ISG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Computacenter

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Hybrid work determines productivity as a state, not a place.

There is a broad consensus that hybrid working will continue to be an important part of our workplace culture. It has been nearly two and a half years since the pandemic began to challenge German businesses to review the extent that corporate culture determines the use of technology. However, we still have some way to go to let the "new normal" arrive in everyday work.

We see an ongoing rise in digitalization efforts, subsequently leading to an increase in the demand for work-from-home and hybrid work settings. Surprisingly, according to Bitkom Research, 26 percent of the German companies surveyed will consider revoking the COVID-19-driven home office option, with 45 percent allowing working from home part of the time. With 40 percent of workers in Germany looking for a different job, Gallup predicts that the German labor market is heading toward Great Resignation, as happened in the U.S.

There is strong demand for hybrid work models that combine the benefits of working from home with the benefits of the office as a social anchor point to stay connected with colleagues and the corporate culture. This can lead to a dilemma because many people say they will quit if forced back into the office, but if enterprises cannot keep them connected, they run the risk of losing them as well. Therefore, leaders in facilitating hybrid work focus on the human moments in the office and communicate the value of such moments.

Digital workplaces emerge into a **state of ongoing change**

Looking at our Dutch neighbors, where the parliament passed a law that makes working from home a legal right, there are strong indications that working from home will continue to be a hot topic in the near future.

While the trend toward hybrid collaboration is ongoing, it requires that new workplace and workspace concepts can be quickly adapted to regulatory governance requirements or industry-specific guidelines such as GDPR or BaFin.

As a result, the importance of information security has also continued to grow as an integral part of enabling work from home.

Digital employee experience is vital for the future of work

The gap in the labor market left by baby boomers is widening, and the number of vacant positions remains high, resulting in a continuing search for suitably qualified workers throughout the labor market. While working from home emerged as an important aspect of the post-pandemic society, workplace diversity has become more complex. Companies now have three additional groups to care for: people onboarded before, during and after the pandemic.

With Generation Z (born between 1997 and 2012) making up 11 percent of the German population, companies cannot simply revert to a post-pandemic state if they want to attract and retain these young talents. They are well-educated, inquisitive and digitally savvy, and they are the first generation that grew up with smartphones, social media and digital business models. That is why Gen Zers are of special interest as consumers and as an inspiration for creating the business models of tomorrow.

Compared to the baby boomers, Gen Zers seek companies that align with their values and beliefs. According to studies, many would not accept a job if the company's values contradicted their own. To be attractive to them, employers must be prepared to adapt to this generation, which involves more purpose-driven and company-wide initiatives about sustainability, the environment, social and governance issues (ESG), like carbon footprint reduction.

The digital workplace is a state, not a result

Thinking about digital transformation from the employees' perspective makes providers workplace leaders. They need to keep up with the demand for a great digital experience, the needs of tech-savvy employees, and the cultural and technical challenges of remote and hybrid work models. The hybrid digital workplace has become an ongoing endeavor, and technology adoption capabilities must, therefore, be seen as a critical success factor to realize its full potential.

ISG observed that the market for technology- or end-user-focused computing-only transactions is declining because organizations are increasingly embracing digital workplace initiatives as part of their overall businesses and digital transformations.

While a hybrid work culture is emerging from digital workplace strategies, we have observed the following trends in Germany:

- Agility and new work initiatives empower teams to allow their members to be autonomous and to self-organize, giving them the choice of the best place to work for collaboration and team outcomes.
- Working from home led to a shift in employees' values and beliefs as they began to rate their employers on how

fairly they treated them in terms of well-being and empathy. Those employers giving appropriate importance to these factors report high employee retention and engagement. Leading companies are, therefore, supporting employee well-being with dedicated digital mental health services to prevent burnout and negative mood swings.

- Digital work is becoming more outcome driven as the attention shifts to managing the state of work, regardless of its place. In response, organizations are increasingly looking for advice on how to adapt and enhance their workplace transformation strategies to enable an adaptive and digitally enabled employee experience.
- The shift toward delivering a better employee experience also results in the evolution of persona-centric experience management. To better understand and provide the best digital workplace experience that suits an employee, companies incorporate relevant experience indicators to create a more dynamic and individual persona approach.
- Given the demand to work from anywhere, companies are strategically investing in technologies that provide an enhanced, adaptable and secure employee experience and the means to measure it. As a result, ISG has also seen a refocus on traditional, technology-focused managed services outsourcing to enable hybrid working, with a focus on supporting a modern, AI-driven and automated digital employee experience. Continuous monitoring and performance analysis of equipment and applications can also support ESG initiatives to keep track of the carbon footprint.
- We see the need for a new level of inclusion, as the pandemic-induced work-from-home model has led to a new level of inequality in the workplace. Working from home increasingly divides the workforce into groups whose jobs allow them to work from home and those whose jobs do not. Thus, organizations are facing the challenge of including both blue- and white-collar workers in their employee-centric workplace thinking. Technology solutions like employee community apps can help create a new sense of belongingness and extend corporate culture into the digital realm.
- Although the legal requirement for employers to offer work-from-home programs expired at the end of March 2022, many employees, especially in the service sector, work from home at least part of the time. To cope with varying office space use, facility management experts work closely with IT and HR to transform the workplace into a technology-enabled smart workplace to enrich the employee experience.
- Despite some skepticism, German businesses have a strong interest in the customer value that the mix of reality and virtuality and emerging technologies like metaverse can offer to consumers and industries. While VR glasses are still limited by expensive and unwieldy hardware, research has shown that training can improve effectiveness, as onboarding activities, for example, could benefit from a new quality of digital proximity and a new level of immersiveness.

These trends have refined the traditional understanding of a digital workplace, because designing a modern digital employee experience is also about finding the right place for the desired work activity. As a result, managing a digital work state necessarily involves interacting with various business functions to provide an enhanced employee experience.

This is explained in Figure 1.

To attract and retain talent for a long term, German enterprises need to deliver and support the promised employee experience by embracing agility, sustainability and value co-creation. As digital workplaces are emerging into a state of ongoing change, employee-centric technology adoption capabilities must be seen as a critical success factor across verticals for managing productivity in hybrid work.

Employee-centric technology adoption should be a critical success factor.

Figure 1: Expanding scope of digital workplace technologies and interaction with other business roles

Digital Workplace Technologies			
Human Resources	**Facilities Management**	**Lines of Business/ Chief Digital officer**	**CXO**
Focus on enhancing experience of current workforce, retaining, and attracting talent	Focus on enhancing experience of physical office premises, adapting to new working model and taking sustainability initiatives	Focus on providing business-level differentiation by supporting frontline workers, improving business processes, enhancing collaboration and digital literacy and improving productivity	Focus on adopting corporate level sustainability initiatives, enhancing corporate communications, integrating diversity and inclusiveness, improving company brand image, events

Source: ISG, 2022

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Leader	Leader	Leader
All for One	Contender	Contender	Contender	Contender
AppSphere AG	Contender	Contender	Contender	Not In
Arvato	Contender	Not In	Not In	Not In
Atos	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Axians	Contender	Not In	Not In	Not In
Bechtle	Leader	Leader	Leader	Not In
CANCOM	Leader	Leader	Leader	Not In
Capgemini	Leader	Leader	Leader	Leader
Cognizant	Product Challenger	Contender	Product Challenger	Not In

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Computacenter	Leader	Leader	Leader	Leader
Deutsche Telekom	Leader	Leader	Market Challenger	Not In
Devoteam	Contender	Not In	Not In	Not In
DXC Technology	Market Challenger	Market Challenger	Market Challenger	Product Challenger
Fujitsu	Leader	Leader	Leader	Leader
Getronics	Not In	Leader	Market Challenger	Market Challenger
HCL	Leader	Leader	Leader	Leader
Hexaware	Product Challenger	Contender	Not In	Product Challenger
Infosys	Product Challenger	Product Challenger	Leader	Product Challenger
Insight	Not In	Product Challenger	Contender	Not In

Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Kyndryl	Product Challenger	Market Challenger	Market Challenger	Contender
Materna	Contender	Not In	Not In	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Not In
Orange Business Services	Contender	Not In	Contender	Not In
TCS	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Telefonica	Not In	Contender	Not In	Not In
Unisys	Leader	Leader	Leader	Leader
Vodafone	Contender	Contender	Contender	Not In
Wipro	Leader	Leader	Leader	Product Challenger

A study on what ISG perceives as the most critical issues in 2022 for **Future of Work.**

- **Workplace Strategy Transformation Services**
- **Managed Workplace Services – End User Technology**
- **Digital Service Desk and Workplace Support Services**
- **Managed Employee Experience Services**

Simplified Illustration Source: ISG 2022

Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 2): the **digital workplace**, which includes the underlying technology; the **physical workplace**, which defines the location or place of work that could be both in-office premises and remote; and the **human workplace** that describes the methods, processes and cultural aspects. This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

The ongoing talent crunch and the "great resignation," as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace), instead it is now omnipresent, integrated and connected with multiple "spaces" that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments, such as the Metaverse, are influencing this trend in their own ways.

Figure 2: ISG Future Workplace Framework

Source: ISG 2022

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises would need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX initiatives with CX goals. A combination of remote and in-office workers would enhance the robust and uninterrupted use of technologies to ensure a seamless experience for customers, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers to leverage a high level of automation and analytics to ensure employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers, and they are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors' perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of the employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises' radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including global, the U.S., the U.K., the Nordics, Germany, Switzerland, Australia, Singapore and Malaysia, Brazil and the U.S. Public sector

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants: Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology, Digital Service Desk and Workplace Support Services, and Managed Employee Experience Services.

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 more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

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

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.

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

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

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

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

Workplace Strategy Transformation Services

Who Should Read This

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

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

Enterprises in the region have started asking their employees to return to offices, due to which they are facing increased attrition rates. Hence, enterprises need a flexible hybrid work model that focuses on productivity and not the place of work, which can ensure employees' work-life balance. However, these enterprises are facing various challenges in terms of work culture, collaboration, well-being and talent retention. Hence, they are looking to optimize operational workloads and costs through modernizing their workplaces. For this, they are considering workplace consulting services to design the post-pandemic workplace architecture and roadmaps for the required transformation.

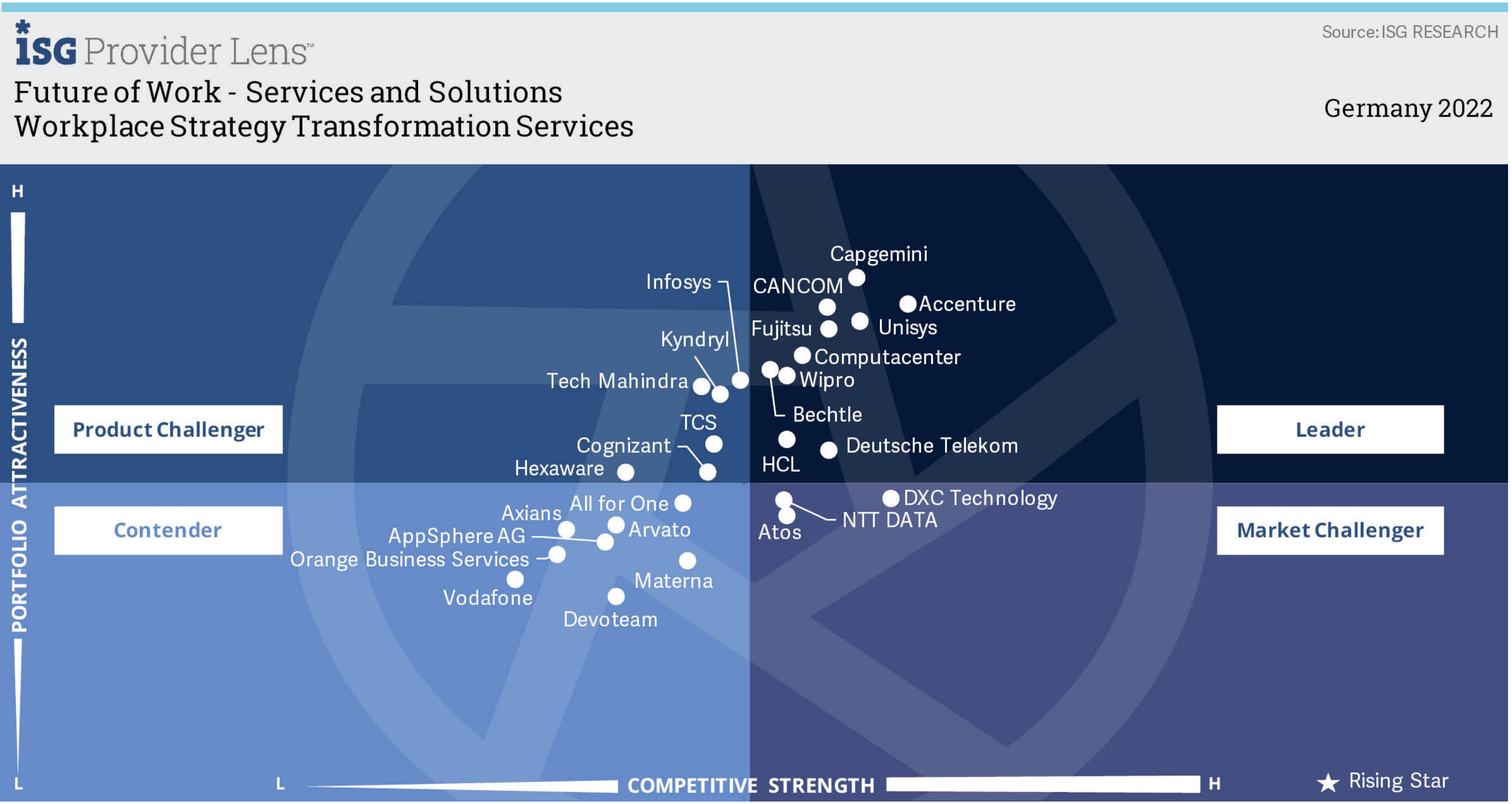
Enterprises are seeking an approach to digital workplaces, which will empower employees and result in a positive employee experience. They want to leverage innovative technologies to create an engaging workplace experience. An employee-centric workplace transformation strategy that helps attract and retain talent, develop workforces and drive organizational changes to drives business value is needed by these enterprises. They are looking to support hybrid collaboration, with security being an overall important concern.

Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers to help them plan and select workplace services. The report also shows how the technical and integration capabilities of a provider are compared in the market.

Digital professionals, including digital transformation, human resource and facility management leaders, should read this report to understand how the providers of workplace strategy transformation services fit their digital transformation initiatives and how they are compared with one another.

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

Cybersecurity professionals 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 workforces.



This quadrant assesses service providers' capabilities to help their clients **strategically** realign their **digital workplace transformation** efforts, with a focus on a modern **employee experience** to provide businesses with the modern, **hybrid workplaces** they demand.

Roman Pelzel

Definition

This quadrant evaluates service providers that offer 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 provided independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating models and enable the desired organizational changes.

Eligibility Criteria

1. Providers should have a vendor-neutral approach for transformation consulting and workplace assessment services. The ability to provide associated managed or implementation/ integration services can be a value add but is not a requirement
2. Providers should be able to define and visualize clients' future of work environment, covering areas such as hybrid working, involving remote and in-office workers, uberization of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX) and associating CX with employee experience (EX), while also enhancing end-user experience
3. Provider should support technology adoption and organizational change/behavior management services through its consulting portfolio
4. Provider should offer solutions to address employee empathy and well-being

For inclusion in the midmarket and small and midsize business (SMB) quadrant in this space, providers should be able to offer all the above for the said market, with at least 50 percent of its clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts can be different across regions and will be explicitly mentioned in the questionnaire.

Observations

Managed services providers are continuously developing and enhancing their capabilities in consulting and strategy services to improve their positioning in this space, as there is an omnipresent demand for transforming traditional digital workplaces into an employee-centric and adaptive digital experience that embraces learning, innovation and growth.

This quadrant continues to evolve from the Workplace Strategy Transformation Service quadrant published by ISG 2021 for Germany and includes specific employee-experience-related elements to enable remote work as well as the transformation of digital workplaces to adopt a hybrid work model.

We saw a slight shift in the positioning of Leaders in this quadrant, with them providing comprehensive consulting and benchmarking, along with strong client case stories for workplace strategy consulting services.

Providers positioned as Contenders in this quadrant have strong service implementation capabilities, and they need to continuously improve their portfolio and demonstrate adequate reference cases to be considered strategic partners for transforming the future of work in German enterprises.

Product Challengers have strong consulting, benchmarking and outcome-oriented service capabilities, even though 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 the growing demand for employee-experience-centric changes in the future of work strategies and the hybrid working needs of organizations.

Of more than 100 companies assessed for this study, 27 have qualified for this quadrant, with 10 being Leaders.

Accenture offers business and strategy advisory services focused on reimagining an employee-centric digital workplace experience in a global context. Combined with continued investment in design-thinking-based research and development, it can help customers achieve both rapid benefits and strategic success.

Bechtle moved into the Leader category this year with its ongoing growth and strong presence in Germany. With solutions from more than 300 technology providers, it can design digital employee experiences tailored to the cultural and business needs of the German market.

Capgemini offers a rich portfolio of relevant workplace strategy transformation services, with a strong understanding of persona-driven and AI-enabled employee experience, supporting clients to address a wide spectrum of future-of-work-related challenges.

CANCOM

CANCOM is a leading partner for digital transformation in the German market, addressing an end-to-end strategy view around new/hybrid work with its analysis method that covers technology, business discipline, people, culture and security.

Computacenter

Computacenter has a long tradition in the German market. The company has an emerging consulting business that helps clients master a holistic and integrated user experience approach by thinking about digital work as a "Digital Me" that is designed for people and engineered for business.

Deutsche Telekom

Deutsche Telekom helps clients of all maturity levels redesign their digital and physical work environments to embrace new work models and has a proven track record of transforming people-centric workplaces.

Fujitsu

Fujitsu has moved into this year's Leader category, providing strong and purpose-driven digital-work-related consulting services to inspire and advise clients on their journeys to evolve the digital workplace by reimaging how people live and work for a more sustainable world.

HCL has moved to the Leader category by offering a holistic approach to workplace transformation and experience consulting, embracing employee journey mapping, user experience measurement and persona segmentation with an intellectual-property-led approach to ensure that expected benefits are realized.

Unisys' consulting service offers clients a design-thinking-based, user-centric approach to support the transformation to the modern workplace. It focuses on workplace equality, driving business and technology consulting to provide organizational change management services so that users are fully engaged regardless of work location.

Wipro moved to the Leader category and is a global company delivering innovation-led strategy, technology and business consulting services, with a strong presence in Germany. It has an experience-driven approach to establish user benefits from strategy and transformation initiatives.

Computacenter

Leader

"Computacenter is a Leader with a deep understanding of people-centric hybrid workforces."

Roman Pelzel

Overview

Headquartered in Hatfield, the U.K., Computacenter offers workplace strategy transformation services under its Digital Me offering. Its consulting proposition focuses on supporting clients in achieving their business objectives by empowering employees with leading digital tools and ecosystems. The company leverages 1,600 consultants to provide technology-agnostic advisory services and has partnerships with leading workplace technology vendors.

Strengths

Well-established presence: Computacenter has a long history of providing workplace services in the German market, with offerings and capabilities for both large enterprise accounts and the midmarket, supporting the unique German industrial structure. Computacenter has reported increased revenue shares from its workplace consulting services. With the rising demand for advisory services, it continues to invest in and expand its consulting offering in Germany, with a strong focus on its holistic Digital Me digital workplace approach.

Analytics approach: Computacenter provides employee-centric workplace analytics backed by a strong technical and architectural background, along with business objectives and maturity assessments. With a goal to maximize business outcomes, it engages with clients on making the hybrid working model a delivered reality.

Co-innovation with clients: Computacenter develops new services and products based on clients' needs to deliver a quantifiable impact, reduce cost, streamline operations and improve end-user experiences.

Caution

Computacenter continues to expand its regional consulting teams and should enhance its capabilities in workplace transformation services by including elements on employee reskilling, learning and well-being. The company should showcase more examples of working beyond IT functions to highlight the value of its consulting services for German clients.

Managed Workplace Services – End User Technology

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating the providers of managed workplace services – end user technology.

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

The hybrid work model and digital transformation are gaining traction across Germany. Enterprises are looking to transform their existing digital workplaces into a modern digital experience. However, IT security and data protection are the main areas of concern for these enterprises. Enterprises also face other challenges, as different platforms, product roadmaps and new technologies can affect employee productivity. To overcome these challenges, enterprises are looking for managed workplace services that can enhance end-user experiences and the security of enterprise-level data.

Enterprises in the region are looking for connected workplaces to improve employee productivity. Predictive analytics and AI for operational efficiency are the main focus areas for these enterprises. Moving to cloud to support the hybrid work model is another trend that is gaining traction. Enterprises are also looking to create modern digital workplaces driven by technology and security at the forefront to deliver modern employee experiences.

Technology professionals, including 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.

Digital professionals, including digital transformation, human resource and facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives and how they are compared with one another.

Cybersecurity professionals 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 workforces.

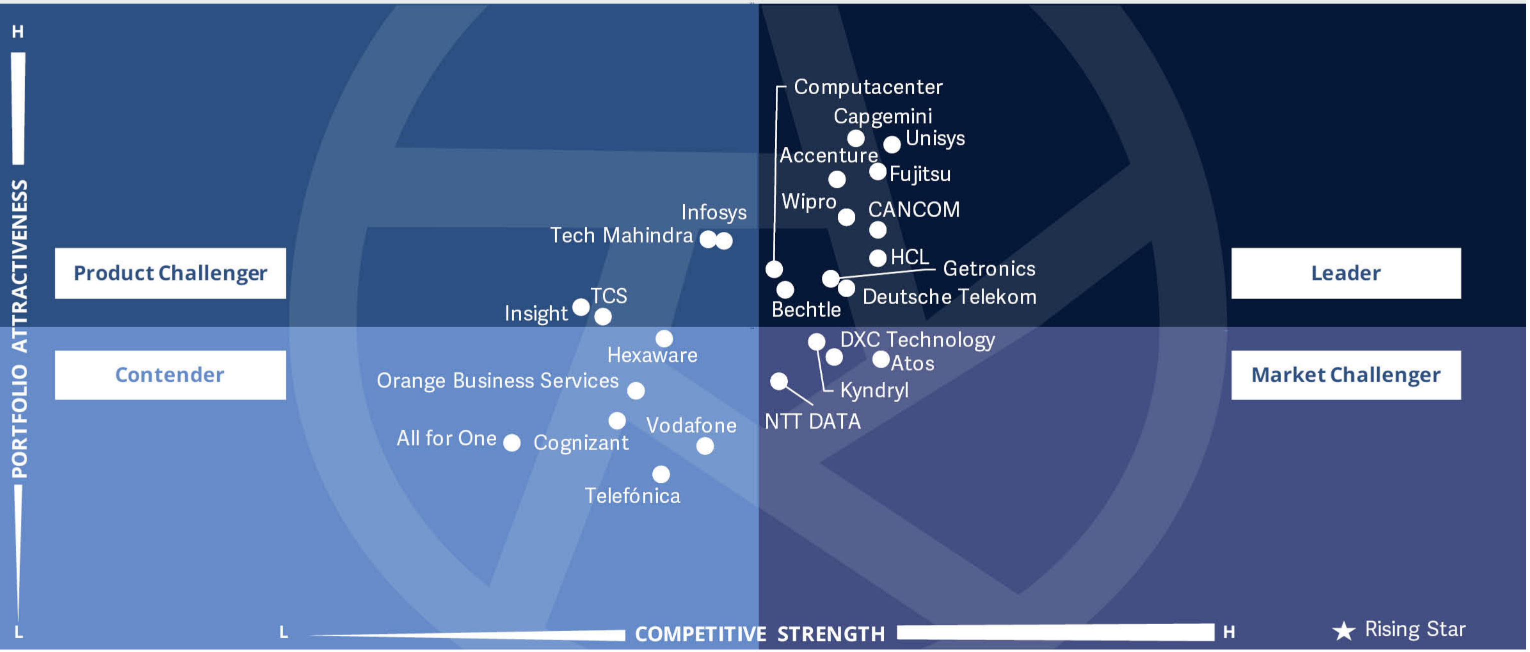
Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed workplace service providers in Germany.

ISG Provider Lens™

Future of Work - Services and Solutions
Managed Workplace Services – End User Technology

Source: ISG RESEARCH

Germany 2022



This quadrant assesses providers that deliver a **modern, employee-centric hybrid workplace experience** to business users by providing end-user-technology-related services such as **endpoint** and **mobility** management services.

Roman Pelzel

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are deployed, provisioned and secured typically by enterprise IT department for employees.

These services include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide endpoint management and security services supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management
2. Provide complete device lifecycle management services, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud
4. Manage devices in the respective countries in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support endpoint security services by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support modern network and unified communication as a foundation for a digital workplace

For the midmarket and small and midsize business (SMB) quadrant in this space, providers should offer all the above with at least 50 percent of clients from the midmarket/ SMB segment. The value of the midmarket/SMB business and associated workplace services contracts deals can be different across regions and will be explicitly mentioned in the questionnaire.

Observations

The 2022 Managed Workplace Services quadrant focuses on end-user technologies, service desk and support are analyzed within a distinct quadrant. End-user-technology-focused services are rather mature and include the lifecycle and provisioning management for all kinds of devices, including virtual desktops, smartphones and physical devices. However, hybrid work is challenging long-established provisioning and management concepts.

Contenders in this quadrant either focus only on aspects of the end-user technology lifecycle or need to strengthen their presence in the German market with customer stories that show they can excel at managing the end-user technology ecosystem to improve business outcomes.

Product Challengers in this quadrant can enable and drive hybrid work by offering a rich portfolio of device-lifecycle-related services and utilizing experience management solutions with predictive analytics and proactive monitoring. To progress, they need to showcase a stronger presence in the German market, highlighting end-user-technology-centric service excellence.

The Market Challengers of this quadrant show a similar end-user-technology-focused service excellence as Contenders but have a stronger market presence in Germany, but in some cases, ISG did not find enough evidence of their ability to provide differentiated end-user technology services.

The Leaders in this quadrant have a strong presence in the German market to deliver and support comprehensive end-user-technology-centric services. They are driving hybrid working and digital employee experiences by offering predictive, analytics-driven experience measurement and improvement.

Of more than 100 companies assessed for this study, 25 have qualified for this quadrant, with 11 being Leaders.

accenture

Accenture's holistic understanding of the hybrid and experiential digital workplace helps its manage digital workplace services, with a focus on technology modernization and the transformation of the workplace, workforce and work environment, helping customers quickly realize the desired benefits.

BECHTLE

Bechtle is a well-established managed workplace service provider in the German market with a comprehensive portfolio of managed workplace services for the requirements of the post-pandemic workplace, including boardroom solutions and mobility management offerings for hybrid workforces.

CANCOM

CANCOM is a leading IT services provider with a long tradition in workplace services in Germany. It supports its customers in enabling hybrid working as the new normal, with a focus on managed services for secure, connected and people-centric workplaces, including device and collaboration management as well as a desktop-as-a-service offering.

Capgemini offers comprehensive and compelling services for the adaptive and experience-centric managed digital workplace, with a focus on connected employees. Its deep understanding of the digital workplace as a way to engage and empower people led to its ongoing growth in the German market.

Computacenter

Computacenter has a strong market presence in Germany and provides a robust portfolio of managed workplace services, helping its customers with the procurement, management and transformation processes associated with digital workplaces. With its Digital Me approach, it adds value by incorporating strong automation and analytic capabilities into its workplace thinking.

Deutsche Telekom

Deutsche Telekom is a strong partner in Germany with a compelling offering of managed digital workplace services. It supports German companies in their new work transformations, focusing on connectivity, device management and security services, as well as designing places and spaces for digitally connected employees.

Fujitsu

Fujitsu has a long tradition in the German market and is a leading partner for the future of digital work. With its strong managed workplace services capabilities, Fujitsu is driving the evolution of modern workplace experiences for the employee-centric, digitally connected hybrid workforce.

Getronics

Getronics leverages its strong partnerships with leading providers of software and hardware solutions to offer compelling digital workplace delivery and support services with AI-enhanced automation and a deep understanding of the requirements, thus adding value through a technology-enabled, secure hybrid working experience for the modern workforce.

HCL provides industry-leading managed workplace services for the German market. HCL is a leading partner in shaping the future of digitally connected workforces with its strong device and mobility management capabilities, powered by advanced automation and analytics, and its deep understanding of experience-centric hybrid workplaces.

Unisys is a leading provider of managed workplace services, with a strong approach to designing experiential and people-driven digital workplace experiences for hybrid workplaces. Unisys offers a broad portfolio of workplace services, including mobility and end-user technology support and complete device lifecycle management.

Wipro is a strong global IT services partner and leading managed digital workplace services provider with cross-industry expertise in digital transformation. With its LiVE Workspace™ platform, Wipro enables the transformation of digital workplaces by providing an intelligent and end-user-centric future-ready workplace experience.

Computacenter

Leader

"With its strong presence in Germany, Computacenter helps source, manage and transform workplaces."

Roman Pelzel

Overview

Computacenter is a British multinational company that provides computer services to public- and private-sector firms. It is based in Hatfield, Hertfordshire, and has 18,000 employees, including 1,600 consultants. It is well-established in the German market with 2.4 million managed devices in 2022, which is a 38 percent rise compared to 2021. It offers managed digital workplace services to German customers through its Digital Me offering, providing local coverage through its 22 German offices.

Strengths

Adding value with a compelling portfolio: Computacenter's Digital Me offering addresses the needs of today's managed hybrid workplaces, including identity and access management, desktop as a service and unified endpoint management. With its advanced, data-driven workplace analytics, Computacenter is embedding experience into its core workplace services. The company also provides on-site and field services to deliver and support hybrid collaboration at scale.

Well-established: With its strong base of major German clients, Computacenter is considered a market leader and a preferred workplace service provider. It helps its clients source, transform and manage digital workplace experiences by leveraging its vendor-agnostic approach to enable, deliver and support digital work. Computacenter is known for its strong strategic partnerships with market leaders to facilitate people-centric digital workplace experiences.

Trusted partner: Computacenter has increased the number of managed devices by 38 percent with the rising adoption of the hybrid working model.

Caution

Whereas Computacenter's Total Experience Management incorporates XLAs into service delivery, pricing strategies do not yet commit to XLA performance. As experience and employee-centricity become more important to the hybrid workplace, Computacenter should start helping enterprises in Germany operationalize XLAs.

Digital Service Desk and Workplace Support Services

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating the providers of digital service desk and workplace support services.

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

Modernizing IT and workplace support services in this hybrid working era is one of the top priorities for enterprises in Germany to deliver exceptional experiences to their employees. Meeting the current remote working needs, reducing the number of service desk calls and bottom-line savings are a few other factors pushing enterprises in Germany to go beyond traditional IT help desk. Therefore, enterprises in this region are emphasizing adopting future-ready workplace support services with cognitive and automation capabilities to deliver seamless user experiences and drive employee productivity.

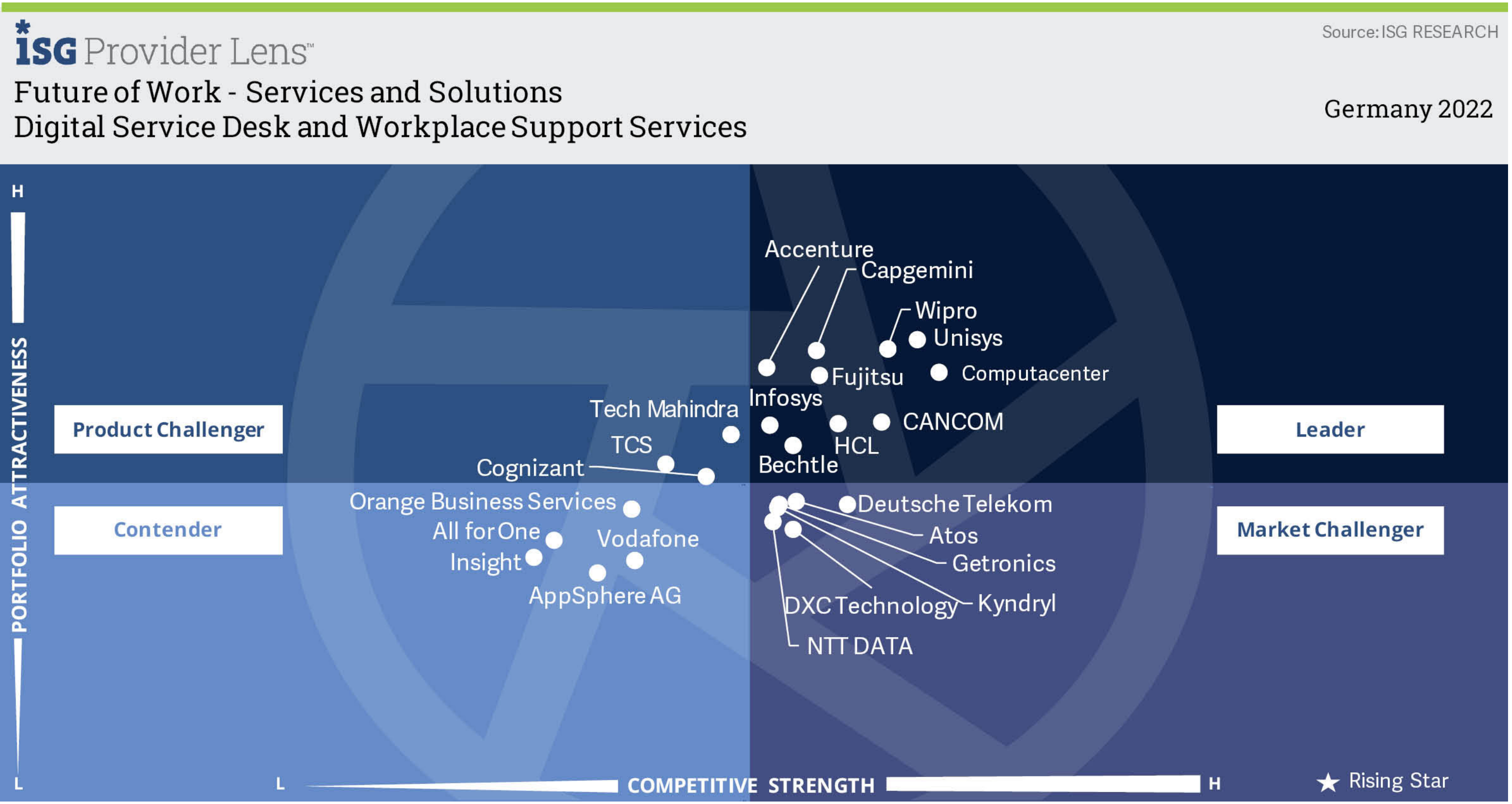
Enterprises in this region are shifting from the reactive to predictive mode to minimize business disruption and are looking for providers offering proactive experience tools to provide support to their employees. Outcome-based pricing, predictive analytics, proactive monitoring, AI-based chatbots, virtual agents, and security and compliance are a few other focus areas for enterprises in Germany.

Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them in modernizing service desk and workplace support services.

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

Digital professionals, including digital transformation, human resource and facility management leaders, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives and how they are compared with one another.

Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of the digital service desk and workplace support service providers in Germany.



This quadrant assesses managed service providers that **enhance and support the digital employee experience** by providing modern **analytics-enabled** and **automated service desk services** as well as **workplace-related support** capabilities.

Roman Pelzel

Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digi-lockers, Uber-style field support and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere and anytime and include device support that encompasses automated proactive technical support and cloud platforms to provision always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

Eligibility Criteria

1. Ability to provide managed service desk and workplace support services through a hybrid workforce, including virtual agents
2. Offer remote and onsite field support plus in-person technical assistance, leveraging augmented reality and virtual reality (AR/VR)
3. Capability to set up and support self-help kiosks, tech bars, IT vending machines and digi-lockers
4. Data-driven enriched analytics to support self-service, automatically resolve tickets and generate actionable insights among users
5. Provide automated and contextualized support for end users, based on their roles and work
6. Ability to quantify workplace support function performance beyond traditional service metrics

Observations

This year's Digital Service Desk and Workplace Support Services quadrant has been separated from the 2021's Managed Workplace Services quadrant to better differentiate between technology-focused and end-user-support-focused services. We see a mature services sector with a significant shift toward providing employee experience support in the context of hybrid work. Providers are continuously improving their capabilities in all support areas with special attention to AI-driven analytics and smart automation.

Contenders have a strong managed services portfolio covering most aspects of modern end-user support. To progress, they need to enhance their capabilities around AI/ML, smart automation and should demonstrate a stronger presence in the German market.

Product Challengers are known for having an excellent portfolio that can leverage the full stack of modern employee experience support technologies. They deliver their services based on good market practices and frameworks such as ITIL. To progress, they need to expand their market presence in Germany.

Market Challengers are well-recognized for offering traditional workplace support and service desk services. However, they need to think about supporting employee experience beyond chatbots and self-service.

Leaders demonstrate a high level of continuity in delivering service excellence even in times of uncertainty, underlining their brand image and strong local footprint in Germany. They offer smart employee experience and workplace support by leveraging contextual AI and a broad range of workplace-centric analytics and automation.

Of more than 100 companies assessed for this study, 24 have qualified for this quadrant, with 10 being Leaders.

accenture

Accenture's digital service desk and workplace support services create a class-leading experience-centric offering using strong automation and predictive analytics for smart next-generation omni-channel user support. It also offers experience-enhancing self-help services such as digital lockers and remote technology support.

BECHTLE

Bechtle offers a wide range of user-centric managed workplace support services with excellent references in problem resolution and response time. With its strong local presence and compelling network of partnerships, Bechtle can deliver and support leading employee experience-centric solutions, including smart meeting room management and 360-degree VR-enabled experiences.

CANCOM

CANCOM has a long tradition in the German market, providing digital service desk and workplace support. It has advanced capabilities in enabling and supporting smart desk sharing concepts, including hybrid meeting room management, making it a premier partner to help clients enable an employee-centric hybrid work experience.

Capgemini

Capgemini is a leading provider of service desk and support services. It leverages advanced knowledge management, analytics and contextual AI, as well as gamification and persona-based personalization, to deliver and support a leading employee support experience for the hybrid workforce. Capgemini is continuously expanding its footprint in the German market.

Computacenter

Computacenter's employee-centric service desk services and cutting-edge digital workplace support have a long tradition in Germany, resulting in its great brand recognition. Its leading Digital Me approach leverages next-generation support capabilities, including AI, smart automation, self-healing and analytic capabilities, for providing leading employee experience support.

Fujitsu

Fujitsu can be considered a leading provider of managed digital workplace services in Germany. With its purpose-driven and experience-centric approach, it places people at the center and builds and supports digital experiences around them. Fujitsu is constantly improving its managed services portfolio, incorporating cutting-edge tools and technologies.

HCL

HCL is a leading global provider of digital service desk and support services with a rich proprietary portfolio of employee- and experience-centric workplace services. HCL provides automation and AI-based contextualized omnichannel support for end users and enables businesses to address the challenges in supporting hybrid workplaces.

Infosys®

Infosys provides end-to-end managed digital workplace services to major clients in Germany, leveraging its Cortex platform powered by analytics and smart automation. It has developed industry-focused support capabilities, leveraging augmented reality, making it a leading partner for modern hybrid workplace solutions.

UNISYS

Unisys is recognized as a leading managed services provider for German enterprises. It has a compelling employee- and experience-centric digital workplace services portfolio, enabling German clients to manage their digitally enabled hybrid workplaces. It keeps evolving its capabilities by leveraging automation, analytics, AR-based support, tech cafés and more.

wipro

Wipro has strong brand recognition, and it delivers its service desk and managed workplace services through its LiVE Workspace™ offering. Wipro leverages proprietary solutions such as VirtuaDesk™ (its smart virtual desktop management solution) as well as VR-powered support services to deliver leading employee experience support to its clients in Germany.

Leader

"Computacenter is well-established in Germany, providing workplace support and service desk services."

Roman Pelzel

Computacenter

Overview

Computacenter is a British multinational company that provides computer services to public- and private-sector companies. It is well-established in the German market with 2.4 million managed devices in 2022, which is a 38 percent rise compared to 2021. It offers managed digital workplace services to German customers through its Digital Me offering, providing local coverage through its 22 German offices.

Strengths

Comprehensive portfolio: Computacenter's Digital Me offering provides services around the full lifecycle for endpoint management, application portfolio deployment and Windows evergreen services. It also includes productivity support for smart voice, video collaboration, enterprise smart spaces and onsite support, covering field and kiosk services and content community services for content and social communities. Its asset lifecycle management services provide asset intelligence, real-time tracking and financial services for desktop-as-a-service enablement.

Smart remote support: Computacenter's remote support services include intelligent support, proactive engagement and self-healing services.

Strong commitment: Computacenter has invested in its major integration center in Kerpen, adding an additional 29,500 square meters to support the company's continued growth. With a total capacity of approximately 53,000 m2, this is a strong commitment to the German market, underlining its position as a leading managed service provider for digital hybrid workplaces in Germany.

Caution

Computacenter could showcase more references of how AI, machine learning and smart automation enhance end-user self-service experiences, contributing to employees' digital dexterity. While many German customers still rely on SLAs, there is a shift toward experience-level agreements (XLAs). To strengthen its leadership position in this quadrant and gain thought leadership in this field, Computacenter should start to support its German customers in adopting and operationalizing XLAs.

Managed Employee Experience Services

Who Should Read This

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

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

Enterprises globally as well as in Germany are trying to cope up with the COVID-19-pandemic-related challenges and are demanding resilient digital workplace strategies. These enterprises are focusing on delivering a personalized and superior digital experience to employees anywhere, anytime and on any device, as employee experience is now a critical element for driving business outcomes. Focusing on a modern digital employee experience also helps attract and retain talents. Resolving employee issues quickly, enhancing employee productivity, empowering collaboration regardless of place with flexible working models and creating smart workspaces are a few other focus areas for these enterprises.

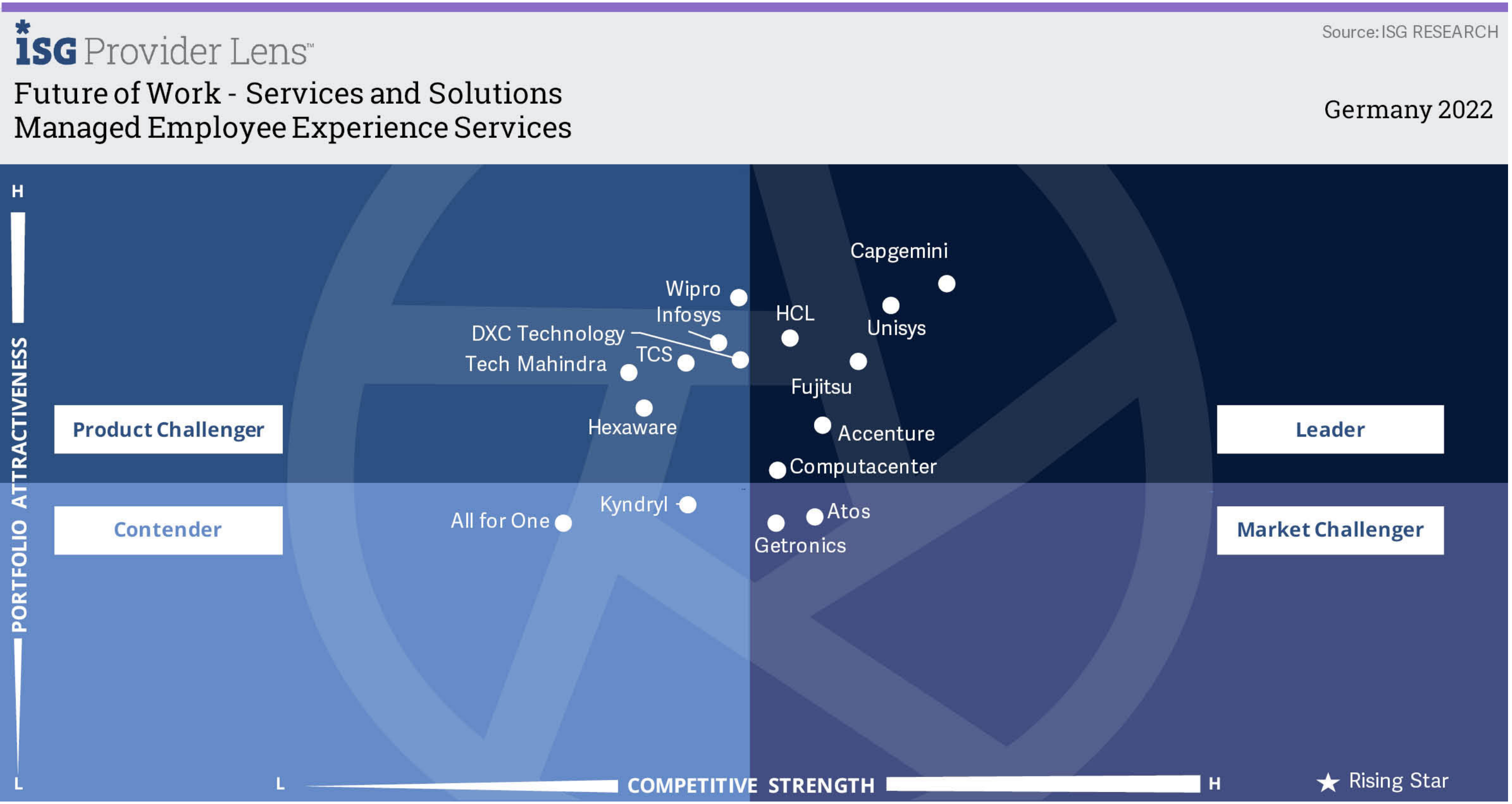
Enterprises in Germany focus on delivering differentiated employee experiences and outcomes by mapping XLAs with employee personas. These enterprises are, therefore, looking for service providers that can offer an integrated approach and help them manage employee's digital experience throughout the employee lifecycle.

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

CHRO leaders should read this report to know which providers are leading in managing experience for employees in this new age of hybrid working, from the talent retention, upskilling and recruitment perspectives.

Digital professionals, including digital transformation leaders and human resource and facility management leaders, should read this report to understand how the providers of managed employee experience services fit their digital transformation initiatives and how they are compared with one another.

Procurement professionals, including 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 Germany.



This quadrant assesses service providers that can deliver managed **employee experience** services, helping enterprises **understand and drive technology adoption and productivity** from an end-user perspective, with hybrid work in mind.

Roman Pelzel

Definition

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

Eligibility Criteria

1. Ability to provide services that directly correspond to user experience associated with device and app access, plus team collaboration, human augmentation to a digital workforce. Examples of these services include virtual agents, line-of-business as employee experience, user productivity and digital dexterity services
2. Offer a seamless experience for remote-working employees and part-time workers that include innovative engagement services or solutions
3. Should have at least 50 percent of its clients leveraging experience level agreements (XLAs), related key performance indicators (KPIs) and at least 10 percent of clients, globally, with XLA-based actual pricing (risk and reward) engagements
4. Provide managed unified communications and collaboration (UCC), user behavior analysis and user experience measurement beyond workplace technology, thus extending smart workplace services to other business functions such as HR and operations
5. Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces
6. Offer smart facilities and physical on-premises services that support intuitive capabilities such as hot desking, health assessment and a customized and contextualized experience with smart devices-supported workplace
7. Offer services to enhance employee digital dexterity and support technology democratization initiatives such as low-code/no code development

Observations

This is an emerging quadrant carved out from the managed services space to better address experience-related offerings. Noteworthy is that there is currently no common understanding of what employee experience is and how to measure it.

As experience is always based on subjective perception and evaluation, the psychological side of technology use can fall short if the focus is merely on aggregating technology data.

In contrast, sentiment-based analytics must be careful not to overfocus on employee expectations when considering employees' digital experiences.

Providers need to ensure they understand the techno-social realities of German enterprises, including data privacy and security.

Contenders in this quadrant provide basic employee experience services, leveraging automation and analytics. To progress, they must develop experience-related capabilities beyond device app performance and service satisfaction.

Product Challengers have comprehensive capabilities covering employee experience through the integration of technology performance, workplaces and enterprise applications.

Market Challengers are well-established providers and should showcase more capabilities in enabling experience for specific areas in the future of the work model.

Leaders have proven a deep understanding of people-centric experience, providing differentiated offerings covering diverse aspects of enhancing employee experience and well-being in hybrid workplaces.

Thought leadership is strong evidence for being a Leader in this quadrant. R&D with the early prototyping of new technologies impacting the future of work, such as metaverse, additionally emphasizes leadership.

Of more than 100 companies assessed for this study, 16 have qualified for this quadrant, with six being Leaders.

accenture

Accenture has become a strong Leader in this year in the managed employee experience services quadrant. Its analytics-based experience management capabilities, along with its metaverse-focused job offerings, stand out as a strong differentiator. It also offers strong physical workspace transformation capabilities.

Capgemini

Capgemini has a strong portfolio of managed employee experience services, with proven methodologies and tools to quickly realize benefits for its clients. It is ready for the hybrid-enabled digital work experience and is continuously improving its offerings. Experience analytics and citizen developer services are its key differentiators.

Computacenter

Computacenter has been rated a Leader in this year's quadrant, as its Digital Me offering becomes more mature with a strong focus on incorporating employee experience into the hybrid workplace. The outlook for integrating sentiment analytics and technical metrics is promising.

Fujitsu

Fujitsu delivers managed employee experience under its purpose-driven Work Life Shift approach, incorporating individual, business and societal demands to provide clients with tailored services to align workforce, culture and business demands. Personas, journey mapping and outcome centricity are differentiators for its leading experience services supported by a strong partner ecosystem.

HCL

HCL's strong services portfolio, addressing several relevant areas of the employee experience domain, such as engagement, productivity and digital dexterity, makes it a Leader. HCL has strong innovative capabilities around metaverse-based onboarding and VR-driven training and education.

UNISYS

Unisys provides compelling thought leadership around evolving XLAs into a persona-centric and holistic experience measurement. Unisys is a Leader because it was an early adopter of digital experience monitoring technology, with a strong portfolio of managed employee experience services that leverages and collects experience-related information from every end-user touchpoint.

Computacenter

Leader

"Computacenter leads with its experience-centric Digital Me offering and strong presence in Germany."

Roman Pelzel

Overview

Headquartered in Hatfield, the U.K., Computacenter offers experience-centric workplace services under its Digital Me offering. It helps clients achieve their business objectives by enhancing their employees' digital experience with leading digital tools and ecosystems, leveraging smart automation and analytics. Computacenter provides technology-agnostic advisory and has partnerships with leading technology vendors. It has a recognizable market presence in Germany with a strong local footprint.

Strengths

Outcome centric: Computacenter's experience management offering shifts the focus from technology to experience. From defining the service outcome to addressing the right experience level and creating a fitting XLA, its strong XLA management capabilities help customers understand the quality of their users' experience with IT services and make it the basis for informed decisions.

Proactive digital experience: Computacenter offers people-centered solutions, leveraging strong analytics, AI and automation capabilities, to provide a proactive digital experience across the domains of workplace, applications and data, the cloud and data centers, networking and security.

Digital dexterity: Computacenter leverages its leading workplace expertise to ensure that users are effectively supported in all stages of digital transformation by applying carefully selected adoption and engagement activities. As a result, they experience themselves as more self-efficacious while co-creating value for their organizations, which contributes to employee satisfaction and retention.

Caution

Computacenter traditionally has a strong local footprint in Germany and is one of the Leaders in this year's quadrant, with its experience-driven Digital Me offering. However, it should show more evidence of the improvements its experience management is achieving for its German clients. To strengthen its leadership position, it must continue to build its capabilities in experience-based market trends such as sentiment analysis, in-flow learning and employee well-being solutions.

Appendix

The ISG Provider Lens™ 2022 – Future of Work - Services and Solutions research study analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

Lead Author

Roman Pelzel
Principal Consultant

Roman Pelzel is a thought leader and trusted advisor with more than 25 years of experience in leading and facilitating digital workplace strategies and technologies as well as ITIL and value-driven service management in different business areas, including insurance, automotive, utilities and e-commerce.

As part of ISG's Collaboration and Experience Solution, he has made it his mission to sustainably connect talent and technology by helping organizations transform their digital workplaces into a people-centric digital work state experience.

Roman is a recognized expert in workplace management technologies and workplace rollouts. He contributes to his clients' success with his comprehensive expertise gained in various roles, combining leadership, coaching and technical skills.

Roman holds graduate degrees in laws and economics with a focus on service and information management.

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Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions and Cybersecurity Solutions and Services. Sonam comes with five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting on research projects.

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

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

For more information about ISG Provider Lens research, please visit this webpage.

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ISG Provider Lens™

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