

Magic Quadrant pour les services externalisés de l'espace de travail numérique

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Les tendances et les meilleures pratiques du marché des ODWS montrent que les clients exigent de leurs prestataires de services une meilleure expérience sur le lieu de travail, de l'innovation et des offres à valeur ajoutée. Gartner a réalisé une analyse de 18 fournisseurs pour aider les responsables du sourcing informatique à faire une sélection adaptée à leurs objectifs.

Définition/Description du marché

Gartner définit le marché des services d'espace de travail numérique externalisés (ODWS) comme les capacités requises d'un fournisseur pour fournir des services de conseil, de mise en œuvre et/ou d'assistance aux utilisateurs finaux qui dépendent des terminaux et des applications pour mener leurs activités.

Les services offerts par les fournisseurs ODWS comprennent des services de lieu de travail numérique (DW) intégrés et omniprésents pour accroître l'engagement des employés, la productivité et la dextérité numérique à l'appui de la stratégie commerciale de l'organisation.

Caractéristiques obligatoires

- **Centre de services** : Assistance à distance, multicanal et personnalisée pour les utilisateurs finaux et leurs appareils, 24 h/24, 7 j/7, 365 jours par an. Cela inclut également la gestion des comptes utilisateurs, des appareils et périphériques, des applications, du contenu, des systèmes de messagerie et de collaboration, ainsi que des services

associés. Les canaux de contact incluent le téléphone, le web, la messagerie électronique, le chat et le support en libre-service. Un support personnalisé distingue les différents profils d'utilisateurs finaux et leurs besoins spécifiques. Il peut s'agir, par exemple, d'un support hybride, entièrement à distance, présentiel, ainsi que des intervenants VIP, de première ligne, de back-office et des équipes opérationnelles.

- **Prise en charge de la virtualisation : solutions d'infrastructure de bureau virtuel (VDI)** dédiées et de virtualisation d'applications et offres de bureau en tant que service (DaaS) entièrement basées sur le cloud qui adhèrent de plus en plus aux modèles de consommation utilitaires et élastiques.
- **Services sur le terrain et en dépôt : assistance** traditionnelle sur site pour les problèmes qui ne peuvent pas être résolus à distance ou à l'aide de l'automatisation , ainsi qu'assistance sur site pour les emplacements sans autre assistance informatique ou sans rendez-vous.
- **Gestion des services et processus informatiques : flux de travail** structurés et bonnes pratiques pour la fourniture de services informatiques, généralement conformes à un cadre de gestion des services informatiques reconnu par le secteur, tel qu'ITIL . Cela comprend la gestion des incidents, des demandes de service, des changements et des problèmes, ainsi que la fourniture de services.
- **SaaS application support:** SaaS is now a default delivery model for many applications. Most service providers have developed capabilities to support and manage mainstream SaaS applications, such as Microsoft 365, Google Workspace, workstream collaboration, and some line-of-business applications like Salesforce or Workday.
- **Unified communications as a service (UCaaS):** Support of voice and video conferencing and calling services.
- **Endpoint management:** Tasks to provision, configure, deploy, update, patch, protect and repair end-user PCs and mobile devices. It also includes packaging, deploying, patching and managing the life cycle of end-user applications, operating systems and agents. It may include administration of various endpoints, experience and security tools.

Common Features

The common services offered beyond mandatory for this market may include:

- **Data privacy and security:** The ability to demonstrate compliance to industry standards and laws regarding data privacy and security through certifications or audits. Some examples are the General Data Protection Regulation (GDPR), ISO27001 and SOC 2 Type II. This also includes device security, such as antivirus, VPN and firewalls, as well as device backup and recovery services.
- **Walk-up support and self-service:** Walk-up support includes locations staffed with agents who possess both technical and interpersonal skills. End users can turn in their devices for service, address how-to questions and offer troubleshooting services through scheduled appointments or ad hoc requests. Self-service is delivered through a centralized portal where users access services that include, but are not limited to, automated scripts, a knowledge management portal, known issues, how-to videos and peer support.
- **Multilingual service desk capabilities:** Support of clients that have a global presence.

Advanced and emerging services may include:

- **Experience-level agreements (XLAs):** XLAs help drive better digital employee experience (DEX) by leveraging digital experience monitoring (DEM) and DEX tools, sentiment analysis, and traditional service-level metrics that monitor the timeliness and effectiveness of supporting processes. XLAs measure the total experience (TX) for employees that consume IT services. XLAs and DEX enable proactive services that improve workforce productivity and engagement.
- **Employee enablement or organizational change management (OCM):** To deliver greater ROI and business outcomes from technology investments, employee enablement seeks to improve workforce digital dexterity and adoption of technology, and new ways of working. Enablement is delivered by a combination of transformational consulting, ongoing OCM, and continual service and technical improvements.
- **Intelligent automation services:** Services are implemented through autonomous endpoint management (AEM) or unified endpoint management (UEM), DEX, digital platform conductor (DPC) and other automation tools or bots. These tools are increasingly powered by AI/machine learning (ML) technology, which accelerates efforts to identify, determine the root cause of, and self-heal or otherwise remediate common requests and issues.

- **Peripheral vending, smart lockers and support kiosks:** Technology is leveraged that enables contactless support methods and accelerates employee's abilities to acquire common IT goods and services.
- **Smart workplaces:** Internet of Things (IoT) sensors and devices that automatically control workplace heating, lighting, air conditioning and other capabilities based on usage. This may also include workspace booking, nonstandard endpoints (augmented reality/virtual reality [AR/VR] headsets and wearables), smart conference rooms and other workplace IoT.
- **Virtual personal assistants:** A new generation of AI/ML-powered virtual assistants that use natural language processing to go beyond answering simple questions to engage in an active dialogue and make recommendations.
- **Knowledge management:** The use of AI/ML and advanced analytics to capture knowledge from structured and unstructured data sources. These capabilities are normally delivered from self-service portals and chatbots and can adapt support based on the end-user context.

Magic Quadrant

Figure 1: Magic Quadrant for Outsourced Digital Workplace Services





Gartner

Vendor Strengths and Cautions

Accenture

Accenture is a Leader in this Magic Quadrant and is headquartered in Ireland. It has 294 outsourced ODWS clients. Its focus is primarily on large and very large enterprises across most industries. Accenture reports 28,102 ODWS-dedicated internal staff, which makes up 90% of its total ODWS resources. With aims of improving its ODWS innovation, Accenture has invested in internal assets and platforms, new acquisitions, and upskilling talent.

Strengths

- **Industry-specific solutions:** Accenture excels in delivering industry-specific solutions with clear business outcomes, supported by a strong consulting approach and investments in AI and automation. This capability allows Accenture to tailor solutions that not only meet industry standards but also anticipate future challenges and opportunities across sectors. One example of this is its bed management solution for a national healthcare organization, which achieved tangible business results through redefined service management processes and technology.
- **Comprehensive service portfolio:** With a holistic approach to digital and technical transformation, Accenture offers a comprehensive service portfolio that interconnects applications and infrastructure managed services. Its ability to integrate diverse services into solutions drives efficiency and innovation across its clients' operations. This can enable clients to achieve business outcomes effectively with Accenture playing a direct role.
- **Strong XLA framework:** Accenture has developed a strong XLA framework, integrating key performance indicators (KPIs) into a balanced scorecard to generate a digital experience score. This approach ensures accountability and aligns with client business processes, enhancing user experience (UX) management and providing a clear, data-driven understanding of performance measurement.

Cautions

- **Pricing and complex contracts:** Client feedback indicates concerns with Accenture's pricing, particularly for services with per-user costs and new image builds. This necessitates careful scrutiny of value versus cost and is further compounded by complex contract structures.
- **Regional strategy:** Accenture's approach to regional growth allows each region to determine its own strategy for market execution. Global clients should ensure each regional approach still follows Accenture's cohesive global solutions and strategies to ensure there are no variabilities between regions that affect their business objectives.
- **Limited modern device management:** Accenture's focus remains on traditional device management, with limited customer deals to manage modern endpoints like VDI, cloud-based DaaS and IoT. Of the over 10 million endpoints it manages, only 6.3% make up these modern devices. Clients seeking workplace transformation should evaluate Accenture's willingness to manage their modern devices.

Atos

Atos is a Leader in this Magic Quadrant and is headquartered in France. It has approximately 730 ODWS clients. Its focus is primarily on large enterprises in the healthcare and life science industry. Atos reports 10,483 ODWS-dedicated internal staff, which makes up 71% of its total ODWS resources. To improve customers' experience, Atos has invested in a new Experience Operations Center.

Strengths

- **Evolving experience framework:** The experience framework within Atos is steadily evolving, showcasing the company's commitment to enhancing client satisfaction. This year, Atos launched its Experience Operations Center, an initiative that leverages real-time telemetry from DEX and other sources. Atos can be a good fit for organizations seeking committed XLAs as part of their agreements.
- **Innovative sustainability offering:** Atos continues to enhance its sustainability focus through targeted investments in innovative offerings like sustainability advisors who address critical human-centric dimensions of environmental, social and governance (ESG). These efforts focus on fostering more sustainable workplace environments and creating tangible social value.
- **Agile co-creation deal commitment:** Atos has demonstrated good commitments to approaching deals through non-RFP methods, such as dynamic sourcing. Its high percentage of deals executed in this way demonstrates a focus on helping clients develop solutions that address their business needs through outcomes, and to provide a more value-driven contract.

Cautions

- **Market uncertainty persists:** Gartner clients remain uncertain about Atos' commitment to the digital workplace services business based on its recent financial difficulties. Feedback reveals that during the 12-month period of this research, this ambiguity caused disruptions in the quality of Atos' ODWS delivery. Clients are advised to remain vigilant and monitor Atos closely to ensure the stabilization process continues.
- **Inconsistency in automated contact resolution:** Atos' reported statistics concerning methods of automated contact resolution exhibit inconsistencies. Therefore, it is important for clients to have a clear understanding of these categorizations when

reviewing any stated statistics Atos may be reporting to ensure it meets their needs and that there is transparency in the data being presented.

- **Decline in revenue and clients:** Atos experienced a 5.3% decline in revenue within its ODWS business during the current rating period. Potential clients should request relevant references and assess the company's long-term strategy to evaluate its potential for delivering effective and sustainable solutions.

Capgemini

Capgemini is a Visionary in this Magic Quadrant and is headquartered in France. Gartner estimates it to have 1,800 ODWS clients. Its focus is primarily on large and midsize organizations across multiple industries. Gartner estimates Capgemini to have 7,665 ODWS-dedicated internal staff, which makes up 77% of its total ODWS resources. Capgemini has invested in automation capabilities to improve its support experience platform.

Strengths

- **Innovation and automation:** Capgemini has significantly advanced its generative AI (GenAI) and automation capabilities by developing solutions like BuddyBot and CHIP. These innovations enhance service delivery by reducing manual interventions in training and end-user interactions, improving agent efficiency and modernizing client experiences.
- **Geographic strategy:** Capgemini has shown notable growth in its ODWS business in the European region. Additionally, new global delivery centers in European "nearshore" locations have expanded client options for support models. This demonstrates its ability to penetrate a specific market effectively and address the regional priorities that drive business success.
- **Sustainability focus:** Capgemini demonstrates a strong commitment to sustainability by integrating workplace monitoring, carbon scorecards and standardized reporting in its experience management service. Additionally, Capgemini has developed sustainability tools and frameworks intellectual property (IP) that integrates carbon tracking, eco-labeling and sustainable design into business operations, aligning with the steady client demand for environmentally responsible solutions.

Cautions

- **Slow transformation hinders agility:** Client feedback indicates that Capgemini is slow in executing transformational changes and implementing new technologies. A decline in workplace transformation consultancy revenue, notably a 13% decrease in Asia/Pacific (APAC), reinforces this sentiment. This lag could hinder its ability to meet client expectations in a fast-paced market where agility and rapid adaptation are key to maintaining competitive advantage and client satisfaction.
- **XLA definitions unclear:** While Capgemini deploys multiple methods for gathering experience data, it is unclear how these translate to contractual commitments as it pertains to measuring true sentiment. Unlike traditional SLAs that prioritize service performance, XLAs must include employee sentiment and their end-to-end experience. Clients looking to implement XLAs for continuous improvements in overall experience should carefully assess Capgemini's contractual obligations.
- **Declining self-service portal utilization:** Capgemini has seen a global decline in self-service portal usage, with significantly fewer contacts resolved this way across all regions. This drop may be due to employee dissatisfaction, inadequate promotion or training, or the complexity of issues unsuitable for self-service.

Cognizant

Cognizant is a Challenger in this Magic Quadrant and is headquartered in the U.S. It has approximately 710 ODWS clients and reports 21,625 ODWS-dedicated internal staff, which makes up 91% of its total ODWS resources. Cognizant focuses on large enterprises across all major industries. Cognizant recently launched its AI-powered Stores 360 self-service product for retail and hospitality verticals.

Strengths

- **WorkNEXT platform:** Cognizant's WorkNEXT platform provides ODWS solutions with AI, DEX, automation and digital tools. The platform offers a WorkNEXT accelerator, an AI stack, DigiHub and smart office technology. Neuro IT, an integrated AIOps platform, enables end-to-end transformations. WorkNEXT ONE provides scalable solutions for midsize enterprises (MSEs). WorkNEXT labs in the U.S. and India foster innovation and skill development through co-creation and resource training, aligning technology and talent growth.
- **Agile co-solutioning:** Cognizant delivers a consulting-led, co-creation approach, emphasizing agile models for ODWS solutions, intelligent automation, collaboration,

platform management, DEX and VDI solutions. This approach allows Cognizant's subject matter experts (SMEs) and clients to collaboratively design rapid solutions.

- **Strategic growth investments:** Cognizant strengthened its capabilities through the strategic acquisition of Thirdera in January 2024 to expand its IT service management (ITSM) client base and expertise. Its acquisition of Belcan in August 2024 enhanced its ability to service the defense and aerospace verticals. Cognizant has established dedicated teams for customer information systems across the Americas and growth markets to enhance sales and consulting competencies. Investments in its digital workplace practice enhanced both market and delivery capabilities by adding SMEs for each ODWS offering.

Cautions

- **Geographic strategy:** Cognizant focuses its ODWS operations in the North American market, which accounts for 70% of its total revenue. Its presence in the APAC region is minimal, contributing only 3.5% of its DWS revenue. Customers seeking vendors with a strong APAC presence should carefully assess Cognizant's capabilities in the region.
- **Service/offering complexity:** Cognizant consolidates its ODWS offerings under its WorkNEXT platform, adopting a highly modular approach to its capabilities. However, with many new products recently added, understanding how the portfolio integrates cohesively can be challenging. Clients with lower maturity in managing ODWS service provider performance should carefully evaluate and align Cognizant's capabilities with their specific needs.
- **XLA accountability:** Although Cognizant emphasizes the total employee experience, its contractual XLAs fall short in ensuring the accountability needed to deliver continuous improvement to clients. Prospects should incorporate penalties and incentives into XLAs to ensure the right behaviors that lead to meeting desired outcomes.

Computacenter

Computacenter is a Niche Player in this Magic Quadrant and is headquartered in the U.K. It has approximately 275 ODWS clients and reports nearly 9,600 ODWS-dedicated internal staff, which makes up 72% of its total ODWS resources. It focuses on large enterprise and public sector clients. Computacenter increased its North America presence, growing nearly 70% in the number of supported users year over year (YoY).

Strengths

- **Flexible commercial adjustments:** Computacenter's commercial models are designed for flexibility, allowing adjustments without contract modifications. This includes scaling with user volume changes, accommodating new sites and offering frameworks that support mergers and divestitures through clear and transparent commercial mechanisms. Clients with evolving needs due to changing business scopes and outcomes can benefit from Computacenter's flexibility.
- **Product/service strategy:** Computacenter's key priorities include enhancing its Experience Management Office solutions, especially in its managed device life cycle services, and advancing mobility solutions. Its recent offerings also feature developments in generative AI along with improvements to its mobility and sustainability solutions. Clients seeking customizable deals and comprehensive ODWS solutions may find Computacenter aligns with their goals.
- **Data-driven service improvement:** Computacenter's solutions are customer-focused and increasingly driven by advanced analytics. ServiceNow integrations and accelerators have enabled better data access and successful growth as a ServiceNow Elite partner. Likewise, through its partnership with Nexthink, it uses end-user analytics to underpin its continued efforts to provide an improved digital employee experience.

Cautions

- **Contract terms:** Computacenter offers the lowest percentage of deals that include KPIs for continuous improvement and achieving outcomes compared to the other vendors in this research. DWS buyers looking to achieve business objectives, transformational adoption and improved experiences should ensure that Computacenter is contractually obligated.
- **Modern device management options:** Over 99% of devices managed by Computacenter are traditional workplace endpoints, such as laptops and mobile devices, with limited experience supporting more modern endpoints like VDI, cloud DaaS and IoT devices. While some clients may not seek a transformative workplace with these endpoints, modern devices offer clients cost and management efficiencies and greater employee flexibility.
- **Geographic coverage:** Computacenter's ODWS business is primarily focused in Europe, representing over 83% of its revenue, with 13% in North America. Its support in APAC is

4% of its ODWS business and has decreased YoY. Global enterprise clients with employees needing support across all regions may find Computacenter to be limited in its presence and ability to provide its full breadth of services directly.

DXC Technology

DXC Technology (DXC) is a Leader in this Magic Quadrant and is headquartered in the U.S. It has approximately 716 ODWS clients and reports 17,073 ODWS-dedicated internal staff, which makes up 87% of its total ODWS resources. Its go-to-market focus is primarily on Fortune 1500 companies with 10,000 or more employees. DXC Technology has established new leadership across geographic regions in efforts to expand and improve its global delivery.

Strengths

- **Experience management:** DXC Technology uses a tiered control framework for experience management, offering a structured, scalable approach to enhancing digital workplace services. Its comprehensive strategies cover all levels of the digital workplace, from organizational to individual user experiences. Its predefined experience performance indicator (XPI) framework enables DXC Technology to reach a level of granularity for quicker deployment and scaling than custom solutions.
- **Operations:** Despite having undergone a reorganization during the past 12 months, DXC Technology has strengthened its market position. Its reorganization focused on establishing global and regional teams to improve delivery on customers' business goals. The company also launched numerous global programs and partnerships to bolster its strategic direction.
- **AI-driven workplace services:** DXC Technology offers a range of solutions for both large and midsize enterprises, with a growing focus on AI-driven offerings through its Uptime Experience platform. By centralizing its AI-driven workplace services, it provides automated and actionable solutions such as real-time fraud detection on voice calls and near-real-time language translation.

Cautions

- **Technology centricity:** Although DXC Technology has invested in experience management programs, it fails to focus on employee sentiment as a core component of improving DEX. Instead, the company primarily focuses on the technology-centric view of

experience. This limits alignment of DEX, technology adoption and customers' business outcomes.

- **ODWS business decline:** During the assessment period for this research, DXC Technology has experienced declining ODWS revenue (down 11.1%) and in the number of supported workers (down 5.2%). In addition, client feedback cites multiple news sources that rumor a possible acquisition of DXC, expressing concerns about its viability, although DXC denies any plans to divest its ODWS business or to seek an acquisition.
- **Service/offering complexity:** DXC Technology offers a breadth of solutions and capabilities, but clients often struggle to understand which are included in offerings, how they integrate with existing systems or which are best-suited for specific industries. Prospective clients should co-solution with DXC Technology to understand each solution and how it aligns with their business needs.

Fujitsu

Fujitsu is a Challenger in this Magic Quadrant and is headquartered in Japan. It has approximately 1,700 ODWS clients. It targets clients of all sizes with a focus in the public sector and financial services industries. Fujitsu reports 20,000 ODWS-dedicated internal staff, which makes up 68% of its total ODWS resources. To improve customer work environments, Fujitsu has invested in its human-centric employee experience methodology and has a strong commitment to sustainability.

Strengths

- **Transformational capabilities:** Fujitsu has placed greater emphasis on its consulting capabilities, strengthened through a program to develop 10,000 Uvance Wayfinder consultants, alongside recent acquisitions, such as MF & Associates (Australia). This acquisition brings management consulting and cybersecurity advisory expertise and the addition of 50 digital transformation consultants.
- **Portfolio investments support industry solutions:** Investments into its Kozuchi AI platform, included in its ODWS portfolio, allows Fujitsu to leverage the platform's computing capabilities to develop industry-specific solutions. For example, Kozuchi can help manufacturing clients detect defects on production lines, reducing waste and promoting more sustainable manufacturing practices.
- **Commitment to sustainability:** Fujitsu continues to prioritize sustainability as a key business objective, focusing on environmental and societal goals embedded in its Uvance

strategy. This strategy uses a consultative approach to drive change by addressing environmental issues. Offerings include a co-design accelerator for working sustainably and a carbon emissions calculator.

Cautions

- **Significant regional disproportion:** The U.S. represents only 4% of Fujitsu's ODWS business revenue. Its APAC ambition, with ODWS revenue representing 18% of its business, is based primarily on acquisitions to become the "digital transformation partner of choice" in that region. Europe represents the remaining 78%. Clients with significant presence outside of Europe may want to ensure geographic portfolio consistency.
- **Contact resolutions lag industry averages:** Fujitsu continues to support manual ticket resolution, which is typically more expensive than automation. Its distribution of ticket resolution modes shows lower-than-average performance for automated intelligent resolution and self-healing, and above average (45%) for manual. First call resolution (FCR) rates in Europe (60%) and APAC (66%) underperform the industry average for this Magic Quadrant.
- **Transaction-based end-user experience:** Fujitsu is slow to adopt a comprehensive sentiment-based experience program to support its vision of prioritizing XLAs. The contractual delivery of XLAs among its clients is the lowest among other providers in this research at just 4%, and its XLAs still rely on traditional parameters like transactional customer satisfaction (CSAT) scores.

Getronics

Getronics is a Niche Player in this Magic Quadrant and is headquartered in the Netherlands. It has approximately 240 ODWS clients and reports having 4,283 ODWS-dedicated internal staff, which makes up 85% of its total ODWS resources. Getronics targets both large and midsize enterprise clients across most industries. To improve its traditional device management capabilities, Getronics has invested in endpoint automation solutions.

Strengths

- **Flexibility with customized solutions:** Getronics' smaller size enables a more flexible approach to its ODWS deals when engaging with clients of all sizes. Where some providers have a prepackaged solution that may be difficult to customize, Getronics is

able to provide a more personalized experience that focuses on specific goals and outcomes.

- **Multilanguage support:** In this past year, Getronics has developed its AI capabilities to include chatbot language support to serve more global customers. At 135 language proficiencies via chatbots, up from only nine in years prior, Getronics' newly developed capabilities put them above the average among other providers in this research.
- **Better reliance on internal talent:** Although Getronics has the capability of utilizing staff from several other partners as part of the Global Workspace Alliance (GWA), it only relies on the usage of subcontracting when it needs to supplement its reach in more distant regional locales. As such, Getronics has one of the lowest ratios of using subcontractors versus its own full-time equivalents (FTEs) at less than 15%, allowing better quality and accountability in its service delivery.

Cautions

- **Global options remain limited:** Getronics primarily provides services in Europe, with a small but declining footprint in APAC. While Getronics does work with the GWA to extend delivery options through those partnerships in all regions, its own ODWS business in the Americas is nearly nonexistent. Global clients looking for a single vendor with worldwide reach should seek clarity from Getronics on its current capabilities and its investment plans for geographical expansion.
- **Limited transformative solutions:** Getronics' offerings are more suited to clients with a traditional "keep the lights on" approach as opposed to more innovative and transformative solutions. This is evident in its low adoption of supporting modern devices, such as cloud DaaS, and its less mature platform automation compared to others in this research. Clients looking for advanced innovative solutions may not find Getronics offerings mature enough at this time.
- **Low XLA maturity:** Although Getronics has an XLA framework, it still relies heavily on traditional user-centric, transactional measurements, such as CSAT scores and Net Promoter Score (NPS), with some experience indicators (XI) that infer sentiment. Adoption of XLAs in client contracts is very low among its customer base. Clients should challenge Getronics to accountable contractual obligations for improved experience.

HCLTech is a Leader in this Magic Quadrant and is headquartered in India. It has approximately 480 ODWS clients. It delivers to organizations of all sizes, specifically in the manufacturing and financial services industries. HCLTech reports 30,500 ODWS-dedicated internal staff, which makes up 81% of its total ODWS resources. To improve talent attraction and retention, HCLTech invested in numerous initiatives such as IP monetization and Kalido, an AI-powered skill-matching platform.

Strengths

- **Outcome-based innovations:** HCLTech has several solutions for client innovations, such as FlexSpace (a managed device life cycle services solution), Onlooker Detection (security), real-time translation and sign language detection. HCLTech has also launched a NeoX application that combines work-related applications and tools for employees to access information or make requests through functions such as HR and IT services.
- **Large and growing:** HCLTech is among the largest ODWS providers in this research, with more than 14 million users supported and a user base that grew YoY by more than 10% in all three regions. The revenue is split evenly between the U.S. and Europe, with APAC representing a smaller portion but growing steadily. HCLTech invests 10% of its ODWS revenue back into new solutions for transformation, innovation and transitions to XLA models.
- **Deployment of industry solutions:** HCLTech provides unique solutions to manufacturing, healthcare, automotive and retail. New for 2024, it includes 3D digital twins for immersive information and AI visual verification, IT kiosks, and its Onsite platform to implement faster resolution on field incidents.

Cautions

- **Sustainability solutions lack differentiation:** HCLTech's sustainability solutions lack market differentiation despite rising client demand for innovation. Basic offerings like DigiPrint, which eliminated print servers and IT kiosks to reduce the need for field service on-site visits, meet standard expectations in this market. While it has some IP to track environmental aspects of ESG for clients, HCLTech lacks social sustainability solutions for communities or individuals.
- **Contract inflexibility:** Feedback from customers indicates frustration with HCLTech's inflexibility when it comes to contract deviance. HCLTech boasts many innovative solutions to transform the workplace. However, if these are not included in a customer

contract, it is reported that HCLTech will not offer innovative ideas or solutions. Or, it will instead face resistance to or demonstrate disparity between what is marketed versus the actual outcomes it will commit to.

- **Misaligned XLA definition:** HCLTech's deployment and definition of XLAs are not aligned with their primary intent to measure experience metrics that represent human-centric outcomes. Unlike traditional SLAs that prioritize service performance, XLAs must include employee sentiment and their end-to-end experience. HCLTech's XLAs fail to properly include sentiment, relying instead on transactional metrics and NPS.

Kyndryl

Kyndryl is a Leader in this Magic Quadrant and is headquartered in the U.S. It has approximately 534 ODWS clients and reports approximately 5,355 ODWS-dedicated internal staff, which makes up 93% of its total ODWS resources. It targets larger enterprise clients in the industrial, financial services and distribution industries. Kyndryl has made significant investments and improvements to its platform and is developing XLAs to improve employee and workplace experience.

Strengths

- **Platform development:** With its Kyndryl Bridge, Kyndryl has integrated transformative tools around AI, GenAI, DEX and overall observability. This platform allows Kyndryl to present visual real-time data insights and deeper analytical data that provide organizations with the information they need to improve upon employee experience, security and sustainability.
- **XLA focus:** As Kyndryl Consult continues to mature and integrate into its overall ODWS solutioning and delivery, Kyndryl has a notable focus on experience and developing XLAs with its clients. Through these efforts, Kyndryl has improved the number of overall ODWS deals that include XLAs by fivefold YoY.
- **Sustainability solutions:** Kyndryl is committed to upholding its roles in the community with a strong focus on social responsibility. Kyndryl integrates social, economic and environmental data analytics into customer solutions, offering metrics to control targeted improvements. With programs to assist customers with sustainability efforts, Kyndryl can help align business value with ESG regulations and goals.

Cautions

- **Inconsistent geographic messaging:** Clients express concerns about the lack of synergies between Kyndryl's global account teams and leadership versus individual local ones. They cite differences in contractual language/obligations, product and capability descriptions, and overall innovative solution recommendations. Global enterprise clients should encourage closer collaboration between Kyndryl's global and local teams.
- **Flat ODWS business growth:** Global growth of Kyndryl's ODWS business remained relatively flat YoY, with an overall decline in its client base across both Europe and APAC. Kyndryl has indicated a deliberate shedding of some accounts that had profitability concerns, which may be a contributing factor in its ODWS growth. Prospective clients should gain a clear understanding of Kyndryl's long-term financial growth plan in regard to its ODWS business.
- **Limited cloud DaaS/VDI support:** As clients adopt more modern devices for ease of management, cost reduction and overall versatility, demand has increased for cloud DaaS and VDI from ODWS providers. Kyndryl has the lowest ratio of support for traditional versus these more modern device types compared to others in this research.

LTIMindtree

LTIMindtree is a Niche Player in this Magic Quadrant and is headquartered in India. It has approximately 87 ODWS clients and reports 8,519 ODWS-dedicated internal staff, which makes up 90% of its total ODWS resources. It primarily focuses on large and midsize organizations in the banking, financial services and insurance (BFSI) and manufacturing industries. To provide customers with continuous improvement, LTIMindtree has a framework to drive service improvements and innovation ideas in every client account.

Strengths

- **Strong focus on MSE clients:** LTIMindtree continues to place strong emphasis on small-to-midsize enterprises, offering tailored solutions to address the unique needs of these clients within its ODWS. With more than 90% of its end-user device services supporting clients with revenue under \$1 billion, LTIMindtree is well-equipped to cater to MSEs with either regional or global operations.
- **Strong ODWS growth momentum:** LTIMindtree has experienced strong ODWS revenue growth, with a global increase of approximately 15% in business performance. The number of ODWS clients grew by around 25%, highlighting the company's robust expansion in this sector. ODWS now contributes about 12% of its revenue, reflecting the

company's continued prioritization of its digital workplace business and its positive growth momentum.

- **Enhanced ODWS expertise:** LTIMindtree's transition to "empathetic assistance" demonstrates its understanding of the evolving workplace and customer demands for ODWS. It has invested in IP and accelerators like MigExpress, Botzers, Smart Interactive Voice Response (Smart IVR) and Supervisor Assist to enhance service delivery.

Cautions

- **Lack of understanding alternative sourcing methods:** LTIMindtree has not demonstrated to Gartner that it understands how alternative sourcing methods such as agile or dynamic sourcing can provide a more value-based deal. It is Gartner's opinion that LTIMindtree does not offer better outcomes through a competitive alternative sourcing method when engaging prospective clients.
- **Low automation levels:** LTIMindtree's intelligent automation for contact resolution remains one of the lowest among other providers, with only 36% of tickets being resolved without manual intervention, well below the average of 70%. Its automation capabilities lag behind its competitors, and clients should ensure LTIMindtree's offerings are advanced enough to meet their objectives.
- **Limited XLA visibility:** LTIMindtree incorporates XLAs within its DWS offerings, with its framework focused on three main pillars: productivity, personalization and perception. However, its XLA approach to proper sentiment measures and accountability to maintain continuous improvements remains unclear. Therefore, organizations seeking a strong commitment to XLAs from LTIMindtree should verify the details before finalizing any agreements.

NTT DATA

NTT DATA is a Challenger in this Magic Quadrant and is headquartered in Japan. It has approximately 500 ODWS clients. Its focus is primarily on large and midsize enterprises, serving all industries including manufacturing, public sector and healthcare. NTT DATA reports 9,360 ODWS-dedicated internal staff, which makes up 89% of its total ODWS resources. To improve device life cycle, NTT DATA has invested in a new concept that consists of full-functional repair.

Strengths

- **Strong industry partners ecosystem:** NTT DATA has cultivated strong industry partnerships, collaborating with a vast network of digital partners. By working closely with key players in the digital workplace domain, such as Cisco, NICE CXone and Genesys, NTT DATA has created a customer experience (CX) advisory services catalog and achieved significant advancements with the development of GenAI-powered agents.
- **Innovative device life cycle concept:** NTT DATA has developed a comprehensive strategy aimed at tackling environmental, social and economic challenges through its innovative remanufacturing concept. This solution is an integral part of NTT DATA's strategy incorporated into its ODWS offering. This approach prioritizes sustainability with a holistic device-use approach that focuses on full-functional repair and extending the life cycle of devices.
- **Tailored XLA framework:** NTT DATA is transforming XLAs from generic, one-size-fits-all frameworks to more tailored, industry-aligned solutions that cater to specific business needs. This evolution reflects a growing emphasis on delivering user-centric outcomes. By focusing on contextual factors such as customer experience, NTT DATA aims to tailor XLA strategies beyond traditional SLAs.

Cautions

- **Focusing predominantly on the North American region:** Eighty-three percent of ODWS users supported by NTT DATA are in North America (NA). Despite the advantage of local NA expertise, potential clients contracting in countries outside this region must thoroughly evaluate the organization's capabilities.
- **ODWS vision is unclear:** While NTT DATA has industry-standard core services reflecting buyer needs for ODWS, its vision of how ODWS will evolve, as well as its strategy to support that vision, is unclear to Gartner. It is also unclear how it aligns with the current and future demands of ODWS customers. Clients seeking these services from NTT DATA should ensure its long-term strategies align with their individual business objectives.
- **Limited agile deal pursuit:** NTT DATA primarily engages with clients through traditional RFP-based deals with a low participation in alternative sourcing methods such as agile competitive co-creation deals. NTT DATA offers one of the lowest percentages of alternative sourcing deal pursuit options among its competitors in this research. This may affect clients looking for deals with improved business value.

Ricoh

Ricoh is a Niche Player in this Magic Quadrant and is headquartered in Japan. Gartner estimates it has approximately 2.95 million ODWS users supported. Its focus is primarily on midsize enterprises in the healthcare and life science industry. To improve performance, Ricoh has invested in customized solutions.

Ricoh declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Custom ODWS solutions:** Ricoh excels in catering to the needs of clients by prioritizing personalized customer service and tailored solutions. Unlike larger providers that have a more “templated” approach, Ricoh’s targeted commitment to customized solutions allows it to provide more value-based deals to companies aligning with its business objectives.
- **Diversified portfolio:** Ricoh has strategically diversified its ODWS business to serve a wide range of industry verticals, such as healthcare, life sciences, logistics, retail and financial services. With a diversified industry-specific portfolio, Ricoh has positioned itself as a valuable partner for organizations seeking to optimize their operations.
- **Emphasis on sustainability:** Sustainability in the workplace is at the core of Ricoh’s mission, emphasizing a holistic approach that integrates social, economic and environmental responsibility. Its commitment is reflected in the ODWS offering, which provides solutions aimed at reducing carbon emissions while fostering education and reskilling initiatives to prepare the workforce for future challenges.

Cautions

- **Limited global footprint:** Gartner estimates that most of Ricoh’s ODWS revenue continues to be generated in the EU. Concentrating on the European region provides businesses with the advantages of established networks. However, potential clients who require work in countries outside this region should thoroughly evaluate the organization’s capabilities.
- **Slow adoption of intelligent automation:** Gartner estimates that Ricoh’s percentage of contacts resolved through intelligent automation is significantly below the average among comparable providers in this research. This low automation level underscores a potential gap for customers seeking highly automated solutions. To address this,

organizations must strategically design their billing models to incentivize higher levels of automation and ensure consistent monitoring of automation performance throughout the engagement.

- **ODWS not a primary focus:** Gartner estimates that Ricoh's ODWS segment represents a very small percentage of its overall business. Ricoh's marketing efforts and strategic priorities are designed to only appeal to clients who value a diversified portfolio of services, with ODWS positioned as one among many others in its offerings. Potential clients whose interest lies in securing a provider with a clear vision of ODWS priorities may not align well with Ricoh's market approach.

Stefanini Group

Stefanini Group is a Visionary in this Magic Quadrant and is headquartered in Brazil. It has approximately 260 ODWS clients served by 11,500 ODWS-dedicated internal staff, which makes up 95% of its total ODWS resources. Its focus is primarily on clients in the manufacturing and consumer goods industries, from small to large enterprises. Stefanini exhibits an acquisition approach to expand its geographic footprint, as evidenced by its purchase of Solve.it in the second half of 2023 to expand in the Italian market.

Strengths

- **AI vision:** Stefanini has observed AI disillusionment in the market, and to address this, it is focusing on value-based metrics to enable the transition from ROI to return on experience (ROE). With focused AI solutions to address specific needs, such as augmented reality solutions for remote-based support and for performing sentiment analysis, Stefanini has a clear view on the current market maturity level of AI adoption.
- **MSE focus:** Stefanini's solutions cater to the needs of smaller organizations that want to mature and leverage some service desk automation. The StefleX service enables access to an ITSM platform at a lower cost than implementing their own. StefleX ITSM can integrate with multiple instances such as monitoring platforms, automation tools, chatbots and contact center systems.
- **Overall business performance:** Stefanini continues to improve performance of its ODWS business across several metrics such as revenue growth, client retention and average client tenure. Stefanini's performance may indicate to prospective clients that it continues to make ODWS a primary priority in its business.

Cautions

- **Service/offering complexities:** Between the platform Steflex, SAI Library, SAI App, SAI Analysis and SAI Plant Assistant, and other AI tools such as virtual assistant SophieX, customers may find it challenging to understand how offerings meet their respective requirements. Although Stefanini offers consulting to tailor solutions for customers, potential clients unfamiliar with the company might overlook it.
- **Limited XLAs:** Less than a quarter of Stefanini's contracts include commitments for either XLAs or for continued improvements in KPIs. These metrics vary significantly by region, where no European clients have contracted for continued improvements and less than 10% include contracted XLAs.
- **ESG initiatives:** While Stefanini integrates ESG and responsible practices into its solutions, these capabilities are less mature and less adopted than competitors. Organizations with robust ESG requirements should carefully assess Stefanini's ability to deliver.

Tata Consultancy Services

Tata Consultancy Services (TCS) is a Leader in this Magic Quadrant and is headquartered in India. It has approximately 650 ODWS clients and reports 15,047 ODWS-dedicated internal staff, which makes up 95% of its total ODWS resources. Its focus is primarily on large enterprises. TCS continues to prioritize its commitment to build and retain its talent to improve its customer experience.

Strengths

- **Holistic and value-driven solutions:** TCS' holistic offerings approach goes beyond traditional IT by focusing on comprehensive, value-driven solutions that address client outcomes rather than just cost or transactional efficiencies. With the integration of seven of what it calls global pace ports, TCS enables clients to co-create, test and scale next-generation ODWS solutions aligned to their strategic business goals, reducing time to market and accelerating innovation.
- **Talent management:** TCS is committed to driving internal staff growth organically, necessitating agility and innovation, with a strong focus on internal skill development. TCS' continued investment in its internal resources through extensive training in GenAI capabilities and certifications aims to reduce attrition and retain expertise.

- **Advanced technology integration platform:** TCS utilizes a cognitive and integrated operations model, supported by its Cognix Platform value builders, to incorporate advanced technologies like AI, DEX, automation and self-healing. Through the Cognix Platform, TCS delivers a compelling value proposition, enabling significant TCO reduction.

Cautions

- **MSE offerings:** Despite having prepackaged offerings for MSEs (TCS Cognix Platform), MSE customers may find that customization of these packaged solutions will require additional consultation to ensure it meets their individual business objectives. These customizations could significantly affect the benefits TCS claims for faster onboarding and cost optimizations.
- **Customer experience:** As with the previous year for this research, Gartner continues to capture feedback from customers highlighting challenges with TCS' service delivery, ongoing communication, and the quality of deliverables and resource management. Despite TCS' emphasis on improving DEX, significant progress is still needed to address and reverse negative sentiment.
- **XLAs need more sentiment measures:** Although TCS is focused on transforming the customer experience, its XLAs are more closely aligned with SLAs and KPIs based on personas than measuring actual sentiment and capturing the entire user experience. TCS' XLAs are not aligned with their primary intent to measure experience metrics that represent human-centric outcomes.

Tech Mahindra

Tech Mahindra is a Niche Player in this Magic Quadrant and is headquartered in India. It has approximately 142 ODWS clients. It focuses on midsize and large enterprises across all verticals. Tech Mahindra reports 5,894 ODWS-dedicated internal staff, which makes up 87% of its total ODWS resources. To improve its customers' user experience, Tech Mahindra has invested in regional dedicated XLA offices across the globe.

Strengths

- **Alignment with vertical priorities:** Tech Mahindra remains aligned with verticalized solutions to customers' needs by embedding digital workplace resources in industries like healthcare, manufacturing and retail. This approach deepens its sector-specific

understanding and ensures delivery of tailored solutions. Using FLEX eXM, which includes AI-driven analytics, employee experience platforms and intelligent automation, Tech Mahindra delivers experiences aligned to the unique demands of industry verticals.

- **Continued investment in sustainability:** Sustainability continues to be a focus for Tech Mahindra, investing in strategic acquisitions and offerings for a sustainable digital workplace to help customers achieve net-zero. It creates significant socioeconomic value while addressing global environmental challenges by minimizing its ecological footprint through its FLEX sustainability offerings to cut waste, such as reused end-of-life components, sustainable procurement, reduced operational emissions and IoT sensors.
- **Elevated UX:** Tech Mahindra's XLA framework has matured over the past year, allowing organizations of all sizes to benefit from an enhanced user experience. For midsize-to-large accounts, Tech's dedicated XLA office creates, customizes and measures XLAs while liaising with the broader customer ecosystem. Its regional joint XLA office for smaller accounts uses best practices from competencies.

Cautions

- **Limited ODWS global footprint:** Tech Mahindra's ODWS presence in NA and EMEA accounts for 88% of its total digital workplace services revenue. With its APAC focus primarily in India and the Philippines, global clients seeking capabilities in other APAC regions should evaluate its ability to deliver.
- **Service prioritization gaps:** Tech Mahindra's DWS revenue is a small percentage of its overall IT services, suggesting other segments may be prioritized. This could result in less investment into DWS or a potential diversion of resources to more strategic or profitable services. Customers should carefully evaluate its service maturity, resource allocation and overarching commitment to ensure their needs are adequately prioritized.
- **Client retention rates:** Tech Mahindra has one of the lowest client retention rates in this research. Gartner attributes this to issues often raised by Tech Mahindra's clients about its digital workplace services, such as service quality, high staffing attrition rates, cost pressures and operational friction.

Unisys

Unisys is a Challenger in this Magic Quadrant and is headquartered in the U.S. It has approximately 777 ODWS clients. Its focus is primarily on large organizations in the

manufacturing industry and public sector. Unisys reports 11,497 ODWS-dedicated internal staff, which makes up 69% of its total ODWS resources. To improve future growth, Unisys has invested in its Service Experience Accelerator platform.

Strengths

- **Strong client experience management:** Unisys has enhanced its client experience management framework by creating an experience management office and experience governance boards to proactively manage XLAs, aligning service delivery with client goals. Unisys' introduction of what it calls XLA 3.0 demonstrates its commitment to advancing client experience management by integrating data from diverse sources like IoT devices and smart environments for a holistic view of the user experience.
- **Smart workplace solutions:** Unisys is advancing modern field services by integrating smart lockers and other device management technologies, including IoT-enabled endpoints, to create smart workplaces. Unisys enhances operational efficiency and user experiences, positioning itself well for transforming traditional service models into more agile, automated solutions.
- **Contract flexibility:** Unisys' range of pricing models, including outcome-based and consumption-based, provides clients with flexibility and cost-efficiency. Its willingness to adjust contracts midterm enhances its offerings to organizations seeking adaptable service agreements. Additionally, its strategic focus on transformation-led contracts highlights Unisys' adaptability in aligning service offerings with evolving client needs.

Cautions

- **High subcontractor dependency:** Over 30% of Unisys' ODWS workforce consists of subcontractors, which is among the highest dependency on third-party resources from providers in this research. This could lead to inconsistencies in service delivery and quality control, impacting client trust and satisfaction.
- **Unclear ODWS strategies:** Unisys' emphasis on initiatives like liquid cooling and AI factories, while innovative, may not align with traditional or modern DWS and may confuse clients about its core offerings and strategic vision; potential clients should ensure that contracted services include only what is required.
- **Automation resolution metrics inconsistencies:** Unisys reports a questionably high self-heal resolution rate of 73.1%, far exceeding the industry average of 26.3%, while its use of self-service portals (5.9%) and intelligent automation (10.5%) is low. This discrepancy may

indicate variations in defining resolution methods, potentially leading to client confusion about its automation capabilities.

Wipro

Wipro is a Leader in this Magic Quadrant and is headquartered in India. It has approximately 286 ODWS clients and reports 33,045 ODWS-dedicated internal staff, which makes up 85% of its total ODWS resources. To contribute to the future of work, Wipro continues to evolve its LiVE Workspace platform with cognitive insight engines and predictive analytics. Its focus is primarily on large enterprise clients in the BFSI and healthcare industries.

Strengths

- **Mature XLA framework:** Wipro focuses on XLA-driven governance to enhance employee satisfaction and productivity. With a robust XLA mapping framework, it aligns XLAs with measurable experience-level indicators and metrics. These XLA themes are co-developed with customers to ensure alignment with organizational goals. Clients looking to drive accountability to an enhanced workplace experience should find Wipro's terms fit their needs.
- **Reimagining live workspace capabilities:** Wipro is enhancing its service portfolio by reimagining its LiVE Workspace vision to deliver the workplace of the future. This involves investing in innovative and emerging technologies while developing service capabilities and use cases aligned with customer needs. The introduction of Wipro AI LiVE Workspace utilizes various AI (traditional, generative, agentic and responsible) to enable autonomous operations, boost productivity, empower users, and ensure security and privacy.
- **Co-solutioning capabilities:** Wipro, through Wipro Designit, focuses on impactful employee journey engineering with a multidisciplinary, agile approach. Using consulting and collaborative workshops, it co-creates with clients to map user journeys, define personas and personalize workflows. Its Delivery Maturity Index framework quantifies service delivery maturity by integrating best practices, offering performance insights, and driving continuous process and quality improvements.

Cautions

- **MSE fit:** Wipro did not disclose its MSE client percentage, but it is often seen as less suitable for this market due to perceptions of overpriced, inflexible solutions for smaller

accounts. Gartner estimates Wipro's focus is on targeting large enterprises with revenue over \$1 billion rather than actively pursuing the MSE market.

- **Attrition rates:** Wipro's workforce attrition rate is 14.8%, which is higher than that of the average among others in this research and is increasing quarter over quarter. This can disrupt Wipro's operations, particularly when executing delivery strategies for a roughly 4% increased ODWS client base. Clients seeking consistency in delivery should include contractual commitments or penalties for any disruptions caused through attrition.
- **Contractual flexibility:** Wipro has struggled with delivery quality, with clients citing a reluctance to exceed contract terms. Clients often note a lack of innovation, recommended improvements and operational or cost-efficiencies unless specified in agreements. Potential ODWS clients should ensure that contracts explicitly address expectations for innovation, flexibility and continuous improvement.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Computacenter

Dropped

- Infosys: Infosys is an IT services and consulting company headquartered in India. It offers a full complement of outsourced digital workplace services, primarily focusing on large enterprise customers. Infosys was dropped from this Magic Quadrant because its ratio of FTE to subcontracted engineers used for field services delivery did not meet the inclusion criteria, which requires providers to use no more than 70% third-party delivery.

Inclusion and Exclusion Criteria

This Magic Quadrant uses the same inclusion criteria as the companion **Critical Capabilities for Outsourced Digital Workplace Services**.

To be included in this Magic Quadrant, each service provider must meet the following criteria:

It must deliver ODWS as part of outsourcing engagements that include:

- 24/7 multilingual service desk with remote support to end users through a minimum of three channels (voice, chat, email).
 - Service desk functions must be delivered by a minimum of 80% FTE and a maximum of 20% that are subcontractors, temporary employees or third parties.
- End-user device support of all top-tier OEMs, including application packaging, patching, break-fix and return merchandise authorization (RMA) support.
 - End-user device support must be delivered by a minimum of 70% FTE and a maximum of 30% that are subcontractors, temporary employees or third parties.
- Field services end-user support such as dispatch, on-site and depot services.
 - Field services must be delivered by a minimum of 30% FTE and a maximum of 70% that are subcontractors, temporary employees or third parties.
- Ability to demonstrate that it provides ODWS as a core business offering with no more than 40% subcontracting across all ODWS services. In other words, each provider needs to use at least 60% of internal, full-time resources (FTE, not subcontracted or contingent resources) to deliver its ODWS.
- PC provisioning for both physical and virtual devices, including asset/inventory management, imaging, deployment, new user onboarding, device requests/replacement and inventory refresh.
- Offering of contractually committed XLAs.
- Use of AI-based automation, including automated workflows, AI personal assistance, machine learning, self-healing/self-repair and predictive maintenance.
- Support both on-premises and SaaS-based collaboration, productivity and business applications delivered to end users.

- Delivery of digital workplace transformation capabilities and services, such as:
 - Nontraditional ODWS that leverage intelligent automation, IT kiosks, smart lockers, remote support and self-service.
 - Support of cloud collaboration tools (Google apps, Microsoft Office 365, Microsoft Teams).
 - Digital workspace integration services, including mobile apps, teleconferencing and the ability to work from any device, at any time, anywhere.
 - Desktop and application virtualization services (including VDI, cloud DaaS).
 - Unified communications end-user support.
 - Workplace security for data protection and regulatory compliance.
 - OCM consulting and functions for adoption of transformational technologies and workplace practices.
- ITSM platform (e.g., ServiceNow) consulting and management to include workflow improvements, reporting, app integrations, metric tracking and IT asset configuration management database (CMDB).
- Delivery of consulting and professional services to scope, design, implement and manage an integrated digital workplace solution.
- Ability to demonstrate data privacy and security processes through holding certifications such as ISO 27001, U.S. Health Insurance Portability and Accountability Act (HIPAA), payment card industry (PCI), etc.
- Ability to demonstrate IT systems and process management by holding certifications in one or more IT system management frameworks, such as ITIL, Six Sigma or ISO 20000.
- Ability to support a minimum of two global clients that span multiple (two or more) regions.
- A minimum of the annual revenue of ODWS services in **at least two regions**, excluding revenue through direct, augmented or supplemental staffing or from the sale or resale of products (hardware and software):
 - \$80 million in the Americas

- \$50 million in Europe
- \$30 million in Asia/Pacific

For the purposes of clarity and for the ODWS Magic Quadrant, definitions for staffing include the following:

- **Direct staffing:** Assisting clients with finding IT talent for direct hire as FTE into that client's organization, usually for a fee.
- **Augmented (or supplemental) staffing:** Providing clients with temporary, part-time or full-time IT technical resources to assist that client with their IT needs. These resources would be managed by the client for their day-to-day tasks. This is opposed to being part of a shared or dedicated managed services team assigned to that client or for any other fixed scope managed services agreement or other fixed or time and materials (T&M) scoped IT project. Examples of augmented staffing can include:
 - Assigned on-site technical resources at client locations on a fixed schedule to perform tasks as requested/required by the client, separate from a managed services engagement.
 - Assigned technical resources for an IT project that the client is managing and needs additional staff to help supplement their own teams, remotely or physically on-site.
 - Any IT resources assigned to a client that have general duties defined, but where the provider bears no responsibility or accountability to SLAs or outcomes from those duties performed.

For ODWS capabilities in the Americas, each service provider must:

- Have at least 50% of ODWS revenue from clients in the U.S.
- Have ODWS revenue from clients in at least two other countries in the Americas.

Countries in the Americas region considered for this report:

- For the scope of this study, we define the Americas as the United States, Canada, Mexico, Chile, Colombia, Peru and Argentina. **Brazil is excluded from this analysis** because it exhibits different characteristics as a market for outsourcing and is treated separately by most buyers.

For ODWS capabilities in Europe, each service provider must:

- Not have more than 50% of its total European ODWS revenue from clients based in a single country.
- Have a minimum of 20% of its total European ODWS revenue in at least three European countries.

For the purposes of this study, Gartner considers the following European countries:

- **Western Europe:** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and the United Kingdom.
- **Eastern Europe:** Albania, Belarus, Bosnia and Herzegovina, Bulgaria, Czech Republic, Croatia, Estonia, Hungary, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Türkiye and Ukraine.

For ODWS capabilities in the APAC region, each service provider must:

- Not have more than 80% of its total APAC ODWS service revenue from clients based in a single country.
- Have a minimum of 10% of its total APAC ODWS service revenue in at least two APAC countries. For example:
 - A provider that generates 70% of its revenue in Australia, 20% in India and 10% in Singapore will qualify for the study.
 - A provider that has 80% in Australia, 5% in New Zealand and 10% in China will also qualify.
 - A provider that has 85% from Australia and 15% from Singapore will not qualify.
 - A provider with 80% from India, 5% from China, South Korea, Malaysia and Indonesia will not qualify.

For the scope of this study, we define APAC as the sum of mature Asia/Pacific, emerging Asia/Pacific and Greater China. Japan and the Chinese mainland are excluded from this analysis because they exhibit different characteristics as a market for outsourcing and are treated separately by most buyers. The specific countries included are:

- **China:** Hong Kong and Taiwan
- **Mature APAC:** Australia, New Zealand, Singapore and South Korea
- **Emerging APAC:** India, Indonesia, Malaysia and Thailand
- **Rest of APAC:** Bangladesh, Pakistan, Philippines, Sri Lanka and Vietnam

Customer Interest Indicator (CII): Vendor must rank among the Top 20 for the CII as defined by Gartner. CII is calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and vendor customer sentiment from 1 October 2023 through 30 September 2024.

Note: Each bullet point above constitutes a separate and distinct criterion. All criteria must be met to qualify for participation.

Evaluation Criteria

Ability to Execute

Gartner evaluates an ODWS vendor’s Ability to Execute by assessing its offering’s services, viability, pricing, customer experience and overall operations. We evaluate how these criteria enable the vendor to be competitive and effective in the market. We also evaluate the vendor’s ability to retain and satisfy customers, create positive perception and respond to market changes.

In this Magic Quadrant, the product or service, customer experience and operations criteria each has a “high” weighting. This is because the ability to provide global ODWS depends highly on the vendor’s core goods and services quality and operational capability, and ultimately, customer experience is crucial in a services market. Market responsiveness, overall viability and pricing criteria each has a “medium” weighting. This is because, for a single buyer of ODWS, the dynamic changes to the market, the sales performance, and the overall viability of the company, as well as how the service is organized, come second in relevance when selecting an ODWS vendor. Marketing execution is weighted low because, in managed services, it has little relevance.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (March 2025)

Completeness of Vision

Gartner evaluates an ODWS vendor’s Completeness of Vision by assessing multiple criteria that show its ability to understand current market trends, properly direct investments in innovation and respond to customer needs and competitive forces — as Gartner views them.

In modern ODWS, having the proper market understanding, industry and vertical-specific solutions, and an investment in the right innovation will make or break the ability to deliver modern global ODWS. Gartner has given these criteria the highest weighting. Business model and geographic strategy have a medium weighting because they are ancillary capabilities that will not necessarily lead to the best ODWS solutions. Marketing and sales strategy are rated low because they have very little influence on the actual quality of ODWS delivery but still may indicate overall viability.

Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Innovation	High
Geographic Strategy	Medium
Vertical/Industry Strategy	High
Sales Strategy	Low

Gartner (March 2025)

Quadrant Descriptions

Leaders

Leaders deliver their service solutions skillfully, have a clear vision of the direction of the service market and are actively building and improving their competencies to sustain their leadership positions. The Leaders quadrant indicates the direction of the ODWS market. Leaders have demonstrated their expertise and track record in delivering ODWS globally and understand the requirements to successfully deliver these services. They have proven their Ability to Execute and their Completeness of Vision.

Challengers

Challengers execute well but have less well-defined views of the market’s direction. Some are poised to join the Leaders, while others may not (yet) be preparing aggressively enough

for the future. Challengers have demonstrated that they have a solid base of clients that are satisfied with the services they provide. Challengers' proximity to the Leaders quadrant indicates that their vision of the ODWS market is still maturing or not keeping up with market demand. They have the potential to move into the Leaders quadrant if they can advance their strategic visions, solidify and expand their service offerings, and deliver services consistently in all the regions covered by this Magic Quadrant.

Visionaries

Visionaries have a clear vision of the market's direction and are focused on preparing for it; however, they could improve or scale their service delivery capabilities. Providers in the Visionaries quadrant have an effective vision of the ODWS market; however, they have neither invested in nor delivered on that vision enough in the global market to emerge as Leaders at this time.

Niche Players

Niche Players focus on a segment and/or region of the market, as defined by characteristics such as size, vertical focus and selective ODWS offerings. Providers in the Niche Players category can be a perfect fit for some organizations because they focus on a specific area of the market. However, this narrow focus affects a niche provider's ability to deliver the full spectrum of ODWS globally.

Context

Gartner's Magic Quadrant analysis offers support required for informed decisions on how organizations spend digital workplace services budgets, represented as approximately 10% for workplace and 5% for service desk. This Magic Quadrant assesses the Ability to Execute and Completeness of Vision of 18 ODWS providers. This information and analysis can help CIOs; sourcing, procurement and vendor management leaders; and infrastructure and operations leaders who are selecting a provider for midrange to long-term ODWS contracts that support critical functions and business objectives with appropriate regional capabilities.

Sourcing, procurement and vendor management leaders looking for a sourcing initiative in a specific geographic region can leverage **Critical Capabilities for Outsourced Digital Workplace Services**. This document contains use cases for three main regions — North America, Europe and Asia/Pacific — where they can assess a set of capabilities to discern

which providers are stronger in what regions. This Magic Quadrant and the companion Critical Capabilities are produced with a single methodology by collaborating research teams.

Clients should not disqualify a provider simply because it is not in this Magic Quadrant. Gartner's inclusion criteria result in analyzing the most established providers in the ODWS market, but other regional or local IT service providers may present better alternatives for your business requirements. A Gartner expert can help shortlist the most suitable candidates for specific client requirements and assist with an analysis of shortlisted candidates.

Market Overview

Overall trends and best practices in this market include an emphasis on workplace and employee experience, innovations in automation and AI, device management that includes sustainability solutions and modern endpoints like VDI and Cloud DaaS. Deals are based on value versus cost with an emphasis on more outcomes and industry-specific solutions. Providers are expected to have a clear vision of the current market and may help shape its future direction. Each provider's focus on growth and strategic investments in their ODWS business helps clients understand their viability, strategies and execution on client business priorities.

We continue to see an overall year-over-year decrease in pricing for multiyear ODWS deals that include accountabilities for automation and other innovations. ODWS providers continue to invest heavily in new technologies to enable automated resolution and decrease service delivery costs. Service providers relying on traditional delivery methods and legacy device support do not address the growing client demand for transformation.

Although many organizations have used ODWS to maintain their workplace environments, a common complaint is the provider's inability to look beyond the contract to truly partner to achieve business goals. To facilitate value-based deals, more than 30% of all ODWS contracts now originate through sourcing methods other than RFPs, such as dynamic sourcing, which includes an agile and co-solutioning element (see [Infographic: How to Use Dynamic Sourcing for IT Services Deals](#)). Customers of traditional ODWS deals that include legacy tasks and transactional components find their providers are not innovative enough. They suffer from the "watermelon effect," where the provider reports all green for their tasks and metrics, yet the overall sentiment is that the delivery is all red.

SLA-based contracts continue to decrease, replaced by XLAs and deals that require accountability beyond hard metrics that do not map to business outcomes. Experience management must measure end-user sentiment beyond transactional metrics like CSAT and NPS. True measures of workplace experience require proper digital experience (DX) tools and mapping the user journey with persona-based technology for service delivery solutions. This approach helps address inequities and dispels the assumption that a “one-size-fits-all” solution can meet a client’s needs.

Clients have inquired about how ODWS providers are responding to return to office (RTO) mandates. They seek assistance from providers in developing innovative solutions for hybrid, remote and on-site work that bridges gaps in collaboration, social connections and organizational culture (see [Design a Return-to-Office Strategy That Balances Organizational and Employee Needs](#)). These RTO mandates clearly impact the overall experience of both individual workers and their leaders (see [Executive Pulse: A Third of Leaders Could Leave Their Organization If Forced Back to the Office](#)). Therefore, it becomes even more imperative to measure the DEX and sentiment of all employees for real-time analysis that turns into actions to help stave off attrition.

The trends and best practices mentioned earlier are explained in more detail here, to help clients understand what to expect when negotiating an ODWS deal with their providers:

- **Innovation to support transformation:** Automation remains an essential part of offerings that every vendor included in this research has invested in on some level. However, most providers have completely changed their delivery structure to provide autonomous-first services to clients. With more investment into GenAI solutions, clients are looking for a competitive edge, along with innovative models to increase productivity and provide a transformative experience to their end users. Accountability is being built into ODWS deal constructs to expect providers to deliver continuous innovative ideas that support business outcomes.
- **XLA strengths seen across six providers:** Resolving user-related issues when something breaks is not the standard for ODWS delivery quality. Client organizations expect ODWS providers to help them improve the EX and take contractual liability for achieving such results. XLAs have replaced traditional SLAs and many ODWS providers are leveraging DEM and DEX tools, paired with a consulting process to map what constitutes a good experience, and to design the process and metrics that will compose the XLA. Sentiment

gathered and analyzed across the entire user journey is essential to help determine where technology and services play key factors in an employee experience.

- **Value-based deals trump cost savings:** More contracts now include accountability to outcomes than ever before. Constructing deals based on the solutions businesses need, including industry-specific solutions and tangible results, now trump the legacy transactional contracts. Clients seek providers that will craft solutions that help them achieve their objectives, work with them on how to measure the results, and offer competitive pricing that allows sourcing, procurement and vendor management (SPVM) and IT leaders to easily articulate the values that their outsourcers bring.

⊕ Evidence

⊕ Evaluation Criteria Definitions

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