ISG Provider Lens™

Digital Workplace of the Future

Unified Communications as a Service (UCaaS)

A research report comparing provider strengths, challenges and competitive differentiators

Global 2019-20

Quadrant Report

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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 July 2019 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.

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ISG Provider Lens

ISG Provider Lens™

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EXECUTIVE SUMMARY

Digital Workplace of the Future: Dawn of Microsoft Technology and the XLA-Dominated Workplace

The workplace environment is under rapid transformation. Multiple factors challenge large enterprise clients and reassess their workplace strategies in present times. The most prominent challenge is a talent shortage and the related need to reskill and upskill existing staff. While there is a talented workforce out there in the market, the new, younger workers are tech savvy and it is imperative for enterprises to modernize their workplaces to be able to attract fresh relevant talent.

In multiple interactions with industry experts, we learned that younger workers often don't join a company even after accepting their offer letters. The reason is tech savvy users can get feedback about the firm's working culture through social media, and can rethink their decisions. Enterprises need to consider developing a positive image about their workplace environment for existing employees, so that they can spread favorable feedback in public forums. Technology can help immensely in enabling that positive image among employees, the end users.

Modern technologies enable enterprise IT to not only provide employees a favorable user experience with their applications and devices, but also to assess their sentiment and working patterns through data analytics. These analytics can generate many possible outcomes that can be useful for multiple enterprise business functions. Managing and monitoring the end-user experience is increasingly becoming a topic of interest among enterprises and their IT departments. Eventually it is affecting how the vendors and service providers hired by the enterprises are managing end user computing in a digital workplace environment.

ISG's recently released "Creating the Workplace of the Future" report found that many enterprises still look to managed service providers as a source of labor arbitrage or specific time-and-material resources – not as valuable sources of innovation or transformation. In fact, most traditional contract structures fail to support strategic engagement. Traditional contracts use service-level agreements (SLAs) as the key metric. Typical SLAs used require careful governance but do not support strategic engagement.

A modern outlook towards digital workplace require service contracts that measure service provider performance as per measurable end-user experience, using experience level agreements (XLAs). There is a growing interest in XLA-based contracts, although wide acceptability has not been observed, as both clients and service providers are still figuring out best way to structure XLAs. In essence, continuously monitoring system, network, device and application performance can generate analytics that can provide an indication of the prevalent overall end-user experience level with enterprise IT. Leveraging machine learning, data analytics, sentiment analysis and cognitive intelligence can provide significant improvements in the way enterprise end users consume IT services. Many service providers are developing analytics offerings that are personalized around end users to provide the most appropriate actionable insight for enterprise business functions.

Apart from XLAs, another important trend that we are witnessing in the market is the dominance of Microsoft tools and technologies in the workplace environment. Microsoft had always been the de facto technology solution vendor for the workplace, be it operating systems, servers, productivity applications or system configurators. However, with cloud and SaaS applications entering into the workplace, easier and less costly alternatives to traditional Microsoft resources are available. To counter this competition, Microsoft introduced a number of innovative solutions, including the Office 365 cloud-based office productivity suite, Windows10, an omni-device operating system that can support cloud apps, the Intune cloud-based mobile device management solution and the recently announced Windows Virtual Desktop (WVD). These successive steps by Microsoft brought large enterprises back to the Microsoft technology ecosystem. These enterprises are now looking for solution partners and vendors that can enable the latest Microsoft Office 365, Windows 10 enabled workplace environment and manage it. Microsoft is further strengthening its grip on the market by introducing subscription services like Microsoft 365 and Microsoft Managed Desktop. Leading service providers in digital workplace services are developing their offering around these technologies to support upcoming client requirements.

The state of digital workplace of the future services at the moment is Microsoft technology focused and XLA oriented. Different services have their own set of trends and updates.

Digital Workplace Consulting

Workplace consulting is as important as ever. Though some enterprises do not consider their managed service provider as a consulting partner, almost all leading global service providers are developing consulting capabilities on top of their managed services offering.

Consulting capabilities involve not just advisory on end-user persona segmentation and as-is workplace assessment, but also for measuring technology adoption and supporting change management.

Visionary service providers are considering further enhancing their consulting capabilities to include elements of digital dexterity measurement for end users and to extend their managed services scope beyond being enterprise IT centric.

Managed Services – Workplace and Mobility Support

With the advent of XLAs, almost all service providers are building capabilities to measure user experience based on technology usage at the minimum. How the providers define and what they measure as part of end-user experience is increasingly becoming a differentiating factor for service providers.

The growing scope of intelligent automation and cognitive intelligence is opening new doors and unexplored areas to improve end user experience by having a bot or virtual agent act as personal digital secretary, or in some cases, a digital twin of the end user.

There is a huge interest in smart workspace, meeting rooms and intelligent physical campuses. Service providers are investing in these capabilities by partnering with IoT solution vendors.

Augmented and virtual reality technologies continue to be explored for onsite field support.

In mobility, there is a growing interest in moving to a leading enterprise mobility management (EMM) solution vendor like Microsoft, which offers Intune. Service providers are developing offerings to enable the migration.

On the device analytics front, zero-touch Windows 10 migration and application readiness services are significant areas of interest for service providers.

Workplace services clients are seeing value in the device-as-a-service model. Clients do not want to own the hardware and are asking managed service providers to take care of device lifecycle management along with associated device app provisioning and security.

Unified Communications as a Service (UCaaS)

UCaaS is a cloud-focused technology and is susceptible to quick evolution. Large enterprise and mid-market customers have fast-tracked their migration from on-premise and legacy solutions to pure cloud solutions. The biggest shift in the UCaaS marketplace has come because of the improving digital dexterity of end users. It is not just business leaders, but end users themselves who are also looking for new ways to automate the routine tasks associated with communication and collaboration.

The need for a more streamlined workflow has given rise to technologies like artificial intelligence (AI), automated speech recognition (ASR), natural language processing (NLP) and smart assistants in the workplace. Voice-driven artificial intelligence has been the major highlight in the UCaaS segment, and most of the leaders have started to develop solutions around it for their clients. Some of the leaders provide solutions that enable users to take call notes, record action items and schedule meetings by using an omnipresent smart assistant. AI also brings sentiment analysis into the picture, which involves data mining to determine opinions in speech or written text.

While newer technologies are disrupting the UCaaS space, the fact remains that cloud has been the biggest driver of change in this industry. Unified communications delivered as a service through the cloud allows for greater scalability, better mobility, more predictable operating expenses and a more seamless and consistent communication and collaboration experience.

Unified Endpoint Management (UEM)

With the proliferation of different devices and applications, device management has evolved from being device centric to encompassing enterprise mobility management (EMM). UEM offers a culmination of PC device management, mobile device management (MDM) and enterprise mobility management. Many EMM and MDM solution vendors are focusing on offering a holistic, unified endpoint management solution. Many security service providers are also providing unified solutions to manage the different endpoints used to access the workplace environment.

A unified approach to managing different devices and endpoints is in demand. It requires centralized solutions for all devices, including smartphones, tablets, PCs, Macs and smart IoT devices. Because of enterprise IT's requirement to manage all devices from one solution and end users' expectations for self-service, UEM solutions are expected to provide end-user self-service, desktop and PC lifecycle management plus endpoint mobility management.

Technologies like artificial intelligence and machine learning can monitor traffic at each endpoint and recognize threats in the device ecosystem. Only issues that are not being automatically resolved will be escalated to human agents.

Introduction

Simplified illustration

Digital Workplace of the Future - Global				
Digital Workplace Services			Digital Workplace Solutions	
Digital Workplace Consulting Services*	Managed Services – Workplace Support**	Managed Services – Mobility Support**	Unified Endpoint Management	Unified Communications and Collaboration as-a-service (UCaaS)*

**Segmented into mid- and large- market at country level

* Providers evaluated at country level as well

Source: ISG 2019

Definition

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

Key trends in digital workplace are driven by users' preference to use technology of their own choice and by the increased relevance of emerging technologies and diverse possibilities they bring. Enterprises are focusing on end user experience enablement and its measurement. Consequently, service providers are moving from SLAs to XLAs in workplace services contracts.

Definition (cont.)

Augmented and virtual reality (AR/VR) reduces and eliminates needs for in-person tech support. Its relevance and use are growing in onsite and remote support. Through use of interactive virtual agents and analytics running on systems and tracking resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There is also an increasing interest in transforming workplace management to a more operating expense (opex) model through device leasing or device-as-a-service approaches where OEMs and service providers handle the complete device lifecycle management and the client pays per month per device usage. There is growing interest among enterprises in desktop virtualization in cloud or DaaS (desktop-as-a-service) and also in unified endpoint management. There also has been a huge interest in various collaboration solutions and platforms because they are becoming the face and focal point for digital workplace enablement and provide visible benefits in end user productivity and other business benefits. However, while enterprises are trying hard to catch up with changing user expectations, they are still unable to match the pace technology is changing and attracting the new-generation workforce.

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 global, U.S., Germany, U.K., Brazil, the Nordic countries and Latin America.

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

Definition (cont.)

Digital Workplace Consulting Services

This quadrant assessment centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture, creating the roadmap and for validating the business case for transformation specific to workplace digital transformation.

Managed Services – Workplace Support

Managed services for workplace support for IT service desk with level one and two support, along with in-person technical support and user self-help services, form the core of the managed services offering. The quadrant includes next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help, chatbots, managed end-user collaboration (EUC) and unified communications (UC) services and managed virtual desktop services.

Managed Services – Mobility Support

Mobility services include secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy, mobile device management (MDM), policy configuration, device configuration, device kitting, device staging, mobile application management (MAM), mobile security and cloud-based services.

Unified Communications as a Service

UCaaS combines voice and telephony, enterprise messaging, online meetings (web, video and audio), team collaboration and presence on a single integrated cloud platform.

Unified Endpoint Management

This quadrant assesses key solution vendors offering a unified solution to manage different endpoints in the workplace environment.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials 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

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

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 of the Future - Quadrant Provider Listing 1 of 4

	Digital Workplace Consulting Services	Managed Services - Workplace Support	Managed Services - Mobility Support	Unified Communications as a Service (UCaaS)	Unified Endpoint Management
42Gears	Not In	Not In	Not In	Not In	Product Challenger
8x8	Not In	Not In	Not In	Leader	Not In
Accenture	Leader	Leader	Leader	Not In	Not In
Alcatel-Lucent	Not In	Not In	Not In	Contender	Not In
Astreya	Contender	Contender	Not In	Not In	Not In
Atos	Leader	Leader	Leader	Rising Star	Not In
Blackberry	Not In	Not In	Not In	Not In	Leader
Capgemini	Leader	Rising Star	Product Challenger	Not In	Not In
Cisco	Not In	Not In	Not In	Leader	Not In
Citrix	Not In	Not In	Not In	Not In	Leader
Cognizant	Rising Star	Leader	Product Challenger	Not In	Not In
CSS Corp	Not In	Product Challenger	Not In	Not In	Not In
Digital Workplace Group	Product Challenger	Not In	Not In	Not In	Not In
DMI	Not In	Not In	Product Challenger	Not In	Not In

Digital Workplace of the Future - Quadrant Provider Listing 2 of 4

	Digital Workplace Consulting Services	Managed Services - Workplace Support	Managed Services - Mobility Support	Unified Communications as a Service (UCaaS)	Unified Endpoint Management
DXC Technology	Leader	Leader	Leader	Not In	Not In
Fujitsu	Product Challenger	Leader	Leader	Not In	Not In
Fuze	Not In	Not In	Not In	Market Challenger	Not In
Getronics	Product Challenger	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Product Challenger	Not In
HCL	Leader	Leader	Leader	Not In	Not In
Hexaware	Product Challenger	Contender	Contender	Not In	Not In
IBM	Leader	Leader	Leader	Not In	Leader
Infinite	Contender	Not In	Product Challenger	Not In	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
ITC Infotech	Product Challenger	Contender	Contender	Not In	Not In
Ivanti	Not In	Not In	Not In	Not In	Rising Star
Jamf	Not In	Not In	Not In	Not In	Product Challenger
Kaspersky	Not In	Not In	Not In	Not In	Contender

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Digital Workplace of the Future - Quadrant Provider Listing 3 of 4

	Digital Workplace Consulting Services	Managed Services - Workplace Support	Managed Services - Mobility Support	Unified Communications as a Service (UCaaS)	Unified Endpoint Management
LogMeIn	Not In	Not In	Not In	Product Challenger	Not In
LTI	Product Challenger	Product Challenger	Contender	Not In	Not In
ManageEngine	Not In	Not In	Not In	Not In	Product Challenger
Matrix42	Not In	Not In	Not In	Not In	Product Challenger
Microsoft	Not In	Not In	Not In	Leader	Leader
Mitel	Not In	Not In	Not In	Product Challenger	Not In
MobileIron	Not In	Not In	Not In	Not In	Leader
Mphasis	Not In	Product Challenger	Not In	Not In	Not In
NIIT	Not In	Product Challenger	Not In	Not In	Not In
NTT DATA	Leader	Leader	Product Challenger	Not In	Not In
NTT	Not In	Not In	Not In	Product Challenger	Not In
Orange	Not In	Not In	Not In	Leader	Not In
RingCentral	Not In	Not In	Not In	Leader	Not In
Snow Software	Not In	Not In	Not In	Not In	Product Challenger

Digital Workplace of the Future - Quadrant Provider Listing 4 of 4

	Digital Workplace Consulting Services	Managed Services - Workplace Support	Managed Services - Mobility Support	Unified Communications as a Service (UCaaS)	Unified Endpoint Management
Sophos	Not In	Not In	Not In	Not In	Contender
SOTI	Not In	Not In	Not In	Not In	Product Challenger
Star2Star	Not In	Not In	Not In	Contender	Not In
Stefanini	Not In	Product Challenger	Contender	Not In	Not In
Tangoe	Not In	Not In	Market Challenger	Not In	Not In
TCS	Leader	Leader	Leader	Not In	Not In
Tech Mahinda	Not In	Contender	Not In	Not In	Not In
Unisys	Product Challenger	Leader	Leader	Not In	Not In
UST Global	Product Challenger	Contender	Not In	Not In	Not In
Vmware	Not In	Not In	Not In	Not In	Leader
Vox Mobile	Not In	Not In	Market Challenger	Not In	Not In
Windstream	Not In	Not In	Not In	Contender	Not In
Wipro	Leader	Leader	Leader	Not In	Not In
Zensar	Product Challenger	Product Challenger	Product Challenger	Not In	Not In

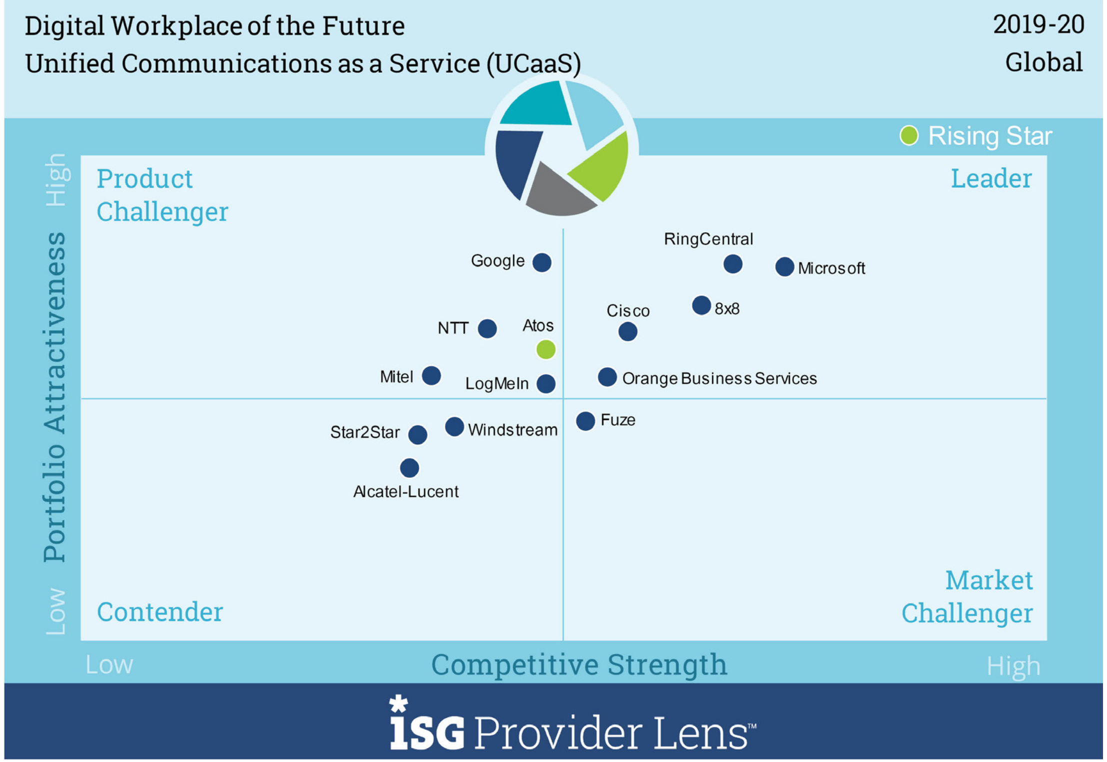
Digital Workplace of the Future Quadrants

UNIFIED COMMUNICATIONS AS A SERVICE (UCAAS)

Definition

Unified communications as a service (UCaaS) is a cloud-based delivery model that provides business communications system across multiple channels and devices. UCaaS combines voice and telephony, enterprise messaging, online meetings (web, video and audio), team collaboration and presence on a single integrated cloud platform. It is designed to be accessed from any device – desktops, laptops, tablets or mobile phones. UCaaS enables businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

The objectives of a UCaaS solution provider are to maximize the user experience, specialize in a broad range of communication tools, supply product onboarding and integration expertise, and deliver innovation, training and high service levels. The market is evolving toward UCaaS, and digital workplace application leaders are deploying UCaaS solutions as there has been a fundamental shift from premise-based unified communications (UC) to cloud-based UCaaS.



Source: ISG Research 2019

UNIFIED COMMUNICATIONS AS A SERVICE (UCAAS)

Eligibility Criteria

- Ability to offer PBX features (including voice and telephony, boss/secretary functionality), mobile client, conferencing (voice/web/video conferences, desktop/file sharing), instant messaging and presence;
- Ability to offer business process solutions powered by communication and collaboration, contextual integration of the UC solution, integration with intranets (social enterprise networking suites);
- Offering communications platform as a service (CPaaS);
- Solution should offer rights and role systems, reporting (dashboards), activity stream and e-mail integration (Exchange, Google, etc.);
- Solution should offer mobile apps, ability to support both thick desktop and thin browser clients, knowledge management solution.

Observation

- Leaders have effectively combined calling, meeting and team messaging into single unified communications platforms. While most vendors can deploy subscribers globally, Leaders have full sales, support and partner ecosystems around the globe and help customers derive the most value from their offerings with complete customer success management functions. Access to partner applications is easy through a well-designed app store.
- Microsoft Teams is leading the market by providing a feature-heavy unified communications solution, but banks on an already established user base through Office 365.
- RingCentral is a dominant leader and it continues to differentiate and grow with a robust UCaaS solution and enterprise acceptance.
- 8x8 has gained momentum through its differentiated X Series platform, and has the best-in-class UCaaS and contact center package.
- Cisco leads with a strong and integrated roadmap showcasing UC-One at its core.
- Orange Business Services impresses with its end-to-end offerings as a communications service provider (CSP), its resource pool and commitment to UCaaS engagements.
- Atos, with its own differentiated UCaaS solutions like Circuit and OpenScape Cloud, has been identified as the Rising Star.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services is a $7.3 billion company with a global workforce of approximately 25,000 employees. It provides UCaaS solutions through its proprietary offering called Business Together as a Service. The solution integrates all communication applications through a single end-user client across multiple devices. It supports 31 languages and can be used on multiple devices, including mobile. It has UCaaS infrastructure across North America, Europe and Asia Pacific. It focuses on large enterprises and multinationals and has 390 clients globally. It has a strong presence in the healthcare, retail and manufacturing industries.

Strengths

Comprehensive services portfolio: Orange Business Services provides services in more than 80 countries and customers typically acquire a rich bundle of services along with UCaaS. For UCaaS, it provides a complete collaboration environment including local field support for gateways and endpoints. It also offers a feature-rich administrator and end user portal for full solution management and administration that can scale from 100 to 100,000 users. Its complementary components include managed mobility, SD-WAN, managed LANs, security, contact center and SIP trunks.

Partner ecosystem: Orange Business Services has a strong partnership with Cisco to provide its UCaaS solutions. It also partners with Equinix, VHM, VMware, Nates, Kurmi, Nice and West, which helps Orange to strengthen its UCaaS offerings.

Competitive pricing: Orange Business Service's UCaaS pricing is competitive in comparison to other CSPs in the industry. There is no preliminary requirement for costly equipment purchases or software licenses, nor ongoing maintenance. The company offers a total of 13 different user profiles with a feature list attached to each. Billing is based on user profiles tailored to different user needs, where users only pay for what they use.

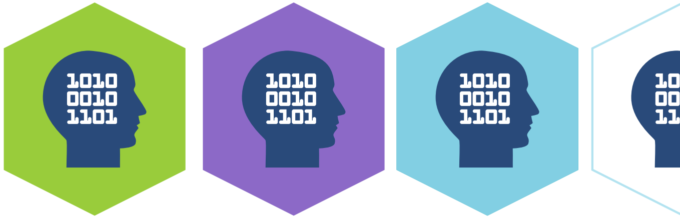
Caution

Orange Business Services has been late to focus on innovation and technology by using AI, machine learning, API-based integrations and CPaaS. Other UCaaS providers have already started implementing these solutions with clients.

2019 ISG Provider Lens™ Leader

Orange Business Services has a proven track record for implementing large UCaaS accounts with its Business Together as a Service offering. It is suited to serve midsize and large enterprises and provides global UCaaS support. The company can also serve clients in Latin America, Middle East and Africa.

Methodology



METHODOLOGY

The research study “ISG Provider Lens™ 2019-20 – Digital Workplace of the Future” analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

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

Authors and Editors

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Mrinal Rai is the principal analyst for digital workplace and social business collaboration. His area of expertise is digital workplace services and enterprise social collaboration both from the technology and business points of view. 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. In social business collaboration, he focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms. He has been with ISG for over six years and has more than 11 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end-user computing and service desk.

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