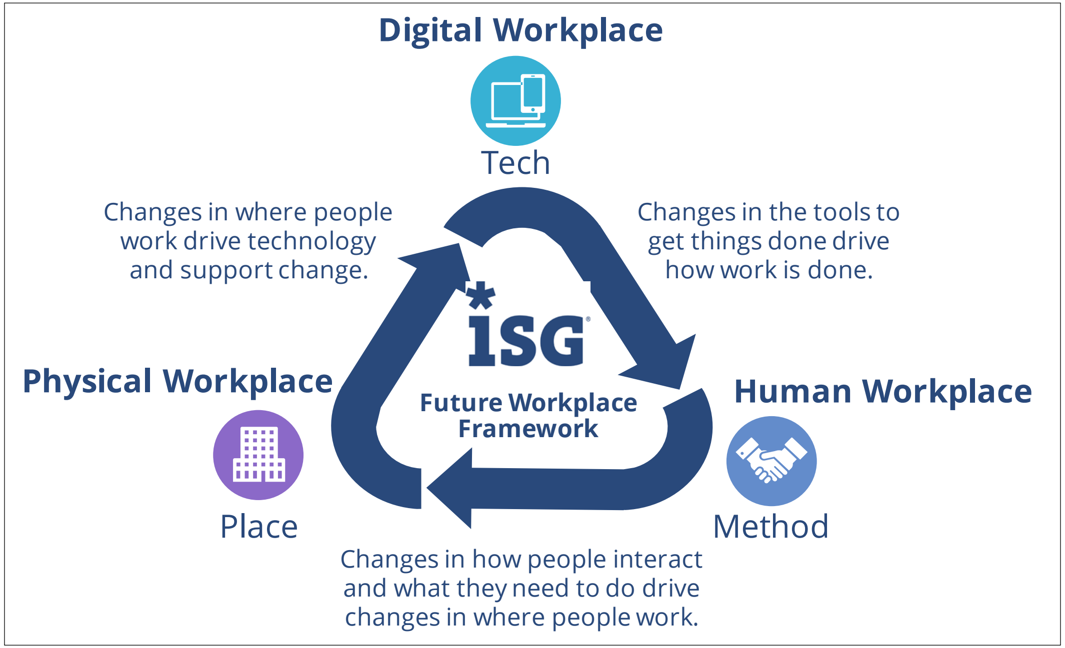
Source: ISG 2021

Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to the remote-working model was expected in the coming years, but the crisis has accelerated its adoption at a significant pace. Enterprises that have changed their business culture and technological adoption due to the situation have learned to iterate, adapt and overcome. This has led to new ways of increasing both productivity and engagement for employees. While ISG had equated the term “future of work” with “digital workplace,” the pandemic has led to an understanding that the future of work is more than just technology and support functions performed by enterprise IT functions. ISG’s new Future Workplace Framework comprises three workplace ecosystems, namely Digital Workplace, Physical Workplace and Human Workplace, as described in the following illustration:

Definition (cont.)

Figure 4: ISG Future Workplace Framework



Source: ISG

Definition (cont.)

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but also will cover aspects of human empathy and drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms for tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of a future workplace will differ and have specific nuances for different geographic regions, but the requirements will generally revolve around a few key themes. In each region, client expectations will involve establishing relationships with service providers that offer future workplace strategies transformation services such as cultural enablement and office versus remote workforce planning. Clients will also partner with service providers that can manage and support the entire workplace technology ecosystem for remote employees while also managing and measuring the experience of both in-office and remote workers. At a global level, the pandemic has led enterprises to invest in workplace technologies that can help secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this trend to continue over the years.

Scope of the Report

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including the Global, UK, U.S., Germany, Nordics, Australia and Brazil

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

The following illustrates the scope from the brochure as well as quadrants as applicable to this report:

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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 (exceptions are possible).

Rising Star

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

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.

Future of Work – Services and Solutions - Quadrant Provider Listing 1 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
Accenture	Leader	Product Challenger	Not in	Market Challenger
Atos	Leader	Leader	Not in	Leader
Birlasoft	Not in	Contender	Not in	Contender
Capgemini	Leader	Leader	Not in	Leader
Capita	Not in	Market Challenger	Product Challenger	Not in
CGI	Market Challenger	Not in	Leader	Not in
Claranet	Contender	Not in	Not in	Not in
Coforge	Not in	Contender	Not in	Not in
Cognizant	Contender	Product Challenger	Not in	Not in
Computacenter	Leader	Leader	Not in	Leader

Future of Work – Services and Solutions - Quadrant Provider Listing 2 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
CSS Corp	Not in	Contender	Contender	Product Challenger
DWG	Product Challenger	Not in	Not in	Not in
DXC	Leader	Leader	Not in	Product Challenger
Fujitsu	Leader	Leader	Not in	Not in
GAVS	Not in	Contender	Contender	Not in
Getronics	Rising Star	Leader	Leader	Leader
HCL	Leader	Leader	Not in	Leader
Hexaware	Product Challenger	Product Challenger	Rising Star	Product Challenger
IBM	Market Challenger	Product Challenger	Not in	Not in
Infosys	Product Challenger	Product Challenger	Not in	Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 3 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
ITC Infotech	Not in	Contender	Not in	Not in
LTI	Contender	Product Challenger	Not in	Not in
Microland	Contender	Contender	Not in	Product Challenger
Mphasis	Not in	Product Challenger	Product Challenger	Not in
NTT DATA	Market Challenger	Leader	Not in	Not in
Orange Business Services	Leader	Product Challenger	Not in	Not in
Sopra Steria	Not in	Market Challenger	Contender	Not in
SS&C	Not in	Market Challenger	Not in	Not in
TCS	Leader	Leader	Not in	Leader
Tech Mahindra	Product Challenger	Product Challenger	Not in	Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 4 of 4

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
TET	Not in	Not in	Market Challenger	Not in
Trianz	Product Challenger	Not in	Not in	Not in
Unisys	Product Challenger	Leader	Not in	Leader
UST	Contender	Contender	Contender	Contender
Vodafone	Not in	Product Challenger	Leader	Not in
Wipro	Leader	Leader	Not in	Leader
XMA	Not in	Not in	Market Challenger	Not in
Yash Technologies	Not in	Not in	Product Challenger	Not in
Zensar	Product Challenger	Product Challenger	Not in	Product Challenger

Future of Work – Services and Solutions Quadrants

ENTERPRISE CONTEXT

Managed Digital Workplace Services – Large Accounts

This report is relevant to large enterprises across industries in the UK for evaluating providers of managed digital workplace services.

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

With changing lockdown rules in the UK, enterprises are planning to bring employees back to the office, which is one of the challenges for enterprises to overcome. To achieve this, they are focussing on hybrid work strategy, employee safety, organisational culture and the workplace value proposition. Enterprises are also looking forward to implementing chatbots, virtual assistants and self-service technologies to automatically resolve ticket queries and reduce the number of tickets landing to service desks.

Managed digital workplace services are empowering large enterprises in creating a compelling environment to bring employees back to the workplace and ensure digital success. Service providers in this region are combining the power of intelligent automation, AI, machine learning and analytics to help enterprises reduce workplace-related complexities.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of service desk and IT support service providers to help them in effective planning and vendor selection. The report also shows how the technical and integration capabilities of a service provider differ from the rest in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit their digital transformation initiatives and how they compare with one another.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of managed digital workplace service providers in the UK.

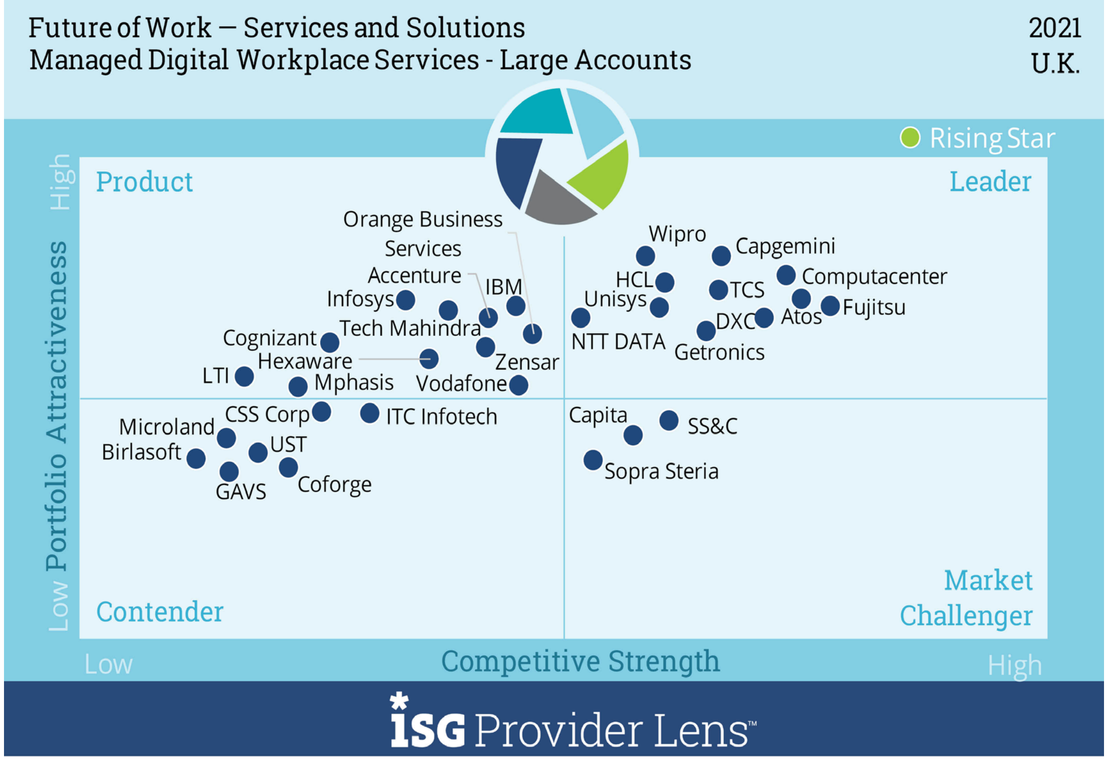
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while maintaining seamless employee experience for a remote workforce.

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

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualised workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services provide the ability to work from anywhere/anytime, device support, including automated proactive technical support and cloud platforms to provision always-on systems. They leverage AI and cognitive technologies for end-user facing tasks and help achieve significant cost savings.



Source: ISG Research 2021

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents
- Offer on-site field support and in-person technical assistance
- Set up and support self-help kiosks, tech bars, IT vending machines and digital lockers
- Offer managed services for collaboration and communication over diverse platforms
- Provide device support, predictive analytics and proactive monitoring services
- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud
- Offer managed mobility services in the respective countries with at least 25 percent of the devices managed outside the home region
- Offer complete device lifecycle managed services as a plus, covering device sourcing and logistics, device as a service (DaaS) for device security, support for unified endpoint management (UEM) and mobility program management
- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations

The Managed Digital Workplace Services quadrant this year includes the Managed Workplace and Mobility Services for which ISG had separate quadrants last year. Providers offering the combined portfolio are positioned in this quadrant. Providing Microsoft 365 and Microsoft Teams enablement is now a commonplace service, and leveraging AI and automation to eliminate low-level incidents such as password resets is also not a major differentiator.

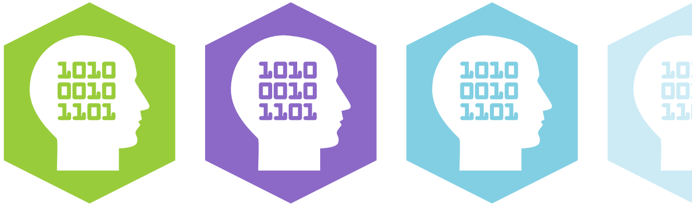
Contenders in this quadrant offer strong managed services portfolio around the Microsoft technology ecosystem. At the same time, they should develop capabilities for further automation and integration while showcasing a better market presence with client stories and revenue. Product Challengers have a stronger portfolio that leverages automation, AI and machine learning technologies plus augmented and virtual realities capabilities. These providers also have frameworks and platforms for managed services and offer device lifecycle management services. They should pursue the UK market aggressively to acquire more clients and expand their local presence. Market Challengers offer traditional workplace support and service desk services and are well established in the market with large client bases. They should further develop their capabilities. Leaders in this quadrant provide differentiated workplace services powered by contextual AI technologies and further integration with business functions. They also have strong and growing client bases in the UK.

- **Atos** is strongly positioned in the UK with its managed services focused on a data-driven approach.
- **Capgemini** offers a strong connected employee experience service portfolio and leads with strong growth in the UK.
- **Computacenter** considers UK as its home turf and offers strong capabilities with automation and analytics solutions through its DigitalMe approach.
- **DXC** has a wide presence in the UK and adopts a collaboration automation-oriented approach.
- **Fujitsu** has improved its managed services portfolio and demonstrates a strong regional presence.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations (cont.)

- **Getronics** offers a strong support model with an automation analytics capability to provide managed services to enterprise clients.
- **HCL's** Fluid Workplace addresses the current and future needs of the managed future working model by leveraging an optimum combination of its IPs and solutions.
- **NTT DATA** offers the Nucleus platform, dynamic workplace services and an ability to extend to other business functions.
- **TCS** leads with its Cognix™ solution and experience-level measurement approach.
- **Unisys** benefits from its strong local presence and a solid portfolio, making it a well-established leader in the market.
- **Wipro** leads the market with its LiVE Workspace™, virtuadesk™ and other intellectual property-led solutions. The company has a strong market presence in the region.



DXC TECHNOLOGY

Overview

Headquartered in Virginia, U.S., DXC provides modern workplace services to more than 1,000 clients in 67 countries. The company globally manages 7.2 million end users, 6 million devices including PCs, laptops and desktops, 1.3 million virtual desktops and 1.2 million smartphones. Its modern workplace services cover intelligent collaboration, workplace support, device and asset management capabilities.

Strengths

Strong service portfolio: DXC's digital support services provide contextual, omnichannel user-centric support by leveraging automation and analytics. It can resolve up to 7 percent of incident tickets automatically and has achieved an end-user satisfaction score of 94 out of 100. Its device management services include UEM and enterprise mobility management (EMM) support along with entire device lifecycle management, backed by strong partnerships. The company also offers workplace device asset management capabilities to predict and manage cost.

Focus on user collaboration: DXC leverages its partnership with Microsoft around Microsoft Office 365 and Microsoft Teams to provide integrated collaboration and business workflow automation. It has also partnered with Microsoft for the latest Windows 365 offering. DXC leverages augmented and virtual reality technologies for augmented workplace services. Another initiative involves managing the collaboration ecosystem powered by non-Microsoft technologies.

Strong local presence in UK: DXC has recently strengthened its reputation in the UK by winning many workplace services client contracts from diverse industries such as banking, transportation and the public sector. It provides service desk support from Erskine and generates more than 60 percent of its managed workplace services revenue from Europe.

Caution

DXC has witnessed a dip in its scale of workplace managed services due to a decline in the number of users and devices managed.

The company has a strong focus on growth and transformation and is winning new clients in the UK. However, it will take some time for clients to consider this new and improved approach.

2021 ISG Provider Lens™ Leader

DXC has a strong brand recognition in the UK with extensive experience across diverse industries, making it a leader in the managed services space.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 – Future of Work – Services and Solutions" analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Future of Work – Services and Solutions 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. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy 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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Mrinal Rai is the Principal Analyst at ISG and responsible for creating research reports for Digital Workplace, Enterprise Collaboration, and intelligent automation. He is also the official ISG spokesperson for media relations in India. His area of expertise is Digital Workplace services, modern Unified Communication, Collaboration, conversational artificial intelligence (AI) both from a technology and business point of view. He is the US lead quadrant and global archetype analyst for digital workplace and social collaboration in the ISG Provider Lens (IPL) program. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture, enterprise social software, content collaboration and team collaboration. In intelligent automation space, he focuses on conversational AI and intelligent virtual agents. He has been with ISG for last 9 years and has more than 13.5+ years of industry experience.

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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™ | Quadrant Report
October 2021

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