

Future of Work (Workplace) - Services

A research report comparing provider strengths,
challenges and competitive differentiators



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Services and providers adapt as public-sector workspaces continue to evolve.

Since 2020, the use of digital workplace services by U.S. state and local governments and educational (SLED) agencies has seen significant changes and advancements. This shift, in large part, is due to pandemic-driven impacts in work environments, widespread staff retirements and shortages, and most recently, the availability of substantial funds from the U.S. federal government to upgrade IT and increase the operational efficiency and effectiveness of associated projects.

Key developments driving SLED digital workplace changes and disruptions include the following:

- **Adoption of disparate capabilities growing from remote work enablement:** With remote work evolving from experiment to necessity to part of the norm, agencies have embraced a widening array of digital services and tools

to enable collaboration, communication and information sharing among employees.

- **Cloud as *de facto* infrastructure:** Prior to the COVID-19 pandemic, IT infrastructure challenges, application software costs, and staffing issues were slowly moving agencies away from traditional on-premise infrastructure toward cloud-based platforms and services. The COVID-catalyzed combination of digital citizen demands and remote and hybrid work environments accelerated and expanded this to the point where cloud IT became the norm for new capabilities while legacy IT still requires attention and skills.
- **Mobile enablement and expectation:** Most SLED agencies have embraced mobile applications and related web interfaces that allow employees to access workplace services via smartphones and tablets. However, rapidly achieved and loosely controlled implementations have plagued many agencies with IT security nightmares.

SLED digital
workplaces
frequently extend
directly into
citizens' lives.



- **Data security and privacy:** The above changes brought a heightened focus on data security and privacy, resulting in more agencies struggling to implement effective, robust security measures in increasingly complex, hybrid IT and work environments.
- **Automation and AI:** An offshoot of the SLED staffing challenge has been increased interest in using automation and AI to augment and occasionally replace workers, especially within IT and related support organizations. Agencies are experimenting with AI-powered chatbots to automate employee and constituent support, data analytics to aid decision-making, and process automation to streamline repetitive tasks.
- **Virtual training and learning:** Virtual and remote employee training experiments have led to an influx of learning management systems, webinars and online training platforms in SLED agencies, enabling a continuous learning culture in environments formerly built on skill-plus-seniority hierarchies.

- **Digital changes altering citizen service expectations and delivery:** As with most recent digital changes, SLED constituents' digital preferences were growing prior to COVID. Months-long inability to physically interact with many agencies heightened this to a point where online is now the default mode for most citizen-facing SLED interactions and transactions. Agencies still struggle with enabling acceptable levels of interaction, information and transaction, while constituents demand an increase in consistency of interface and service delivery.

SLED IT organizations, already under-resourced and short-staffed, thus struggle to enable adequate digital workplace environments in the face of overwhelming change.

In this ISG Provider Lens™ study, we look at three important sets of capabilities that help overburdened SLED IT teams enable and support digital workplaces – many of which are still evolving. They also facilitate improved worker and constituent capabilities and satisfaction while reducing support costs.

Critical capabilities

Digital workplace advancements in SLED organizations must rapidly and cost-effectively enable and support the digital service expectations of staff and constituents. Critical capabilities enabling this, and which must be delivered by service providers, include the following:

- **Workflow automation:** Routine tasks such as approvals, document processing and data entry should be streamlined and automated using tools such as RPA and workflow management systems.
- **Collaboration and communication tools:** Implementing adequate, adaptable communications and collaboration applications and solutions is critical, but the ability to unify these into a service or set of services (i.e., unified communications as a service (UCaaS)) will greatly improve the ability to use and manage such capabilities while reducing their cost of operation and use.
- **Data analytics and reporting:** The use of advanced analytics tools in every process is a core need. Leading-edge providers use advanced AI (e.g., large language models (LLMs)) to automate, augment and extend analytics and reporting relevancy.
- **Cybersecurity:** Cybersecurity remains a major challenge for SLED organizations. Integrated and readily used security within solutions, especially as part of managed services, enables much broader and more adaptable security capability.
- **Mobile and remote productivity:** Mobile practices and policies should be integrated with remote work solutions and policies. Providers and SLED agencies alike should be able to readily adapt to mobile and remote behavior changes and conditions.
- **Training and change management:** Digital work includes, and differs from, traditional work. Changes in policy, behavior, oversight, interaction and organizational structure and culture must be resolved for digital workplace efficiency and effectiveness.



Unique SLED provider and solution requirements

State and municipal government agencies and educational institutions have several sector-unique needs when contracting digital workplace services. Service providers and their offerings must meet and exceed these to minimize potential disruptions and maximize the agencies' ability to procure services and solutions. These include the following:

- **HR-centric vs. IT-centric approaches.** Digital workplace providers tend to follow one of two approaches when developing and delivering services: HR-centric and IT-centric. HR-centric approaches emphasize client HR/HCM organizations as most responsible for digital workplace strategy and management, using a strategic approach aligned with established and expected workplace strategy and management. IT-centric approaches, also called tech-plus-tools, tend to emphasize the capabilities of solutions and services, including performance and cost improvements. In our experience, both approaches are significant to SLED agencies, but HR organizations are most likely to
- dominate digital workplace requirements and provider/solution qualification.
- **Workforce extension into constituencies.** Many agency groups and functions extend well beyond the internal environment into citizen and constituent environments (e.g., taxation, licensing, health and human services). Ideally, digital workplace solutions address and improve the experience of both.
- **Regulatory compliance, including worker roles and data security.** Agencies must comply with the expanding scope of regulations and standards related to data security, privacy, accessibility and transparency, along with function-, departmental- and agency-specific worker roles and rules.
- **Integration with legacy systems.** Even the most advanced SLED digital workplaces will rely on mainframes and other legacy IT types for years to come. When procuring digital workplace services, agencies must consider the compatibility and integration capabilities of the service provider's solution with their incumbent systems and data.
- **Scalability and flexibility.** Contracted digital workplace services should be able to accommodate increasing and decreasing workloads, data requirements and system usage over time. Flexibility is important to adapt to changing requirements and evolving technologies.
- **Accessibility, inclusivity and sustainability.** Government agencies must ensure accessibility and inclusivity for all workers and citizens when workplaces extend into constituent domains (e.g., licensing, revenue and/or taxes). An increasing number of SLED agencies also require commitment to and measurable evidence of ESG improvement.
- **Procurement regulations and processes.** Government procurement processes may involve competitive bidding, evaluation criteria, documentation and contract management. Government agencies may have additional criteria when evaluating potential providers, including transparency and public accountability requirements. Providers with established and extensive SLED procurement and contracting

expertise can help reduce the time consumed and challenges faced during the selection and contracting processes.

- **SLAs and contract terms.** Given the criticality of digital workplace services, government agencies are working to establish clear SLAs that define performance expectations, response times, support availability and penalties for non-compliance. Contract terms should also address issues such as termination, data ownership, liability and dispute resolution.

Planning for future disruption and advancement

Which developments in SLED digital work environments will likely be the most disruptive through 2025?

While it is challenging to predict the future with absolute certainty, based on current trends and emerging technologies, several developments will likely disrupt digital workplaces through 2025. Here are some of the most prominent ones that should be enabled by current digital workplace services and must be included in future offerings:



- **AI advancements.** AI technologies and applications will continue to evolve and transform digital workplaces. ML and LLMs will advance intelligent automation, predictive analytics, NLP and computer vision. Properly implemented and managed through provider services, each should enhance productivity, automate repetitive tasks and provide intelligent insights for decision-making.
- **Remote and hybrid workforce models.** Remote and hybrid workforce models will persist and expand to include more contract workers and freelancers or gig workers in many areas previously considered off-limits to such.
- **Augmented and virtual reality (AR and VR).** AR and VR technologies will enable remote training, virtual meetings, immersive simulations and enhanced collaboration. These technologies can reduce geographical barriers and provide engaging and interactive remote and temporary work environments.

- **Internet of Things (IoT).** IoT will continue connecting devices, sensors and objects, creating smarter workplaces. IoT data should improve operational efficiency, enable better resource management and enhance employee experiences (EX). For example, smart offices can adjust lighting, temperature and other environmental factors based on occupancy or individual preferences.
- **Blockchain for trust and security.** Blockchain technology will be crucial in enhancing trust, security and transparency in SLED roles and associated digital workplaces. Blockchain-based solutions will provide greater data integrity across and within increasingly complex workplaces, reduce fraud and streamline complex processes.
- **Human-machine collaboration.** As AI and automation evolve, these technologies will augment human capabilities, allowing SLED employees to focus on complex, creative and strategic tasks. Collaboration between humans and intelligent systems will become more seamless and intuitive.

- **Ethical and responsible technology adoption.** Though we have seen early advancement toward this, by 2026, there will be widespread and increased emphasis on ethical and responsible technology adoption. Organizations will prioritize data privacy, fairness in AI algorithms, diversity and inclusion, and responsible AI use. This will lead to the advancement of policies, regulations and guidelines that must be integrated into digital workplace solutions and services.

What makes a leader?

The providers positioned as Leaders in this study are those that demonstrate portfolio and competitive strengths most suitable to ISG client requirements.


Scope of portfolio, company size and market presence all shape perception of provider leadership. But the size, number, range and complexity of technology and services included in provider portfolios are usually secondary to whether and how the provider enables and delivers business value to client organizations in the manner(s) that they require. The number

of resources, revenue amounts and number of locations also shape provider positioning. However, these must be weighed against how and how much these capabilities deliver measurable improvement to clients.

Ideally, Leaders combine key aspects of the above while positioning themselves to compete effectively in satisfying client needs that have yet to develop fully. Those emphasizing innovation in adopting technologies into more effective ways of working, or delivering value through new ways of working, are more likely to be recognized as Leaders.

The most effective service providers enable and improve SLED agency digital workplaces that extend beyond the traditional workplace to include external users citizens, constituents, regulators and more.



 Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Accenture	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Contender
BCG	Contender	Not In	Not In
Bell Techlogix	Not In	Not In	Contender
Capgemini	Product Challenger	Product Challenger	Product Challenger
CGI	Leader	Not In	Leader
Cognizant	Not In	Not In	Contender
Computacenter	Contender	Contender	Contender
Deloitte	Leader	Not In	Not In
Digital Workplace Group	Contender	Not In	Not In






Provider Positioning

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	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
DXC Technology	Contender	Rising Star ★	Product Challenger
Fujitsu	Product Challenger	Not In	Contender
HCLTech	Market Challenger	Rising Star ★	Rising Star ★
Hexaware	Product Challenger	Product Challenger	Product Challenger
HPE	Product Challenger	Market Challenger	Product Challenger
Infosys	Leader	Leader	Leader
KPMG	Leader	Not In	Not In
Kyndryl	Leader	Leader	Leader
Leidos	Product Challenger	Not In	Not In
Movate	Contender	Contender	Contender



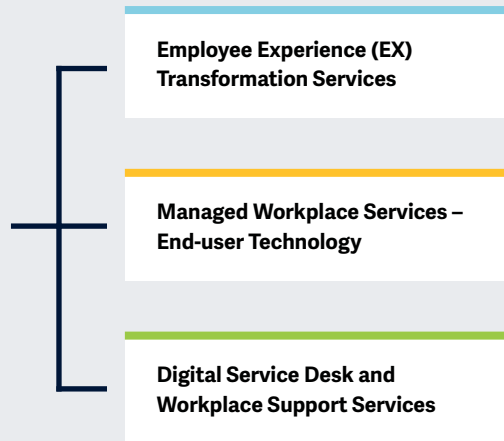
 Provider Positioning

	Employee Experience (EX) Transformation Services	Managed Workplace Services – End-user Technology	Digital Service Desk and Workplace Support Services
Mphasis	Product Challenger	Contender	Product Challenger
NTT DATA	Market Challenger	Leader	Market Challenger
PwC	Contender	Not In	Not In
TCS	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Leader	Product Challenger	Product Challenger
Unisys	Leader	Leader	Leader
UST	Contender	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger
Zensar Technologies	Product Challenger	Contender	Product Challenger
Zones	Rising Star ★	Not In	Market Challenger



This study evaluates **service providers capabilities** around the key **Future of Work services** across different regions.

Simplified Illustration; Source: ISG 2023



Definition

As new digital business realities emerge that are increasingly disruptive, public sector entities, especially state, local and educational (SLED) organizations, face tremendous pressure to improve the way they operate and modernize their whole environment to reduce costs and staff. Their IT needs and challenges are similar to those of complex commercial enterprises, but typically with more restrictions on acquisition, staffing, management, reporting and operations. SLED organizations need objective insights, assessments and guidance more than ever.

This ISG Provider Lens™ Future of Work 2023 study offers IT buyers and decision-makers objective guidance on providers identified as Leaders, Rising Stars, Market Challengers, Product Challengers, and Contenders, with experience in developing, selling and supporting digital workplace services for public sector entities in the U.S. Their services include managed workplace services to enable and support end users’ digital environments, digital

service desk and workplace support services for workers and constituents being served, and employee experience transformation services. ISG clients use these reports to gain market insights and understand provider intelligence that help expand their views about markets, providers and solutions. ISG U.S. public sector advisory and consulting teams use these reports to help clients understand provider types, capabilities and offerings suitable for their requirements. This study also provides competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three services quadrants: Managed Workplace Services – End-user Technology, Digital Service Desk and Workplace Support Services and Employee Experience (EX) Transformation Services.

This ISG Provider Lens™ study offers IT and business decision-makers with:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. public sector

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

Provider Classifications

The provider position reflects the suitability of 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 \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Employee Experience (EX) Transformation Services

Employee Experience (EX) Transformation Services

Who Should Read This Section

This report is relevant to public sector organizations in the U.S., including state and local government and education (SLED) organizations, for evaluating employee experience transformation service providers.

In this quadrant, ISG highlights the current market positioning of the providers of employee experience transformation services to the U.S. public sector and how each provider addresses the key market challenges.

The employee experience transformation service market is evolving in the U.S. public sector, where SLED organizations are significantly increasing their investments in transformation services. These organizations seek to engage providers with proven expertise in end-to-end transformation and can empower them to deliver human-centric employee experiences. Public sector organizations in the U.S. also seek service providers that support and strategize effective organizational change management.

The digital natives within U.S. government entities seek to ensure they have the best collaboration tools available, leading public sector organizations to adopt modern digital workplace strategies focusing on user experience to drive higher employee engagement. These organizations also prefer providers that offer outcome-driven approaches and innovative pricing models.



Digital professionals, including digital transformation leaders, should read this report to know how employee experience transformation service providers accommodate digital transformation initiatives.



Public sector professionals should read this report to understand the relative provider positioning and capabilities that can help them effectively plan and select digital workplace services.



Cybersecurity professionals should read this report to see how providers address the significant compliance and security challenges while maintaining a seamless employee experience.

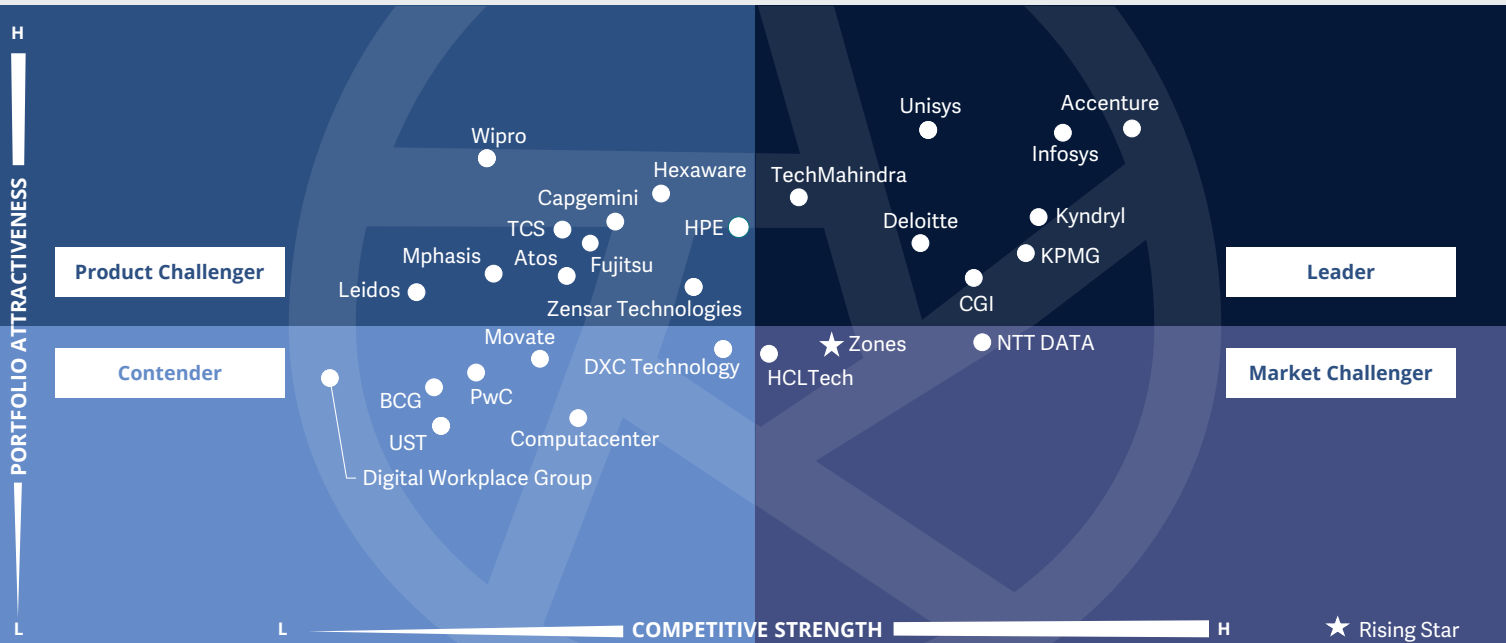


CXO leaders should read this report to know the leading providers that can help them better prepare their workforces for the changing business models and dynamics in the post-pandemic world.



**Future of Work (Workplace) - Services
Employee Experience (EX) Transformation Services**

U.S. Public Sector 2023



EX transformation includes **business consulting and managed technology services**. This quadrant assesses providers that **align EX with digital and physical facets** of the future workplace and deliver measurable business improvement.

Bruce Guptill



Employee Experience (EX) Transformation Services

Definition

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience. These providers typically deal with department leaders, agency representatives and CIOs. They offer services that associate employee experience with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

As global organizations realize the increasing importance of managing and enhancing the employee experience, they partner with service providers that offer EX transformation services leveraging workplace technologies. EX transformation goes beyond technology enablement and includes professional services for promoting and enhancing technology adoption. Service providers providing EX transformation services engage with their clients in an outcome-focused model and follow an XLA approach.

These models leverage the analytics and data from workplace technology usage and technologies such as digital employee experience (DEX) to collect information and focus on actionable insights.

EX transformation is highly influenced by the usage of the collaboration and productivity solution stack. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication and collaboration (UCC) and productivity applications are key to EX transformation.

EX transformation also extends to services that support return-to-office initiatives with smart campus and intelligent physical workspace while also focusing on ESG initiatives.

Eligibility Criteria

1. **Established presence and experience** in public sector entities
2. **Ability to visualize and define an EX transformation model** with technology transformation, technology adoption and organizational change management (OCM)/behavior management services, employee engagement, productivity and associating CX with EX
3. **Ability to address employee empathy** and well-being
4. Making clients **leverage XLAs**
5. Supporting the unified communications and collaboration (UCC) and productivity stack and **extending smart workplace services to multiple business functions** such as HRO and operations
6. **Offering smart facilities and physical on-premises services** that support intuitive capabilities such as hot desking, health assessment and customized and contextualized experience with a smart device-supported workplace
7. **Strong local presence and partnerships**



Employee Experience (EX) Transformation Services

Observations

This study's Employee Experience (EX) Transformation Services quadrant positions selected service providers that transform EX for workplace performance and broader business and IT improvement. Integrating EX with business and IT operations ensures lower operating costs and an improved ability to adapt to business and technological changes. The transformation or perpetual improvement of UX and EX in digital workplaces is critical to digital business and sustainability. EX transformation services aim to offer easy and intuitive UIs; uniform UX and EX across systems, applications, devices and tasks; and an effectively managed digital employee experience (DEX) that facilitates efficiency, security, reliability and extension into future digital environments.

Meanwhile, increased demand for digital workplace enablement, transformation and managed services is attracting more providers to the market. Our 2022 study found a total of 17 qualified providers, including six considered

to be Leaders and two as Rising Stars. This year, we include 28 qualified providers in total, with eight Leaders and one Rising Star.

Previous ISG U.S. public sector studies noted that rapid growth in the scope and number of providers makes provider differentiation and selection more challenging for clients. Given SLED agencies' ongoing IT staffing and budget trends, these challenges will intensify through at least 2025 as more providers enter the marketplace and attempt to replicate leading providers' portfolios, pricing and contracting.

From the 30 companies assessed for this study, 28 qualified for this quadrant, with eight being recognized as Leaders and one as a Rising Star.

accenture

Accenture approaches EX transformation with a broad experience management organization (XMO) portfolio, advanced analytics and an experience-focused platform. The company is a leader in the AI application and adaptation space for experience management improvement.

CGI

CGI differentiates by approaching EX transformation as it does customer experience (CX) transformation in a consultative manner emphasizing user business context, preferences, and behavior over technological functionality.

Deloitte.

Deloitte's digital workplace development and transformation engagements use its expertise from various public sector business consulting practices, including risk management, cybersecurity, tax and legal and HR/HCM consulting.

Infosys

Infosys offers a strong AI-enabled, comprehensive human experience-focused service portfolio. Its emphasis on experience design, platformized approach and services suited to large enterprise clients position it as a Leader in the quadrant.

KPMG

KPMG's adaptable digital interaction model is a valuable, repeatable framework for designing and optimizing digital workplace services from the employee's perspective. The framework uses data and insights across persona groups, enabling uniformity of analysis, reporting and employee management.

kyndryl

Kyndryl follows a data-based approach for EX measurement and XLA. It also combines CX and EX data to offer a comprehensive experience. Its consulting services focus on co-creation and innovation.

TECH mahindra

Tech Mahindra's FLEX eXM solution captures, measures, analyzes and reports UX data from all digital touchpoints throughout processes and systems, providing real-time visibility into EX.



Employee Experience (EX) Transformation Services



Unisys innovates with its XLA 2.0 and data-driven approach. Its digital workplace services focus on aligning EX with organizational business goals, including sustainability targets.

ZONES

Zones' (Rising Star) consultative offerings include EX transformation strategy consulting services, employee technology adoption training and management, and organizational change management.





“Unisys leads in Employee Experience (EX) Transformation Services for U.S. public sector clients with data-driven analytics, collaboration tools experience and XLA 2.0 approach.”

Bruce Guptill

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. One of the most deeply-embedded IT services providers in the U.S. public sector, Unisys provides EX transformation as part of its digital workplace services portfolio. It emphasizes XLAs and technology organization change management as key DEX workplace services, aligning them with clients' business goals.

Strengths

Advanced XLA capabilities: Unisys' XLA 2.0 approach differentiates it from other leaders in this quadrant. Parameters in this approach include precognition, device responsiveness, device stability, device performance, technology adoption (such as chatbot usage), teams' responsiveness and UCaaS solution usage. Unisys is also planning an upgraded version of XLA 2.0 that will include parameters relevant to HR, operations and business initiatives.

Public sector contracting and client support expertise: Few IT providers match Unisys' U.S. public sector experience and expertise, especially as regards organization and user roles, IT and business operation, security, regulatory compliance and contracting.

Business-focused, data-driven EX

improvement: Unisys' digital workplace services focus on aligning EX with organizational business goals, including sustainability targets. Its PowerSuite platform collects usage and performance data from UCC tools, user profile data and endpoint telemetry or DEX tools. Performance metrics include business efficiency parameters and sustainability-related metrics such as carbon savings and employee work impact. AI-enhanced analytics enable real-time insights for EX adjustment and adaptation.

Caution

Unisys offers a comprehensive service portfolio of EX transformation. However, its capabilities in managing physical workspace and extending experience management and transformation through line-of-business applications are not as exhaustive as some other Leaders in this quadrant.





Managed Workplace Services – End-user Technology

Managed Workplace Services – End-user Technology

Who Should Read This Section

This report is relevant to public sector organizations in the U.S., including SLED organizations, for evaluating managed workplace service providers.

In this quadrant, ISG highlights the current market positioning of the providers of managed workplace services to the U.S. public sector organizations and how each provider addresses the key challenges they face.

U.S. public sector organizations are continually challenged with optimizing IT and operational costs and boosting workplace productivity and efficiency. Hence, these organizations are focusing on engaging with managed service providers that can help them address remote-work-related challenges and equip them with the right technologies and processes at affordable prices to meet the current dynamic demands of their workforce. SLED agencies also seek to engage with managed service providers that can accelerate their journey toward modern workspaces and take a human-centric approach.

With the increasing trend of BYOD, the need for endpoint management and security services has also heightened in U.S. public sector organizations. It has led to the demand for a device as a service (DaaS) and the Zero Trust security model to enhance workplace security and create a secure environment for employees. These organizations thus prefer providers that offer a complete portfolio of end-to-end managed security services and governance frameworks.



Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers can fit their digital transformation initiatives.



Public sector professionals should read this report to learn the relative provider positioning and capabilities that can help them effectively plan and select digital workplace services.



Cybersecurity professionals should read this report to see how providers address the significant compliance and security challenges while maintaining a seamless employee experience.

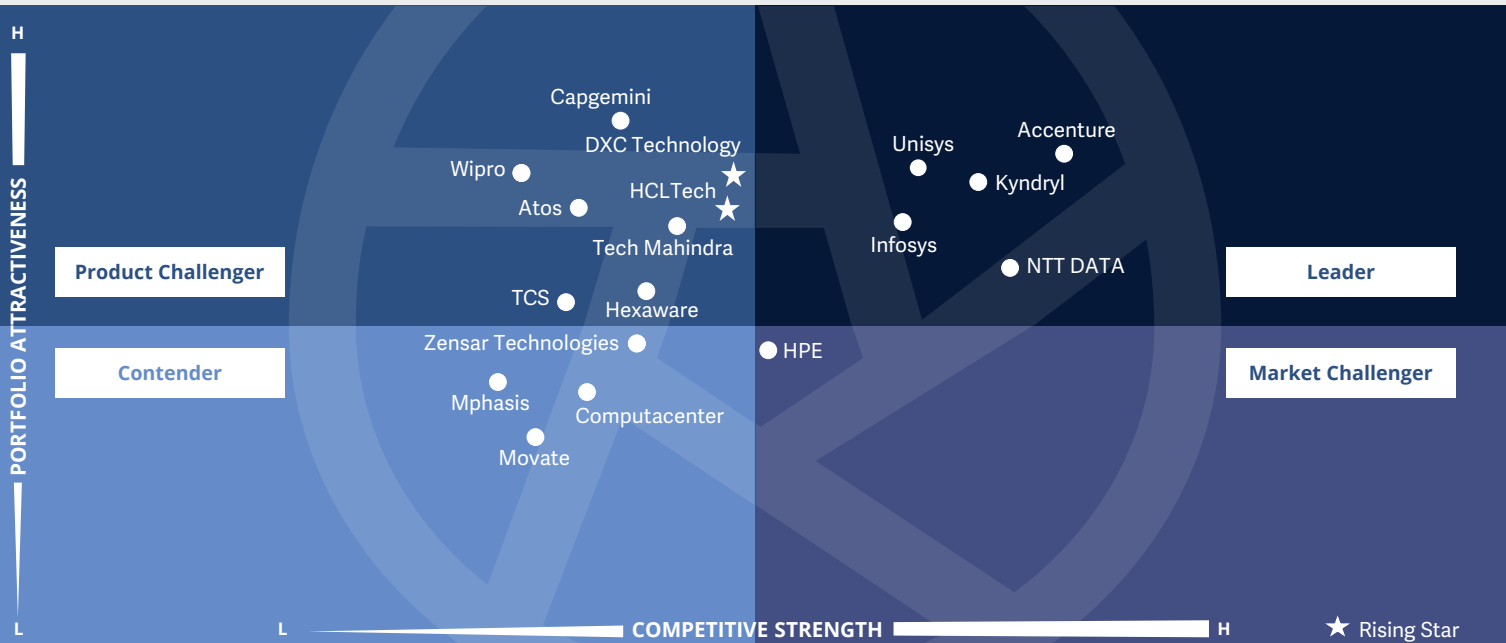


Procurement professionals should read this report to better understand the current landscape of managed workplace service providers in the U.S. public sector.



Future of Work (Workplace) - Services
Managed Workplace Services – End-user Technology

U.S. Public Sector 2023



This quadrant assesses and positions providers that offer **managed services associated with end-user technologies** that are typically deployed, provisioned and secured by SLED IT departments for end users/employees.

Bruce Guptill



Managed Workplace Services – End-user Technology

Definition

Most digital work environments involve many potentially costly and complex end-user devices, software, data resources, networking and support needs across changing remote and centralized work environments. All these need to be organized and managed effectively to achieve the least costly and most sustainable digital work environments.

SLED organizations lack the ability to achieve this objective. The number of IT staff is scarce and continues to decline. SLED's ability to acquire and support an essential mix of leading-edge digital end-user work solutions is very limited. Outsourcing IT-related tasks to managed service providers is key to affordable, efficient and sustainable management of such devices in changing and sometimes uncertain work environments.

Providers assessed in this space offer comprehensive end-user computing (EUC) technology services that form the core of the digital workplace. This quadrant assesses providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by IT departments for end users/employees. Portfolios vary, but such services typically provide and support end-user enablement through endpoint management, application packaging, provisioning and deployment; mobility support; cloud workspaces; virtual desktop environments; device lifecycle management; and increasingly end-user identity and access management (IAM).

Eligibility Criteria

1. **Established presence and experience** in public sector entities
2. **Providing endpoint management and security services** with device policies related to bring-your-own-device (BYOD), mobility and expense management
3. **Providing complete device lifecycle management services**, including support for procurement, enrollment, app provisioning, device support, and support for unified endpoint management (UEM) and mobility program management
4. **Demonstrating experience in providing remote virtual desktop services**, both on-premises and in the cloud
5. Managing devices in **multiple, widespread locations**
6. **Supporting endpoint security services** with technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
7. **Supporting modern networking and unified communication as a foundation** for a digital workplace



Managed Workplace Services – End-user Technology

Observations

U.S. public sector agencies are dealing with massive and still-evolving digital worker and workplace changes. Managed service providers delivering measurable value in digital workplace enablement and management are among the prime beneficiaries of this.

The core factors driving demand for managed workplace services are the same as those driving demand for most IT-related services in the U.S. public sector: rapidly diminishing numbers of qualified staff combined with accelerating use of remote, mobile and hybrid environments, all supporting an expanding digital services reality of systems, processes, users, constituents, and supplier/partner participants. SLED agencies, in particular, are increasingly challenged to enable, let alone improve or manage, the scope of digital workplace capabilities needed or expected by workers and group leaders.

This widespread growth in demand for relevant services is attracting more providers from year to year. Our 2022 study found 14 total qualified

providers, including five considered to be Leaders. This year, we identified 18 qualified providers in total, with five recognized as Leaders and two as Rising Stars.

As we have noted in multiple U.S. Public Sector studies, this growth in scope and number of providers makes provider differentiation and selection more challenging and will continue to do so through at least year-end 2025. Given SLED agencies' ongoing IT staffing and budget trends, we expect those challenges to accelerate as more providers enter the marketplace and attempt to replicate leading providers' portfolios, pricing, and contracting.

From the 30 companies assessed for this study, 18 qualified for this quadrant, with six being Leaders and two Rising Stars.

accenture

Accenture's digital workplace services strategy for the U.S. public sector includes expanding its holistic digital business vision and offerings that include and exceed measurable improvement of changing hybrid workforces.

Infosys

Infosys' dedicated U.S. public sector business unit and strong regional presence complement one of the broadest and deepest portfolios of managed end-user technology services.

kyndryl

Kyndryl's legacy in device management, virtualization and end-user computing (EUC) services complements its substantial U.S. public sector IT service presence, expertise and contracting knowledge.

NTT DATA

NTT DATA has one of the more robust U.S. public sector presences in this study and offers strong device lifecycle management and analytics-driven device monitoring services.

unisys

Unisys offers some of the most comprehensive end-user technology management and support services aimed at U.S. public sector organizations – including advanced user and usage analytics and its PowerSuite DEX management-focused platform.

DXC TECHNOLOGY

DXC Technology (Rising Star) stands out for its modern management-focused device management services. It emphasizes automation and analytics-led device refresh management services.

HCLTech

HCLTech (Rising Star) has one of the strongest portfolios for device management services, including device-as-a-service (DaaS). The firm extends vertical-optimized services to improve its public sector presence and value.





“Unisys is among the strongest leaders in this quadrant, with a robust portfolio, dedicated public sector resources and exceptional sector presence.”

Bruce Guptill

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys provides U.S. public sector clients with managed end-user technology services as part of its Digital Workplace service practice. The company manages 5.5 million end-user devices, 240,000 virtual endpoints and 3.1 million end users in the U.S.

Strengths

PowerSuite analytics and reporting with DEX:

Unisys provides detailed analytics data on end-user device and technology performance through its PowerSuite dashboard. Its digital experience management (DEX) services leverage telemetry and analytics to baseline, monitor and enhance end-user device experience. Unisys partners with key DEX technology providers for proactive monitoring and predictive analytics to resolve device issues before they occur.

Strong managed services portfolio:

Unisys’ portfolio includes modern device management, device security, seamless collaboration, transitioning and transforming, migration and upgrade services with a strong focus on EX.

Modernization and digitalization for public services and organizations:

Unisys focuses its public sector IT and consulting services on modernizing operations to reduce costs, improve and advance operations efficiency, enhance citizen services access and improve user and constituent IT usage satisfaction.

UcaaS as part of its portfolio: Unisys is one of the few providers in this quadrant that offers UCaaS as part of its end-user technology management services portfolio, which includes usage analytics, UX management and reporting.

Caution

As noted in our U.S. regional study on this topic, Future of Work (Workplace) - Services 2023 – U.S.), Unisys significantly outpaces the ability of its clients, especially SLEDs, to derive an advantage from its portfolio. Therefore, an engagement approach focusing on tactical improvements that directly enable strategic gains will be useful to most.





Digital Service Desk and Workplace Support Services

Digital Service Desk and Workplace Support Services

Who Should Read This Section

This report is relevant to U.S. public sector organizations, including SLED organizations, for evaluating digital service desk and workplace support service providers.

In this quadrant, ISG highlights the current market positioning of the digital service desk and workplace support services providers to the U.S. public sector and how each provider addresses the key challenges.

Digital service desk and workplace support services continue to gain traction among U.S. SLED organizations. The gaining interest is attributed to the digital transformation initiatives that support the U.S. federal government. SLED organizations in the U.S. constantly focus on redefining their IT support and service desk services to offer seamless user experiences to their workforce and drive efficiency.

They seek to reduce their IT management burden and streamline support services to enhance productivity and cost effectiveness. Thus, they look for providers with strong service delivery and regional language capabilities that can modernize their support services and increase the first-level resolution rate.

U.S. SLED organizations have started to realize that integrating virtual agents, AI-based chatbots, automation and analytics can help them efficiently drive digital transformation. Hence, they seek service providers that offer AI-based analytics capabilities with the data-driven insights needed to enhance service delivery improvements.



Digital professionals, including facility management leaders, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives.



Procurement professionals should read this report to better understand the current landscape of the digital service desk and workplace support service providers in the U.S.



Public sector professionals should read this report to understand the relative provider positioning and capabilities that can help them effectively plan and select digital workplace services.

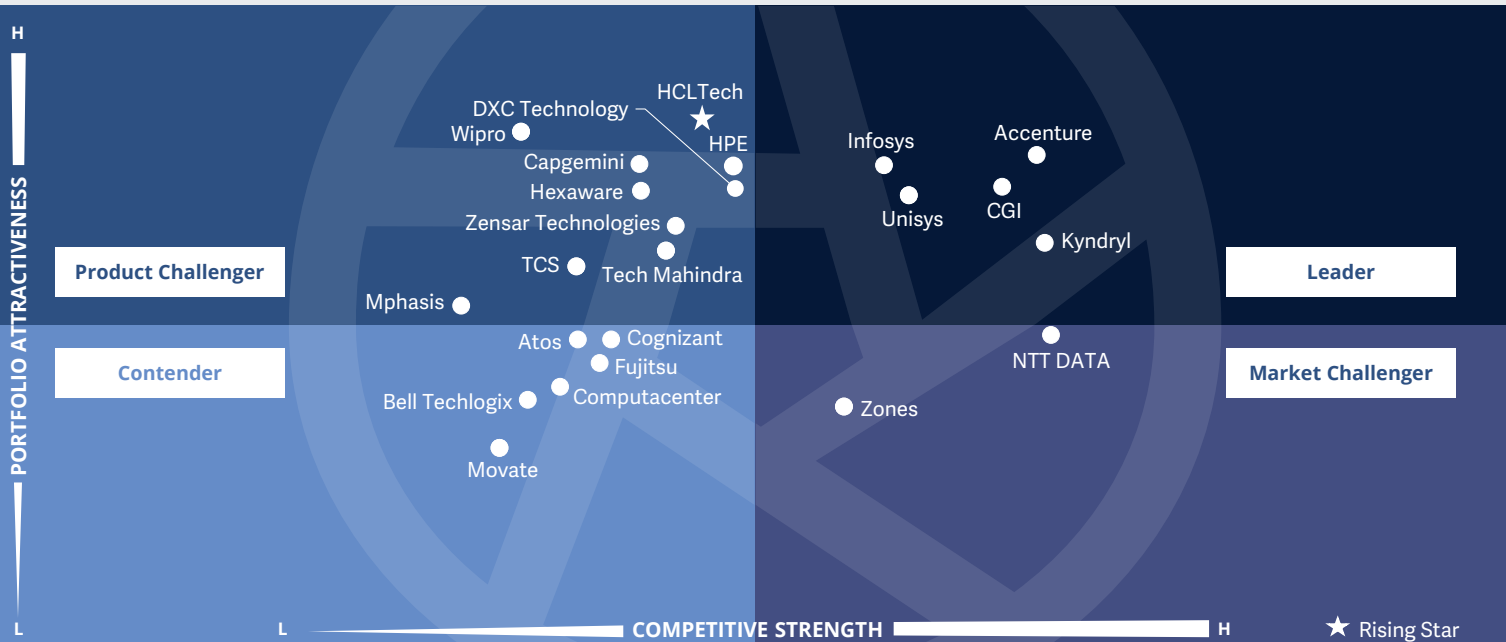


Field service professionals should read this report to understand how service providers implement and increase the use of workplace services to better manage field service operations.



Future of Work (Workplace) - Services
Digital Service Desk and Workplace Support Services

U.S. Public Sector 2023



This quadrant assesses providers delivering **support services** that enable and sustain the ability to **work from anywhere and anytime**. These services include proactive, AI-enhanced technical support and cloud platforms to provision **always-on** systems.

Bruce Guptill



Digital Service Desk and Workplace Support Services

Definition

Supporting workers in an environment that encompasses a variety of devices, network types, and software is challenging. Even more challenging is doing so in a shifting, often unpredictable mix of centralized, remote, and mobile digital workplaces. It is also beyond the capabilities of many public sector entities – and adds significantly to these entities' IT and labor management costs.

Outsourcing such services is increasingly sensible for budget-challenged public sector organizations with limited IT resources. Outsourcing enables cost-effective worker support within and across almost any types of digital work environment. It does so while enabling and enforcing uniform usage and support policies, standardized resource access by workers, and predictable service and support levels and response timeframes. And such services are able to react and respond quickly to changes in business, organization, and technologies being used.

This quadrant assesses service providers that offer modernized support services, including workplace support, service desks, on-site/field support, tech bars and cafés, IT vending machines and automation-enabled omnichannel support for chat and voice. Their services provide the ability to work from anywhere and anytime, device support, including automated proactive technical support, and cloud platforms to provision always-on systems. They leverage digitally transformed services through AI and other cognitive technologies for end-user-facing tasks and help achieve significant cost savings.

Eligibility Criteria

1. **Established presence and experience** in public sector entities
2. **Ability to provide managed service desk and workplace support services** through a hybrid workforce, including virtual agents
3. **Offering remote and on-site field support plus in-person technical assistance**, leveraging augmented reality and/or virtual reality (AR/VR)
4. **Ability to set up and support self-help** kiosks, tech bars, IT vending machines and DigiLockers
5. **Enriched data-driven analytics** to support self-service, automatically resolve tickets and generate actionable insights among users
6. **Providing automated and contextualized support** for end users based on their roles and work
7. **Ability to quantify workplace support function performance** better than traditional service metrics



Digital Service Desk and Workplace Support Services

Observations

Digital service desk and workplace support services are cornerstones of digital workplace enablement for most SLED organizations and form the core of most IT providers' digital workplace service offerings.

Digital support-related services typically offer some of the greatest immediate benefits for users, including a significant reduction in tier-1 response time, improved overall resolution time and percentages, and measurable, sustainable cost savings for internal support organizations. Increasing use of more advanced AI, especially ML and LLMs, further improves providers' ability to resolve more complex issues either during initial contact or through efficient routing of requests to the correct qualified tier-two and tier-three resources. Providers tell ISG that they expect LLM adaptations will enable consistent, 90-plus percent tier-one/first-call resolution and reduce service queue times by 75 percent or more.

Hence, these services are important for providers to establish themselves as digital workplace transformation partners.

The opportunity to improve service and support while requiring fewer staff is why we see a rapidly increasing number of U.S. SLED agencies interested in working with providers. Many are already outsourcing at least tier-1 support; the ability to improve on that while enabling manageable digital workplace advancement is driving more interest and engagement.

That activity, in turn, is attracting more providers to compete. Our 2022 study found 18 qualified providers overall, including five considered to be Leaders. This year, we have included 23 qualified providers in total, with five Leaders and one Rising Star.

From the 30 companies assessed for this study, 23 qualified for this quadrant, with five being recognized as Leaders and one as a Rising Star.

accenture

Accenture's public sector experience and expertise in business strategy, organizational and operational consulting create advantages for developing and refining digital workplace and support services for sector clients.

CGI

CGI has been providing outsourced IT infrastructure and application design, development and support to public sector clients for over 40 years. Few providers have a comparable track record in IT service desk and support with digital transformation for this sector.

Infosys

Infosys leverages its deep AI expertise and recent innovations such as Infosys Topaz to strengthen its digital support and service desk services. It also leverages Infosys Cortex to strengthen its support function.

kyndryl

Kyndryl combines its decades-long legacy of public sector IT services and support with core service capabilities, including an integrated omnichannel platform personalized per user, intelligent analytics and AI-enhanced automation focused on user workflow.

unisys

Unisys offers IntelliServe, a strong platform that leverages AI and analytics to provide experience-focused user support services.

HCLTech

HCLTech (Rising Star) continues to innovate with automation and the latest technologies to provide differentiated support services. It leverages AI and generative AI to empower LUCY, its virtual agent, and transform field support.



Unisys



“Unisys’ consumer-like experience for users, decades of sector IT support services evolution, and next-gen service desk and workplace support services for U.S. public sector clients.”

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys’ digital service desk and workplace support services include service desk, field support, automated virtual agent-based support, tech bar and cafés, and DigiLockers. In the U.S., Unisys has over 1,600 certified professionals supporting its digital workplace support services. The company has a longstanding presence as a legacy IT service provider in the U.S. public sector.

Strengths

Digital government service, solutions and transformation experience: Unisys’s digital service desk and workplace support expertise stem from decades of providing IT support to public sector clients, as well as from developing and supporting solutions, platforms and services that automate and digitalize government administration and departmental and program operations.

Robust service desk and frontline support capabilities: Unisys supports clients through 12 global service desk locations and four field services locations, with over 6,000 field technicians and nearly 6,500 warehousing sites. It manages 19 million service desk contacts and supports 19 languages. In the U.S., Unisys’ first-level resolution rate is 94 percent.

Unisys IntelliServe: This highly-adaptable solution is a part of the company’s digital workplace services suite. It aligns with evolving workplace and workforce needs, helping clients provide their users with a secure, simplified, personalized way to access support services. The solution integrates AI, analytics and automation into support roles, processes, and tasks, helping to transform traditional service desks into digital-ready operations.

Caution

While Unisys is investing in new and upgraded services for public sector clients, its revenues continue to grow more slowly than those of key competitors. This suggests diminishing capital to invest in significant portfolio advances.





Appendix

The ISG Provider Lens™ 2023 – Future of Work (Workplace) - Services study analyzes the relevant software vendors/service providers in the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this 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 2023, 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.

The study was divided into the following steps:

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



Author & Editor Biographies

Lead Analyst



Bruce Guptill
Distinguished Analyst and Executive Advisor

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients.

Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. Public Sector research for ISG's Provider Lens global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Masters' degree in Marketing and Finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.

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Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions, Cybersecurity Solutions and Services. Sonam comes with an experience of over 5 years in market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights.

In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting research projects.





IPL Product Owner

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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™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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iSG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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