ISG Provider Lens™

# Future of Work – Services and Solutions

## Germany 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Computacenter

October 2021

# About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™



## ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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# EXECUTIVE SUMMARY

## Future of Work Becomes Hybrid

Just like many countries around the world, Germany is coping with the impact of the COVID-19 pandemic effects on the office workplace and the changes necessary to implement. While the first wave of the pandemic mainly resulted in a shift in work location – from the company office into the home office – during the following period, after a short time of back to the office, the shift was more towards hybrid work instead of purely remote work.

According to the Federal Ministry for Economic Affairs and Energy (Bundesministerium für Wirtschaft und Energie, BMWi) the rate of home office work has dropped significantly – by about 20 percent – over the course of the last year. In Germany, many DAX-listed, large industry-heavyweight enterprises have introduced plans and executed them to make home office work available to their eligible workforce, and many of them are adopting a three-day home office, two-day office approach, basically resulting in a hybrid work model.

Eligibility of course differs by position and by industry, resulting in different levels of home office/hybrid work penetration. Generally speaking, the more senior or managerial the position the more likely such entitlement is given. From an industry perspective a high volume of remote working was witnessed in banking and finance. The same is true – obviously – for the IT industry. Evidently the more production-heavy industries with manufacturing plants had and have lower home office/hybrid work rates.

Despite the technical possibilities to provide a work environment that enables office personnel to access corporate data and applications the processes of the underlying ways of working have not yet been adopted. This puts a burden on the workload and needed effort to fulfil the given work by such office staff. Examples typically relate to a missing level of digitalization e.g. by still requiring printed documents for a later sign-off as part of the process.

But remote workers in Germany – just like elsewhere – are also faced with challenges on the personal level. Organizing work from home while at the same time caring for young children is a particular difficulty. As a result of this, both mental and work-related stress are increasing. It has been observed that those staff members that are working from home are sometimes not treated the same way as those visible in the office. This and the disconnect with other team members and peers results in the tendency to work partly in the office, all of which leads to the hybrid work trend.

With these trends in mind, there have been new opportunities for managed service providers to bring additional value to their clients and to also support a safe return to office with the particular focus on hybrid work models. This report positions different service provider for diverse workplace technology and strategy services for the German market. The services quadrants it covers are presented and summarized below.

## Workplace Strategy and Transformation Services

- Businesses need to rethink their operating models. Organizations also need to adjust to changing requirements and to leverage modern workplace technologies, in particular in light of digitalization.
- An enhanced collaboration with service providers for workplace strategy and transformation services is required and key to successfully implementing a hybrid work environment.
- For managed service providers, many German clients have improved their engagements at the consulting- and strategic-level discussions for workplace transformation.
- As a result of that, German service providers have increased the size of their consulting workforces to provide this service.
- In light of all the changes currently ongoing, clients put employee experience at the top of their priorities. As a result, they are now seriously discussing experience-level agreements (XLAs).

## Managed Digital Workplace Services

- The scope of managed services for German clients has widened. Clients are increasingly looking for workplace solutions that enable them to attract the best talents and provide a strong security wrapper.
- CIOs, operations, technical leads and procurement still lead all buying decisions for managed services, but increased interaction with human resource functions has been observed recently.
- The importance of phone calls as the most preferred channel to raise support incidents is declining, portals and chat are on the rise. The highest level of satisfaction continues to come from in-person walk-ins, a concept that was particularly challenged during the pandemic, a situation that remains in the hybrid work environment.
- Virtual desktop infrastructure (VDI) environments have been key to cope with the pandemic challenges. Many clients have increased their number of virtual desktop users during this time but are now at the point to decide how to proceed in the future. German clients keep managing VDI mainly in an on-premises operational model. But with public cloud on the rise in general, clients are more and more considering a shifted towards a public cloud desktop-as-a-service model.
- Many providers are developing their capabilities for meeting room design and management. A key part of a successful hybrid work model where it is essential to be all in one virtual place, no matter where the physical location is.
- Workplace services outsourcing sometimes remains part of a larger outsourcing contract covering many other services, including application services.

## Managed Employee Experience Services

- Although becoming a priority for enterprises, employee experience enhancement is yet to become mainstream trend. Therefore, German clients are only at the beginning of signing managed services contracts with experience level agreements (XLAs) that center around the specific digital experience of end users.
- The big factor for remote working staff is work-life balance. Providers that focus on offering a seamless technology experience for home users to work efficiently without interruptions will lead the market.
- Automation continues to shape the workplace, and automated ticket resolution and predictive analytics are on the rise to become commoditized offerings. To provide more advanced managed employee experience services, providers are further using experience-related data to drive correlation among employees with a high digital experience and business performance.

**Global outlook applicable for Germany:** Overall, global managed services providers are at a crucial juncture of defining their future strategy. This space was earlier dominated by large IT infrastructure managed service providers that offer technical end-user computing services. These providers have evolved their services to provide automated issue resolution, IT vending machines and kiosk services. They are enhancing their capabilities by supporting mobile device and enterprise mobility management initiatives and have started to characterize themselves as digital workplace service providers. As these services are increasingly focusing on end users, providers have begun to prioritize experience-level measurement and develop XLA strategies.

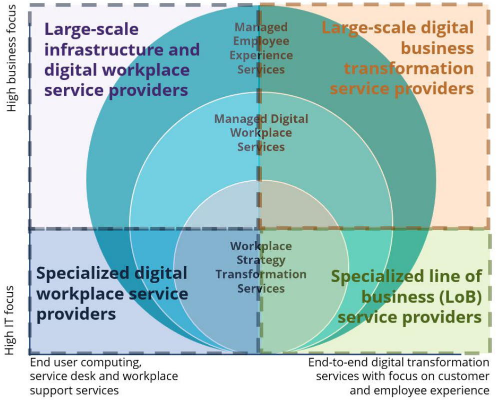
The pandemic has accelerated the shift towards thinking beyond traditional end-user computing elements while pushing organisations to consider workplace and work-related technologies as key business enablers that can make or break the employee experience. A satisfied employee with high experience can deliver a strong customer service. A provider consulting service portfolio that usually focuses on as-is state assessment closely tied with its own implementation services is now increasingly defined by its strategy transformation services to prepare both the client's workplace and workforce for the future of work. As enterprises are increasingly leveraging technologies and expert help in designing their employee experience strategy, service providers are transforming themselves from traditional technology implementation and managed service providers into cross-industry experts for providing strategy, consulting and transformation services. In addition, workplace technologies are increasingly permeating business functions and helping line-of-business heads (LoBs) drive decision making. The rise of modern low-code/no-code development, democratization of IT and digital dexterity coupled with a focus on reskilling have further enhanced the focus on managed services for improving the end-user experience and preparing them for the new norms of working.

Many service providers that were traditionally not strong in IT infrastructure managed services but rather focused on understanding business nuances and on applications and strategy transformation services are increasingly getting involved in providing digital workplace or future of work services. At the same time, traditional end user computing or modern digital workplace service providers should invest heavily to differentiate their consulting and transformation abilities. Managed services including desktop engineering, predictive analytics and automated service desk are now becoming table stakes. Even support for Microsoft 365 is becoming commonplace. Providers with diverse strengths are now competing in the future of work services with strategy transformation services at the core, supported by managed workplace services and an overarching focus on managing employee experience. This has led to the development of a competitive landscape comprising of four different set of providers as explained in Figure 1.

An interesting area of development in user experience measurement approaches includes application and devices usage. It is increasingly covering elements of employee learning and talent management while leveraging automation and AI for a human workforce, making it a challenge for both traditional workplace service providers and application-focused providers.

Fig 1

Global Future of Work Managed Service Provider Competitive Landscape




- Digital workplace services no longer stay in siloes. Changing business models and pandemic induced effects are cascading to these services as they become more business value focused
- Diverse set of managed service providers compete in the new Future of Work services market leveraging their specialization and scale.
- Three key set of services: workplace strategy transformation, managed digital workplace services and managed employee experience are offered by every managed service provider. However, the degree of focus, dedicated vision and coverage depth differs.

Source: ISG

# Introduction

Simplified illustration

**Future of Work - Services and Solutions - Germany 2021**

Workplace Strategy Transformation Services

Managed Digital Workplace Services

Managed Employee Experience Services

Source: ISG 2021

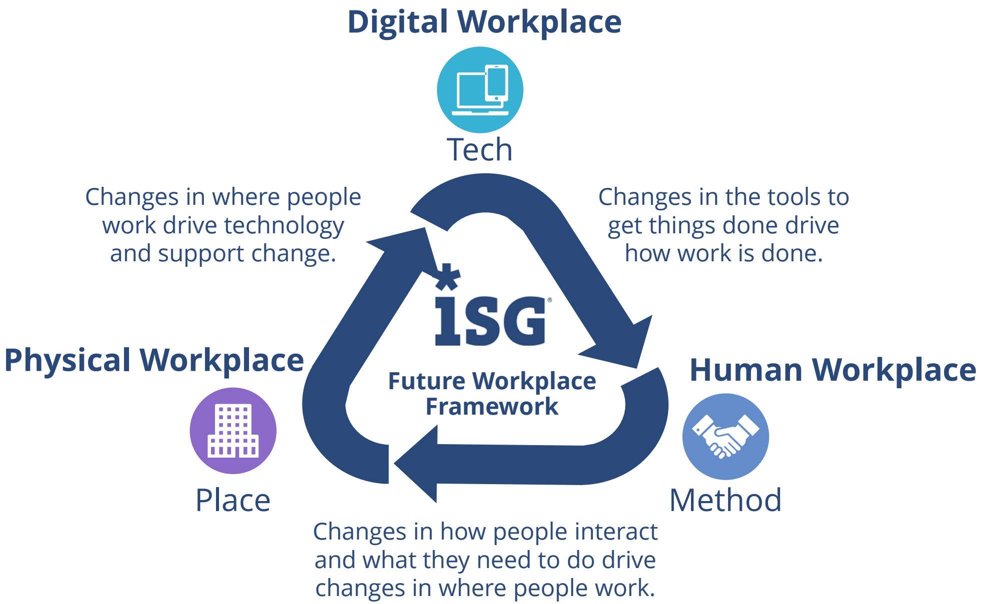
## Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to a remote-working model was expected in the coming years, but the crisis has accelerated its adoption at a significant pace. Enterprises that have changed their business culture and technological adoption due to the ongoing situation have learned to iterate, adapt and overcome. This has led to new ways of increasing both productivity and engagement for employees. While ISG had equated the term "future of work" with "digital workplace," the pandemic has led to an understanding that the future of work is more than just technology and support functions performed by enterprise IT functions. ISG's new Future Workplace Framework comprises three workplace ecosystems, namely Digital Workplace, Physical Workplace and Human Workplace, as described in the following illustration:

## Definition (cont.)

Fig 2

The heart and soul of the Future Workplace Great Collaboration and Experience




Source: ISG

# Definition (cont.)

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but will also cover aspects of human empathy and will drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms of tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of future workplace will differ and have specific nuances for different geographic regions, but the requirements will generally revolve around a few key themes. In each region, client expectations will involve establishing relationships with service providers that offer future workplace strategy transformation services such as cultural enablement and office-vs.-remote workforce planning. Clients will also partner with service providers that can manage and support the entire workplace technology ecosystem for remote employees, while also managing and measuring the experience of both in-office and remote workers. At a global level, the pandemic has led enterprises to invest in workplace technologies that can secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this to continue in the coming years.

## Scope of the Report

The ISG Provider Lens™ study offers IT-decision makers:

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

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

## Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

## Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

### Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

### Product Challenger

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

### Market Challenger

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

### Contender

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

## Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

### Rising Star

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

### Not In

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

# Future of Work – Services and Solutions - Quadrant Provider Listing 1 of 3

| | Workplace Strategy Transformation Services | Managed Employee Experience Services | Managed Digital Workplace Services |
|---|---|---|---|
| Accenture | Leader | Market Challenger | Market Challenger |
| All for One | Rising Star | Contender | Product Challenger |
| Appsphere AG | Not in | Not in | Product Challenger |
| Arvato | Contender | Not in | Not in |
| Atos | Leader | Leader | Leader |
| Axians | Product Challenger | Not in | Product Challenger |
| Bechtle | Market Challenger | Not in | Product Challenger |
| CANCOM | Leader | Not in | Leader |
| Capgemini | Leader | Leader | Leader |
| Cognizant | Product Challenger | Not in | Product Challenger |
| Computacenter | Leader | Contender | Leader |

# Future of Work – Services and Solutions - Quadrant Provider Listing 2 of 3

| | Workplace Strategy Transformation Services | Managed Employee Experience Services | Managed Digital Workplace Services |
|---|---|---|---|
| Deutsche Telekom | Leader | Not in | Leader |
| Devoteam Alegri | Contender | Not in | Contender |
| DXC | Leader | Leader | Leader |
| Fujitsu | Product Challenger | Market Challenger | Leader |
| Getronics | Not in | Not in | Market Challenger |
| GIS | Not in | Not in | Contender |
| HCL | Product Challenger | Leader | Leader |
| Hexaware | Contender | Contender | Market Challenger |
| IBM | Market Challenger | Product Challenger | Product Challenger |
| Infosys | Product Challenger | Product Challenger | Leader |
| Insight | Not in | Not in | Product Challenger |

# Future of Work – Services and Solutions - Quadrant Provider Listing 3 of 3

| | Workplace Strategy Transformation Services | Managed Employee Experience Services | Managed Digital Workplace Services |
|---|---|---|---|
| Materna | Contender | Not in | Not in |
| NTT DATA | Market Challenger | Not in | Not in |
| Orange Business Services | Contender | Not in | Contender |
| Orbit | Not in | Not in | Product Challenger |
| TCS | Product Challenger | Leader | Product Challenger |
| Tech Mahindra | Product Challenger | Product Challenger | Market Challenger |
| Telefonica | Not in | Not in | Market Challenger |
| Unisys | Product Challenger | Leader | Product Challenger |
| Vodafone | Contender | Not in | Market Challenger |
| Wipro | Product Challenger | Product Challenger | Leader |

# Future of Work – Services and Solutions Quadrants

# ENTERPRISE CONTEXT

## Workplace Strategy Transformation Services

This report is relevant to enterprises across industries in Germany for evaluating providers of workplace strategy transformation services.

In this quadrant report, ISG highlights the current market positioning of workplace strategy transformation service providers to enterprises in the German market and how each provider addresses the key challenges faced in the region.

COVID-19 disruption has brought several challenges for enterprises in this region, forcing them to move towards more dynamic working models. Challenges associated with sudden shift in remote working, security concerns and keeping employees engaged and productive have led enterprises in Germany to look for consulting-led approaches to maintaining business and operational excellence.

Enterprises in Germany are looking for end-to-end business consulting to uncover the potential of digital innovation in this hybrid working new normal scenario. Enterprises in this region are also focusing on technology-based services that use AI, analytics, automation, augmented reality and virtual reality for building smart or connected physical workspaces. XLA-based approach, workplace compliance, change management, employee health and safety, workplace analytics and unified collaboration strategy are few of the other demands from enterprises in this region.

**Infrastructure, IT and workplace technology leaders** should read this report to understand the relative positioning and capabilities of providers to help them effectively plan and select workplace-related services and solutions. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

**Digital transformation professionals** should read this report to understand how providers of workplace strategy transformation services fit their digital transformation initiatives and how they compare with one another.

**Sourcing, procurement, and vendor management professionals** should read this report to develop a better understanding of the current landscape of workplace strategy transformation service providers in Germany.

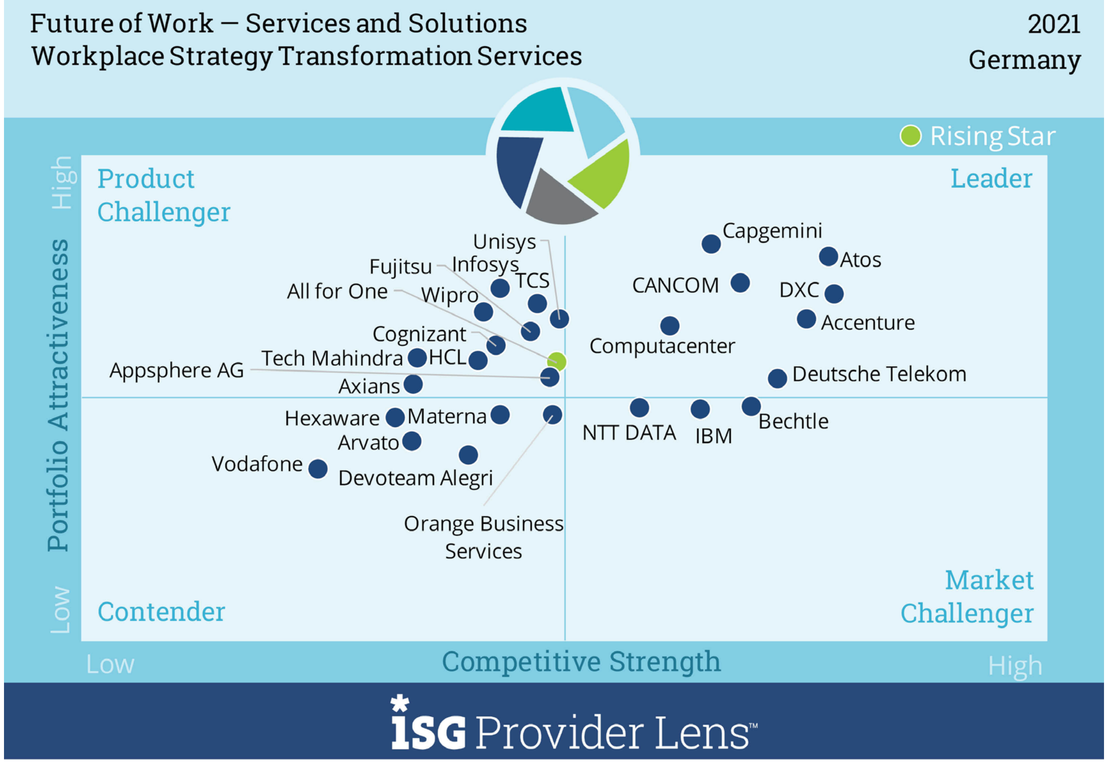
**Security and HR leaders** should read this report to see how service providers address the significant challenges of compliance and security while keeping the employee experience seamless for remote employees. HR leaders should read this report to know leading providers assisting in developing strategies for future workforce and talent management.

**Facility managers** should read this report to know the providers helping clients develop strategy for future needs for physical office campuses.

# WORKPLACE STRATEGY TRANSFORMATION SERVICES

## Definition

This quadrant evaluates service providers that offer professional and transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are offered independently of the associated technology and managed services. These also assist clients in transforming their business and operating model and enabling the desired organisational changes.




Source: ISG Research 2021

# WORKPLACE STRATEGY TRANSFORMATION SERVICES

## Eligibility Criteria

- Ability to provide consulting and workplace assessment services that are independent of the associated managed services and offer a vendor-neutral approach for assessing the best technology partner
- Define and visualise the post-pandemic workplace environment, covering areas such as workforce segmentation into remote and in-office workers, “uberisation” of the workforce, innovative talent models and cultural adoption while also enhancing the end-user experience
- Provide technology adoption and change management services in the consulting portfolio
- Provide solutions to address employee empathy and wellbeing as a plus

## Observations

Managed service providers are continuously developing and enhancing their capabilities in consulting and strategy services to improve their positioning in this quadrant — an evolved version of the Digital Workplace Consulting quadrant that ISG released last year for Germany — and include specific elements of remote work enablement and preparing clients to make a transition to a hybrid work model.

Providers positioned as Contenders in this quadrant have strong service implementation capabilities and need to further develop their portfolios and showcase adequate number of reference cases to be viewed as strategic partners in the future of work model among enterprises in Germany.

The Product Challengers have strong consulting, benchmarking and outcome-oriented service capabilities, although they do not engage with many clients to offer strategy services.

Market Challengers in this space are well-positioned to offer workplace strategy services, but they must further develop their offerings to address pandemic-induced changes in the future of work model of organizations.

Leaders in this quadrant provide comprehensive consulting and benchmarking, along with strong client case stories for workplace strategy consulting services as explained below.

# WORKPLACE STRATEGY TRANSFORMATION SERVICES

## Observations (cont.)

- **Accenture** is a consulting company. It has a strong partnership with Avanade, which complements its consulting and transformation service portfolio.
- **Atos** has strong consulting capabilities and provides a human-centric approach for workplace transformation.
- **Cancom** addresses an end-to-end strategy view around new/hybrid work with its analysis method, covering technology, business/discipline, people/culture and security.
- **Capgemini** provides strong capabilities in consulting and transformation combined with a strong thought leadership towards the new and hybrid work.
- **Computacenter** has a growing consulting business to provide structured solutions and has expertise in integrating digital technology with a focus on business goals.
- **Deutsche Telekom** helps customers on all maturity levels to transform their working environments towards its New Work approach.
- **DXC** leverages the long-time partnership with Microsoft within its workplace strategy and transformation services to offer a personalized and immersive experience.
- **All-for-One** (Rising Star) is emerging as a rising star and offers a compelling set of transformation and consulting services, covering various formats and methods.

# COMPUTACENTER

## Overview

Headquartered in Hatfield, U.K., Computacenter leverages 1,500 consultants to provide technology-agnostic advisory and has partnerships with leading workplace technology vendors. Its service spans defining roadmaps and designing new solutions to driving user adoption, simplifying management and supporting customers on their journey from a contemporary workplace to a modern digital environment. It has a strong focus on helping clients achieve their business objectives.

## Strengths

**Growing consulting revenue:** The company has witnessed significant revenue growth of its advisory services in recent years. It is continuing to invest and expand its consulting offering.

**Approach:** Computacenter provides workstyle and employee analytics along with business objectives and maturity assessment to design the digital roadmap. With a goal to maximize business outcomes, it engages with clients on key areas of new hybrid ways of working.

**Well-established presence:** Computacenter has a long history of providing workplace services in the German market. The service provider is among the few with an offering and capabilities for both large enterprise accounts and the midmarket, supporting the unique German industrial structure.

## Caution

Computacenter can further enhance its capabilities in workplace transformation services and should showcase more examples of working with non-IT business functions to highlight the value of its consulting services.

### 2021 ISG Provider Lens™ Leader

With its growing consulting services and a well-structured and innovative consulting offering meeting the demands of larger German clients, Computacenter leads the market.

# ENTERPRISE CONTEXT

## Managed Employee Experience Services

This report is relevant to enterprises across industries in the Germany for evaluating managed employee experience services providers.

In this quadrant report, ISG highlights the current market positioning of managed employee experience service providers to enterprises in the Germany and how each provider addresses the key challenges faced in the region.

During the COVID-19 crisis employees across the world as well as in Germany faced several challenges in terms of protecting physical and mental health, increasing workloads and preventing loss of connectivity. Enterprises in Germany also face challenges associated with devices security, unsecure home networks and other compliance-related challenges. Evolving employee expectations, increased workplace complexities and dispersed workforces are a few other challenges German enterprises face. These challenges have created demand among enterprises in this region for managed employee experience services.

Enterprises in Germany are majorly focusing on reducing the complexities faced by employees and offering personalized employee experiences to enhance employee wellbeing. Enterprises in this region post the pandemic have started focusing more on upskilling and reskilling their employees and are looking for a unified approach for enhancing employee engagement and productivity. With post-pandemic return to work accelerating, enterprises in Germany are also looking for smart building solutions to offer their employees a connected workplace that would further result in enhanced employee productivity.

**Infrastructure, IT and workplace technology leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed employee experience services. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

**Digital transformation professionals** should read this report to understand how providers of managed employee experience services fit their digital transformation initiatives and how they compare with one another.

**Sourcing, procurement, and vendor management professionals** should read this report to develop a better understanding of the current landscape of managed employee experience service providers in the Germany.

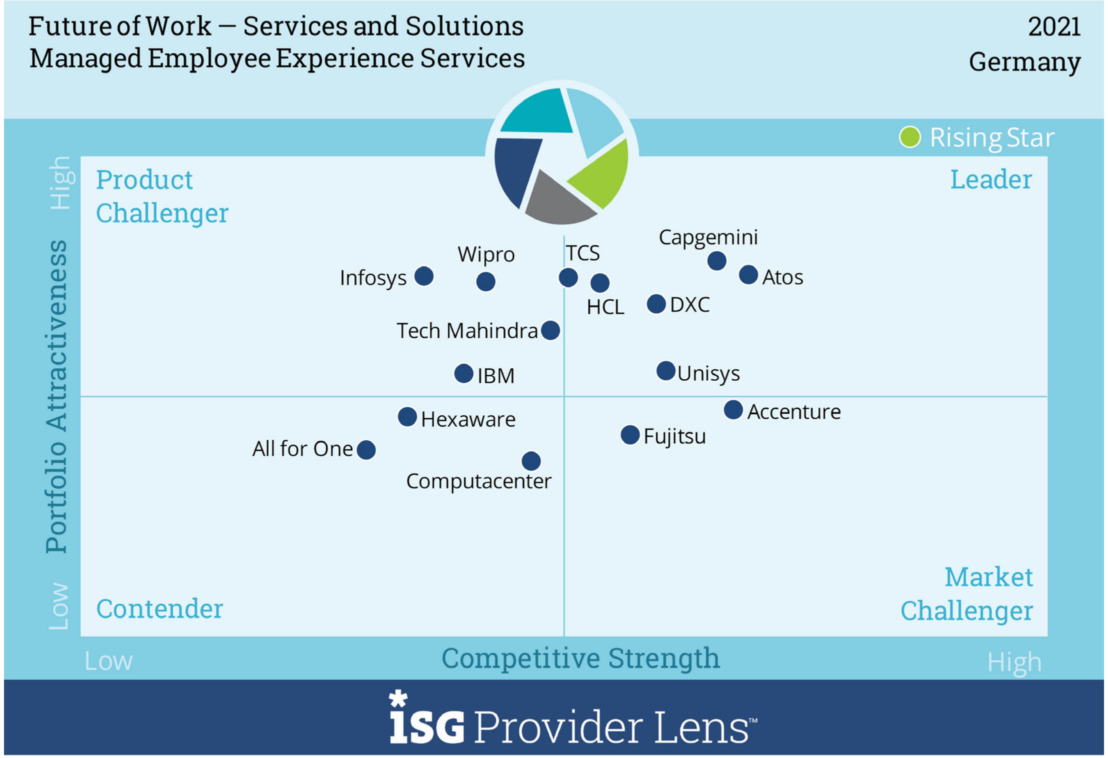
**Security and HR leaders** should read this report to see how service providers address the significant challenges of compliance and security while keeping the employee experience seamless for remote employees. HR leaders should read this report to know which providers are leading in managing experience for employees in this new age of hybrid working from talent retention, upskilling and recruitment perspective.

**CXO leaders** should read this report to know about leading providers whose services can help better prepare workforce for changing business models and dynamics in the post pandemic world.

# MANAGED EMPLOYEE EXPERIENCE SERVICES

## Definition

This quadrant assesses providers that offer value-added managed services not only for enabling the workplace technology ecosystem but also for enhancing the end-user experience. These providers typically deal with business leaders and line-of-business representatives in addition to the CIO office. They offer services that associate employee experience with measurable business results. Their services help align the digital and physical facets of the future workplace with the human aspect.




Source: ISG Research 2021

# MANAGED EMPLOYEE EXPERIENCE SERVICES

## Eligibility Criteria

- Ability to provide services that directly correspond to user experience associated with device and app access, as well as team collaboration, human augmentation with digital workforce, line of business (LoB) employee experience, user productivity and digital dexterity
- Offer a seamless experience for remote-working employees and part-time workers as well as provide work-from-home support and innovative engagement services/solutions for the respective country/region
- Should have a sizeable client base in the respective country/region with experience-level agreement (XLA) engagements that span beyond IT enablement
- Provide managed unified communications and collaboration (UCC), analysis of user behavior and measurement of user experience beyond workplace technology, extending smart workplace services to other business functions such as HRO and operations
- Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces
- Offer smart facilities services, physical workspaces with services to ensure COVID-appropriate behavior and tracking

# MANAGED EMPLOYEE EXPERIENCE SERVICES

## Observations

This is a new quadrant that ISG has carved out from the managed services space to differentiate providers offering value-added services on top of their regular digital workplace capabilities. Providers positioned in this quadrant have strong focus on employee experience and other services are weaved around experience.

Providers positioned as Contenders offer basic employee experience services powered by basic automation and analytics. They need to further develop their capabilities to provide hyper-personalized capabilities and to be known in the market because of their experience.

The Product Challengers in this quadrant provide comprehensive capabilities covering employee experience through technology performance, physical workplace and enterprise application integration.

Market Challengers in this quadrant are well-established in employee experience space; however, they should showcase specific capabilities in enabling experience for specific areas in future of work model.

Leaders in this space have differentiated themselves from regular managed service providers with visible experience, enhancing services and with actual client implementations.

- **Atos** leads with its focus on employee experience, well-being, citizen development support and experience center.
- **Capgemini** offers employee experience analytics and citizen developer services that are key differentiators in the market.
- **DXC** offers to improve the workplace experience by providing business results such as reduced employee absenteeism and increased productivity
- **HCL** is leading with a comprehensive set of capabilities to provide employee experience services.
- **TCS** differentiates with a set of offerings with employee experience elements for all types of clients.
- **Unisys** has experience in delivering employee experience managed services clients covering diverse business functions.

# ENTERPRISE CONTEXT

## Managed Digital Workplace Services

This report is relevant to enterprises across industries in Germany for evaluating providers of managed digital workplace services.

In this quadrant report, ISG highlights the current market positioning of managed digital workplace service providers to enterprises in Germany and how each provider addresses the key challenges faced in the region.

The impact of COVID-19 in Germany was severe, with several industries including travel being devastated due to the global outbreak. With the hybrid work model accelerating, enterprises in this region have started focusing more on digitization and improving collaboration. Enterprises in Germany are also looking forward to implementing AI-enabled chatbots, virtual assistants and self-service technologies to automatically resolve ticket queries and reduce number of tickets landing to service desks.

Enterprises in this region are focusing on creating a secure and compelling environment to bring employees back to the office and reduce other workplace-related complexities. In response to the COVID-19 pandemic, enterprises in Germany are looking for end-to-end managed services from workplace support to device support that can empower their employees to work from anywhere and anytime. Enterprises here will continue to focus on modern device management to create flexible workplaces and ensure security.

**Infrastructure, IT and workplace technology leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

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**Sourcing, procurement and vendor management professionals** should read this report to develop a better understanding of the current landscape of managed digital workplace service providers in Germany.

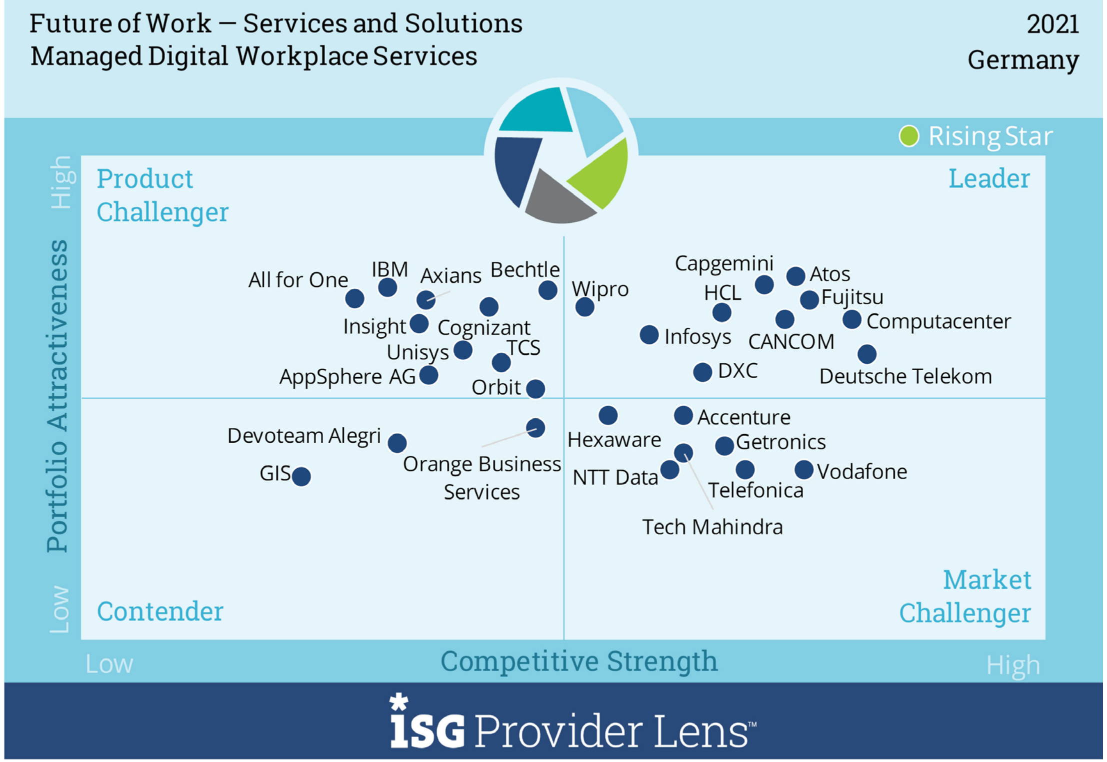
**Security and HR leaders** should read this report to see how service providers address the significant challenges of compliance and security while keeping the employee experience seamless for remote employees.

**Admin and field services managers** should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.

# MANAGED DIGITAL WORKPLACE SERVICES

## Definition

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualized workspaces. Providers assessed in this space offer complete end-user computing services that form the core of the digital workplace. Their services provide the ability to work from anywhere/anytime, including device support, automated proactive technical support and cloud platforms to provision always-on systems. They leverage AI and cognitive technologies for end-user facing tasks and help achieve significant cost savings.




Source: ISG Research 2021

# MANAGED DIGITAL WORKPLACE SERVICES

## Eligibility Criteria

- Ability of service provider to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents
- Offer on-site field support and in-person technical assistance
- Set up and support self-help kiosks, tech-bars, IT vending machines and digital lockers
- Offer managed services for collaboration and communication across platforms
- Provide device support, predictive analytics and proactive monitoring services
- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud
- Offer managed mobility services in the respective countries, managing at least 25 percent of the devices outside the home region
- Offer complete device lifecycle managed services as a plus, covering device sourcing and logistics, device-as-a-service (DaaS) for device security, support for unified endpoint management (UEM) and mobility program management
- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management

# MANAGED DIGITAL WORKPLACE SERVICES

## Observations

With the outbreak of the COVID-19 pandemic, enterprises have been focusing on accelerating their transformation and digitization processes in the managed digital workplace services space. During the shift to the remote work model, providing devices and mobile connectivity for employees while ensuring security became a priority. In addition to keeping devices safe and secure on private networks, enterprises have to ensure the safety of their own networks with the gradual return to the workplace. In addition to these requirements, user experience and client engagement became crucial aspects for driving the efficiency of workplace services.

This wave of change forced providers of managed digital workplace services to quickly address the sudden spike in requests for mobile devices and laptops to support remote operations. Service providers reacted in different ways, with some offering solutions under a unique umbrella (devices, service desk, experience, security, etc.) and others focusing on experience-level agreements (XLAs) and security issues.

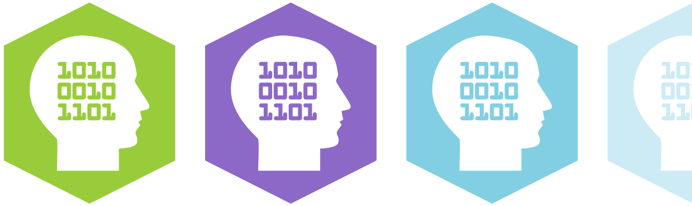
Among the many service providers that qualified for this quadrant, 10 were identified as Leaders. Among them, there are two new entries for the Leaders' quadrant due to their new deals and increased revenues.

- **Atos** offers a strong set of integration services and solutions to clients, making it one of the leading players in the workplace services space.
- **Cancom** is a hybrid IT service provider with a focus on offering managed services, anything as a service and DaaS. It has a strong legacy in providing workplace services in Germany.
- **Capgemini** brings a complete and compelling offering in the field of managed digital workplace services and expanding its footprint in Germany year after year.
- **Computacenter** focuses on helping clients to source, manage and transform the workplace mostly for enterprise businesses.
- **Deutsche Telekom** has a compelling offering for managed digital workplace services with a deep focus on connectivity, device management and security services.

# MANAGED DIGITAL WORKPLACE SERVICES

## Observations (cont.)

- **DXC** is in the process of modifying its offering with an ambitious vision in the managed digital work workplace services space which could bring the company further up in the Leaders' quadrant next year.
- **Fujitsu** is one of the leading providers of managed digital workplace services in Germany with a strong focus on customer and end-user experience.
- **HCL** has a rich portfolio of workplace services and long-lasting experience. Strong focus on enhancing user experience in the provision of managed digital workplace services.
- **Infosys** provides end-to-end managed digital workplace services to major clients in Germany. The company now adds an experience layer to its comprehensive portfolio of workplace services.
- **Wipro** is a leading provider of managed digital workplace services and adopts a forward-thinking strategy to deliver its offerings.



# COMPUTACENTER

## Overview

Computacenter is a British multinational company that provides computer services to public and private-sector companies. It is based in Hatfield, Hertfordshire and is listed on the London Stock Exchange and the FTSE 250 Index. It has 17,000 employees worldwide with a strong presence in Germany, where it manages more than 1 million users, 800,000 PCs, 63,000 smartphones and 260,000 other devices (IoT, smart devices and field devices), which is an increase of 6 percent in this last figure since last year.

## Strengths

**Convincing overall value proposition:** Computacenter's digital managed workplace services address the remote working requirements of enterprises while providing a secure, fast and seamless experience. The overall value proposition is backed by the use of data, analytics and intelligent systems to reduce noise, lower costs and increase business agility.

**Strong partnership network in Germany:** Computacenter is a provider-agnostic service provider with a network of partners specialized in various workplace services associated with identity and access management, DaaS and unified endpoint management. Some of its major partners include Microsoft, VMware, Citrix, HP, Dell, Lenovo and Splunk. This strong network has helped the company address the peak in demand for devices during the pandemic.

**Large scale of services delivered:** Computacenter is one of the main providers of workplace services at scale in Germany. Its range of services helps manage a wide range of thin clients, PCs, notepads, laptops, smartphones and IoT devices.

## Caution

Most of Computacenter's clients in Germany are under service level agreements. While the workplace services market is increasingly moving towards experience level agreements, the company could further support its customers to get ready for XLA-based contracts.

### 2021 ISG Provider Lens™ Leader

Computacenter focuses on helping clients to source, manage and transform the workplace, mostly for enterprise businesses.

# Methodology

# METHODOLOGY

The research study "ISG Provider Lens™ 2021 Future of Work – Services and Solutions, Germany" analyzes the relevant software vendors/service providers in the Germany market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Future of Work – Services and Solutions, Germany market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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# ISG Provider Lens™ | Quadrant Report
# October 2021



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