



**\*ISG** Provider Lens™

2020

Digital Workplace of  
the Future – Services  
& Solutions 2020

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit [www.isg-one.com](http://www.isg-one.com).



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# Definition

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

The digital workplace technology ecosystem is comprised of software solution vendors offering solutions that provide secure device management, access to apps and data over any device anytime and anywhere, next-generation meeting collaboration, and productivity-focused solutions. It also includes system integrators and service providers that act as partners for enterprises in their workplace transformation journey, helping to assess their workplace environment, suggesting best approaches, managing the entire technical environment and providing support to end users by leveraging the latest and emerging technologies.

As global enterprises are grappling with the COVID-19 pandemic, they need to enable remote working at scale for a majority for their workforce. This requires employees to have seamless access to their workplace apps in the device they carry (personal or company-owned). It also requires an overarching technical environment that ensures connectivity and collaboration among globally dispersed employees anytime and anywhere. Also, enterprises must ensure that corporate data and applications remain secure and protected from cyber-attacks. This requires significant investments in secure remote working tools along with meeting and collaboration solutions to ensure employee productivity.

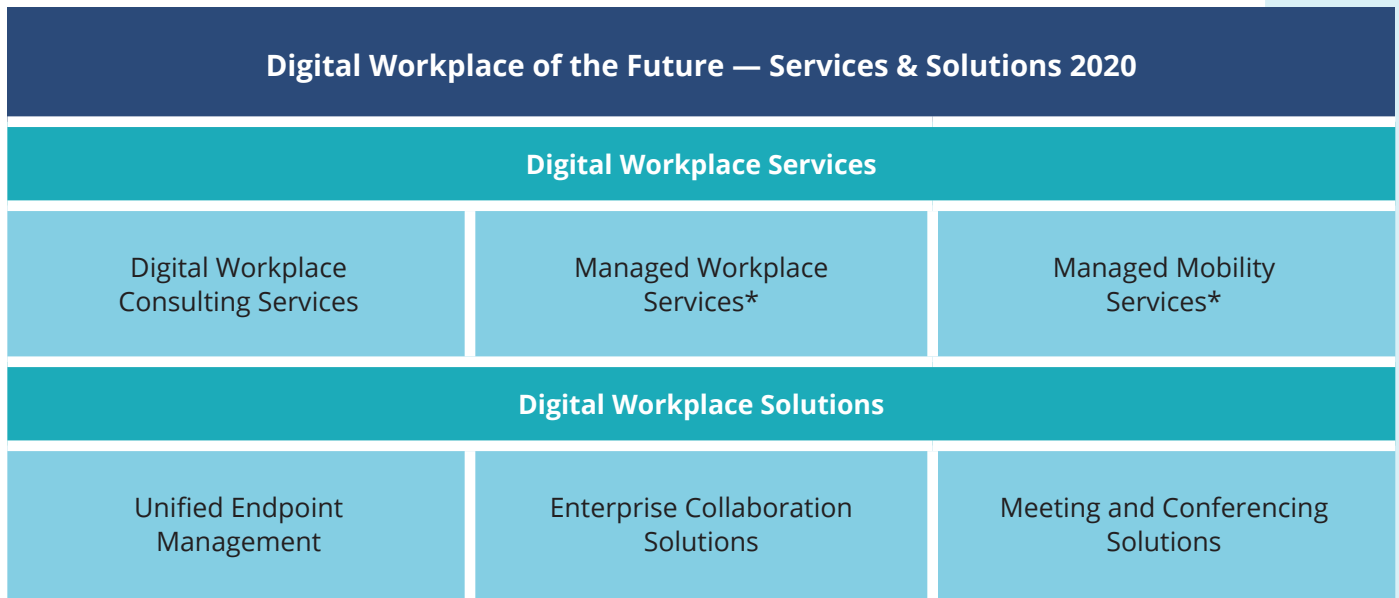
The ISG Provider Lens™ study offers IT decision makers:

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

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

# Quadrant Research

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



Source: ISG 2020

\*Segmented into mid and large market at regional level

## Digital Workplace Consulting Services

Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture, and creating the roadmap for validating the business case around transformation. Consulting and workplace assessment are an essential part of the digital workplace offering and is offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the end user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end-user personas, providing a roadmap for implementation, enabling technology adoption and change management.

### Eligibility Criteria:

- Provide consulting and workplace assessment services that are independent of the associated managed services
- Vendor-neutral approach in assessing best technology partner
- Established methodology for end-user persona segmentation
- Ability to define and visualize modern workplace environment for enhancing end-user experience and to measure it
- Inclusion of technology adoption and change management services in the consulting portfolio

## Managed Workplace Services

Managed digital workplace services are comprised of all managed services related to the digital workplace. An IT service desk with level ½ support, in-person technical support and user self-help services form the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services, and managed virtual desktop services.

### Eligibility Criteria:

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents
- Offer onsite field support and in-person technical assistance
- Set up 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-premise and on cloud

## Managed Mobility Services

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

### Eligibility Criteria:

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

## Unified Endpoint Management

Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a unified approach to managing desktops, PCs, and mobile and smart devices through a single console.

A UEM solution should support both on-premise and cloud deployments, remotely manage and configure devices, and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.

### Eligibility Criteria:

- Ability to offer an independent software solution for UEM that can be purchased separately
- Software solution to provide MDM, EMM, MCM, MAM, secure user access and profile management.
- Solution to integrate with systems managers such as system center configuration manager (SCCM) and manage devices from different platforms
- Manage smart devices

## Enterprise Collaboration Solutions

Enterprise collaboration software provides enterprise social networks, next-generation intranet solutions, business communications, and team-centric and content-centric collaboration. It can also extend to provide groupware, knowledge management, email, conferencing, activity streams, microblogging, and talent and skills management. The software solutions offer productivity enhancements for end users, providing them with new and improved ways of communicating with peers along with continuous enhancements to the enterprise knowledge base. These solutions ensure that employees in a team or a project are connected irrespective of the device or location. They can create accessible workspaces and virtual rooms, provide collaboration over chat, audio, and video channels, integrate with the enterprise ecosystem, and provide knowledge orchestration and management. A key strength of a team collaboration solution lies in its ability to make the best use of social interactions, application integration and combined knowledge. It is a cloud based software solution which can be leveraged by both mid-sized and large enterprises.

### Eligibility Criteria:

- Provide functionality to reduce email usage and/or complement intranet usage
- Focus on enterprise-wide information sharing and team/content-based collaboration
- Technology differentiation with a focus on measurable productivity enhancement
- Cover elements in a converged service stack of enterprise social collaboration offering chat, audio/video collaboration, content collaboration and third-party enterprise app integration
- Offer productivity, knowledge management, content collaboration and workflow management

- Integrate with both IT and non-IT business function applications and business function applications
- Integrate artificial intelligence (AI)-enabled bot, usage of ML for content collaboration
- Ability to provide both freemium and on-premise versions
- Partnerships and client adoption by both mid-sized and large enterprises

## Meeting and Conferencing Solutions

Meeting and conferencing solutions enable online communication and interaction by combining messaging, content sharing, and audio and video meetings. These solutions reduce the geographic barriers for professional communication and help in setting up corporate communication events to increase employee engagements across an organization. Organizations use meeting solutions to collaborate for both informal and formal meetings such as external presentations, training sessions, webinars and town hall meetings. Some video conferencing systems provide marketing automation and customer relationship management (CRM) software integrations to synchronize essential business data into specific conferences, allowing for seamless follow-up communications and updates for contact accounts. The meeting solutions should follow protocols to protect information online through encryption and compliance to internationally accepted security and privacy standards.

### Eligibility criteria:

- Ability to provide cloud-based solutions for audio/video meeting and conferencing; solutions may also have an on-premise deployment option
- Provide softphone capabilities or PBX telephony integration, built-in VoIP and toll-based audio calling options
- Allow video conference hosts to have access to moderator controls, invite guests to meetings and integrate with conference room systems
- Offer features such as chat, remote access, and desktop and application sharing
- Provide meeting recording, replaying and sharing capabilities for future references
- Integrate drawing tools with virtual whiteboard capabilities
- Support different endpoints, from room systems to personal computers, laptops, smartphones and tablets



# Quadrants by Region

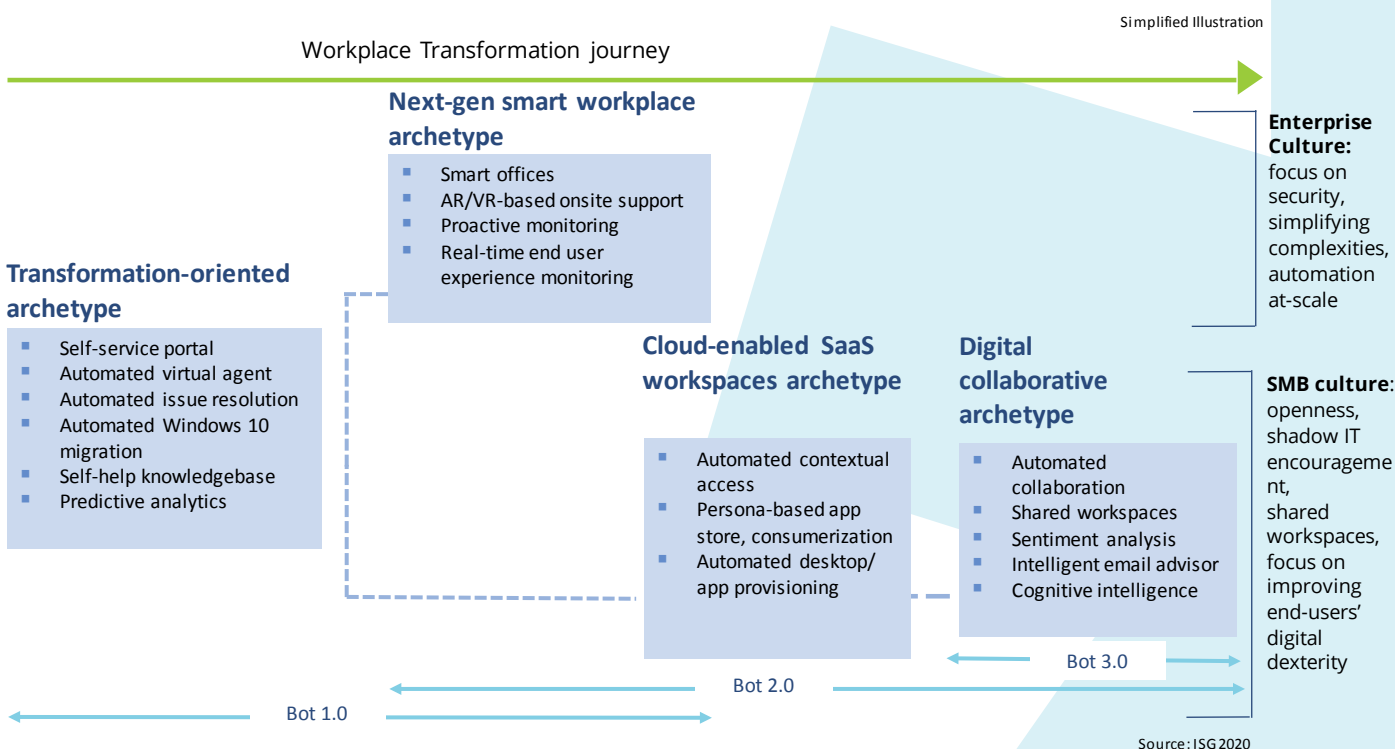
Quadrants	Global	U.S.	U.K.	Nordics	Germany	Brazil
Digital Workplace Consulting Services	Overview	√	√	√	√	√
Managed Workplace Services	Overview	√	√	√	√	√
Managed Mobility Services	Overview	√	√	√	√	√
Unified Endpoint Management	Overview	√	√	√	√	√
Enterprise Collaboration Solutions	Overview	√	√	√	√	√
Meeting and Conferencing Solutions	Overview	√		√		√

# Archetype Report

In this report, ISG identifies and classifies the typical buyers of digital workplace of the future services, which now also include transformational capabilities.

Enterprises aspiring to transform their workplace environments exhibit different characteristics according to their digital maturity. Based on the workplace environment complexity and level of enterprise IT integration with businesses, ISG will classify enterprise behavior into different archetypes around workplace transformation. An example of this classification is illustrated below.

Figure 1: Digital Workplace Archetypes as defined in 2020



# Schedule

The research phase is between **June and September 2020**. During this period, survey, evaluation, analysis and validation will take place. The results will be presented to the media in **October 2020**.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Launch	June 3, 2020	
Survey Phase	June 3, 2020	June 26, 2020
Sneak Preview	September 2020	
Press release	October 2020	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2020 research agenda:

## **Access to Online Portal**

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

## **Research production disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by lead analysts.

# Partial list of companies invited for the survey

**Are you in the list? Do you see your company as a relevant provider but missing from the list?** Contact us to become an active participant in the research phase.

3CX	Bell Techlogix
42Gears	BigMarker
8x8	Bitrix
Accelerite	BlackBerry
Accenture	Blizz
Acronis	BlueJeans
Advania	bluend
AirWatch	BMC
Alcatel-Lucent Enterprise	BT
Algar Tech	CA
Amazon	Calero
AppSphere AG	Campaingery (für wen)
AppTec 360	Cancom
Arkadin	Capgemini
arvato Systems	Cass Information Systems
AT&T	CBTS
Atea	CenturyLink
Atos	CGI
Avanade	Cipher
Avaya	Cisco
Axians IT Solutions GmbH	Citrix
Baramundi	Clearbox
Bechtle	ClearSide
Bell Canada	Cloud Jumper

Cognizant

CompuCom

Computacenter

Cortado

COYO

Damovo

Dataone

Demio

Desk Top Publishing Micro Systems Limited

Deutsche Telekom / T-Systems

Digital Workplace Group

DMI

DXC

Elisa Oyj

Elium

Enghouse Interactive

Ericsson

Evolve IP

Evry

ezTalks

FireEye

Flock

Flowdock

Forcepoint

FreeConference.com

FreeConferenceCall.com

Fujitsu

Fuze

G&P

GEMA

Genisis 10

Genpact

Getronics

GISA

Glip

GlobalMeet Collaboration

Google

GoToMeeting (LogMeIn)

HCL

Hexaware

Highfive

Honeywell Enterprise Mobility

HP

HPE

Huawei

IBM

Igloo

Infosys

Innofactor

Insight

Instituto Senai de Tecnologia da Informação e Comunicação

Intelecom Group

Intermedia

ITC Infotech

Ivanti

Jalios

Jamf

Jitsi

Jive

Join.me

JustSoftware

Kaspersky Lab

KEA Company

KingHost

Komsa

KPN

L & T Infotech

Liferay

Lifesize

Livestorm

LogMeIn

Long View Systems

Luxoft

ManageEngine

Masergy

Materna

Matrix42

Meta

MetTel

Microsoft

Mindsmash

Mitel

Mobileiron

Mphasis

MSG Systems

NationSky

NEC Corporation of America

NetApp

Netia

Nextiva

NFON

NIIT Technologies

NorCom

NTT DATA

NTTA

Nutanix  
OneNeck IT Services  
Onstream Live  
Orange Business Services  
Penso Tecnologia  
Pexip  
PGi  
PhDsoft  
QSC  
Redpill Linpro  
Requestia  
Ricoh  
RingCentral  
Ryver  
Sakon  
Salesforce  
SantoDigital  
SAP  
Scopevisio  
Secu Sys  
Slack  
Snow Software  
Softtek  
SONDA

Sophos  
SOTI  
Sprint  
Star2Star Communications  
Stefanini  
Stratix  
SVA  
Tangoe  
TCS  
TDC Group  
TeamViewer  
Tech Mahindra  
TechQuarters  
Techstep  
TECJUMP  
TEKsystems  
Tele2  
Telefonica  
Telenor  
Telia  
Telstra  
TIBCO  
Tieto  
TIVIT

Tixxt  
Tocario  
TopLink  
Trend Micro  
Trianz  
Trio  
TrueConf  
UberConference  
Unily  
Unisys Corporation  
United Planet  
UOL Diveo  
UST Global  
USU  
Verizon  
Vexia  
Vita  
Vmware  
Vodafone  
Vonage  
Votacall  
VoxMobile  
WatchGuard  
Whereby

Wincor-Nixdorf  
Windstream Communications  
Wipro  
Wittel  
Workplace by Facebook  
Workspot  
Xelos  
Yash Technologies  
Zensar  
Zimbra Collaboration  
Zoho  
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## Do you need any further information?

If you have any questions, please contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).