End-user Computing Services 2023 RadarView
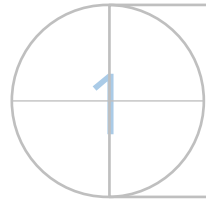
Enhancing end-user experience and productivity

September 2023
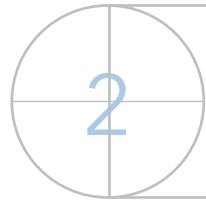
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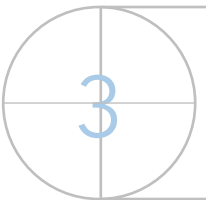
RADARVIEW™

Table of contents

# About the End-user Computing Services 2023 RadarView

1 End-user computing service providers are increasingly offering experience level agreement (XLA)-based services to ensure consistent end-user experience in hybrid work environments. They also help enterprises transform their computing environments to enable efficient monitoring and analytics of productivity data and enhance collaboration among end users.

2 Avasant evaluated 32 providers using a rigorous methodology across the key dimensions of practice maturity, partner ecosystem, and investments and innovation. Through its analysis, Avasant recognized 24 providers that brought the most value to the market over the past 12 months.

3 The *End-user Computing Services 2023 RadarView* aims to provide a view into the leading service providers offering end-user computing services. Based on our methodology, these service providers are categorized into four broad segments: leaders, innovators, disruptors, and challengers.
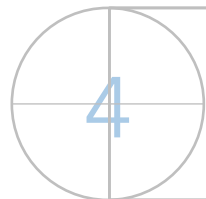
4 To enable decision-making, Avasant has provided an overview of the major service providers in the industry. The RadarView includes a list of each provider's top enterprise clients, customer success stories, key IP assets/solutions and partnerships, and major industry verticals. This is supported by an analyst's take on the provider across the three key dimensions mentioned in the second point.

Note: Please refer to Avasant End-user Computing Services 2023 Market Insights™ for demand-side trends

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Executive summary

Defining end-user computing services

Key definitions

End-user computing

Avasant defines end-user computing (EUC) as a set of technologies and processes used to provide, administer, and manage devices, including physical/virtual desktops, laptops, smartphones, tablets, conference room audio-visual equipment, and connecting peripherals. It also includes technologies for managing enterprise software assets, such as operating systems, productivity applications, and security tools.

End-user computing services

End-user computing services enable organizations to integrate end users into a computing environment and provide them with secured access to digital technologies and applications at the desired time and on preferred devices.

It entails end-to-end life cycle management, including IT product order fulfillment, installation, migration, warranty support, and decommissioning for enterprise devices and assets. This includes offering device as a service, software access administration, application packaging, patching support on enterprise devices and endpoints, and software license management support on enterprise software assets.

It also includes on-site and remote distribution, installation, and integration of applications, provision of end-user support, application virtualization, and implementation of bring-your-own-device (BYOD) policy for enterprises.

Technologies enabling end-user computing

	Virtual desktop infrastructure	A solution for providing multiple desktop computing environments for end users from a centralized location through the internet
	Application virtualization platform	A software used to remotely access and use applications installed on a centralized server
	Unified endpoint management solution	A solution used by the IT department to manage, secure, and deploy applications on any device from a single console
	Productivity and collaboration tool	A suite of applications, such as Microsoft 365, used for creating and collaborating on documents, graphics, and spreadsheets

Source: Avasant Research

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Avasant recognizes 24 top-tier providers supporting the enterprise adoption of end-user computing services

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Practice maturity

CHALLENGERS
Happiest Minds

DISRUPTORS
Kyndryl

INNOVATORS
ITC Infotech
Orange Business
Fujitsu
HP
Dell Technologies
NTT DATA
Birlasoft
Mphasis

LEADERS
HCLTech
Infosys
TCS
Capgemini
DXC
Tech Mahindra
Computacenter
Cognizant
Unisys
Stefanini
Atos
Zensar
Accenture
Wipro

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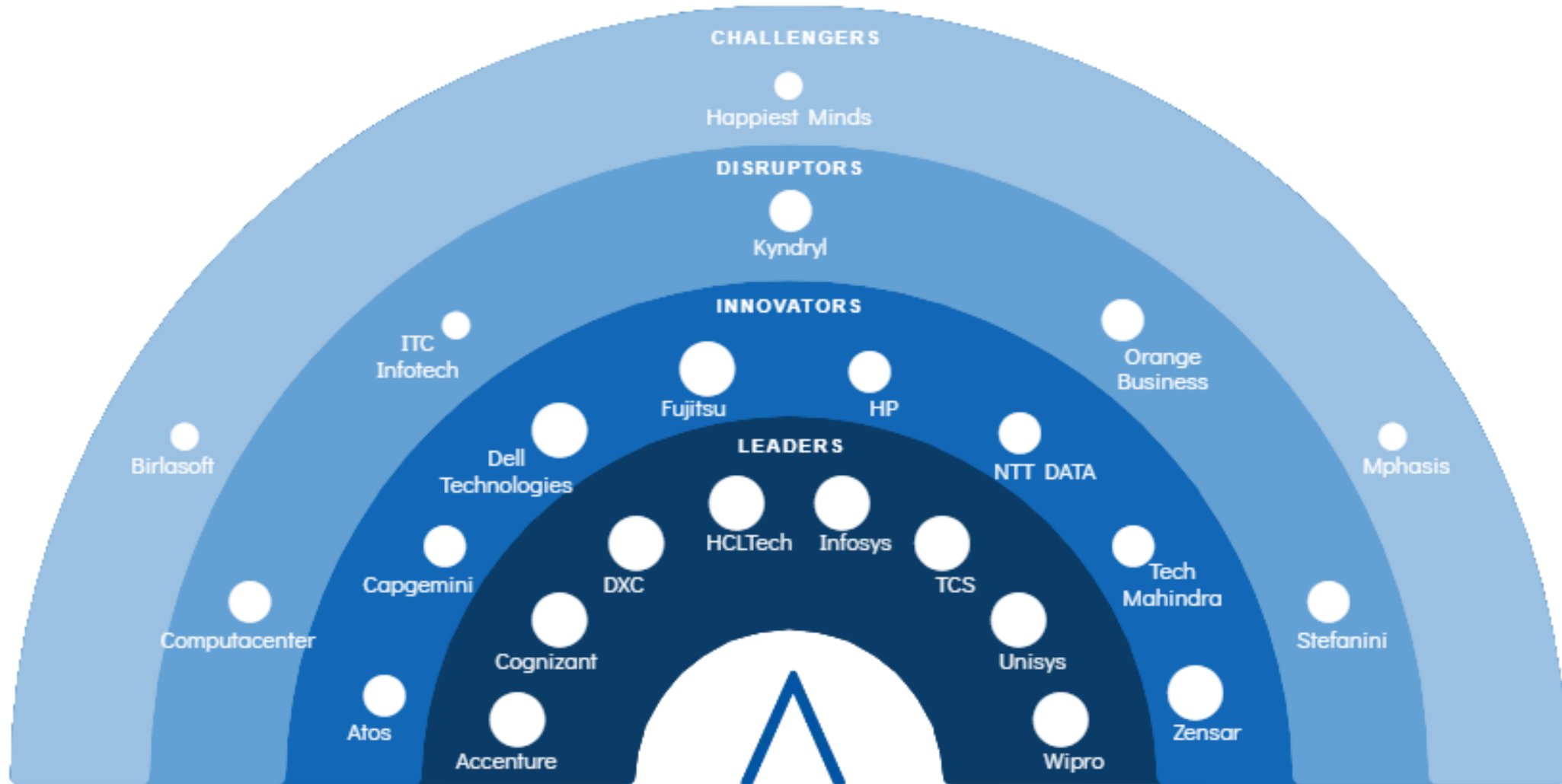
State of the market

Nearly 80% of enterprises include components of XLAs in their end-user computing services contracts

Experience-level agreements (XLAs) assist organizations in closing the experiential disparity by utilizing performance metrics that assess the value being provided to end users rather than solely focusing on technical performance.

XLA indicators	Description	Guidelines to improve XLA
End-user experience index	• This indicator measures the degree of end-user satisfaction while interacting with support teams, digital devices, and business applications. • It is identified based on user sentiments and feedback.	Deploy AI-based sentiment analysis tools to analyze service desk interactions and use persona-specific service delivery strategies.
Proactive resolution rate	• It measures the number of issues identified and resolved proactively through automation against user-reported issues. • It aims to improve user productivity by reducing their intervention.	Leverage automated device health monitoring solutions and offer proactive maintenance and device refreshes.
Device availability and performance	• It measures the latency and performance of the processor, network, and storage; crash incidents; and perceived sluggishness of devices. • This indicator also helps in persona-based device assignments.	Perform periodic checks for driver updates, patch deployments, application conflicts, and end-user experience with devices.
Self-service adoption rate	• This metric measures the rate of issues resolved through channels such as chatbots, self-service platforms, and remote and on-site service desks. • It helps identify personas and geographies needing adoption support.	Collect user feedback to address pain points with self-service tools and provide workshops for improving adoption.
Ticket reopening/ reassignment rate	• It tracks the number of issues reopened after being marked as resolved and the number of times it is moved within multiple resolver groups. • It helps in measuring service desk efficiency and accuracy.	Develop service desk compliances aligned with business goals and upskill service desk agents to improve accuracy.

Source: Avasant Research

Enhancing sustainability is a significant factor driving the adoption of end-user computing services

Enterprises take several measures to achieve carbon neutrality, for instance, improving data collection and analysis, optimizing device usage, and revising device procurement strategies.

Deploying automated solutions for sustainability management

- Enterprises deploy prebuilt solutions to automate sustainability management activities that enable them to track, act on, and accelerate their sustainability goals.
- These solutions can help enhance operational efficiency, strengthen the digital foundation, and optimize IT systems, enabling a quicker attainment of sustainability objectives.

Optimizing infrastructure procurement and utilization

- Enterprises improve workplace sustainability by reducing the demand for PCs and devices by optimizing their performance for extended usable life and deploying circular computing options.
- They prefer procuring devices from OEMs that have adopted carbon-neutral manufacturing practices and offer eco-friendly device disposal services.

Enhancing sustainability tracking and measurement

- Adoption of unified workplace sustainability platforms allows integration of data from various sources for precise carbon footprint analysis.
- Leveraging AI and RPA-based solutions can help replace periodic device refreshes with performance-based device refresh policies to reduce carbon footprint by providing better insights on device performance.

Improving employee awareness and access to sustainability data

- Enterprises conduct workshops, skill development programs, and campaigns in partnership with service providers to enhance employee awareness about achieving a carbon-neutral workplace.
- Providing employee-level carbon emission details by analyzing printer usage data on end-user dashboards also helps control carbon emissions.

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Enterprises take multiple measures to optimize end-user support and maintenance services

Deployment of self-service options and proactive maintenance measures offer benefits such as improved efficiency, faster incident resolution, reduced operational costs, and enhanced user experience.

hcs.

Shifted from reactive IT administration to proactive management by deploying an AI-enabled self-service platform and a telemetry solution providing collective workplace insights, reducing management time by up to 50%.

A North America-based enterprise

Implemented a single virtual agent across the entire device estate and augmented service desk with ServiceNow connector, reducing the mean time to resolve service desk tickets by 25% and ensuring USD 200K in cost savings.

Bank of England

Adopted proactive endpoint management tools and streamlined the service provider ecosystem, resulting in increased service efficiency, improved governance, and enhanced end-user experience.

Self-service options | Proactive maintenance | Virtual agents |

A global conglomerate

Conducted a workplace infrastructure assessment and developed self-service capabilities, automated driver updates, and streamlined patch deployment, resulting in significant cost savings in maintenance activities.

Mondelēz International

Replaced legacy telephony infrastructure with a Microsoft Teams-based digital communications platform for nearly 80K employees globally and deployed proactive maintenance and self-care portal, improving communication experience.

A US-based hospital chain

Leveraged 24/7 field services, proactive workstation checks, patch deployment, self-service capabilities for end users, and workflow automation to expedite patient care and improve operational efficiency.

Note: Examples from select service providers
Source: Avasant Research

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Enterprise best practices to improve user productivity in remote and hybrid work environments

Communication and collaboration suites

- Adopt modern productivity suites to enable collaboration in remote locations and different time zones.
- Deploy cloud-based communication tools to facilitate cross-device compatibility, improved reliability, and user productivity tracking capabilities.

VR and video conferencing

- Leverage virtual reality (VR) solutions to improve end-user experience and engagement in virtual events and conferences.
- Explore metaverse solutions to build virtual communities and offer real-life collaboration experiences remotely.

Desktop virtualization

- Deploy virtual desktop infrastructure (VDI) to enable secure access to workplace tools and data independent of location or devices.
- Implement VDI for dynamic allocation of resources based on user-specific needs.

Cloud-based applications

- Maximize the use of cloud-based applications to improve the scalability and accessibility of business applications.
- Use the applications to meet dynamic data storage needs and reduce operational costs.

Remote support services

- Provide round-the-clock, multilingual support to global teams for uninterrupted business operations and enhanced productivity.
- Utilize onshore and offshore teams for user support to reduce support costs effectively.

End-point security solutions

- Leverage advanced security solutions, such as multi-factor authentication and automated threat detection, to address data security challenges in remote work environments.
- Revise data-sharing compliances and improve employee awareness.

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Unisys profile

Unisys: RadarView profile

unisys

AVASANT RADARVIEW™ LEADER
End-user Computing Services 2023

Practice maturity ★★★★★

Partner ecosystem ★★★★★

Investments & innovation ★★★★★

Leverages AI, ML, and NLP technologies to offer data-driven change management, hyper-personalization, and insights on the business impact of user experience.

Practice overview

- Practice size: 6,500+
- External certifications: 16,500+
- Active clients: 780+
- Delivery highlights: 60+ delivery centers globally

>USD 1B EUC services revenue, YTD March 2023	<10% EUC services growth, YTD March 2023

Client case studies

- Implemented a service automation factory and launched a virtual assistant for end-user IT support with a data-driven change management strategy at Nutreco. It reduced mean time to resolution by 50% by automating 90% of high-volume requests.
- Addressed technology standardization needs and legacy platform risks through an OCM strategy and RightTrack workshops at Globe Life. It optimized program change, aligned processes, and enabled the adoption of Microsoft 365 services using industry benchmarks.
- Helped the Bank of England overcome slow service delivery and IT reputation issues by transitioning service providers and leveraging proactive endpoint management tools. It resulted in improved end-user experience, increased efficiency, and enhanced governance.
- Improved IT support and mortgage identification by implementing a custom B2C service desk at Fannie Mae. This streamlined mortgage processing and increased the number of mortgages to low-medium income families by 23% compared to the previous year.

Key IP and assets

- XLA 2.0: A framework measuring client satisfaction with devices, applications, and IT services
- PowerSuite CSG module: A platform providing compliance, security, and endpoint insights, including RightTrack consulting and a rules engine to mitigate data loss risk
- RightTrack framework: A framework to evaluate an enterprise's maturity compared to industry standards

Key partnerships

Technology partners

- Microsoft
- nexthink
- Google
- aws
- EXPERIENCE COLLAB Powering Employee Experience
- AMELIA
- servicenow
- 1E
- DELL Technologies

Sample clients

- Bank of England
- Caixa Econômica Federal
- Cushman & Wakefield
- Dyson
- Fannie Mae
- General Dynamics Electric Boat
- Globe Life
- Groupe BPCE
- Nutreco
- Omnicom Group
- Unilever

Industry coverage

- Aerospace & defense
- Banking
- Financial services
- Government
- Healthcare & life sciences
- High-tech
- Insurance
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom, media & entertainment
- Travel & transportation
- Utilities & resources

Darker color indicates higher industry coverage through digital services

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Unisys: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Unisys offers comprehensive services for physical and virtual end-user devices, providing full life cycle support, including procurement, imaging, provisioning, app management, patching, monitoring, support, and replacement. It supports multiple operating systems and aims to transition clients from traditional device management to unified endpoint management, utilizing over-the-air provisioning and automation for proactive issue resolution.
- Its Intelligent PC Refresh service optimizes device replacement based on performance and usage data, resulting in cost reduction, improved employee experience, and potential carbon consumption reduction.
- It offers comprehensive software distribution and license management services, offering both traditional and modern deployment methods (central server or application store), along with application request models and license optimization insights to reduce licensing costs for enterprises.
- Its endpoint security services help enterprises deploy device policies, antivirus, encryption, and AI-based antimalware, and offer password management, behavioral security training, end-user-triggered phishing alert system, and ransomware recovery service.

Partner ecosystem ★★★★★

- Unisys and Microsoft have a strategic partnership that enables Unisys to provide Microsoft's frontline worker solution and utilize Microsoft technologies in unified endpoint and productivity services. It has received the Azure Innovation Partner award and Microsoft Gold Partner status.
- It is a Platinum partner of Dell Technologies. As part of the partnership, it offers Dell white-label support services for PCs and data center equipment, collaborates on digital workspace services, and codevelops solutions such as device as a service, ransomware recovery, and intelligent VDIaaS.
- It has also partnered with AWS, Google, 1E, Nexthink, Amelia, and Experience Collab to collaborate on multiple software and service integrations to enhance the end-user experience, provide cloud solutions, and deliver intelligent virtual agent and meeting room services.

Investments and innovation ★★★★★

- In June 2021, Unisys acquired Unify Square to leverage its PowerSuite platform as a data integration and AI platform for end-user and workplace insights. In November 2021, it acquired Mobinergy to augment its unified endpoint management capability and geographic presence in Europe. It completed the acquisition of CompuGain in December 2021 to expand cloud and infrastructure services.
- It leverages AI, ML, and NLP technologies to ensure data-driven change management, hyper-personalization, user intent recognition to train virtual agents, proactive problem detection, insights into end-user services' impact on business operations, and carbon reduction.
- It leverages IoT-based technology to offer its clients smart conference rooms and smart building services.

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Appendix:
About RadarView

The End-user Computing Services 2023 RadarView assesses service providers across three critical dimensions

Practice maturity

- This dimension considers the current state of a provider's end-user computing practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement.
- The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.

Partner ecosystem

- This dimension assesses the nature of the ecosystem partnerships of the provider, the objectives of the partnerships (codevelopment and co-innovation), and the provider's engagement with technology solutions providers, startup communities, and industry associations.
- Vital aspects evaluated in this dimension are joint development programs around offerings, go-to-market approaches, and the overall depth of partnerships.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

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Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures
Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements

Market interactions
Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement

Provider inputs
Inputs collected in April 2023 through an online questionnaire and structured briefings in April–July 2023

Of the 32 service providers assessed, the final 24 featured in the End-user Computing Services RadarView for 2023 are:

accenture · Atos · birlasoft · Capgemini · cognizant · Computacenter · DELL Technologies · DXC TECHNOLOGY · FUJITSU · happiest minds The Mindful IT Company · HCLTech · hp · Infosys · ITC INFOTECH Business-friendly Solutions · kyndryl · Mphasis The Next Applied · NTT DATA · orange Business · stefanini GROUP · tcs TATA CONSULTANCY SERVICES · TECH mahindra · UNISYS · wipro · zensar

Note: Assessments for Accenture, Atos, Capgemini, Dell Technologies, Fujitsu, HP, Infosys, Kyndryl, NTT DATA, Stefanini, and Wipro were conducted based on public disclosures and market interactions only.

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Reading the RadarView

Avasant has recognized service providers in four classifications:

LEADER — End-user Computing Services 2023

Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.

INNOVATOR — End-user Computing Services 2023

Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.

DISRUPTOR — End-user Computing Services 2023

Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.

CHALLENGER — End-user Computing Services 2023

Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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