

Future of Work (Workplace) - Services

A research report comparing provider strengths,
challenges and competitive differentiators



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| | |
|------------------------------|----|
| Executive Summary | 03 |
| Provider Positioning | 10 |
| Introduction | |
| Definition | 13 |
| Scope of Report | 15 |
| Provider Classifications | 16 |
| Appendix | |
| Methodology & Team | 39 |
| Author & Editor Biographies | 40 |
| About Our Company & Research | 42 |

| | |
|--|---------|
| Employee Experience (EX) Transformation Services | 17 – 23 |
| Who Should Read This Section | 18 |
| Quadrant | 19 |
| Definition & Eligibility Criteria | 20 |
| Observations | 21 |
| Provider Profile | 23 |

| | |
|--|---------|
| Managed Workplace Services – End-user Technology | 24 – 30 |
| Who Should Read This Section | 25 |
| Quadrant | 26 |
| Definition & Eligibility Criteria | 27 |
| Observations | 28 |
| Provider Profile | 30 |

| | |
|---|---------|
| Digital Service Desk and Workplace Support Services | 31 – 37 |
| Who Should Read This Section | 32 |
| Quadrant | 33 |
| Definition & Eligibility Criteria | 34 |
| Observations | 35 |
| Provider Profile | 37 |

Report Author: Roman Pelzel

The AI revelation starts to unfold in the workplace as hybrid work evolves to become just work

Hybrid work shifts paradigms

The ongoing Russia-Ukraine conflict and the significant inflation continue to cause costs to surge across various industries. Climate protection agreements and changed legal perspectives force companies to evolve their business models comprehensively. Concurrently, organizations in almost all sectors are grappling with a growing scarcity of skilled workers, keeping recruitment and retention at the top of the priority list. With “climate quitting” on the rise, where employees leave their jobs due to dissatisfaction with their company’s environmental, social and governance (ESG) initiatives, ESG strength is becoming a distinct competitive advantage in the battle for talent. Skills shortages and changing values underline the evolving dynamics in the workforce,

particularly within Generation Z, prioritizing flexibility, autonomy and digital innovation. At the same time, enterprises recognize the potential benefits of hybrid work, including reduced overhead costs, increased productivity and access to a broader talent pool. Businesses are challenged to manage the rapid organizational and leadership culture changes to keep up with the pace, necessitating robust change management for the shift toward hybrid work.

Organizations need to tailor hybrid working models carefully to avoid disengagement and increased stress

However, in Unispace’s latest global study on returning to work, researchers discovered that mandatory return-to-office policies impact recruitment for Germany. Thirty-four percent of employers (one of the highest rates in Europe) say they have struggled to attract talent since the introduction of such a policy. Establishing and maintaining work relationships can be more challenging in a hybrid workplace. In its recent State of the Global Workplace report, Gallup researchers found that

Hybrid work
challenges
organizations to
reinvent the
office **while coping**
with flexibility
demands.



72 percent of workers are quietly quitting in the EU, while in Germany, only 16 percent consider themselves engaged. This significantly low rate not only means lost productivity but also psychologically disconnects employees from their employer, which makes employees more likely to be stressed and burnt out than engaged workers because they feel lost and disconnected from their jobs. A strong insight from the past years indicates that it is less about where you work and more about how you work. Thus, it is remarkable that the researchers found a light tendency that today's hybrid work models seem to cause more stress and are less thriving among employees compared to exclusively remote or entirely onsite models. According to Gallup, 16 percent and 41 percent of those quietly quitting cite well-being at work and culture or engagement as reasons, respectively.

Particularly regarding flexibility requirements, ISG sees that many organizations are turning to providers to find appropriate strategies to balance the expectations of new employees and the onboarding experience.

Hybrid work goes beyond the provision of technology at one's permanent residence

The challenge of implementing hybrid work goes beyond the provision of technology such as web conferencing systems, collaboration platforms, or setting a maximum number of home office days per week. The transition to hybrid work means a profound change in the social and technical foundations of collaboration. This transition requires conscious and purposeful planning and design, and innovation partners that can drive and manage change.

With hybrid work, the idea of working from home also transcends working from one's permanent residence, making the efforts needed to support and collaborate even more complex. We are seeing a cultural shift from the Taylorist paradigm of corporate knowledge work, which demands physical presence and strict work schedules to outcome-focused, agile and self-organizing approaches.

Corporate real estate management must keep up with the pace of change

However, adapting to this new reality entails its challenges. Traditional German businesses, known for their preference for established structures and face-to-face interactions, may struggle to embrace the hybrid work model. Moreover, the need to transform physical office spaces into areas that employees want to inhabit, as opposed to having to, represents another hurdle. It's not just about enabling remote work; it's about creating an environment that supports collaboration, creativity and connectivity, irrespective of physical location, which goes clearly beyond the traditional desk.

As hybrid work becomes the norm, the role of corporate real estate management is also evolving. With an increase in office space vacancies, the focus is shifting toward flexible and adaptive use of spaces. Enterprises need to rethink their real estate strategies to accommodate the evolving demands of the workforce, fostering spaces that encourage collaboration and creativity while enabling remote work.

Outcome-based experience level agreements remain of great interest

Managed service providers are facing a fundamental shift in traditional norms and expectations of work, leading to more people-centered approaches in corporate employee experience and workplace well-being. However, this also requires a shift in thinking in terms of moving from traditional service level agreements (SLAs) to outcome-based experience level agreements (XLAs) that should also facilitate a safe space for innovation and experiments.

Leading providers accept this challenge and evolve and adapt, leveraging smart technology to create people-centric flexible, collaborative and productive work environments for German enterprises while providing the highest levels of security and compliance. Although there are challenges, German businesses that embrace this change will be well-positioned to attract and retain the talent needed to succeed in the future of work, focusing on employee experience and well-being in the workplace.



Co-piloting the workplace with AI calls for safeguards

The year 2022 ended with a historical moment when AI in form of ChatGPT became easily accessible to everyone. It delivered a new yet obvious customer value through a supercharged smart chatbot-like experience that promises an enhanced human-machine interaction of unprecedented quality.

Major tech companies such as Microsoft with Microsoft 365 Copilot and Google with its Duet AI for Google Workspace, quickly integrated this technology into their offerings. This triggered a trend, and today, almost all unified communication and collaboration (UCC) platforms have generative AI or have it on the priority roadmap to stay ahead of the market. Its ability to provide intelligent, human-like insights sets it apart. It could herald the biggest technological shift since the introduction of the graphical user interface or the dawn of the mobile age with the launch of Apple's iPhone in 2007.

Generative AI's rapid adoption spans consumer and enterprise markets, reflecting its potential

to revolutionize the workplace. From IT service assistance to enhancing individual productivity, its applications are vast, and generative AI's disruptive power for knowledge workers feels comparable to the automation of manual production lines in manufacturing. However, technology providers and the public are called upon to ensure AI development, propagation and utilization is ethical and inclusive. Europe and Germany, in particular, must be careful to keep up with this new megatrend because, to date, all the leading drivers of generative AI are U.S.-based companies.

AI offers great potential for differentiation and is often effective in enterprise settings

In the German market, both enterprise clients and service providers are eager to leverage this powerful, emerging technology to create a compelling digital workplace experience that can boost productivity if enterprises handle AI anxiety with care. This seems to be one reason why leading software vendors underline that their AI offerings are not competing with workers but acting as "co-pilots" by augmenting human capabilities.

Co-piloting the workplace experience by using AI offers great potential for differentiation, as there are several general reasons why these types of solutions are often effective in enterprise settings. Some of them are listed below.

- **Efficiency:** AI co-pilots can automate routine tasks, saving employees time and allowing them to focus on more complex or strategic work.
- **Accuracy:** By reducing the potential for human error in tasks, such as data entry, AI co-pilots can help ensure a higher degree of accuracy.
- **24/7 availability:** Unlike human employees, AI co-pilots can work round the clock, providing constant support and immediate responses when needed.
- **Learning and adaptability:** Machine learning (ML) algorithms allow these systems to improve over time, learning from previous interactions to provide better service and support.

- **Personalized user experiences:** AI co-pilots can leverage data to provide personalized experiences, which can be particularly valuable in areas such as customer service or employee onboarding.
- **Data analysis:** AI co-pilots can process and analyze large amounts of data quickly, helping businesses gain insights and make data-driven decisions.
- **Scalability:** AI co-pilot solutions can be scaled up or down according to business needs, making them a flexible solution for enterprises of varying sizes.

In addition to these significant benefits, significant challenges exist, such as the need for ongoing training and data management, counteracting bias in AI algorithms and addressing privacy and security concerns. Successful implementation of AI in organizations requires careful planning and a clear understanding of the potential benefits and challenges. In this year's study, we see a significant commitment and investment by leading providers in the advancement of smart capabilities.



Integration of AI and AR into the workplace is not merely about technology

Successfully integrating AI and AR into the workplace is about more than technology. It requires a comprehensive strategy that includes upskilling employees, setting up the necessary infrastructure and maintaining a continuous feedback loop to ensure these technologies are truly enhancing the work experience.

Despite the challenges, German enterprises have the opportunity to lead the way in the AI-enabled hybrid work revolution. Through strategic partnerships with innovation experts and a steadfast commitment to enhancing the employee experience, these companies can transform the face of work in the modern age.

Supporting the future of work means empowering employees to thrive

The role of IT support has never been more critical. IT support is no longer merely troubleshooting technical issues but enabling productive, efficient and secure digital work environments.

In light of AI, supporting the future of work demands being predictive and proactive,

data-driven and smart. This requires anticipating potential issues and addressing them before they disrupt productivity. It involves monitoring the digital environment, ensuring systems are running smoothly and providing regular updates and upgrades to keep tools efficient and secure while keeping an eye on the digital employee experience.

IT support must be even more accessible and responsive in a hybrid working model

IT support needs to be accessible and responsive. In a hybrid work model, where employees may be working from different locations and at different times, support for employees' digital experience must be available when and where employees need it. Good digital experience requires flexible and adaptive support models, including self-service options, AI-powered chatbots and remote support. All shift-left strategies empower the employees' digital dexterity and self-efficacy, leading to a more inclusive workplace experience.

AI and large language models (LLMs), like OpenAI's GPT-3 or GPT-4, will play significant

roles in supporting and enhancing the digital workplace and contributing to the employees' digital dexterity in various ways including:

- **Automated customer service:** AI can handle many customer service interactions. AI chatbots or virtual assistants can respond to common inquiries, troubleshoot simple issues and provide information around the clock. They can reduce wait times, improve efficiency and free up human staff to handle more complex issues.
- **Knowledge management:** LLMs can understand and generate human-like text, allowing them to search vast knowledge bases and provide accurate information in response to queries. They can assist in managing and navigating large amounts of information generated in a digital workplace, improving the efficiency of information retrieval.
- **Onboarding and training:** AI and LLMs can facilitate onboarding and training processes by providing personalized learning materials, answering common questions, and offering interactive learning experiences.

This can help new employees adjust to the company culture and understand their roles more effectively.

- **Predictive analysis and maintenance:** AI algorithms can analyze patterns in data to predict potential system issues before they occur, enabling proactive maintenance. They can also help analyze patterns in IT support tickets to identify common issues and develop targeted solutions.
- **Employee support:** AI-powered tools can assist employees with scheduling, task management and other administrative tasks. LLMs can provide context-specific suggestions, reminders and other productivity-enhancing functions.
- **Enhanced security:** AI can enhance cybersecurity measures through anomaly detection, identifying unusual patterns that might indicate a security breach and responding swiftly to neutralize threats.
- **Cultural fit assessment:** AI and LLMs can help assess potential hires' cultural fit by analyzing their responses during interviews or assessments against the organization's



defined cultural values and practices, although with comprehensive precautions taken against biased algorithms.

These technologies can streamline processes, improve productivity and enhance the user experience in a digitally enabled workplace, reflecting the organization's commitment to innovation, efficiency and employee-centricity. However, it is crucial to adopt these technologies with careful consideration of the ethical implications, including data protection and transparency. As these tools continue to evolve, they will play an increasingly important role in shaping the digital workplace and, by extension, the corporate culture.

Digital workplaces evolve the corporate culture into the digital realm

Just as the physical office once reflected a company's values and norms, the digital workplace now plays a pivotal role in representing and fostering an organization's culture.

This makes it obvious that the digital workplace transcended the state as just a set of productivity tools; it has become an

environment that facilitates communication, collaboration and productivity. It reflects how an organization values its employees, approaches work and embraces innovation. As such, the digital workplace has become an integral part of the corporate culture, embodying the company's ethos and driving its practices.

In a hybrid work model, the importance of the digital workplace becomes amplified. With employees dispersed geographically, the digital workplace serves as a unifying platform. It helps foster a sense of belonging and connection, creating a shared virtual space where culture can thrive. Moreover, it provides a conduit for open communication, fostering transparency and trust.

One should not underestimate the power of first impressions in hybrid/remote onboarding

The employee-centric digital workplace models also play a crucial role in onboarding new employees. It provides a platform to introduce new hires to the company culture, set expectations and provide resources for their role. In the case of remote onboarding, the digital workplace is also the first point of

contact where the new employee's expectations meet the corporate culture presented.

Therefore, organizations have to see the digital workplace as an essential tool for immersing new hires in their values, norms and ways of working. By creating an environment that embodies a company's values and fosters its desired culture, businesses can engage and empower their employees, thereby driving productivity, satisfaction and retention.

Implementing a digital workplace that accurately represents and fosters a company's culture is complex. It requires careful selection and integration of digital tools that align with the company's values. Moreover, it involves fostering a digital mindset across the organization, promoting digital literacy and encouraging engagement and participation.

However, in the age of digital transformation, corporate culture is not limited to physical office spaces, practices and mindset anymore. It encompasses all assets, which makes creating a digital culture that embodies a company's values, fosters engagement and drives innovation in the digital realm paramount.

Kick-starting the relationship between businesses and providers would need a digital manifesto

To kick-start the relationship between businesses and providers, we recommend agreeing on a common manifesto to enable, drive and manage the shift toward hybrid work, fostering innovation, engagement and shared success based on trust and esteem. Looking at cooperations between clients and providers, ISG has identified the following success indicators of a winning partnership:

- **Embrace digital transformation:** View digital transformation as an opportunity to drive innovation, enhance efficiency and improve customer and employee experiences; commit to using technology to achieve business goals and create value while taking responsibility for people, society and the environment.
- **Champion open communication:** Foster a culture of open communication and transparency and using digital tools to facilitate dialogue, encourage feedback and share knowledge.



- **Prioritize security and privacy:** Recognize the critical importance of security and privacy in the digital age, implementing robust security measures, respecting privacy laws and educating employees about safe digital practices.
- **Promote flexibility and autonomy:** Value flexibility and autonomy, leveraging digital tools to enable flexible work arrangements and empowering employees to manage their work effectively.
- **Foster continuous learning:** Foster a culture of continuous learning and growth and providing digital resources and tools for learning and encouraging employees to upgrade their skills and knowledge.
- **Focus on user experience:** Prioritize user experience in digital touchpoints, aiming to create an intuitive, efficient and enjoyable digital environment to attract and retain talent.

Key Trends in Managed Workplace Services in Germany

- **Embracing cloud technologies:** German companies are increasingly embracing

cloud-based solutions for their flexibility and scalability. This trend allows businesses to adapt quickly to changing needs, reduce operational costs and enhance collaboration and productivity. It is particularly evident in the use of software as a service (SaaS) and infrastructure as a service (IaaS) models.

- **Rise of cybersecurity measures:** As businesses continue to integrate digital solutions, the need for robust cybersecurity measures has significantly increased. German businesses are acknowledging the growing threats of cyberattacks and data breaches by investing more in advanced cybersecurity solutions. They are taking steps to ensure compliance with regulations, such as the General Data Protection Regulation (GDPR), making cybersecurity a key trend in managed workplace services.
- **Increased use of AI and ML:** German companies are increasingly leveraging AI and ML technologies to improve their operations and services. These technologies are used to automate repetitive tasks, provide predictive insights, enhance customer service through

chatbots and much more. Adopting AI and ML technologies is reshaping the business landscape and is a major trend in the industry.

- **Focus on employee experience:** With the growing realization that enhancing the employee experience is the key to improving customer experience, companies are investing in tools and technologies to make processes more efficient, encourage collaboration and improve the workplace. This includes implementing intuitive and user-friendly digital tools and promoting a healthy work-life balance, particularly in remote and hybrid work arrangements.
- **Sustainability:** An increased emphasis on sustainability in IT operations in Germany drives companies to seek ways to reduce their carbon footprint, from using energy-efficient data centers to promoting responsible e-waste disposal. Regulatory pressures and a genuine commitment from companies to contribute to a more sustainable future drive this trend.

Key Trends in Employee Experience (EX) Transformation Services in Germany

- **Personalization of employee experience:** There is a growing focus on personalizing the employee experience to increase engagement and retention. This involves using dynamic personas, AI and data analytics to understand individual needs, preferences and work styles and tailor services accordingly to deliver enhanced customer experience by driving employee experience.
- **Upskilling and reskilling initiatives:** With the rapid technological evolution, businesses are emphasizing upskilling and reskilling employees to adapt to new technologies and roles. This is also in response to the German Qualifications Framework (DQR) that encourages lifelong learning and skill enhancement.
- **Incorporating sustainable IT practices:** Sustainable IT, including energy-efficient hardware, cloud solutions and e-waste management, is becoming a vital part of EX transformation services. This aligns with



Germany's strong focus on sustainability and environmental protection and influences employee satisfaction and brand image.

Key Trends in Managed Workplace Services – End-user Technology in Germany

- **Hybrid work models and remote work infrastructure:** German businesses are embracing hybrid work models, blending in-office, at-home and on-the-go work environments. This is reflected in a significant investment in end-user technology that supports these models, such as collaborative software, VPNs, cloud-based applications and cybersecurity solutions. EU campaigns, such as The “European Charter for Digital Workplace Wellbeing, further stimulate this trend”.
- **AI and ML adoption:** AI and ML are being integrated into end-user technology to facilitate automated processes, better data management and more efficient work models. These tools provide personalized, context-aware interfaces that simplify workflows and enhance productivity.

- **Focus on cybersecurity and data protection:** In line with GDPR and the German Federal Data Protection Act (BDSG), there is an increased focus on robust cybersecurity measures and data privacy. This is crucial as remote and hybrid work models open up new vulnerabilities that businesses need to address.

Key Trends in Digital Service Desk and Workplace Support Services in Germany

- **Omnichannel IT support:** Businesses are transitioning from traditional helpdesk models to omnichannel support platforms that support hybrid work. These provide users with a seamless experience across various communication methods (e.g., emails, chatbots, social media), to enhance user empowerment and experience with a consumer-grade experience with internal IT users in mind.
- **Implementation of AI-powered service desks:** The use of AI and ML in service desks is increasing, facilitating automation and enhancing the effectiveness and efficiency of support services. These include

automated chatbots, predictive analytics, self-service portals and AR-empowered field services.

- **Emphasis on performance metrics:** Businesses are focusing on measuring and optimizing performance metrics, such as automation benefits, return on investment, user adoption and first-level resolution to ensure service desk efficiency and effectiveness. They are incorporating XLAs and outcome-focused indicators.

Incorporating AI into the workplace is not merely about the technology. It requires a holistic strategy, focused on enhancing the work experience while managing the transition efficiently and avoiding AI anxiety.




Provider Positioning

Page 1 of 3


| | Employee Experience (EX) Transformation Services | Managed Workplace Services – End-user Technology | Digital Service Desk and Workplace Support Services |
|-------------------|---|---|--|
| Accenture | Leader | Leader | Product Challenger |
| All for One Group | Not In | Contender | Contender |
| Atos | Leader | Product Challenger | Product Challenger |
| Axians | Not In | Not In | Contender |
| Bechtle | Leader | Leader | Leader |
| CANCOM | Leader | Leader | Leader |
| Capgemini | Leader | Leader | Leader |
| Cognizant | Product Challenger | Product Challenger | Product Challenger |
| Computacenter | Leader | Leader | Leader |
| Datagroup | Not In | Not In | Contender |



 Provider Positioning

| | Employee Experience (EX) Transformation Services | Managed Workplace Services – End-user Technology | Digital Service Desk and Workplace Support Services |
|------------------|--|--|---|
| Deutsche Telekom | Market Challenger | Market Challenger | Market Challenger |
| DXC Technology | Leader | Leader | Leader |
| Fujitsu | Leader | Leader | Leader |
| Getronics | Market Challenger | Product Challenger | Market Challenger |
| HCLTech | Leader | Leader | Leader |
| Hexaware | Product Challenger | Product Challenger | Not In |
| Infosys | Product Challenger | Product Challenger | Leader |
| Kyndryl | Product Challenger | Product Challenger | Product Challenger |
| Lenovo | Product Challenger | Rising Star ★ | Product Challenger |
| Netgo | Contender | Contender | Contender |



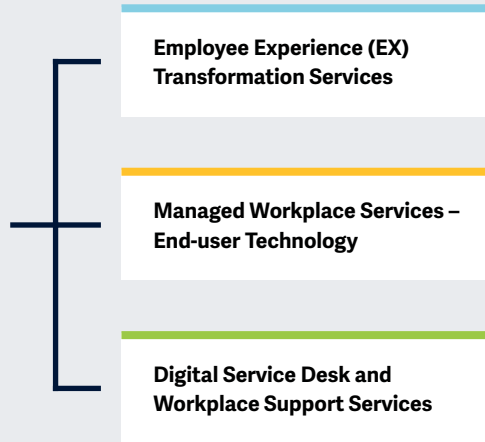
 Provider Positioning

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



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

Simplified Illustration; Source: ISG 2023



Definition

From the future of work perspective, 2023 will be a year of stabilization. After the disruptions and challenges posed by the pandemic world and the “great resignation” that followed, global businesses have started adjusting to new realities and acknowledging the importance of employee experience (EX). EX transformation is now every business leader’s priority, along with adapting to changing customer demands, evolving technologies and becoming more conscientious and environmentally focused.

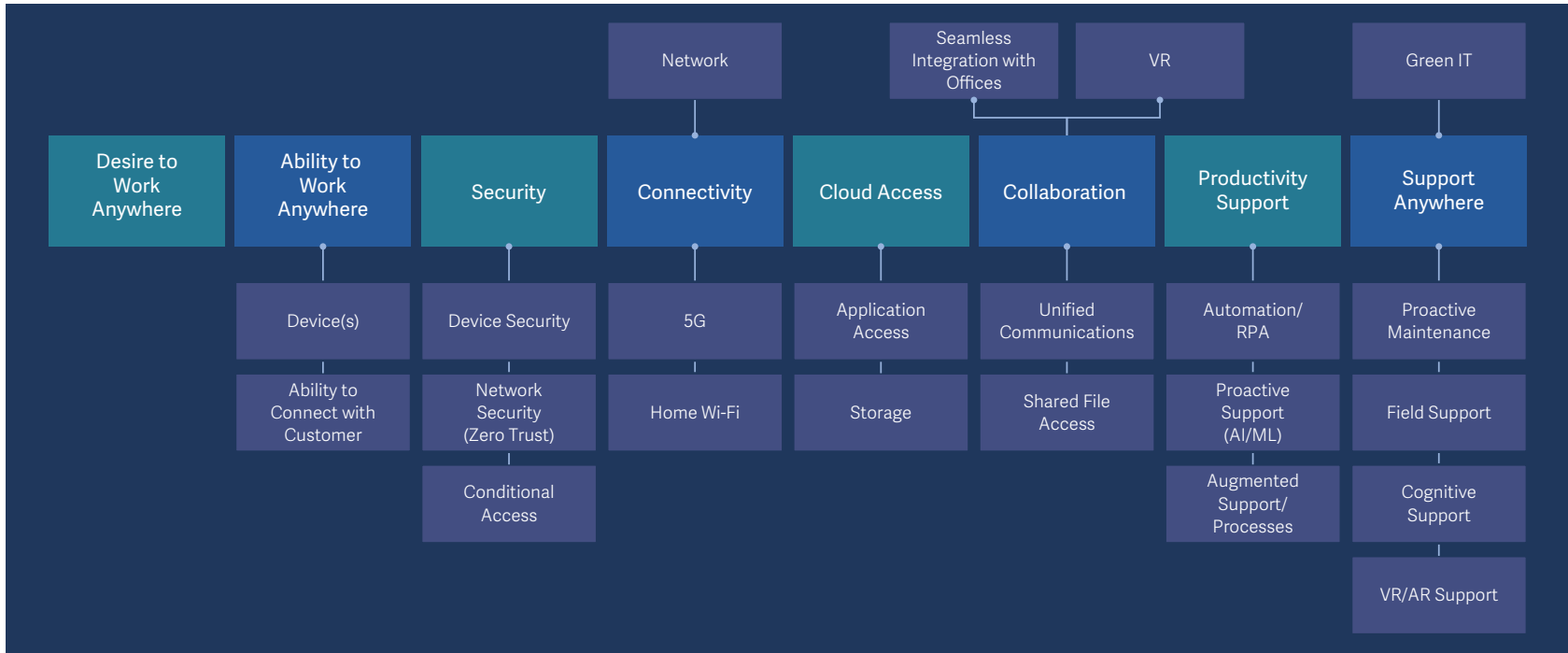
According to the new future of work technology landscape, technologies that support work from anywhere are only one of the components shown below.

While other ISG Provider Lens research covers the topics of connectivity and security, this research focuses on all the other aspects of the above landscape.

The future of work services landscape becomes wider as enterprises need assistance in implementing and supporting an EX-centric technology model. As new decision-makers get involved in tech investments that enable and engage with employees, clients must analyze the capabilities offered by different service providers in underlying technology enablement and maintenance, workplace tech support and overall experience transformation. As organizations take a holistic approach to EX transformation, strategy and consulting become an integral part of the approach. Hence, ISG has decided to merge this area with other services covered in the research this year. Another accompanying research study on technology providers will cover the solutions part for these services.



Figure: Key Components of the Future of Work Technology Landscape



Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

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

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

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





Provider Classifications: Quadrant Key

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

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.





Employee Experience (EX) Transformation Services

Employee Experience (EX) Transformation Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany for evaluating the providers of employee experience (EX) transformation services.

In this quadrant, ISG highlights the current market positioning of employee experience (EX) transformation service providers in Germany and how each provider addresses the key challenges faced there.

Enterprises in Germany are looking for local providers that are experienced in improving EX, with a sound understanding of supporting broader digital transformation and automation initiatives. This includes initiatives such as enhancing collaboration tools and providing personalized employee experiences. To be genuinely successful, service providers must be familiar with the socio-technological reality of German businesses and have a high level of knowledge of the EU-specific requirements in Germany to guide enterprises on their transformation journey as innovation partners.

Although many German businesses still stick to the penalty-driven SLA model, enterprises utilize XLAs mapped with employee personas to deliver unique and personalized employee experiences. Leading providers are developing solutions that can help them continually measure and analyze employee sentiment and engagement levels to improve the EX.

Additionally, companies seek providers offering smart facilities features and on-premises services that support intuitive capabilities. Such capabilities include hot desking, employee-wellbeing assessments and a customized and contextualized experience with smart device-supported workplaces powered by AI and analytics, including generative AI, large language models and cognitive technologies.



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



Digital professionals, including digital transformation leaders, should read this report to understand how the EX transformation services providers fit their digital transformation initiatives.



Technology professionals, including workplace technology leaders, should read this report to understand the positioning and capabilities of providers that can help them in enhancing employee services.

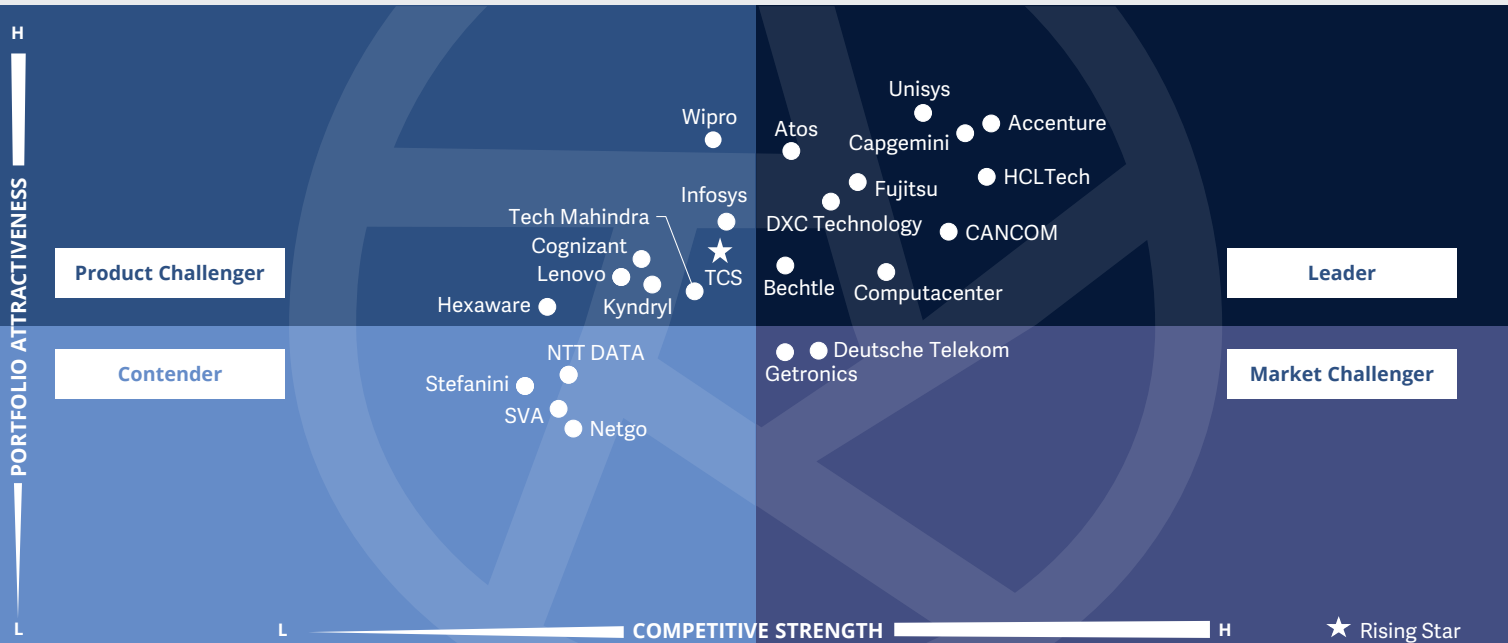


CHRO leaders should read this report to know which providers are addressing employee empathy and well-being in this new age of hybrid working.



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

Germany 2023



This quadrant evaluates providers for their services and capabilities in supporting enterprises to **transform** their **employee experience** by strategizing, managing change and **advising beyond mere tech enablement.**

Roman Pelzel



Employee Experience (EX) Transformation Services

Definition

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience.

These providers typically deal with business leaders, line-of-business (LoB) representatives and chief information officers (CIOs). They offer services that associate employee experience with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

As global organizations realize the increasing importance of managing and enhancing EX, they partner with service providers offering employee experience transformation services that leverage workplace technologies.

EX transformation goes beyond technology enablement and includes professional services promoting and enhancing technology adoption. Providers of EX transformation services engage with their clients in an outcome-focused model and follow an XLA approach.

These models leverage the analytics and data from workplace technology usage and technologies such as digital employee experience (DEX) to collect information and focus on actionable insights. The use of collaboration and productivity solution stack highly influences EX transformation. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication collaboration (UCC) and productivity applications are key to EX transformation. EX transformation also extends to services supporting return-to-office initiatives with a smart campus and intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Ability to **define and visualize EX transformation** models with technology transformation, technology adoption and organizational change/behavior management services, employee engagement, productivity and associating CX with EX
2. Address **employee empathy and well-being**
3. Have considerable percent clients **leveraging XLAs** in the respective geography
4. **Support UCC, productivity stack and extend smart workplace services** to other business functions such as HRO and operations
5. 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 device-supported workplace
6. Have a **strong local presence** and partnerships



Employee Experience (EX) Transformation Services

Observations

This quadrant combines the Workplace Strategy Transformation Service Quadrant and the Managed Employee Experience Services Quadrant published by ISG 2022 for Germany. However, in 2023, workplace transformation can no longer be separated from employee experience and vice versa.

As a result, market competitiveness increased and the providers assessed in this quadrant showed advanced capabilities to advise and lead in workplace transition to enable hybrid work successfully. They highlight their strength as trusted innovation partners in the areas of employee experience, workplace well-being and technology adoption. These developments have helped demonstrate that they can be integral to larger agendas for digital business transformation and have deep change management skills.

We recognize TCS as a Rising Star for demonstrating profound vision, motivation and capabilities in the Employee Experience domain.

Notable changes and highlights include Atos and DXC Technology returning as Leaders with advanced experience-centric capabilities, including data-driven and analytic-based digital experience (DEX) management and XLA frameworks. Bechtle and CANCOM have developed their workplace-leading transformation capabilities accordingly to enter this quadrant as Leaders. Lenovo is being added to this study for the first time in the position of Product Challenger.

Leaders have a strong local footprint and a proven, deep understanding of people-centric experience. They provide differentiated offerings covering diverse aspects of enhancing employee experience and well-being in hybrid workplaces, leveraging generative AI and having sustainability in mind.

From the 27 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture excels in Germany with its AI-enhanced, analytics-driven Experience Management Office (XMO). Its global, employee-centric strategies, design-thinking R&D, and metaverse-focused offerings for digital and physical workspace transformations set it apart.

Atos

Atos entered the Leader category with its People Process Places-centric services, guiding clients to an XLA model. Its commitment to sustainability, inclusion and disability support, alongside robust IT solutions and consulting expertise, has set the company apart.



Bechtle is known for its robust IT solutions and extensive partner network. With a strong customer-centric approach, Bechtle designs customized digital employee experiences meeting the unique cultural and business requirements of the German market.

CANCOM

CANCOM is recognized as a Leader, offering its sound people-centric, holistic Digital Workspace Architecture, facilitating enhanced collaboration, boosting productivity and elevating employee satisfaction with a strong network of partners.



Employee Experience (EX) Transformation Services



Capgemini, a global leader in digital transformation, excels in Germany with persona-driven and employee-centric services leveraging generative AI and advanced experience analytics. With its focus on the environment, it accelerates digital adoption sustainably.



Computacenter is a Leader with its evolving workplace approach, focusing on a people-centric digital experience in a hybrid work model, leveraging analytics, experience management and transformation with a strong focus on sustainability and corporate social responsibility.



DXC Technology, a global IT services company, underlines its leading position in this quadrant by featuring its AI-powered Uptime™ Experience Platform with advanced analytics and leveraging its Experience Cube to extract experience data from live operations data.



Fujitsu is a Leader in Germany's EX Transformation Services and excels with its Work Life Shift approach. Its unique use of personas, journey mapping and outcome-centricity, backed by a strong partner ecosystem, differentiates its services.



HCLTech's ongoing innovations and investments around its holistic IP-led FLUID Workplace approach to workplace transformation, leveraging persona segmentation, XLA and AI, ensures that the expected benefits are realized, making it a Leader in this quadrant.



Unisys leads in the German market with its early adoption of digital experience monitoring, its rich and experience-centric managed services portfolio and strong consulting capabilities. It excels with its XLA 2.0 strategy and AI- and ML-powered, data-driven approach.



TCS, a global IT leader, excels with IP-powered, experience-centric and AI-enabled solutions. Recognized as a Rising Star, it drives the transition to higher DEX scores. Committed to VR-based collaboration and sustainability, TCS stands out in the German market.





“Computacenter leads by delivering value to its customers with its experience-centric hybrid work portfolio leveraging smart automation and analytics to enhance employees’ digital experiences and its strong local presence.”

Roman Pelzel

Computacenter

Overview

Computacenter is headquartered in Hatfield, U.K. and operates in 23 countries. It has more than 20,000 employees across over 70 global offices. In FY22, the company generated GBP 6.4 billion in revenue, with Technology Sourcing as its largest segment. It offers EX transformation services focused on creating a hybrid work environment that enhances productivity and collaboration through its strong technology-centric offerings as part of the Workplace Solutions. With sustainability at its core and over 180 workplace consultants in Germany, Computacenter offers new consulting capabilities in New Work, change and innovation management to its German clients.

Strengths

Hybrid work ready: Computacenter’s new consulting capabilities in the field of New Work, change and innovation management back its hybrid work portfolio. A strong partner ecosystem for smart workplaces and workspaces, collaboration, security and governance enable Computacenter to meet the needs of hybrid workforces and enable seamless collaboration and productivity.

Sustainable Success: Computacenter is a carbon-neutral company for scope 1 and 2 emissions, and it helps clients meet their sustainability goals by applying its broad portfolio of offerings. Its services are designed to ensure the privacy of employees and customers and protect data and IP. These can help businesses leverage digital technology to reduce overall greenhouse gas emissions.

Fostering productive people:

Computacenter’s Modern Workplace approach empowers the workforce by placing people at the heart. It reduces costs and proactively enhances the digital experience by using AI, automation and analytics. Computacenter offers various tools and applications, including AI-driven solutions, to eliminate everyday tasks and allow employees to focus on what matters most. Computacenter creates smart spaces and virtual environments that foster collaboration by providing a stable, secure and constantly supported environment and harnessing the power of cloud technologies.

Caution

Computacenter is recognized as a leader in this year’s EX transformation services quadrant. To maintain its leadership position it should demonstrate how holistic employee experience transformation is at the heart of its modern workplace offerings, adopting global trends, such as generative AI.





Managed Workplace Services – End-user Technology

Managed Workplace Services – End-user Technology

Who Should Read This Section

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

Enabling a distributed/hybrid workforce, promoting inclusivity, diversity and workforce reskilling, fostering corporate social capital and achieving work-life integration remain on the list to attract and retain talent in Germany. However, meeting these goals comes with significant challenges. Modern digital workplace solutions for enterprises in Germany need to be secure by design to comply with the EU and national regulations. Therefore, German enterprises are considering workplace consulting services to develop comprehensive strategies and managed services that enhance end-user experiences while protecting enterprise data. To deliver modern employee

experiences, they seek providers with a strong local presence and a proven track record of successful workplace engagements around end-user computing (EUC) services.

Backed by workplace-related frameworks, the region's service providers offer innovative services to enable enterprise adaptivity, maximize productivity and ensure security. They leverage innovative AI and machine learning technologies to offer personalized, intelligent, relevant support services and digital transformation hubs to support broader digital agendas. Overall, providers offer cutting-edge solutions prioritizing EX, security and productivity. By leveraging these services, enterprises can create a more efficient and effective workforce that is better equipped to tackle the challenges of the modern business landscape.



Technology professionals should read this report to understand the relative positioning and abilities of providers that can help them effectively plan and select managed digital workplace services.



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



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

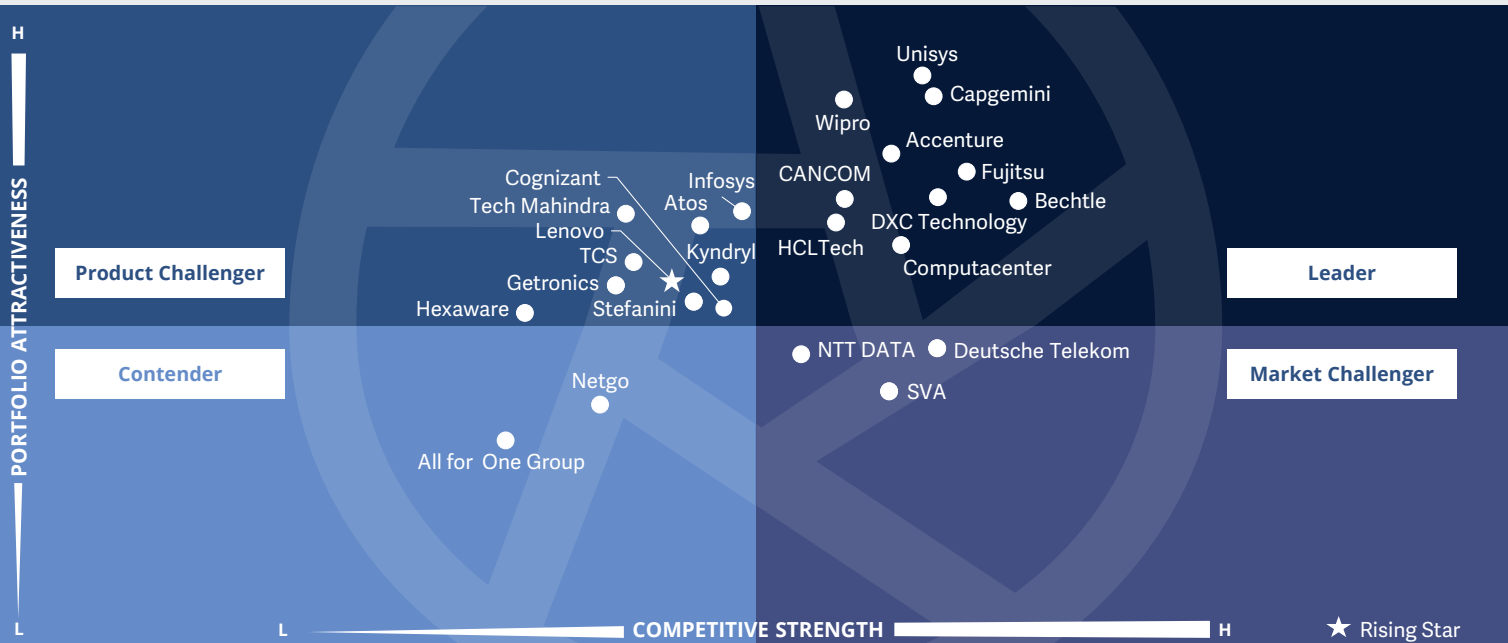


Procurement professionals should read this report to develop a better understanding of the current landscape of managed workplace service providers in Germany.



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

Germany 2023



This quadrant evaluates providers enabling modern, **employee-centric hybrid workplaces** with end-user technology services, including **provisioning, managing** and **securing** the devices, endpoint and mobility management **and proactive experience management.**

Roman Pelzel



Managed Workplace Services – End-user Technology

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in the managed services space offer complete end-user computing (EUC) technology services that form the core of the digital workplace. These include device management, patch management, device and application provisioning, virtualized desktops access, device lifecycle management, support for bring your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and managing the entire IT infrastructure behind an EX-centric workplace design. Provisioning, managing and securing the devices remain the first basic step to enabling a digital workplace and enhancing EX.

The increasing focus on EX is transforming these services to be more focused on enhancing the experience and catering to the client's respective industry. While these services are typically associated with traditional computing devices and tablets, their scope can be extended to include some industry-specific devices such as point-of-sale devices for retail and medical equipment devices for healthcare.

Eligibility Criteria

1. Provide **support for unified endpoint management (UEM) and mobility management**. Also, support application provisioning, patch management and enterprise mobility management
2. Provide complete **device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling (**Device-as-a-Service**). Services should cover device sourcing and logistics and Device as a Service for security
3. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud (**Desktop-as-a-Service**)
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. **Strong local presence** with a majority of workplace engagements around **EUC services**



Managed Workplace Services – End-user Technology

Observations

The end-user technology services market in Germany is mature and sophisticated. The providers assessed in this quadrant offer services, such as device lifecycle management, workplace security or desktop-as-a-service. However, the rise of AI and ML and generative AI challenges providers to enhance their offerings around digital EX management, including automated proactive technical support, to enable employees' digital productivity regardless of place or time. As a result, we see a shift in capabilities where providers must prove that German clients are successfully adopting them.

In 2023, ISG recognized DXC Technology again as a Leader, and Lenovo that was rated for the first time in this quadrant, as a Rising Star.

Contenders show strong capabilities in end-user computing and endpoint and enterprise mobility management services, but they must enhance their market presence in Germany with compelling customer success stories.

Market Challengers are established providers of traditional workplace services and must further evolve their capabilities, pushing forward the hybrid work trend with predictive, analytics-driven experience management.

Product Challengers excel in areas such as AI, automation and VR, and should aim to expand their footprint in Germany.

Leaders deliver differentiated services embracing contextual AI technologies and facilitate hybrid work by offering predictive, analytics-driven experience measurement and improvement. With their strong customer bases and local presence in Germany, they are driving AI-led change to create superior digital workplace experiences and set the pace for the future of work.

From the 27 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture is a leading workplace services provider in Germany to drive digital transformations successfully. With proven expertise in experience analysis and digital workplace management, it is a trusted partner in achieving digital excellence and maximizing outcomes.



Bechtle is a leading provider of end-user technology services in Germany. Its strong local presence and expertise make it a trusted partner for optimizing productivity and enabling hybrid workforces with experience-centric solutions.

CANCOM

CANCOM is a leader in enabling hybrid working in Germany, focused on secure, connected and people-centric workplaces. It offers advanced device and collaboration management and innovative desktop-as-a-service and is a trusted partner for digital transformation.



Capgemini leads with its Experience Management Office, delivering tailored solutions for adaptive digital workplaces that focus on the EX of the connected employees. It has been a longtime trusted partner for achieving digital transformation success.



Managed Workplace Services – End-user Technology



Computacenter excels in end-user technology services, with a strong market presence and comprehensive portfolio. Its workplace approach adds value through automation and analytics, delivering tailored, efficient and innovative digital workplace experiences.



DXC Technology leads in end-user technology services with modern device management, employee experience transformation and innovative solutions, such as its Experience Cube to get data-driven insights for enhanced experiences and its UPtime™ platform.



Fujitsu blends tradition, strong managed workplace services and modern employee experiences. Its tailored solutions drive hybrid workforce productivity, while transformation and sustainability focus ensure future-ready success, making Fujitsu a Leader.



HCLTech leads with its comprehensive portfolio of advanced workplace services in Germany. It drives experience-centric hybrid workplaces with its strong device and mobility management capabilities powered by advanced automation and analytics.



Unisys excels with its comprehensive digital workplace technology management stack, experience-focused solutions, and expertise in employee experience transformation. Its tailored offerings drive digital transformation success and enhance user experiences.



Wipro stands out with its strong Live workspace services portfolio, unique VirtuaDesk™ offering and comprehensive employee experience transformation solutions. Its expertise in digital workplace transformation ensures future-ready and user-centric experiences.



Lenovo, a Rising Star in end-user technology services, excels with its PC market dominance and strategic expansion into managed workplace services. With innovative solutions, Lenovo focuses on meeting changing needs for hybrid working and ensuring continued success.





“Computacenter, with its strong heritage in Germany, is a key player in the managed workplace services market. With its people-centric Modern Workplace offering, it provides leading devices and endpoint-related services to its customers.”

Roman Pelzel

Computacenter

Overview

Computacenter is headquartered in Hatfield, U.K. and operates in 23 countries. It has more than 20,000 employees across over 70 global offices. In FY22, the company generated GBP 6.4 billion in revenue, with Technology Sourcing as its largest segment. Computacenter has a strong heritage in Germany, operating 22 local offices with around 7,000 employees and a leading integration center. It offers managed digital workplace services through its Workplace offering, managing over 2.5 million devices in Germany. Computacenter is carbon-neutral for scope 1 and 2 emissions and delivers sustainable outcomes leveraging circular services as part of its device lifecycle services.

Strengths

Empowering productive people:

Computacenter’s Productive People strategy significantly enhances the technology experience by providing a stable, secure and continuously supported environment. It leverages the power of cloud and AI and ensures employees have access to the latest devices and apps to drive productivity and business success.

End-to-end device lifecycle management:

Computacenter’s device-as-a-service offerings help manage the entire lifecycle of devices, from procurement and enrollment to support, management, disposal and recycling to optimizing device estates, ensuring predictability and continuous productivity.

Managing endpoints at scale:

Computacenter’s vendor-agnostic endpoint management services offer best practice processes and systems management across diverse platforms with configuration capabilities that can handle 9,000 configurations daily. Its endpoint transformation services, virtual desktop management and managed security services enable it to offer a centralized and consistent method of managing devices. These ensure a seamless consumer-like user experience while keeping the technology estate up-to-date and patched. Computacenter offers technology sourcing services as part of its endpoint transformation services that advise on the best way to purchase, deploy and license Windows 11 devices.

Caution

Computacenter has maintained its position. It should advise German businesses on operationalizing XLAs and getting value from generative AI to strengthen its position. To attract new customers, Computacenter could share more of its client success stories of how its services contributed to clients’ sustainability goals.





Digital Service Desk and Workplace Support Services

Digital Service Desk and Workplace Support Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany that are 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 there.

Enterprises in Germany seek digital workplace experts to help them transform their businesses by introducing advanced approaches to digital work service, onsite/field support and technologies that enhance the employee user experience in a hybrid work model.

Leveraging shift-left strategies, they are looking for solutions incorporating innovative enablers, such as digital lockers, IT vending machines, tech bars and virtual kiosks, that allow employees to access self-service options easily.

Service providers in the region are customer-centric, with highly standardized processes adaptable to specific enterprise needs. This ensures the demanded flexibility and the power to innovate in terms of driving XLA-led outcomes by using data-driven analytics and powerful enterprise service management platforms. The providers are committed to delivering digital support solutions that allow for immediate resolution of IT issues, even when out-of-band management capabilities are required. To further enhance their offerings, these providers leverage AI-driven smart visual support solutions to transform field support with AR capabilities into a compelling support experience.



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

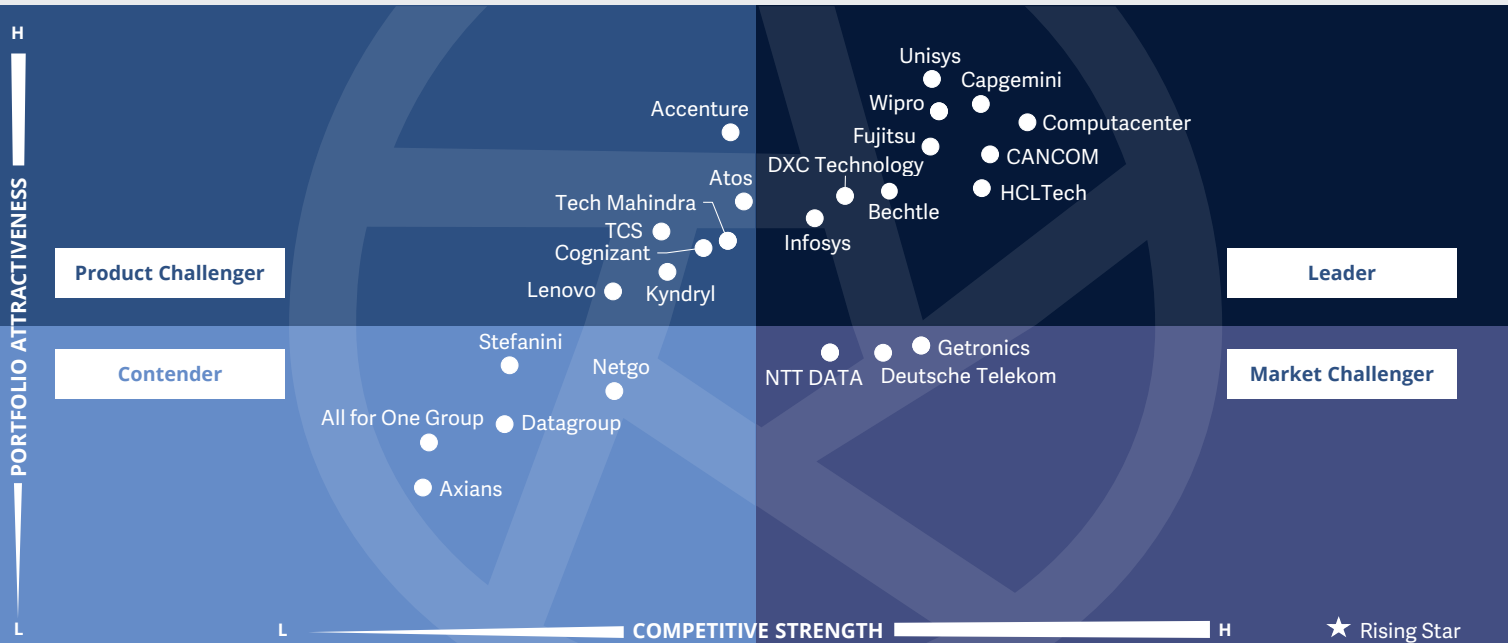


Procurement professionals, should read this report to develop a better understanding of the current landscape of digital service desk and workplace support service providers in Germany.



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

Germany 2023



This quadrant evaluates providers that deliver comprehensive workplace support services, including **service desk, employee experience enhancement, automation, analytics and support for a hybrid workforce**, ensuring a modern workplace experience.

Roman Pelzel



Digital Service Desk and Workplace Support Services

Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, DigiLockers, uber-style field support and automation-enabled omnichannel support for chat and voice. These services encompass automated proactive technical support and cloud platforms to offer 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. Service desk and support services are typically outsourced as part of overall managed workplace services and as standalone services. Traditionally, these services depended solely on the skills of human agents who would take call support requests. The agents' performances were tracked via service level KPIs such as average call handling time. However, with increasing usage of automation, ML and contextual AI, support services have gone

through a complete transformation with less dependent on voice and increasing support from automated chatbots, knowledge articles, peer support and implementation of the latest technologies such as augmented and virtual realities.

These services also include field and onsite support that require expert technicians to visit the location of the employee to fix the devices and issues. This calls for a strong local presence via own staff or through partnerships to provide the required hands and feet support. Organizations with large office campuses also deploy services such as IT vending machines and tech bars to provide in-person support.

Eligibility Criteria

1. Provide **managed service desk and workplace support services** through both human and virtual agents
2. Offer **remote and onsite field support plus in-person technical assistance**, leveraging augmented reality and/or virtual reality (AR/VR)
3. Ability to set up and support self-help **kiosks, tech bars, IT vending machines and DigiLockers**
4. Use **data-driven enriched analytics** to support **self-service, automatically resolve tickets** and generate actionable insights.
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
7. Have a **strong local presence** with a majority of workplace engagements around support services



Digital Service Desk and Workplace Support Services

Observations

In 2023, Germany's digital service desk and workplace support services continue their trajectory toward enhanced EX within the context of hybrid work. With the rise of generative AI, ISG also sees a general increase in quadrant-related capabilities to elevate end-user support services. It has moved beyond traditional service offerings to more comprehensive AI, ML and automation solutions that improve both efficiency and user satisfaction.

Contenders have a solid managed services portfolio, but they must develop capabilities to further automate and integrate while demonstrating a better market presence. Some may lack experience in managing complex/global user scenarios or have insufficient field and onsite support capabilities in Germany.

Market Challengers have a well-established market presence with a solid customer base but need to strengthen their capabilities in

automated and proactive incident resolution, predictive intelligence or intelligent user self-help and other areas.

Product Challengers stand out with their innovative use of cutting-edge technologies, such as AI, ML, AR and VR. They enhance the employee experience through excellent service portfolios, used frameworks and strong first-call resolution, and they can also manage high volumes of incidents via automation. To progress, they need to expand their market presence in Germany.

Leaders in this quadrant are notable for their strong local presence, growing customer base and proven success in delivering differentiated and AI-integrated workplace services. They have a high degree of continuity in providing service excellence with superior customer success and a stronger brand positioning.

From the 27 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders.



Bechtle leads in the German market with its strong presence and an extensive range of user-centric managed workplace services to enable and support the hybrid workforce. Its ongoing growth and strong results make it a preferred partner.

CANCOM

CANCOM, with its longstanding presence in Germany, leads in providing an employee-centric hybrid work support experience. Its profound capabilities in the digital workplace field and its continuous growth make it a reliable partner in the market.



Capgemini leads in Germany's service desk and support services market, mastering advanced AI, automation and gamification to drive workplace productivity and digital adoption. Its constant innovation and growth attest to its commitment to superior service.



Computacenter leads with a strong brand recognition and well-recognized service desk services in Germany. It transforms workplaces with its workplace approach, enhancing productivity with intelligent support experiences and a strong remote, onsite and field support.

DXC TECHNOLOGY

DXC Technology is a Leader with its Digital Support Services powered by its Uptime™ Experience Platform, leveraging strong contextualized multichannel support, accelerated self-service and automation for a frictionless IT experience of a hybrid workforce.



Fujitsu's people-centricity and consistently evolving service portfolio, which uses cutting-edge technology such as generative AI for a superior digital EX focused on hybrid flexible working, make it a Leader in the German market.



Digital Service Desk and Workplace Support Services

HCLTech

HCLTech innovates with AI and superior automation, including its AI-driven virtual agent Lucy. With its Fluid Workplace platform, it offers powerful, experience-driven workplace services tailored to address hybrid working needs, making it a leader in the German market.

Infosys

Infosys is a leader in the German digital service desk and workplace support services market, with its AI-empowered Topaz and Cortex offerings. Emphasizing industry-focused AR support, it partners successfully with clients for modern hybrid workplace solutions.

Unisys

Unisys leads in the German market with its IntelliServe's power, a unique platform blending AI and analytics to deliver superior experience-focused end-user support. Emphasizing constant innovation, Unisys successfully adapts to evolving hybrid workplaces.



Wipro is a recognized global leader in digital service desks. It relies on advanced technologies and proprietary solutions, such as its LiVE Workspace™, VirtuaDesk™, to offer unmatched, experience-led IT services that deliver value to its clients in Germany.





“Computacenter, with its strong brand recognition, leads in transforming workplaces with its Modern Workplace approach, enhancing productivity with intelligent support experiences in Germany.”

Roman Pelzel

Computacenter

Overview

Computacenter is headquartered in Hatfield, U.K. and operates in 23 countries. It has more than 20,000 employees across over 70 global offices. In FY22, the company generated GBP 6.4 billion in revenue, with Technology Sourcing as its largest segment. It supports over 1.1 million users globally and has been a long-time leading technology partner for German clients providing managed workplace services through 22 German offices using its Workplace offering. Computacenter follows a strong sustainability agenda to help customers meet their sustainability goals by leveraging its Circular Services and dedicated Advisory Services.

Strengths

Intelligent support experience:

With Computacenter’s strong focus on people and its experience, it supports over 1.1 million users from 12 global service centers. Eighty-seven percent of its employees support users in 25 languages with an average CSAT score of 4.1 or above. Computacenter delivers a strong, proactive, flexible and personalized omnichannel support experience aligned with people’s needs, easy to access and responsive.

Progress on carbon neutrality:

Computacenter’s ambition to deliver what can be called a conscious service delivery that focuses on people and the planet winning together is exceptional. As a result, it can declare itself as carbon neutral for scope 1 and 2 emissions as of FY22, having avoided

128, 000 tons of carbon. It helps clients meet their sustainability goals by applying its broad portfolio of offerings, including its AI-powered Workplace portfolio.

Strategic hybrid work: Computacenter has a proven track record in delivering end-to-end XaaS services at scale and has made major investments to build dedicated hybrid work capabilities for the German market. It has over 180 consultants and a strong ecosystem of partners in New Work, change management and innovation management. These enable Computacenter to develop and deliver holistic solutions aligned with the needs of German businesses.

Caution

Computacenter must significantly increase its efforts to expand its AI and ML solutions and contribute to a more advanced range of service offerings to maintain its competitive advantage and leadership position. It should initiate transformation toward outcome-based service delivery and XLAs among today’s clients.





Appendix

The ISG Provider Lens™ 2023 – Future of Work (Workplace) - Services 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 August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



Author & Editor Biographies

Lead 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 outcome-centric digital workplace strategy and technology transformations across different industries, including ITIL-based service management.

He is a frequent voice on the topic of experience management. As part of ISG's Collaboration and Experience solution, he advises clients in the employee experience-centric transformation of digital work and hybrid working and contributes to

their success with his comprehensive expertise gained in various roles, combining leadership, coaching, and technical skills.

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.

Research Analyst



Khyati Tomar
Research Analyst

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports.

Prior to this, she had over 2.5 years of experience in the technology research industry and had carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.





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 research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

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

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

iSG Research™

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

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iSG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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

For more information, visit isg-one.com.





SEPTEMBER, 2023

REPORT: FUTURE OF WORK (WORKPLACE) - SERVICES