Welcome to our Technology Insights White Paper, published by the CTO office within Computacenter UK. Our aim is to share, with you, our perspectives and opinions on the major trends that are affecting our market, and our customers.

At Computacenter, we are both proud and fortunate to be “Vendor Independent”. We do not make any products, so a key asset is the skills and expertise of our people, and the way in which we partner with the world’s leading technology organisations to create solutions that add value to our customers.

The commentary around the “rate of change” in the market is at risk of becoming a cliché. Yet we are seeing this manifest across our solution portfolio. The term “Digital Transformation” was arguably an over-used buzzword of 2019 and there’s certainly a fatigue around talking “Digital”. However, what is clear is that we are all experiencing this relentless pace in all our interactions. This paper aims to provide some perspectives on what we’re seeing, and an early outlook for early 2020.

Our aim is to publish this document biannually, offering you timely visibility and insight into our opinions, and our development roadmap and strategy. And as a team, we are always available to meet with you and your teams to share further perspectives and to engage on your specific initiatives where Computacenter can support you.

Paul Bray
Chief Technology Officer, UK&I
Can you give a summary of the key activities you’ve been involved with during the past year?

2019 was an exceptionally busy year within our Platform and Hybrid business PHIT, but the activity that stands out was the launch of our Public Cloud proposition. We have been building capability in Public Cloud for a number of years now, but in 2019 we felt that the timing was right to match our vision to our capabilities, and further invest in our offerings to be ready to embrace the market at scale.

We scaled our internal team to help accelerate this activity and have been working extensively with our key partners on exciting developments and launches. Our intent is to establish a consistent approach for some of our cloud disciplines, whilst also embracing some of the niche use cases that each platform offers.

2019 was not solely focussed on our public cloud proposition though, and other notable activities include:

- Building our mobilisation plan around the Google Cloud Platform
- Driving renewed focus on our relationships with Red Hat and Splunk
- Development of our new Application Disposition offering, that we use in conjunction with our other solutions to help guide customers on the appropriate platforming decisions for their applications as they seek to modernise their infrastructure.

What are the key topics of conversation right now?

The obvious topic is Public Cloud. But other key topics are Containers, Open Source Software, Automation & Management tools, and Multicloud. Even though Public Cloud has been around for many years now, for enterprise customers there is still more to do than they have already achieved, and there is often an absence of some of the foundational knowledge and fundamentals that are required to leverage public cloud in a well-governed and managed way.

There is often interest in hearing how we have developed discreet Professional Services engagements that tackle some of the things they find very difficult. Building best practice landing zones, cost optimisation techniques and controls, application placement/disposition. It would be easy to think that Containers are for a different conversation than Public Cloud but they are
often not – many customers are using container platforms from the same public cloud providers such as in Amazon Web Services (AWS), Azure or Google.

Our Applications Disposition approach resonates well to help transform workloads from within the data center out to one of the cloud providers. Our ability to rapidly assess and make balanced recommendations gives us an important role working between our customers and the technology providers that are often making significant claims!

A key area of focus for is in accelerating our partnership with Google, specifically around Google Cloud Platform. I expect that to be a big topic in 2020.

What is the next big trend that is set to disrupt your market/solution area?

Multicloud. In November 2018 I attended our CIO advisory board, where 12 out of the 13 Customer CIO’s were intentionally pursuing a multicloud strategy. I had prepared a discussion document outlining our perspective on the topics and the CIOs surprised even me with how pro multicloud they were. This has been the case ever since, with customers looking to us to help them develop a capability that allows them to leverage multiple public cloud providers as well as on premises clouds in a seamless fashion. What we have learned in the past 12-24 months is that Enterprise customers are making slower than anticipated progress with their Public cloud initiatives, so Multicloud is only going to compound that problem. When you consider that most of our competition today have focussed their capability on one cloud provider and we have partnerships with the big 3, as well as on premises capability with both Microsoft, VMware and Openstack, we are very well placed when these conversations do arise.

And of course there is a play here with partners who have developed multicloud toolsets - solutions to help deal with multicloud, a good example would be Splunk NetApp, HashiCorp, RedHat, VMware, HPE, Cisco, Dell etc – in fact all of those who have developed multicloud toolsets.

What are you most excited about in 2020?

I am excited about the state of the market around public cloud and the opportunity for us to help our customers by leveraging the solutions that we have been developing over the past couple of years. In 2019 we saw real traction in Microsoft Azure, and in 2020 I expect us to continue our growth with AWS and for Google to emerge more materially in the portfolio.

We also have plans to develop our Mutlicloud proposition, plus further evolve our Application Disposition service that is emerging as a key point of entry for customers to start to tackle these challenges.
Can you give a summary of the key activities you’ve been involved with during the past year?

2019 has been a year of focus and simplification to align our business against a rapidly and constantly changing market. With new leadership in this part of the business, there’s a renewed energy and focus on Networking and Security as we know the challenges our customers face in this area are huge.

To demonstrate this, in 2019 we launched our ‘Digital Connect’ proposition to represent our networking business. Our Digital Trust group proposition has been updated and refreshed, with a simplified look and with messaging tightly coupled to our other propositions which are fundamentally dependant on a “secure connectivity”.

What are the key topics of conversation right now?

Security is at the heart of all our user and business outcomes to ensure organisations can realise the benefits of digitisation and new ways of working in a secure connected manner. The move from legacy Microsoft operating systems to Windows 10 or Apple iOS signposted the need to change security to ensure users are secure by default. Security consolidation was a key conversation with procurement teams seeking to drive down costs and technology teams keen to reduce complexity and increase security visibility.

Cloud security continues to be a significant issue to address, not least due to the mass of terms and acronyms and the need to bond together the current data center world, with new and dynamic cloud workload requirements. It’s impossible to embark on a cloud journey without security change, meaning the evolution and growth in the security landscape will continue.

Wireless networking and the need for a positive user experience was an essential discussion helped by the Windows 10 transformation drive. Computacenter excels in the wireless arena with a market leading Smart Infrastructure team with brilliant consultants. Network automation with SD WAN as the hot topic really drove the connectivity conversation with both vendors and customers keen to understand the benefits.
What is the next big trend that is set to disrupt your market/solution area?

Networking will reappear on the radar for many customers through 2020 with 5G, SDWAN and intent based networking technology solutions with the potential to deliver game changing business benefits.

5G as a new mobile network that could deliver a 10-fold increase in speed with vastly reduced network latency to underpin the delivery of previously unimaginable customer outcomes. SD WAN (Software-Defined WAN) based on software, automation and simplification has the potential to drive down the cost of secure multi-site networking and increase business workload flexibility. The benefits of SD WAN are real and available today. Intent based networking unlocks the power of enterprise networking by using automation and programmability to enable the network to decide how business outcomes are delivered by the network.

This changes the game for networking and helps to reduce complexity but with increased scalability and flexibility. And not forgetting WiFi 6 as enterprise customers upgrade with the potential to deliver a 4-fold increase on today’s device performance levels.

What are you most excited about in 2020?

2020 will be a significant year in the Networking and Security marketplace as organisations further realise and address the fundamental dependence that they have upon secure connectivity to support all their business outcomes. Our vendor partners will continue to elevate their messaging to bring customer outcomes to life via actionable use cases, it unlocks opportunity for us to support our customers through this transition.

5G CHANGES THE GAME FOR NETWORKING AND HELPS TO REDUCE COMPLEXITY BUT WITH INCREASED SCALABILITY AND FLEXIBILITY.
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2019 has been a year of focussed execution across a number of fronts within the workplace portfolio. Clearly the transition from Windows 7 to Windows 10 is the compelling event in the marketplace, but our strategy throughout the past few years has been to evolve our proposition across a holistic workplace. Collaboration continues to be a frustrated conversation, we speak at length about it, and there’s been significant investment in a multitude of technologies, but organisations in many instances are still yet to achieve real business outcomes from all this work.

My focus in 2019 was to establishing a mid-term strategy that will help accelerate the growth of our Workplace business in 2020 and beyond.

This year saw the rejuvenation of our Digital Me proposition. I’m really pleased with the revised tone of our messaging which is simpler, and much more outcome focused. We now talk much less about the things we can do (our capabilities) and much more about the outcomes that can be achieved.

What are the key topics of conversation right now?

I would summarise three major themes of conversation.

Platform modernisation continues to be a prevalent conversation. The need to modernise the desktop platform still exists, but more importantly, the need to realise a different experience for users is becoming key. We’re operating in a very confused market with all manner of new solutions emerging, and so a lot of time is spent helping our customers navigate through this landscape. This topic rarely comes up in isolation. You can’t talk about platform modernisation without talking about “Evergreen”, or even DaaS (Device as a Service). And why limit yourself to Microsoft? What about Apple? What about cloud desktops? It’s now a much broader landscape to secure, manage and enable.

The second theme relates back to my point about collaboration. Microsoft Teams is a huge topic, and is not just about Skype for Business. Teams is potentially the new Operating System for productive workers. But that is a huge change for many users, so introduces topics such as Adoption and Change Management services (ACM), and the wider service experience. How we bring these subjects together is really where we look to provide a differentiated proposition based on strong user outcomes.
The final theme, looking forwards in 2020 is around a renewed “Workplace Vision”. We have some strong thoughts here and are driving our internal developments in a particular direction, but it’s always great to test and validate our thinking with our customers and technology partners.

**What is the next big trend that is set to disrupt your market/solution area?**

Technologists could spend all day talking about and debating trends, which will be the biggest, which can we address best? As you can imagine we spend a lot of our time thinking about this and exchanging ideas internally, and with partners, then validating that with some ‘seeded’ customer interaction to gauge the response. However, being really focussed with this response, I’m going to signpost Augmented and Virtual reality as a significant trend that I think we can expect to see much more of in the coming years.

Many of you will have seen use cases for these kinds of technologies. They’re heavily referenced in the manufacturing industries to support field operatives with easy access to resources and information. And I’m sure many of us are using these features already, such as Amazon’s “show this in my room” feature if you’re looking to buy a new piece of furniture etc. We are spending a lot of time with “new” partners as well as some of our traditional partners, to further understand this market and the role we can play here.

As this market matures, we will keep pace and ensure we can offer a range of value services around these technologies. But whether in AR/VR or more broadly in terms of IOT or Edge technologies, there will be an explosion of new endpoints – all of which need to be procured, integrated and lifecycle managed as they become mainstream and start to permeate into many of the user workstyles that exist in our customers.

**What are you most excited about in 2020?**

I think the next few years in Workplace are going to be hugely exciting. We’ve seen that all organisations are still investing heavily in workplace technologies, which gives us huge opportunities to help them achieve their transformations and support them with the management and support services they provide to users to help deliver a great experience.

Over the course of the past 18 months the momentum has been rising and rising, which gives us great optimism that 2020 is going to be a significant change in realising these transformed workplaces that our customers are seeking. With the swathe of investments and developments we’ve made in recent times, I’m really excited to see how we engage further with our customers and partners to help them fulfil these ambitions.

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FINALE PERSPECTIVES

Hopefully these perspectives offer a glimpse as to the amount of work that is taking place to support our customers today, as well as evolving and developing our capabilities for the future.

We represent our portfolio through our four Digital Propositions, anchored against our Making Digital Work framework and our Transforming Customer Experiences philosophy.

Each of these has been fundamentally updated in the past 12 months to reflect the current market, and importantly to highlight the adjacency and connections between each of them. The technology marketplace has made the shift from siloed solutions towards integrated solutions, and Computacenter’s approach now embodies that to focus on the technology and business outcome and leverage our capabilities and services in support of this.

**DIGITAL me.**
加速数字议程，通过敏捷的工作空间解决方案，释放人的力量并促进业务成功。

**DIGITAL Power.**
构建平台，用于现有应用程序和未来的数字服务。

**DIGITAL Trust.**
一个完整且一致的安全组合，从端点安全到网络防御，每层之间。

**DIGITAL Connect.**
网络解决方案，连接人、数据和事物，以实现连接业务成果。
About Computacenter

Computacenter is a leading independent technology partner, trusted by large corporate and public sector organisations. We help our customers to source, transform and manage their IT infrastructure to deliver digital transformation, enabling users and their business. Computacenter is a public company quoted on the London FTSE 250 (CCC.L) and employs over 15,000 people worldwide.