*i̇SG Provider Lens™

Future of Work Services

A research guide to evaluate providers'
strengths, challenges and differentiators
in the modern workplace

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Computacenter

QUADRANT REPORT | OCTOBER 2024 | GERMANY

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Executive Summary

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Flexibility transforms an office into a competitive advantage to attract and retain talents

Convergence: The current socioeconomic climate in Germany is characterized by significant challenges that affect companies and employees. The ongoing war in Ukraine, the Israeli – Palestinian conflict and continuing challenges posed by migration are increasing the complexity of the already volatile economic environment.

Germany's economy, renowned for its robust industrial base and export-oriented model, is navigating a period of adaptation and resilience. Rising energy costs, regulatory burdens and other challenging economic conditions are prompting some German companies to relocate. Meanwhile, researchers from Gallup state that a significant portion of Germany's workforce is actively seeking or open to new job opportunities. Gallup estimates the annual cost of employee disengagement in

the German economy between €132 billion and €167 billion. According to Gallup's State of the Global Workplace report, approximately 14 percent of employees in Germany consider themselves engaged, reflecting a dynamic job market driven by the desire for better working conditions and enhanced flexibility.

Germany's shrinking working-age population further exacerbates the skills shortage. Moreover, changes to the country's social welfare system pose a potential threat to addressing the shortage of skilled workers. These changes are criticized for sending wrong signals to (re) integrate people into the labor market.

Amid these disruptions, German businesses are also navigating the transition to remote work, driven by the necessity to adapt to new realities. Post-pandemic recovery efforts continue to impact business strategies, with companies balancing the need for stability against pursuing innovation and growth. As companies embrace digital transformation to stay competitive, the shift toward remote work has altered traditional office dynamics, compelling businesses to cope with the changed expectations of today's workforce.

The **future of work** will happen beyond the confines of the office desk.

Executive Summary

The rapid adoption of hybrid and flexible work arrangements in recent years has significantly reshaped the work landscape and challenged traditional perceptions of what it means to work. Looking at the future, it becomes clear that these changes are not merely temporary adaptations but rather a fundamental shift in how we approach work and define its boundaries.

Flexibility is the norm

The future of work will likely witness flexibility becoming the norm rather than the exception. A recent study published in June 2024 by Stanford Professor Nicholas Bloom, highlighted in Nature, indicates that hybrid working models can improve job satisfaction and reduce employee turnover without hampering productivity. These findings suggest that hybrid working can benefit employees and employers. Employees will increasingly expect the ability to choose when, where and how they work, focusing on outcomes rather than adherence to strict schedules or locations. Organizations embracing this flexibility will be in an advantageous position to attract and retain top talent.

Redefining the purpose of physical workspaces

With the rise of remote and hybrid work, the purpose of physical office spaces will transform. Offices will no longer be the default location for work but will serve as hubs for employees to foster collaboration, innovation and social contact. The design of these spaces will prioritize flexibility, creativity and employee well-being, demonstrating a commitment to the health and happiness of the workforce.

Moreover, the term work will likely undergo a perceptual shift, migrating from the traditional notion of a 9-to-5 job performed in a specific location. Instead, the idea of work transforms into a versatile and ever-changing notion that covers a wide spectrum of tasks and endeavors, which aid in achieving individual and company objectives, regardless of when and where they are performed.

Blurring boundaries between work and life

As work becomes more flexible and untethered from traditional office spaces, the boundaries between work and personal life continue to blur. This approach will require individuals to develop strong self-management skills and organizations to support employee well-being and work-life balance proactively.

The shift toward flexible working will place even more emphasis on the outcome and less on the time consumed on tasks. While requiring adaptation, this change also presents an opportunity for a more effective and efficient work environment. It necessitates an evolution in how performance is measured and evaluated, with a distinct focus on establishing clear goals, defining metrics for success, and providing regular and meaningful feedback.

Over the past years, employees have gained experience in the flexibility needed to deliver their best outcomes. In today's rapidly evolving work environment, it is becoming quite apparent that in a world where work is ubiquitous, the future of work will not be confined to an office desk. Furthermore, the traditional office setup is becoming a relic of the past.

Although this changing world of work presents challenges for corporate real estate and facility managers, it would be inadmissible to declare the office obsolete. Gensler's Global Workplace Survey highlights how modern workplaces should transform for peak performance. Comprehensive studies on workplace design, EX and performance metrics have identified key factors contributing to top team performance in office environments.

Pillars of high-performing workplaces

1. **Diverse space types:** High-performing teams thrive in environments that offer a variety of spaces tailored to different work activities. These include focused work areas, collaborative spaces and social zones. Employees in high-performing workplaces can access up to three times more space for relaxation, concentration and confidential conversations than those in low-performing environments.

2. **Effective work modes support:** Gensler identifies five key work modes that need support: working alone, working with others in-person, working with others virtually, learning and socializing. High-performing teams benefit from spaces that effectively support these diverse activities. The most effective office setups are capable of

providing the right environment for individual and collective tasks, thereby increasing overall employee productivity and satisfaction.

3. **Technology integration:** Seamless technology integration is critical to support hybrid and virtual collaboration. Top-performing offices integrate cutting-edge technologies into their building designs, such as IoT sensors and actuators, AI-enhanced occupancy management and building automation systems.

4. **Sustainability and energy efficiency:** Companies have identified the potential of how smart workplaces can contribute to reaching their sustainability goals. Therefore, they are investing in systems to monitor and optimize energy consumption, reduce waste and enhance the overall environmental performance of their office buildings. They also focus on creating environments that are responsive to employees' needs, making spaces comfortable, healthy and conducive to productivity and well-being.

5. **Data-driven design:** Top-performing smart workplaces can adapt to changing conditions and user preferences through data analysis. By collecting and analyzing real-time data, companies gain a better understanding of use patterns to optimize workplace performance.

Companies that are highly advanced in their flexible work journey have a high percentage of hybrid meetings and employ advanced technologies to facilitate collaboration across different places and time zones. They design for experience parity as the emotional response to workplace design significantly impacts team performance and contributes to engagement, satisfaction and productivity. High-performing teams also report improved workplace experiences, contributing to strong team relationships and an increased sense of belonging.

The future of work will increasingly rely on advanced collaborative technologies that enable seamless communication, knowledge sharing and project management across distributed teams. These tools will continue to evolve, becoming more intuitive, AI-powered and integrated into daily workflows. Microsoft released the long-awaited public preview of Microsoft Places — its AI-powered connected workplace solution. This solution helps address challenges of work flexibility, such as booking the right spaces, planning where work happens or scheduling in-person events.

AI integration and workplace transformation

AI is at the forefront of workplace transformation. ChatGPT has been published nearly two years ago, and its impact has just started to unfold. In Germany, as in other countries, AI tools such as copilots are revolutionizing how work is conducted. These tools automate routine tasks, reducing employees' time on administrative chores.

This shift allows workers to concentrate on high-value tasks that demand creativity, strategic thinking and collaboration. AI integration is crucial for boosting productivity and enhancing employee satisfaction, particularly in hybrid work environments where flexibility and efficiency are paramount. However, businesses struggle with the best approach to introduce these smart copilots and often rely on external expertise to build the right approach and identify the best use cases to start with.

Accelerated AI adoption, smart automation and advanced data analytics enhance productivity and create new business opportunities. However, this technological shift necessitates significant investments in digital infrastructure and cybersecurity to safeguard sensitive information and maintain operational integrity. One key finding emerges: Similar to flexible work models and return-to-office approaches, there is no one-size-fits-all solution. AI will drive businesses forward, yet each business will adopt it at its own pace and uniquely.

Continuous learning and upskilling

The integration of AI and automation is currently driving the transformation and development of professional responsibilities while introducing new career paths in various industries. Employees will need to adapt to the new AI-powered technologies, processes and working methodologies. Organizations must invest in learning and development programs

to ensure that their workforce remains competitive.

Despite the widespread use of AI, concerns regarding job replacement persist. According to Microsoft's Work Trend Index, approximately 45 percent of professionals are concerned that AI might replace their jobs. This anxiety is not unfounded, as 66 percent of leaders state that they would not hire someone without AI skills. According to Gallup's research, only 12 percent of employees are prepared to work with AI. This gap underscores the need for more robust training and development programs to help employees adapt to AI-driven changes in their roles. Despite concerns regarding job security, skill gaps and increased work pressure, many employees recognize the potential for AI to improve their work experience. Microsoft's findings indicate that employees are eager for AI integration and are willing to undertake initiatives rather than waiting for their employers to lead.

Increased use and concealment of AI tools

A significant portion of the workforce is actively using AI tools. Approximately 75 percent

of global knowledge workers report using generative AI (GenAI) at work, often without formal organizational approval. This trend challenges businesses to cope, embrace, compete with or navigate the implications of bring-your-own-AI scenarios.

Psychological and emotional impact

Many employees are reluctant to disclose their use of AI for critical tasks. Approximately 52 percent of AI users are hesitant to admit using AI for their most important work tasks, concerned that it may make them appear replaceable. This concealment suggests an underlying anxiety regarding job security and the perception of AI's role in the workplace.

The rapid pace of work, accelerated by AI adoption, contributes to employee burnout. A substantial number of employees report struggling with the pace and volume of work, with 46 percent feeling burned out. AI's role in intensifying work demands highlights the need for balanced integration that considers employee well-being.

Despite anxieties, many employees recognize the potential benefits of AI. Users report that

AI helps them save time (90 percent), focus on important work (85 percent), be more creative (84 percent) and enjoy their work more (83 percent). These positive perceptions advise businesses to carefully design AI implementation. With proper implementation and support, AI can enhance job satisfaction and productivity while successfully mitigating anxiety associated with AI use. Providing AI tools has become a clear career advantage, acting as an accelerator that helps attract and retain top talent.

Digital employee experience (DEX) has become the new standard

With the shift from deploying technology to positioning people at the center and building the digital experience they need to deliver peak performance, DEX has evolved into the new standard for proactively managing the consumption of IT devices and enhancing employees' experience. Ahead of this, DEX encompasses all digital touchpoints employees encounter during their workday. These touchpoints are pivotal in the modern workplace. A seamless DEX ensures that employees remain productive and satisfied.

More and more organizations recognize the importance of DEX and are increasing their budgets to enhance these digital experiences. They are investing in technologies that support remote and hybrid work setups, recognizing that a positive digital experience is critical for employee retention and performance. These investments include deploying user-friendly platforms, providing robust and smart IT support, and implementing continuous feedback mechanisms. In 2024, DEX focuses on enabling work and enhancing the overall employee journey in the digital workspace. This trend includes investing in advanced monitoring tools and AI-driven solutions to anticipate and resolve issues proactively.

Superior and employee-focused DEX design

Leading DEX strategies are increasingly focused on end-user experience, enabling that technologies are user-friendly, accessible and supportive of employees' needs regardless of their technical expertise or work location. The evolving paradigm of DEX management views it as a comprehensive ethos supporting employees' digital journeys instead of a mere technical requirement. This approach includes

improving organizational security and using technology to solve problems preemptively. IT's ambitions in terms of EX, engagement and productivity are to enable, ensure or restore productivity.

Proactive smart issue resolution with AI

DEX tools and management strategies are the backbone of digital experiences, encompassing everything from digital platforms and tools enabling remote work to behind-the-scenes automation that resolves issues seamlessly in real-time. Effective DEX management leverages technologies such as digital experience monitoring (DEM), unified endpoint management (UEM) and IT asset management (ITAM) to provide a comprehensive, real-time overview and proactively maintain digital work environments with advanced smart automation capabilities.

An essential aspect of DEX management is resolving technical problems prior to impacting users. This proactive approach uses AI and ML for predictive maintenance and self-healing systems that address issues automatically. Organizations that prioritize DEX report high productivity and efficiency. Tools that monitor and optimize device performance, application responsiveness and network access are crucial for maintaining a seamless digital experience.

Employee well-being benefits from frictionless IT experiences

High-quality digital experiences reduce frustration and improve overall job satisfaction. When employees encounter minimal technical issues and have reliable, efficient tools at their disposal, their morale and engagement levels increase.

Adobe's 2023 State of Work report indicates that employees' expectations have recently increased. They are expecting more from their technology experience to better collaborate. They demand more and smarter automation, better information and more digital dexterity to contribute to organizations' value creation efficiently. This expectation and perception do not stop at the employee level; even members of senior leadership teams admit that they would leave their organizations for a better technology stack.

DEX helps provide a secure and compliant digital work experience

As organizations strive to meet these rising expectations, it becomes clear that the quality of digital experiences directly influences employee satisfaction, operational security and compliance. A robust DEX strategy transcends beyond mere functionality; it integrates security and compliance into daily workflow, enabling employees to possess the tools they need to work efficiently while maintaining the integrity and security of organizational data.

Poor digital experiences can lead to employees circumventing security protocols, thereby increasing risk. A well-managed DEX ensures compliance and enhances security by providing seamless and secure digital interactions. By understanding and implementing these components and trends, organizations can create a more efficient, satisfying and secure digital workplace, thereby enhancing overall EX and organizational performance.

Sustainability remains a top priority, and digital workplaces are helping to go green

Sustainability remains pivotal in Germany's future of work. Businesses increasingly incorporate sustainable practices into their operations, driven by regulatory requirements and consumer expectations. Corporate responsibility initiatives focus on reducing carbon footprints, promoting circular economy principles and enhancing supply chain transparency. This shift toward sustainability is an ethical imperative and a strategic advantage in attracting environmentally conscious consumers and employees.

Sustainability is increasingly intertwined with digital transformation. Companies are adopting eco-friendly practices and integrating sustainable technologies into their operations to meet the growing environmental demands. Global systems integrators and managed service companies are increasingly differentiating themselves based on the extent to which their workplace-related services help clients achieve their sustainability goals.

Digital tools are being used to monitor and reduce carbon footprints, optimize resource usage and enhance energy efficiency. This convergence of digital and sustainable practices is reshaping work environments. A convergence and dynamic interplay of economic resilience, technological innovation, social change and regulatory adaptation characterize the state of the workplace in

Figure 1: Designing an employee experience that resonates implies bringing all relevant stakeholders to the table (Source: ISG 2024)
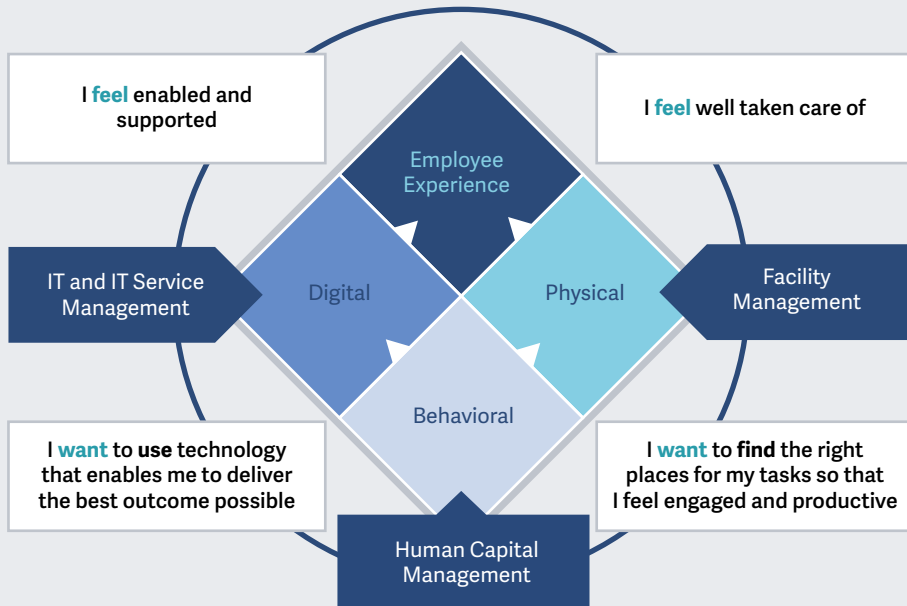
Germany in 2024. As businesses and workers navigate this evolving landscape, the focus remains on creating a flexible, inclusive and sustainable work environment that can thrive in the face of global challenges and provide an attractive, smart EX regardless of the place and time.

The 2024 ISG Provider Lens™ Report on Future of Work Services focuses on what currently matters and how leaders can find the right partner to navigate these challenging times.

Amid all uncertainties, one certainty remains: the future of work is a joint effort that transcends the desk.

Key Takeaways

Quadrant 1: Workplace Strategy and Enablement Services

- The implementation of hybrid and adaptable work models indicates a substantial and enduring shift in the workplace landscape, resulting in enhanced job satisfaction and reduced turnover rates.

- The redefinition of physical workspaces aims to transform traditional office environments into centers for collaboration, innovation and social interaction rather than mere places for work.

- The blurring of work-life boundaries due to the rise of flexible work arrangements highlights the need for strong self-regulation skills and organizational support to maintain a healthy work-life balance.

Quadrant 2: Collaboration and Next-gen Experience Services

- Advanced collaborative technologies, including AI-powered solutions, are essential for facilitating seamless communication, knowledge sharing and project management among dispersed teams.

- The integration of AI tools in the workplace streamlines operations by automating mundane tasks. This strategy allows employees to focus on more strategic and creative responsibilities, ultimately enhancing productivity.

- Continuous learning and upskilling initiatives are crucial for helping employees stay competitive in a rapidly evolving technological landscape driven by AI and automation.

Quadrant 3: Managed End-user Technology Services

- DEX has emerged as the standard approach for managing devices and enhancing IT service experiences and adoption. It emphasizes delivering a seamless digital experience to boost productivity and employee satisfaction.

- Prioritizing high-quality digital experiences in workplaces is key to reducing frustration, enhancing job satisfaction and increasing employee morale and engagement.

- Well-managed DEX practices ensure compliance and bolster security by facilitating secure digital interactions, minimizing the likelihood of employees bypassing security measures.

Quadrant 4: Continuous Productivity Services (including Next-gen Service Desk)

- DEX tools utilize AI for predictive maintenance and self-healing systems, addressing technical issues before they disrupt users, thus promoting continuous productivity.

- Monitoring and optimizing device performance, application responsiveness and network connectivity are crucial for maintaining a seamless digital experience and maximizing productivity.

- Superior DEX design prioritizes employee well-being and focuses on implementing user-friendly technologies to support work-life balance and enhance satisfaction and productivity.

Quadrant 5: Smart and Sustainable Workplace Services

- High-performing workplaces provide a range of spaces tailored to different work tasks, including areas for focused work, collaboration and relaxation, to cater to the diverse needs of teams.

- The seamless integration of cutting-edge technologies, such as IoT sensors and AI-driven systems in workplaces, supports hybrid and virtual collaboration, ultimately improving overall workplace performance.

- Smart workplaces prioritize sustainability by implementing systems to monitor and optimize energy consumption, reduce waste and enhance environmental performance. This strategy creates healthy and productive work environments that are aligned with sustainability objectives.

The digital, human and physical aspects of work converge. In the rapidly evolving workplace, flexibility is not just an option but the new norm that reshapes how we define and interact with work. Emphasizing flexibility, these modern workspaces balance professional and personal life, fostering a culture of productivity and satisfaction while setting the stage for growth.

Provider Positioning   **Page 1 of 4**

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Accenture	Leader	Leader	Leader	Product Challenger	Leader
ACP Group	Contender	Product Challenger	Product Challenger	Contender	Not In
All for One Group	Not In	Contender	Contender	Not In	Not In
Arvato Systems	Contender	Contender	Market Challenger	Not In	Not In
Atos	Product Challenger	Leader	Product Challenger	Leader	Product Challenger
Axians	Not In	Not In	Not In	Contender	Not In
BCG	Product Challenger	Not In	Not In	Not In	Not In
Bechtle	Leader	Leader	Leader	Leader	Leader
Campana Schott	Not In	Not In	Contender	Not In	Rising Star ★
CANCOM	Market Challenger	Leader	Leader	Market Challenger	Product Challenger

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Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Capgemini	Leader	Leader	Leader	Leader	Leader
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Computacenter	Leader	Leader	Leader	Leader	Product Challenger
DATAGROUP	Market Challenger	Contender	Product Challenger	Market Challenger	Not In
Deloitte	Leader	Not In	Not In	Not In	Leader
Deutsche Telekom	Leader	Leader	Market Challenger	Market Challenger	Leader
DXC Technology	Leader	Leader	Leader	Leader	Product Challenger
EY	Product Challenger	Not In	Not In	Not In	Not In
Gensler	Not In	Not In	Not In	Not In	Product Challenger
Getronics	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
HCLTech	Product Challenger	Leader	Leader	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
IT-HAUS GmbH	Contender	Contender	Contender	Contender	Not In
KPMG	Product Challenger	Not In	Not In	Not In	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Lenovo	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
McKinsey & Company	Product Challenger	Not In	Not In	Not In	Not In
netgo	Contender	Product Challenger	Contender	Contender	Contender
NTT DATA	Product Challenger	Product Challenger	Rising Star ★	Product Challenger	Contender

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
PwC	Product Challenger	Not In	Not In	Not In	Not In
SoftwareOne	Market Challenger	Contender	Market Challenger	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
SVA	Not In	Contender	Market Challenger	Not In	Not In
TCS	Leader	Product Challenger	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
Unisys	Leader	Leader	Leader	Leader	Product Challenger
Wipro	Leader	Rising Star ★	Leader	Leader	Leader

This study evaluates providers' capabilities in delivering key **Future of Work services** across different regions.

Simplified Illustration Source: ISG 2024

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace Services

Definition

The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. The advancements in generative AI (GenAI) and the need to assimilate new business models to meet dynamic customer demands also contribute to the evolving future of work.

Enterprises no longer partner with service providers to provide laptops, mobiles, Wi-Fi and service desks and allow employees to work as they want. Instead, they embrace a flexible workplace open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction.

Employees seek the freedom to select both their workspace and the required technology. They need ubiquitous access to devices, applications, data, workflow, documents and processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to better manage back-end workplace technologies. Still, enterprises need expert help strategizing, implementing and adopting this technology.

This report focuses on the approaches where next-generation thinking changes the future workplace landscape.

ISG's Future of Work Framework

- Encapsulates what enterprises are doing to design new ways of working plus the Future of Work / Workplace models and helps connect them to digital solutions
- Represents convergence of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions

ISG Future of Work Framework diagram with hexagonal tiles:

Inner tiles (themes):
- Smart & Sustainable Workplaces
- Workplace Strategy & Enablement
- Ensure Smart Workplace is Sustainable & Inclusive
- Create New Strategies & Workplace Innovations
- Continuous Productivity And User Support
- Ensure Users Are supported And Effective At all Times
- ISG Future of Work Framework
- Enable Workforce to Collaborate in New Ways
- Collaboration & Next Gen Experience
- Integrate Technology To enable Working from Anywhere Anytime
- Provide Devices & Capabilities to Work Effectively
- Always On IT
- End User Devices & Technology

Outer tiles (initiatives):
- Smart Office / Facility Management (Analytics, Hot Desking, Smart Access)
- Next Gen Smart Office Technology (IoT, Lighting, Utilisation, Automation)
- Inclusive, & Integrated Workspaces (Ergonomic, Adaptable)
- Required ESG Reporting / Analytics (Mandatory, Voluntary)
- Commitment to Sustainability (DLA)
- Sustainability Initiatives (CSR, Carbon Reduction, Conservation)
- Hybrid Workplace Design / Integration (Remote, Physical)
- Talent Management Model Design / Innovation (DEI, Human First Change)
- Strategic Workplace Advisory (Human, Digital, Physical)
- Workplace Transformation (Market Led Change Experience)
- Workplace Experience Innovation (Culture, Engagement)
- Workplace Led Business Model Innovation (CX Focused Change)
- Self Heal / Invisible Help Desk (Pro-active Support, True XLAs)
- Intelligent / Personal Support (ML, Sentiment Analysis)
- Intelligent Assistance (Virtual, Chatbot, NLP)
- Next Gen Help Desk (Augmentation, AI support)
- Collaboration / Productivity Solutions (CMS, Teams, Cloud Sharing)
- XLA / Business Outcomes (XLA linked to Business Outcomes)
- Unified Communication Technology (Zoom, Teams, Cisco)
- Experience Augmentation (Digital Assistants, RPA XMO)
- Seamless Maintenance (AI, Data Driven, Automated)
- Support Anywhere / Anytime (Autonomous, Intelligent, Kiosk, Locker)
- XR Integration (AR/VR across Remote / Office for work / Training)
- AI / Gen AI Integration (Training / Incorporation)
- Updated Networks / Connectivity (VPN, SD-WAN, 5G+)
- Device Management (MDM, Tracking, BYOD, IMAC)
- Automation & Orchestration (RPA, Workflow, AI/ML, DevOps)
- Data Center / Green Cloud Transition (Local > Cloud)
- Cybersecurity (Threats, End Point, SIEM, IAM)
- Circular Device Lifecycle Management (Circular DaaS Services)
- Device Provision (DaaS, Laptop, Mobile, Desktop, XR)
- Virtual Desktops (VDI, Thin Client, App Virtualization)
- Workplace Platforms / SaaS (Limited > Full)
- Service Continuity (DR / BCP)
- Device DEX, IMAC / Uptime (Automated Fix, Swap Out)
- Unified Endpoint Management (Patches, UEM Platforms)

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services:

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace Services

The ISG Provider Lens™ Future of Work – Services 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets, including the U.S., U.K., Germany, Switzerland, Brazil and Australia

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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

★ **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.

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.

Workplace Strategy and Enablement Services

Workplace Strategy and Enablement Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany to evaluate the current market positioning of workplace strategy and enablement service providers and determine how each provider addresses key challenges faced in the region.

The German workplace is undergoing a digital revolution, emphasizing employee experience and data security. Enterprises need strategic support to navigate this change. Workplace strategy and enablement services address key areas for success. These services support developing new talent models that attract and retain top performers in a remote-friendly environment.

Enterprises in Germany are seeking data-driven insights to help companies optimize space utilization, technology integration and talent acquisition. This approach can involve designing new business models to efficiently leverage hybrid work and automation.

Integrating onsite and remote work seamlessly requires robust collaboration tools that focus on digital souveränität (data sovereignty) and cybersecurity solutions. Sustainability strategies integrated into workplace design focus on energy efficiency and resource management.

Enterprises also emphasize employee experience, which includes fostering digital upskilling through targeted training programs, using experience-based metrics to measure success and leveraging generative AI (GenAI) to personalize work experiences. Fostering an inclusive culture in a hybrid work environment is important. By leveraging these trends and comprehensive workplace strategy and enablement services, German businesses can create future-proof workplaces that drive productivity, attract top talent, foster a sustainable and positive work environment, and prioritize data security.

Strategy professionals should read this report to identify the leading providers and prepare their workforces for the evolving business models and dynamics in the post-pandemic world.

Technology professionals should read this report to understand providers' positioning and capabilities to enhance workplace strategy and enablement services.
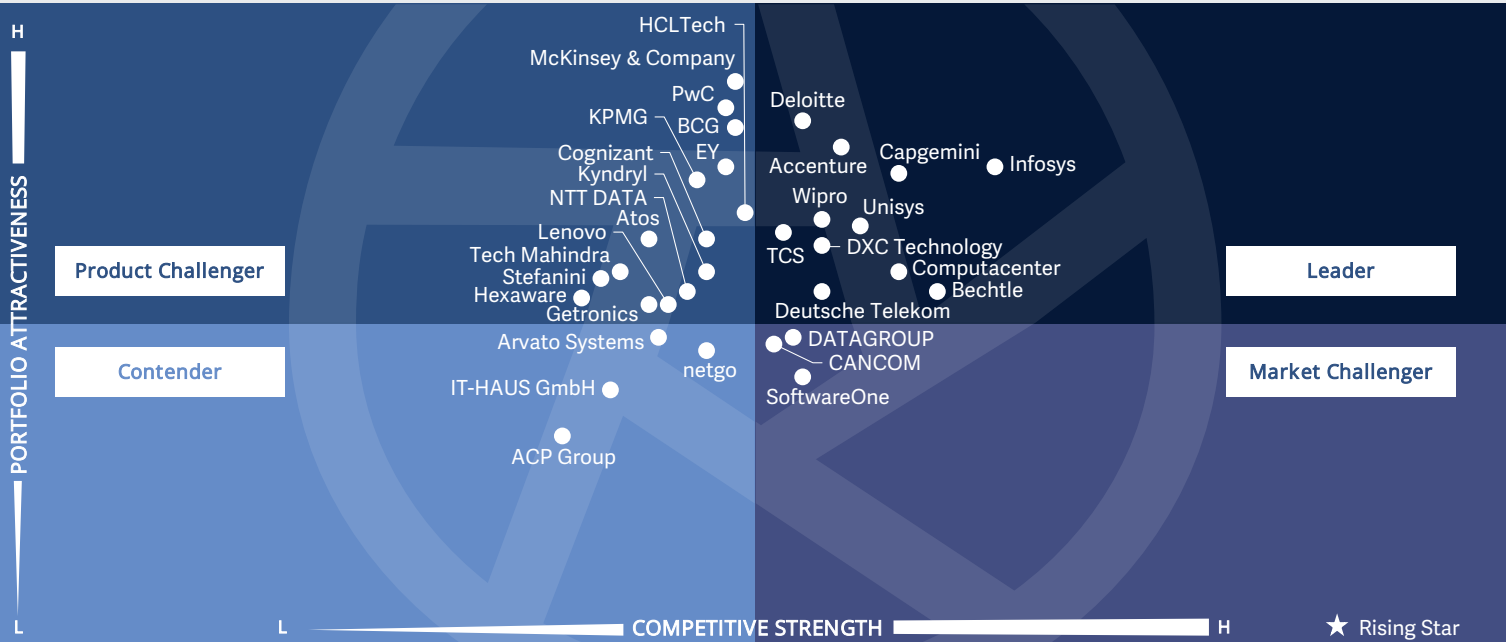
Digital professionals, including digital transformation leaders, should read this report to understand how EX transformation service providers align with their digital transformation initiatives.

ISG Provider Lens™

Future of Work Services
Workplace Strategy and Enablement Services

Source: ISG RESEARCH

Germany 2024

H

Product Challenger

Contender

PORTFOLIO ATTRACTIVENESS

HCLTech
McKinsey & Company
PwC
KPMG   BCG
            EY
Cognizant
Kyndryl
NTT DATA
         Atos
Lenovo
Tech Mahindra
Stefanini
Hexaware
Getronics

Deloitte
           Capgemini
Accenture   Infosys
Wipro
       Unisys
       DXC Technology
TCS
         Computacenter
            Bechtle
Deutsche Telekom

Arvato Systems
            netgo
IT-HAUS GmbH

DATAGROUP
CANCOM
SoftwareOne

ACP Group

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates providers' abilities to leverage **work flexibility as a competitive advantage** and integrate the physical, digital and human aspects of work to create **thriving environments** and workplaces that go **beyond the traditional** office.

Roman Pelzel

Workplace Strategy and Enablement Services

Definition

This quadrant evaluates providers offering workplace strategy and enablement services, including implementations, across industries. Organizations aiming to help clients navigate the complex strategies and regulations of the workplace landscape must be able to tailor advice and strategy by region, market direction and organizational responsibility. They must also provide strategic capabilities and services spanning several integrated areas related to enterprisewide workplaces.

Workplace service providers must focus on considerations such as advanced business models and new talent models. These considerations require guidance, compliance and strategy suited to human, digital and physical workplaces and must be considered collectively instead of in silos. Newer aspects that should be included as part of workplace services are listed as follows:

- Market change and new business model design, including the creation of a circular business delivery model
- Guidance on digital capabilities that can impact human or physical workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategy

While some providers can develop strategies, the key to minimizing potential issues is to work on procurement, project management, change, CX and workplace strategy delivery. Delivering these capabilities across several industries is crucial as the regulations vary by industry.

Eligibility Criteria

1. Provide **advisory services** and **new business model designs**

2. Have a vendor-neutral approach for **workplace transformation-led business delivery models**

3. Offer **advisory services for human, digital or physical workplace strategy**

4. Adopt **new talent models impacting workforces**. The models should integrate diversity, equity and inclusion and eliminate modern slavery risks

5. Integrate **local and remote physical workplaces** to ensure experience parity

6. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom line performance

7. Have **experience and references in delivering workplace-driven sustainability strategy**

8. Have **industry-wide case studies for workplace strategy** leading to human, digital and physical workplace benefits

Observations

Work happens everywhere; it is ubiquitous, and employee expectations reflect this reality. Employees demand to be empowered in this phygital world where the digital, physical and human aspects of work blend. Businesses must rethink their workspace strategy to cope with the current rapidly changing work environment to stay competitive. This year, ISG introduced a new quadrant to assess providers that help organizations navigate this complexity and attract and retain the top talents they require.

Leaders in this quadrant provide comprehensive strategic guidance and industry-specific solutions to holistically rethink the workplace in the context of evolving business models, new talent frameworks, and the integration of office and remote workplaces to achieve seamless and sustainable operations.

Fujitsu, a strong leader in this space, is not included in this year's study because of workplace services reorganization. Product Challengers have global advisory capabilities, although they do not engage with many local clients to offer strategy services. Market Challengers are recognized for their solid capabilities and market presence. However, they need to evolve their capabilities and demonstrate their expertise in advising the future workforce beyond technology. Contenders in this quadrant need to continuously improve their portfolio and demonstrate adequate reference cases for their advisory capabilities. These capabilities would help German enterprises transform their workplace strategy to become employee-centric while meeting the flexibility needs of today's workforce.

From the 44 providers assessed for this study, 28 qualified for this quadrant, with 11 being Leaders.

accenture

Accenture transforms businesses by integrating digital, physical and human aspects of the workplace holistically. Its strategic advisory services, tailored to regional needs, drive rapid, sustainable outcomes and foster a culture of innovation and adaptability.

BECHTLE

Bechtle leads with tailored workplace advisory that adapts to the needs of German businesses of all sizes. Its extensive expertise across industries and in-depth understanding of the German market integrates people, technology and new business models in smart places.

Capgemini

Capgemini offers leading strategic workplace advisory services, integrating advanced digital and physical workplace strategies with inclusive talent models. Its focus on sustainability and seamless experience parity creates a thought-leading workplace experience.

Computacenter

Computacenter excels in end-to-end workplace transformation with its strong market heritage. Its people-centric advisory integrates the demand for a hybrid workforce into the digital and physical workplace for a seamless hybrid work experience.

Deloitte.

Deloitte excels with its leading global strategic advisory that strongly focuses on employee well-being, mental health and mobile workforce enablement. It offers holistic workplace strategies that integrate cutting-edge mobile technologies and advanced talent models.

T

Deutsche Telekom is the backbone of digitalization in Germany and excels in transforming work environments for businesses of all sizes across industries. It connects digital and physical workspaces to enable modern people-centric work models.

DXC TECHNOLOGY

DXC Technology is the enterprise partner that transforms German workplaces. Its strategic advisory capabilities integrate advanced AI, automation and IoT technologies to harmonize human, digital and physical elements, thereby ensuring compliance and operational efficiency.

Workplace Strategy and Enablement Services

Infosys is a transformational force that is evolving Germany's workplaces. With expertise in driving sustainable digital workplaces and connecting talent and technology, it helps enterprises boost productivity and gain experience parity, establishing itself as a leading partner.

TCS integrates the digital, physical and human elements of work through its advanced platforms, workspace.xi and Cognix. Its strategic advisory drives innovative and sustainable transformations across diverse industries focused on superior EX.

Unisys stands out with its strategic experience-centric workplace advisory. Its strong track record of creating people-centric, digitally-enabled work experiences that support modern work models across locations makes it a leading partner for enterprises in Germany.

Wipro delivers superior advisory services leveraging Designit, its strategic design arm, to create innovative, user-centric work environments. Its holistic approach focuses on creating sustainable, efficient and inclusive smart work experience regardless of the location.

Computacenter

Leader

"Computacenter excels in delivering integrated workplace strategies to German businesses. These strategies align with modern business models, sustainability goals and employee experience enhancements. Its strong legacy makes it a strategic partner."

Roman Pelzel

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. The company provides a robust portfolio of services designed to transform and manage workplace environments for clients across various industries in Germany. Its offerings include IT strategy, advisory services, application services and end-to-end lifecycle management. Computacenter's extensive expertise in physical and digital asset management and a strong commitment to sustainability position it as a trusted partner in workplace transformation.

Strengths

Workplace-driven sustainability: Computacenter is committed to achieving net zero carbon emissions by 2040 and has already achieved carbon neutrality for Scope 1 and 2 emissions. The company deploys solar farms, significantly reducing carbon emissions and providing sustainability assessments and circular services to redeploy, remarket and recycle assets for effective physical asset management.

Committed to EX: Computacenter provides new work advisory services to assist clients in implementing modern workplace concepts and adapting to evolving work environments. It helps develop new business models that emphasize social interaction and teamwork, offering comprehensive consulting services for managing workplace changes, including cultural transformation and talent management. These services involve analyzing workstyles, understanding employee personas and implementing collaboration solutions.

Diversity and inclusion: Computacenter emphasizes diversity and inclusion, implementing various programs to enhance the presence of women in leadership roles and bolster different diversity initiatives within the company. The company's workplace strategies incorporate DE&I considerations, align with modern talent models and promote an inclusive environment for all employees.

Caution

Computacenter should continue integrating leading experience-centric technologies to stay competitive and maintain its position. The company could showcase more evidence of how its services have helped companies transform their physical workplaces into flexible solutions that provide experience parity.
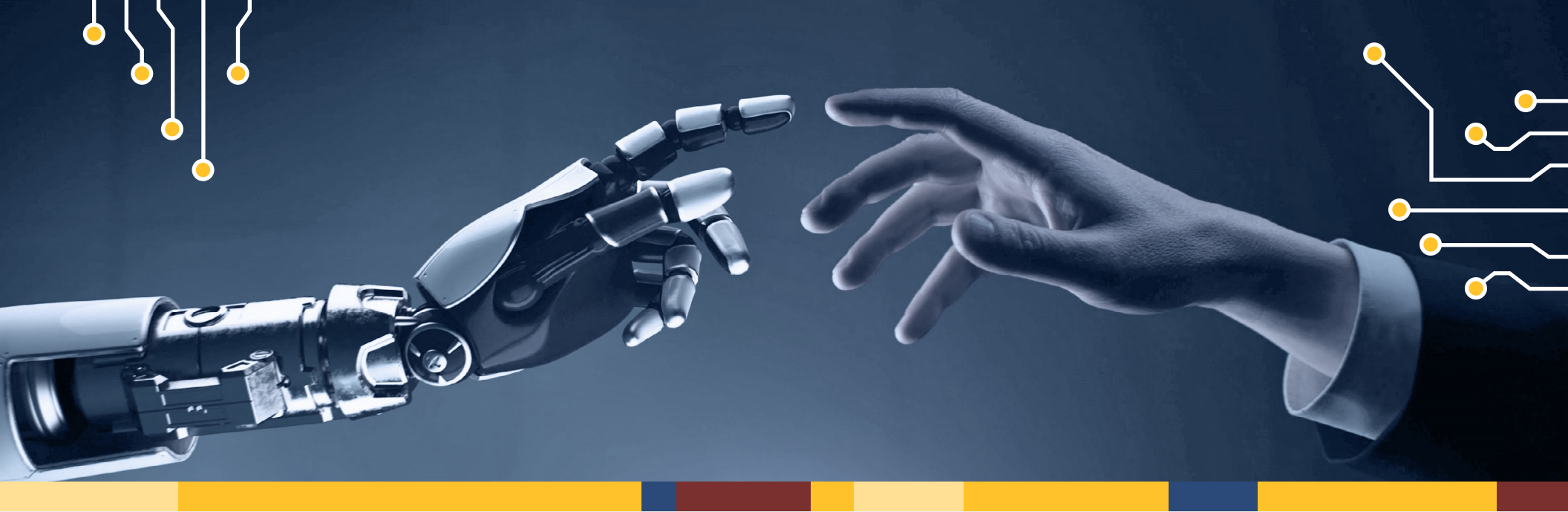
Collaboration and Next-gen Experience Services

Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany to evaluate the current market positioning of collaboration and next-gen experience providers and determine how each provider addresses key challenges faced in the region.

The German business landscape is transforming, driven by the need to foster effective collaboration in a hybrid work environment. Service providers can create personalized user experiences that enhance productivity and satisfaction by measuring experience-based outcomes. AI-powered devices can automatically adjust settings based on individual preferences and work styles, while GenAI can automate workflows and offer context-sensitive recommendations.

Collaboration is paramount in this hybrid environment. Service providers are helping German enterprises leverage leading solutions such as Microsoft Teams, Cisco Webex and Zoom to facilitate seamless communication and collaboration between onsite and remote teams. These solutions and unified communication platforms maintain the uninterrupted flow of information regardless of location. Biometric technologies and contextual awareness add another layer of efficiency. Facial recognition and location detection can streamline access control and trigger personalized settings, further enhancing security and user experience.

By embracing these next-generation services and the hybrid work model, German enterprises can unlock a new era of collaboration. XLAs, AI-powered personalization and best-in-class collaboration tools foster a more productive and satisfying work environment for all employees, ultimately leading to a more competitive and innovative future for German businesses.

Strategy professionals should read this report to identify the evolving business models to create a future-proof workplace and maintain organizational competitiveness.
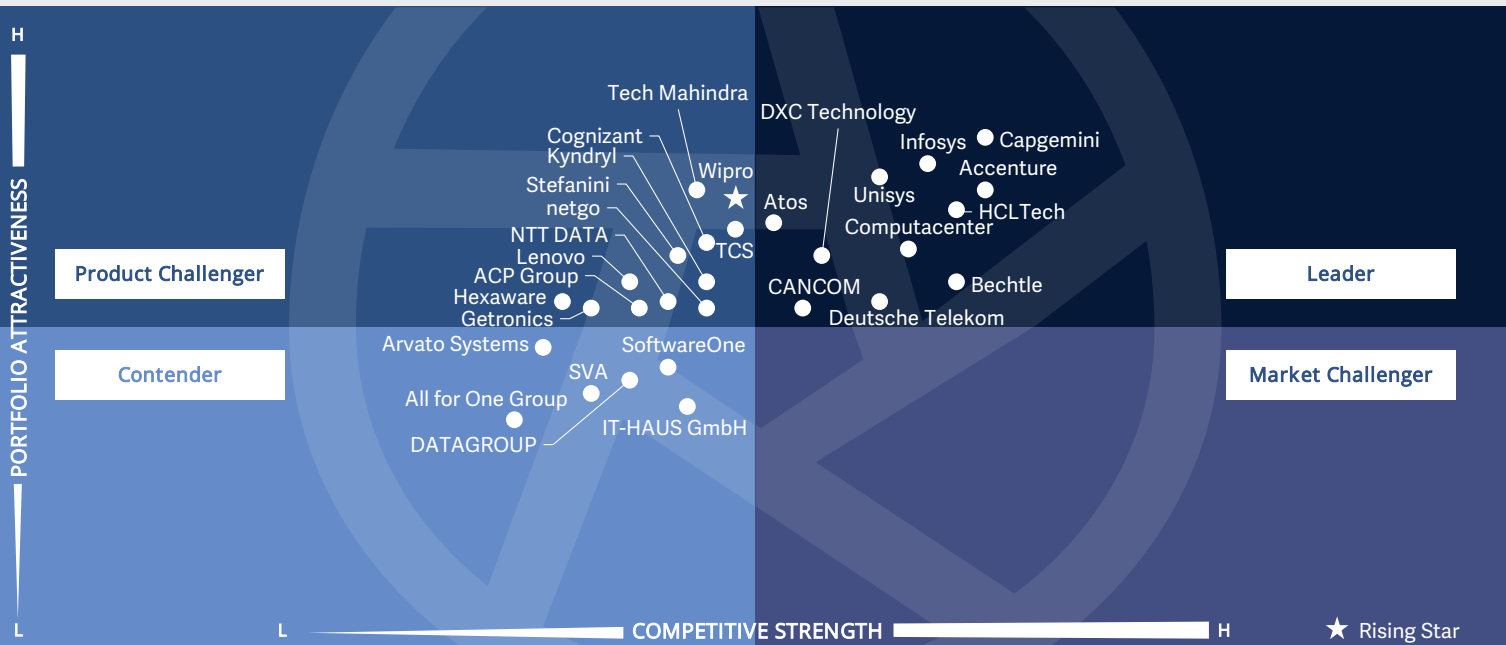
Digital professionals should read this report to learn how to leverage digital transformation acceleration and experience-based metrics to create a thriving digital employee experience.

Technology professionals should read this report to understand the latest trends in digital workplaces, from AI integration and automation to GenAI's transformative potential.

ISG Provider Lens™

Future of Work Services
Collaboration and Next-gen Experience Services

Germany 2024

H

PORTFOLIO ATTRACTIVENESS

Tech Mahindra
DXC Technology
Cognizant
Kyndryl
Wipro
Infosys   Capgemini
Accenture
Stefanini
netgo
Atos   Unisys
HCLTech
NTT DATA
TCS   Computacenter
Lenovo
ACP Group
Hexaware
Getronics   CANCOM   Bechtle
Deutsche Telekom
Arvato Systems
SoftwareOne
SVA
All for One Group
IT-HAUS GmbH
DATAGROUP

Product Challenger

Contender

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates providers' expertise in **transforming employee experience** through strategic planning, **change management** and **advisory** services, fostering a holistic and **engaging** work experience beyond basic technology enablement.

Roman Pelzel

Collaboration and Next-gen Experience Services

Definition

This quadrant assesses service providers' capabilities in enhancing end-to-end CX and EX and offering value-added managed services to enable workplace technology ecosystem and enhance end-user experience. Typically, providers offer services that enable business leaders, line-of-business (LoB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. Their services associate experience with measurable business results and help align the digital workplace transformation with human needs.

Next-generation experience extends beyond technology implementation, including professional services promoting technology adoption. Service providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data and analytics, sentiment analysis, ML and change management activities.

These providers enhance collaboration and support comprehensive communication, collaboration and productivity stacks using AI and GenAI technologies. They also extend their offerings to consulting and advisory services, addressing the requirements of various business functions such as HR and operations. They provide expert guidance on effective change management and technology adoption, using cutting-edge technologies to ensure seamless transitions. Additionally, these providers offer services promoting digital dexterity, thus fostering an environment conducive to learning and skill development essential for navigating the evolving workplace landscape.

Eligibility Criteria

1. Provide an **XLA-focused delivery approach** to enhance collaborative experience

2. **Leverage AI and GenAI technologies** to provide value-added experience transformation services

3. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage by monitoring analytics from deployed hardware

4. **Support unified communication, collaboration and productivity stack**

5. **Provide services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations

6. Provide **services that enable proper change management and technology adoption**, leveraging the latest technologies such as Copilot

7. **Support XMO and associated services**

8. Provide **services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**

Observations

In 2024, collaboration and experience-centric services are key to successful digital workplace transformation. Providers in this quadrant excel with smart, seamless collaboration and productivity solutions across locations and time zones. Using AI and GenAI, they enhance collaboration, automate tasks and improve efficiency. XLAs are popular for their focus on outcomes and user satisfaction. Experience management offices (XMOs) gather insights through data analytics and ML to drive continuous improvement in user experience, aligning digital workplace transformations with human needs for measurable outcomes. Providers offer services such as consulting, technology adoption support and change management.

Fujitsu, a former leader, is not included in this year's study due to the reorganization of its workplace services. ISG acknowledges Wipro as a Rising Star due to its thought-leading vision, drive and demonstrated excellence in experience-centric service delivery in the German market.

Leaders in this quadrant offer a comprehensive, experience-driven portfolio leveraging AI and GenAI, coupled with superior change management capabilities, to support the adoption of unified communication and productivity stacks. They demonstrate remarkable success in delivering outcome-oriented services and manage the overall experience with strong XMO capabilities.

Product Challengers have robust technology but a limited market presence. Contenders offer strong technology and services but lack maturity, market reach or a comprehensive portfolio. They need to develop more experience-related delivery capabilities, including XLA and XMO, to progress.

From the 44 providers assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture leads the transformation of digital and physical workspaces through advanced AI and GenAI technologies. With its innovation-based holistic approach, Accenture is fostering a hybrid work environment that enhances productivity and drives sustainable outcomes.

AtoS

Atos excels in AI-powered and experience-centric digital workplace platforms, smart collaboration tools and advanced analytics. Its GenAI initiatives enhance productivity and ESG outcomes, driving seamless digital transformation and superior EX.

BECHTLE

Bechtle excels in providing smart communication and collaboration solutions, seamlessly integrating them with existing systems. They focus on user adoption and training, enhancing EX through Bechtle's extensive industry expertise.

CANCOM

CANCOM's longstanding tradition in the German market and its excellent capabilities in creating leading collaboration and experience-centric solutions help German businesses achieve a secure, efficient and productive digital work experience.

Capgemini

Capgemini transforms the DEX in Germany with a human-centric approach that drives digital dexterity and collaboration. Clients benefit from AI-powered XMO capabilities to gain actionable insights and support change and adoption initiatives.

Computacenter

Computacenter integrates AI and leading analytics to optimize the digital experience and hybrid working for enhanced productivity and engagement. With a focus on sustainability, the company drives innovation and value for clients across various industries in Germany.

T

Deutsche Telekom leads with its AI-integrated Magenta Business Collaboration portfolio. The company uses its holistic Lean Workplace approach to enhance employee collaboration and experience for German businesses backed by superior infrastructure services.

DXC TECHNOLOGY

DXC Technology utilizes its AI-powered UPtime™ Experience Platform to deliver leading digital user experience to German enterprises with real-time analytics for actionable insights. It ensures smooth user adoption with its robust change approach, Vortical Change OCM.

HCLTech

HCLTech excels with its advanced IP-led solutions, FLUID Workplace powered by the GenAI approach, and WorkBlaze experience management to facilitate the experience-centric workplace transformation in Germany, with a strong focus on digital dexterity and XLA-driven outcomes.

Infosys

Infosys leads the AI-powered transformation of the DEX in Germany. Its solutions such as Cortex and Orbit help enterprises foster hyperpersonalized, smart work experiences that enhance collaboration, productivity and engagement.

UNISYS

Unisys stands out in the German market with its leading digital experience management and a broad, AI-driven and experience-focused managed services portfolio. It offers superior data-driven XLA and XMO capabilities to enhance productivity and end-user experience.

wipro

Wipro is recognized as a Rising Star in this year's quadrant for its strong commitment to enhancing EX, productivity and engagement through AI. Its leading XMO capabilities and collaboration solutions make it a key partner for German businesses.

Collaboration and Next-gen Experience Services

Computacenter

Leader

> "Computacenter's strategic partnership with the experience management vendor HappySignals underlines its claim to excel in people-centric workplace transformation in Germany. Its New Work practice provides a holistic view of enabling work flexibility."
>
> *Roman Pelzel*

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. With its strong local heritage, Computacenter excels in delivering people-centric workplace services in Germany. It designs, implements and operates New Work-driven digital workspaces and manages collaboration tools across various sectors. Its XMO capabilities help gather actionable insights through data analytics and sentiment analysis for a seamless user experience. It further focuses on continuously strengthening its portfolio.

Strengths

Offering comprehensive collaboration solutions: Computacenter offers collaboration tools and solutions, including advanced deployments of Microsoft Teams. These tools are meticulously deployed and managed through experience-centric analytics to ensure optimal performance and user satisfaction. By leveraging these collaboration tools, Computacenter significantly enhances communication and productivity across all organizational levels.

Focusing on cross-functional support and change management: Computacenter supports various business functions, including HR and operations. It offers expert guidance on change management and technology adoption, utilizing the latest technologies to enable smooth transitions.

Its tailored and AI-empowered training programs have significantly improved employees' digital dexterity.

Addressing the modern workplace landscape: Computacenter profoundly understands the evolving modern workplace by implementing innovative New Work concepts, including creating pilot areas within new premises where these concepts are tested and refined. This strategic implementation approach allows for the anonymous measurement and evaluation of the new work environment, enabling continuous adaptation and improvement. It ensures that the workplace remains dynamic and responsive to changing employee needs and business demands.

Caution

Computacenter is a highly trusted brand in Germany that excels in people-centric transformation of modern workplaces. It should showcase more evidence of how it adapts to the rapid advancements in AI to maintain a competitive edge. Clients could benefit from a dedicated innovation lab to pilot new technologies.

Managed End-user Technology Services

Managed End-user Technology Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany to evaluate the current market positioning of managed end-user technology service providers and determine how each provider addresses key challenges faced in the region.

German enterprises, known for their emphasis on data privacy and security, face a unique challenge in the future of work. The rise of hybrid work models necessitates a secure and compliant IT infrastructure for a geographically dispersed workforce; however, German regulations and a focus on employee well-being add another layer of complexity.

Managed end-user technology services play a pivotal role in addressing German-specific needs. Cloud-managed solutions with features such as autopilot and location-independent management offer the flexibility and scalability required for hybrid work while adhering to strict data privacy regulations such as GDPR.

Unified endpoint management (UEM) enables consistent security policies across all devices, effectively mitigating risks.

Security transcends beyond mere data protection. The layered security protection safeguards sensitive information while enabling seamless remote access. AI-driven adoption and support empower employees with self-service options and reduce IT burden, fostering a positive user experience. This focus on experience extends to hyperpersonalization, allowing for tailored workspaces that boost productivity and employee well-being.

Strategy professionals should read this report to understand key trends such as XLA and automation to optimize user experience and drive business outcomes for an efficient hybrid workforce.
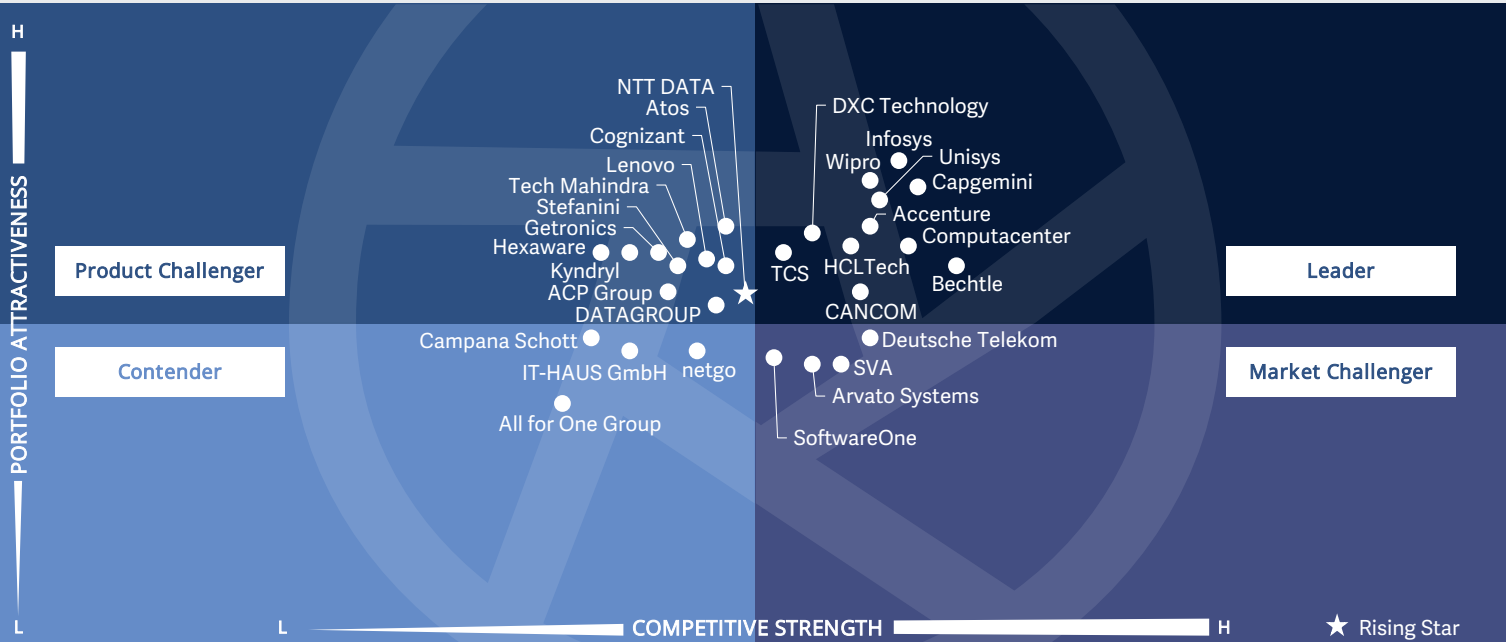
Technology professionals should read this report to identify opportunities where automation and self-healing technologies can be leveraged to improve efficiency and reduce downtime.

Digital professionals should read this report to gain insights into how providers can empower a geographically dispersed workforce and enhance digital transformation initiatives.

ISG Provider Lens™

Source: ISG RESEARCH

Future of Work Services
Managed End-user Technology Services

Germany 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

NTT DATA
Atos
Cognizant
Lenovo
Tech Mahindra
Stefanini
Getronics
Hexaware
Kyndryl
ACP Group
DATAGROUP
Campana Schott
IT-HAUS GmbH   netgo
All for One Group

DXC Technology
Infosys
Wipro   Unisys
              Capgemini
        Accenture
        Computacenter
TCS   HCLTech
              Bechtle
      CANCOM
        Deutsche Telekom
        SVA
      Arvato Systems
    SoftwareOne

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H

★ Rising Star

This quadrant evaluates providers' capabilities to deliver seamless, **secure and always-on** digital workplace solutions with **digital experience management**, smart provisioning and UEM, covering the entire **lifecycle, including device as a service**.

Roman Pelzel

Managed End-user Technology Services

Definition

This quadrant assesses service providers offering managed services associated with technologies that enterprise IT departments deploy, provision and secure 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 endpoint security. Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolio extends to support bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing, and securing the devices remain the first primary step to enabling a digital workplace and providing devices with

integrated collaboration and productivity capabilities to employees. The increasing focus on experience through endpoints has transformed services and helped providers cater to clients' respective industries. While these services are typically associated with traditional computing devices and tablets, their scope can be expanded to include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Eligibility Criteria

1. **Provide connected, always-on and updated end-user devices** for secure collaboration and productivity

2. Support **unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**

3. Offer **complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics

4. Provide **DEX solutions for automated issue resolution**

5. Demonstrate **experience in providing virtual desktop services on-premise and on the cloud** (desktop as a service)

6. **Offer related field services**, IMAC and break/fix services. Provide remote and onsite field support and in-person technical assistance

7. **At least 75 percent of regional contracts must include end-user technology services management**

Observations

The Managed End-user Technology Services quadrant has evolved significantly over the past year, with a clear shift toward integrating advanced AI and automation technologies to enhance DEX. The challenging competitive landscape emphasizes seamless DEX, predictive support and digital workplace services that differentiate Market Leaders from Challengers. Providers are innovating to deliver experience parity in flexible work settings, making it a significant differentiator.

Fujitsu has not been assessed this year because of the reorganization of its workplace services. ISG congratulates TCS for moving into the Leaders quadrant and NTT DATA for being recognized as a Rising Star.

Leaders offer unique, differentiated services that integrate contextual AI, supporting hybrid work environments with predictive, analytics-driven experience enhancement. With a strong customer base and a significant regional presence, they are at the forefront of AI-led transformation, creating superior digital workplace experiences and setting the benchmark for the future of work. They present successful customer stories in hybrid working and expand their market presence in Germany.

Product Challengers excel in AI, automation and VR technologies. They should aggressively expand their operations in Germany to strengthen their market positioning. Market Challengers are established providers of traditional workplace services. They must intensify efforts to adopt analytics-driven experience management to bridge the gap with Leaders. Lastly, Contenders remain focused mostly on traditional services and must adopt new experience-centric technologies and approaches to stay relevant.

From the 44 providers assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture is a leading workplace service provider in Germany. Its strong experience-centric and smart digital workplace management service offers a comprehensive digital experience across devices, enabling the future workforce to stay connected and productive.

BECHTLE

Bechtle's robust workplace and technology capabilities, extensive partnership with leading vendors, strong presence and longstanding history make it a preferred partner for keeping the German workforce engaged and productive in flexible work environments.

CANCOM

CANCOM excels in delivering digital workspaces, including virtual desktop infrastructure (VDI) and desktop-as-a-service, to German businesses. The company positions people at the center, promoting flexibility and productivity with intelligent UEM.

Capgemini

Capgemini's managed end-user technology services excel in the German market owing to its comprehensive and proactive DEX capabilities, which provide a secure and connected digital work experience across devices with leading endpoint security device lifecycle management.

Managed End-user Technology Services

Computacenter has a longstanding tradition in Germany of efficiently managing the entire lifecycle of devices. It optimizes digital workspaces while offering security and compliance to deliver a seamless and productive digital experience across all devices.

DXC Technology has a proven track record in improving operational efficiency with leading end-user technology services. DXC uses its UPtime™ platform for AI-powered device strategy and optimization, delivering enhanced user experience across devices.

HCLTech

HCLTech leads the German end-user technology space with advanced device management services and broad UEM capabilities. Its AI-powered proactive DEX management approach ensures employees stay productive and connected.

Infosys excels in providing end-to-end device lifecycle management in Germany, ensuring employees receive ready-to-use devices. Its proactive and automated maintenance system integrates with its strong UEM and advanced DEX capabilities to enhance productivity.

TCS leads in Germany with its enhanced workplace and device delivery capabilities. It utilizes its Cognix™ solution to facilitate flexible work and provides comprehensive device and software lifecycle management services with improved EX.

Unisys leads with its smart workplace ecosystem, including device subscription services, to ensure employees have the right hardware to perform their jobs effectively. AI and ML help predict device failures and optimize the device lifecycle management.

Wipro expands its Live Workspace™ portfolio with strong GenAI capabilities, distinguishing its device lifecycle services. Leading DEX management and business performance dashboards help clients in Germany progress along Wipro's human-centric workplace maturity model.

NTT DATA (Rising Star) excels with a broad portfolio of AI-enriched workplace and device lifecycle services. Partnerships with leading experience-centric vendors and a robust local presence make NTT DATA a strategic partner in Germany.

Computacenter

"Computacenter's commitment to sustainability and comprehensive circular services in device lifecycle management make it a leading provider in Germany, offering secure, efficient and environmentally responsible end-user technology services."

Roman Pelzel

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. Computacenter is renowned for its holistic approach to managed end-user technology services in Germany — its second-largest market, preceded by the U.K. It has a longstanding tradition of delivering workplace services in Germany. The company excels in device lifecycle management, covering every aspect from procurement to disposal. It has partnered with more than 200 leading vendors worldwide, including Apple, Dell and Microsoft.

Strengths

Holistic workplace portfolio: Computacenter's advanced modern endpoint solutions significantly enhance its end-to-end workplace portfolio. Clients benefit from leading capabilities, including secure UEM, comprehensive device lifecycle management and robust IT asset management. Central to these capabilities is its state-of-the-art Integration Center in Kerpen, Germany, which facilitates seamless delivery and management of these services at scale.

Strategic alliances with leading technology providers: Computacenter's strong partnerships with the world's leading technology providers help expand its managed end-user technology services. By integrating the latest innovations from these strategic alliances, Computacenter

delivers advanced, reliable and secure IT solutions tailored to business needs. It is a trusted partner to technology giants in the German market.

Comprehensive and sustainable technology sourcing: Computacenter provides comprehensive technology sourcing solutions that enable businesses to access the latest and most efficient IT assets. Leveraging its strategic partnerships, Computacenter delivers tailored procurement services, specialist services and logistical support. Its sustainable approach includes rigorous sustainability assessments and circular services that promote IT asset reuse, remarketing and recycling.

Caution

Computacenter's portfolio has evolved to offer experience-centric managed workplace services. It must continue exploring aspects beyond technology and demonstrate how its solutions help German businesses to mature and embrace the flexibility demands of today's workforce to strengthen its position.

Continuous Productivity Services (including Next-gen Service Desk)

Continuous Productivity Services (including Next-gen Service Desk)

Who Should Read This Section

This report is relevant to enterprises across industries in Germany to evaluate the current market positioning of continuous productivity service (next-gen service desk) providers and determine how each provider addresses key challenges faced in the region.

German enterprises thrive on efficiency and prioritize data privacy. This focus shapes the future of work in Germany, where continuous productivity services powered by a next-generation service desk take a unique approach.

Here, autonomous workplace support transcends beyond self-service. DigiLockers dispense preconfigured laptops or peripherals, minimizing downtime. A critical differentiator is GDPR compliance; data security and privacy are paramount, requiring service providers to ensure that solutions adhere to strict regulations. German enterprises also face distinct challenges, needing to quantify workplace support value beyond productivity. Enterprises should demonstrate a clear return on investment for these new service models. Fostering a culture of trust with employees regarding AI and data privacy is crucial for successful adoption.

By addressing these challenges and embracing trends such as unified omnichannel support, proactive problem resolution with a strong focus on AI-powered automation and experience management that prioritizes data security, German enterprises can leverage next-generation service desks to unlock continuous productivity while maintaining high efficiency and data privacy standards defining their business landscape.

Strategy professionals should read this report to identify evolving workplaces and the service desk landscape to improve efficiency and productivity.
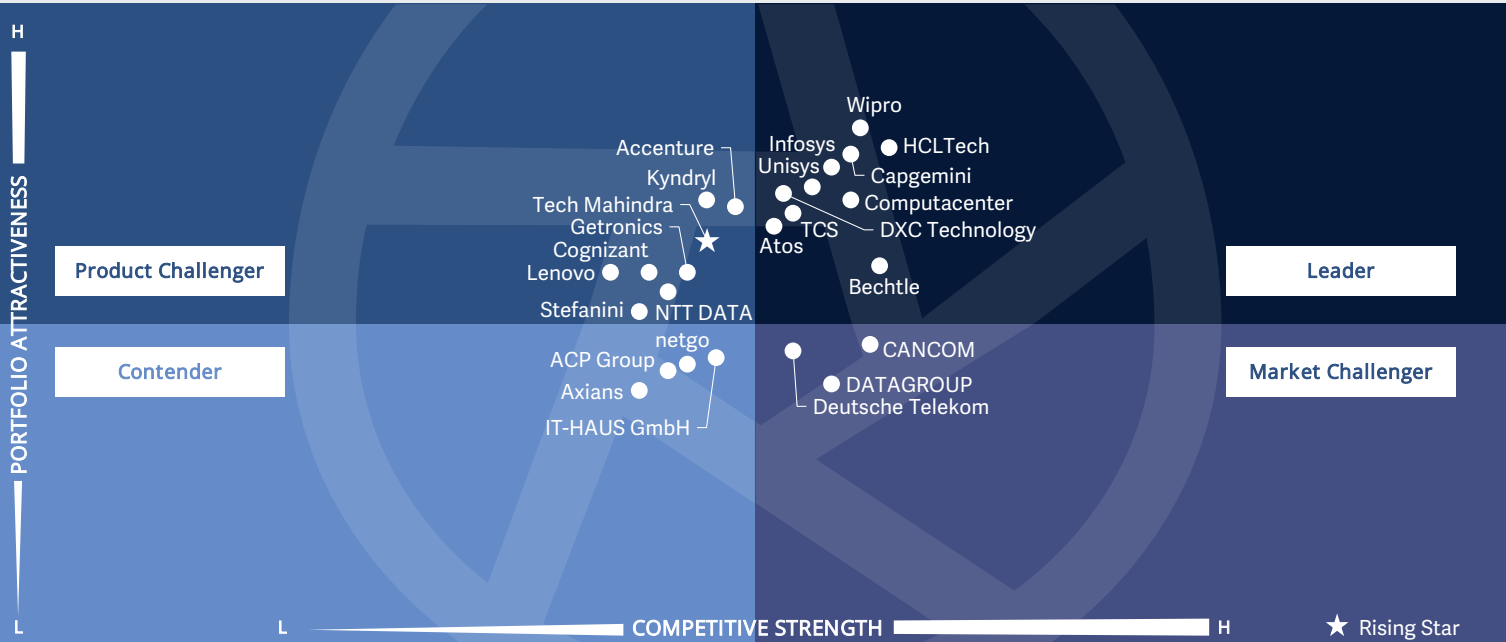
Technology professionals should read this report to understand emerging technologies such as AI, automation and self-service to integrate with the existing IT infrastructure.

Digital professionals, including digital transformation leaders, should read this report to understand how EX transformation service providers align with their digital transformation initiatives.

ISG Provider Lens™

Future of Work Services
Continuous Productivity Services (including Next-gen Service Desk)

Source: ISG RESEARCH

Germany 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

Accenture
Kyndryl
Tech Mahindra
Getronics
Cognizant
Lenovo
Stefanini
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Infosys
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Capgemini
Computacenter
TCS
DXC Technology
Atos
Bechtle

CANCOM
DATAGROUP
Deutsche Telekom

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates providers' capabilities to support **continuous productivity** needs with **proactive support, experience-centric service desk**, effective **field services** and smart **shift-left** offerings to keep employees engaged and connected.

Roman Pelzel

Continuous Productivity Services (including Next-gen Service Desk)

Definition

This quadrant assesses service providers' capabilities in supporting the continuous productivity needs of next-generation workplaces, human workplaces and fully integrated hybrid working patterns.

For today's workforce, being productive means having the ability to work from anywhere, anytime. Users require a different IT operating model, driven by the changes in business models and market channels, which they must operate and support. The current workforce needs autonomy and constant connectivity to ensure productivity regardless of location, work pattern or device. Meeting these needs requires providers to offer enhanced support capabilities, rendering typical service desk offerings less appealing yet available. Next-generation services include sentiment analysis and automated DEX triage to ensure always-on IT is managed, AI-powered health monitoring for managed services, and emerging devices such as AR and VR. These services encompass automated and proactive technical support

and cloud platforms to offer always-on systems. Providers leverage AI and cognitive technologies for user-facing tasks, achieving significant cost savings.

Success is measured through XLAs linked to business outcomes rather than SLAs. Providers can enhance business outcomes by offering advanced productivity support. Previously, these services included field and onsite support requiring expert technicians to visit user locations. Currently, providers leverage automation and use more remote and self-service options such as AR self-fix, workplace support, service desk, tech bars and cafés, DigiLockers, omnichannel chat and voice support.

Eligibility Criteria

1. Provide **deliver-anywhere autonomous workplace support**

2. Offer **fully integrated analytics and automation** for issue resolution

3. Deliver **contextualized AI support** for workplace

4. Provide **service desk augmentation**

5. Offer **XLA-driven support** instead of SLA-driven decisions

6. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers

7. Provide **automated and contextualized support for end users** based on their roles and work

8. **Quantify workplace support function performance** beyond traditional service metrics

9. Have a **robust local presence** with most workplace engagements around service desk services

Observations

The ubiquitousness of work challenges businesses to enable or restore productivity regardless of the location. This quadrant has evolved accordingly to better reflect the increasing demands of today's connected workforce.

Fujitsu has not been assessed this year because of the reorganization of its workplace services. ISG congratulates Atos for returning to the Leaders quadrant this year and Tech Mahindra for being recognized as a Rising Star.

ISG notices that providers increasingly use DEX tools and practices with advanced analytics and automation to proactively solve problems and reduce reliance on traditional service desk models in this mature market.

XLAs for measuring support success based on user experience and business results are also gaining traction. This approach leads to more personalized and efficient support services in Germany, ensuring continuous productivity regardless of the user's location or device.

Leaders excel with a robust local presence and an in-depth understanding of the need for continuous productivity support based on employees' demands to keep them productive and engaged regardless of the location and time. They have developed their portfolio accordingly. Product Challengers are recognized for their strong portfolios. Expanding their market presence in Germany remains crucial for their advancement. Market Challengers maintain a solid market presence with a loyal customer base; however, they should strengthen their capabilities to keep pace with Leaders or Product Challengers. Contenders have shown improvement in their support services but still lack experience-centric support capabilities and market presence to compete effectively.

From the 44 providers assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

AtoS

Atos excels in delivering experience-centric modular support services that address the needs of German enterprise clients. With GenAI, proactive, real-time data analytics and automated issue resolution, Atos offers continuous productivity with enhanced user satisfaction.

BECHTLE

Bechtle excels in offering AI-integrated service delivery and proactive support that meets the continuous productivity needs of German companies of all sizes. Its self-service capabilities are widely recognized, and its strong local presence makes it a leading partner.

Capgemini

Capgemini focuses on boosting workplace productivity and digital adoption in Germany. Its leading experience-centric and AI-powered support portfolio enables users to work from anywhere and includes capabilities such as self-help kiosks and proactive technical support.

Computacenter

Computacenter has expanded its service desk and in-person support services in Germany to address the experience-centric support needs of a hybrid workforce. It focuses on strategic partnerships and enhancing capabilities for improved productivity and experience parity.

Continuous Productivity Services (including Next-gen Service Desk)

DXC TECHNOLOGY

DXC Technology supports continuous productivity in German enterprises with its evolved UPtime™ Experience Platform. This platform delivers proactive and AI-driven support services with advanced self-service, tech bars and conversational AI-enabled smart lockers.

HCLTech

HCLTech, a global leader in workplace support services, excels with its evolved FLUID Workplace GenAI platform. Its robust portfolio includes Lucy, the GenAI-enabled virtual agent, and the WorXspace solution for elevated end-user experience with shift-left capabilities.

Infosys

Infosys is a leader in the German continuous productivity support services market. It leverages its AI-First Digital Operational Model and the DWX Command Center to deliver smart, proactive and experience-centric support that keeps employees connected and engaged.

tcs TATA CONSULTANCY SERVICES

TCS excels in enabling and restoring productivity while supporting the workforce's flexibility needs in German business. Investments in AI and automation have evolved the Cognix™ platform and the workspace.xi offering, making them key differentiators for the company.

UNISYS

Unisys continuously evolves its leading workplace portfolio to improve EX and productivity in Germany. Its service desk, frontline and file services, and InteliServe platform benefit from AI-driven insights and automation.

wipro

Wipro's continuous productivity support services excel in the German market. Its global service desk capabilities are enhanced by robust experience-centric and AI-powered solutions, such as LiVE Workspace™, which deliver proactive and preventive support.

TECH mahindra

Tech Mahindra (Rising Star) leads with its FLEXLA offering. Its single barometer of employee experience can adapt to the flexible support needs of German enterprises. The company's global support model includes localized and contextualized support.

Continuous Productivity Services (including Next-gen Service Desk)

Computacenter

Leader

"With its Triple A approach, advanced experience management capabilities and the latest partnership with HappySignals, Computacenter leads in proactive support, leveraging AI, analytics and automation to enhance productivity and user satisfaction."

Roman Pelzel

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated GBP6.9 billion in revenue, with Technology Sourcing as its largest segment. Its comprehensive service portfolio includes technology sourcing, professional services and managed services. They focus on delivering high-quality IT solutions tailored to the unique needs of various regional markets and sectors. The company invests notably in new capabilities to deliver experience-centric support services to German clients. Its portfolio now clearly addresses the flexibility needs of a modern workforce.

Strengths

Eliminating human intervention: Computacenter's Start Left approach prioritizes user autonomy and seamless support and minimizes the need for human intervention. This AI-powered omnichannel support delivery approach includes voice, chat, web and mobile channels integrated with self-help and self-serve options. It reduces IT support costs and enhances user satisfaction and enterprise productivity.

Elevating user support experience: Computacenter has partnered with top experience-centric vendors, including Nexthink, Genesys, ServiceNow and HappySignals. These partnerships enhance its service desk capabilities, integrating DEX, customer engagement and IT service management tools. Nexthink offers real-time

digital experience insights, Genesys boosts omnichannel support, and HappySignals provides critical sentiment analysis for proactive IT management, improving user satisfaction and productivity.

Minimizing IT disruptions: Computacenter's Triple A (AI, analytics and automation) approach emphasizes proactive and efficient IT support delivery. As a strategic approach to continuous innovation and improvement, it leverages GenAI, ML and advanced workplace analytics to predict and resolve issues before they impact users. This strategy reduces reliance on human intervention, increases user autonomy and minimizes IT disruptions.

Caution

Computacenter's new strategic partnership with HappySignals indicates a shift toward more potent experience-centric service delivery. HappySignals offers new intriguing capabilities that transcend beyond technology. It should leverage its New Work practice to drive adoption among German clients.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is relevant to enterprises across industries in Germany to evaluate the current market positioning of smart and sustainable workplace service providers and determine how each provider addresses key challenges faced in the region.

Germany's focus on innovation positions it at the forefront of workplace evolution. Enterprises increasingly focus on employee experience, recognizing it as a key driver of productivity and talent retention. This focus aligns with service provider trends such as data-driven process optimization and automation, aiming to create a more streamlined and efficient work environment.

German enterprises are building smart office spaces that cater to individual needs by leveraging IoT and workplace analytics. Hot desking and smart building solutions optimize resource allocation and reduce energy consumption, contributing to Germany's ambitious sustainability goals. Automation within facility management allows valuable resources to engage in higher-level tasks.

German enterprises face hurdles in implementing these advancements. Balancing the need for data-driven optimization with employee privacy and fostering a sense of community in a hybrid work environment can be challenging. Integrating new technologies requires a skilled workforce and robust cybersecurity measures. Furthermore, fostering a culture of innovation and continuous improvement is crucial to adapt to the rapidly changing technological landscape.

German enterprises can create smart and sustainable workplaces by prioritizing employee experience, data-driven decision-making and automation. Navigating data privacy challenges, fostering a connected workforce and maintaining a culture of innovation will be critical for success.

Technology professionals should read this report to learn about smart building technology, IoT and workplace analytics in optimizing energy consumption.

Strategy professionals should read this report to understand sustainability trends and efficiency goals to enable data-driven decision-making and reduce carbon footprint.
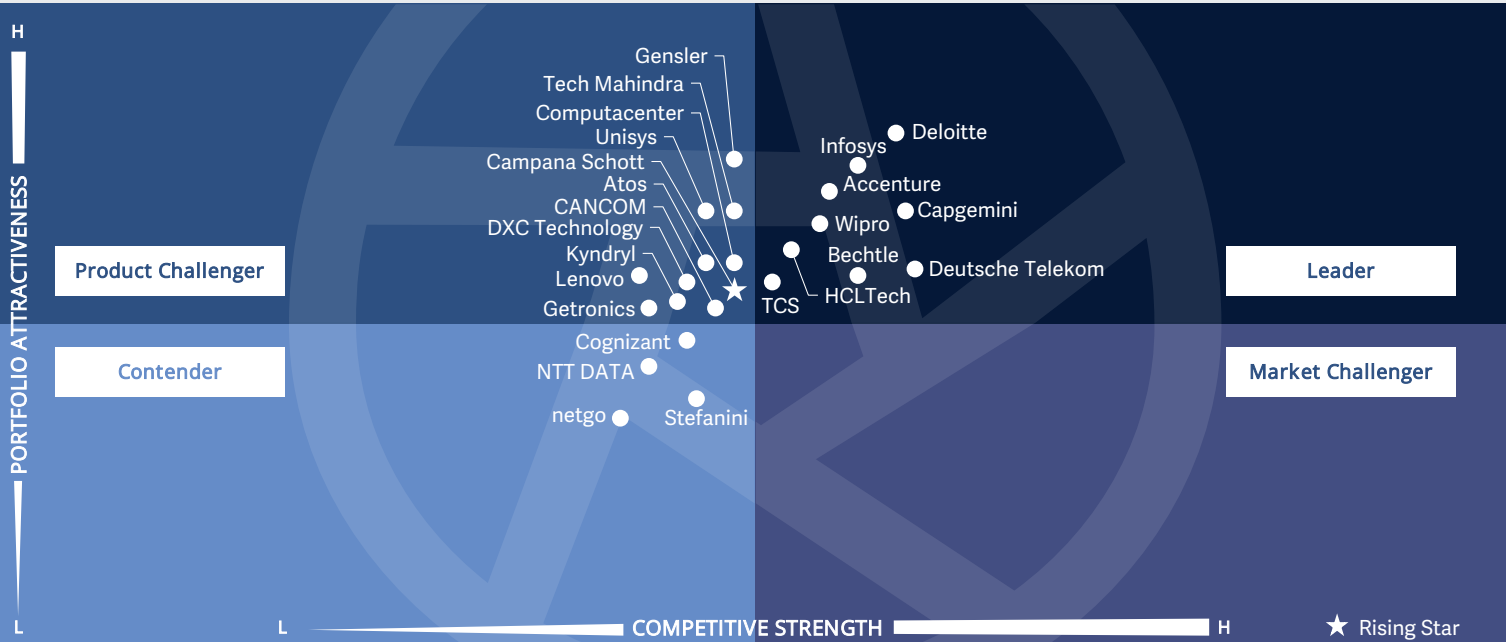
Digital professionals should read this report to understand how seamlessly integrating user-friendly digital solutions will enhance employee experience.

ISG Provider Lens™

Future of Work Services
Smart and Sustainable Workplace Services

Source: ISG RESEARCH

Germany 2024

H

PORTFOLIO ATTRACTIVENESS

Gensler
Tech Mahindra
Computacenter
Unisys
Campana Schott
Atos
CANCOM
DXC Technology
Kyndryl
Lenovo
Getronics

Infosys
Accenture
Wipro
Bechtle
HCLTech
TCS

Deloitte
Capgemini
Deutsche Telekom

Product Challenger
Leader

Contender
Market Challenger

Cognizant
NTT DATA
netgo   Stefanini

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates providers' abilities to create and manage **smart, IoT-enabled** and **sustainable physical workplaces** and foster an **inclusive** work environment, helping clients achieve their **sustainability goals**.

Roman Pelzel

Definition

This quadrant assesses service providers that support smart, IoT-enabled physical workplaces and assist clients in achieving sustainability goals. The modern workplace combines human, digital and physical workplaces to enable remote, hybrid or in-person collaboration and productivity. Buildings and spaces must be integrated, inclusive and sustainable, offering users a purpose to attend.

With commercial retail facing major occupancy issues, workplace service providers must collaborate with enterprise leaders and create a holistic office strategy. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As organizations focus on a return-to-office strategy, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an adaptive, efficient, inclusive and responsible environment. These help create spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

Providers must also integrate experience parity capabilities into their offerings, with tangible outcomes irrespective of remote, virtual or hybrid models. They must incorporate unified communications and collaboration capabilities and offer smart, collaborative workspaces. Their services include IoT-enabled functionality to control the environment, resulting in a smart campus with an intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Support **smart office spaces by leveraging IoT and the latest technologies** to provide workplace analytics, hot desking, smart building and facility management

2. Offer **support for asset efficiency and address energy management requirements**

3. Provide **inclusive, adaptable and integrated hybrid working solutions** and spaces

4. Provide **services to reduce carbon emissions** from workplaces

5. Assist in aligning client **strategies and metrics for reporting the ESG aspects**, particularly focusing on workspace utilization within the social and governance dimensions

Observations

Flexibility has become the new norm, reshaping how employees define and interact with work and the workplace. Businesses are redefining the role of physical offices, originally functioning as traditional work sites, to become sustainable hubs for collaboration and innovation.

This transition requires a comprehensive understanding of how places can be optimized to support different working modes using IoT, analytics and smart building concepts to create an eco-friendly working environment where people can thrive.

With this newly introduced quadrant, ISG addresses the joint touchpoint where digital workplace-related capabilities and the traditional remit of facility management and corporate real estate meet. Fujitsu has not been assessed this year because of the reorganization of its workplace services. ISG congratulates Campana & Schott for being recognized as a Rising Star.

Leaders are distinguished by their ability to deliver comprehensive, innovative and sustainable solutions that meet the evolving needs of modern physical workplaces. They exhibit a strong market presence, a proven track record of success, and a proactive approach to integrate new technologies, support ESG initiatives and build inclusive work environments.

Product Challengers are characterized by their strong portfolio but have a lower competitive strength in the local market compared to Leaders. They need to extend their market presence to progress. Contenders are identified as relevant for this market but show only a limited market presence and usually have less comprehensive service offerings. They often provide basic services without significant differentiation or focus on sustainability or physical workplace capabilities.

From the 44 providers assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

accenture

Accenture demonstrates how to effectively combine technology and sustainability with an in-depth understanding of employee and organizational needs. Clients in Germany can rely on Accenture and its partner ecosystem to meet sustainability goals and regulatory requirements.

BECHTLE

Bechtle excels in implementing IoT solutions that enable AI-powered, real-time monitoring and management of smart workplace environments in Germany. Its offerings include occupancy management, energy usage and sensors for environmental conditions.

Capgemini

Capgemini, a global leader in experience-centric workplace services, has deeply embedded ESG into its service offerings. It has a proven track record in reducing carbon emissions and achieving sustainability goals through smart office solutions and workplace analytics.

Deloitte.

Deloitte, a global advisory firm and a strategic partner in Germany, aims to transform work and the workplace. Its offerings include smart office solutions, IoT-enabled workplace analytics and hot desking to create modern, efficient and sustainable workplaces.

Smart and Sustainable Workplace Services

Deutsche Telekom has a strong market presence in Germany and a proven track record of offering smart and sustainable workplace solutions. It delivers adaptive and inclusive workplace environments while being committed to reducing environmental impact.

HCLTech

HCLTech is a leading partner for German enterprises seeking to evolve their offices into sustainable and inclusive workspaces. It offers comprehensive, smart office solutions, has outstanding integration capabilities and is strongly committed to sustainability.

Infosys' focus on integrating advanced IoT-enabled solutions with sustainability goals, including smart office spaces with predictive maintenance, occupancy analytics and space management, makes it a leading partner for German enterprises to realize experience parity.

TCS leads in Germany by innovating smart workplace technologies with IoT, AI and automation. Its offerings include workplace analytics, hot desking, smart building management and energy systems to enhance efficiency, sustainability and clients' ESG success.

Wipro excels in providing smart and sustainable workplace solutions in Germany. Utilizing IoT-enabled workplace analytics, smart building management and adaptive solutions such as hot desking enhances employee productivity and reduces carbon emissions.

Campana & Schott

Campana & Schott (Rising Star) offers a wide range of services aimed at creating smart, sustainable and IoT-enabled workplaces. Its solutions include smart building and advanced analytics, delivering a seamless, efficient and sustainable workplace experience.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Future of Work Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Region

▲ **Most satisfied**
Western Europe

▼ **Least satisfied**
Eastern Europe

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Insurance

Industry Average CX Score

75.3

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 980

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.7%
Offshore	22.1%

Appendix

The ISG Provider Lens 2024 – Future of Work Services study analyzes the relevant software vendors/service providers in the Germany market, based on a multiphased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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Swathi Amin

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Future of Work Services 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
Assistant Director & Principal Analyst

Roman Pelzel is a thought leader and trusted advisor with 30 years of experience in leading and facilitating outcome-centric digital workplace strategy and technology transformations across different industries, including ITIL-based service management.

Roman 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.

He advises clients in the employee experience-centric transformation of digital work and flexible working and contributes to their success with his comprehensive expertise gained in various roles, combining leadership, coaching, and technical skills.

As a Principal Analyst, he is dedicated to the Future of Work in the DACH region and is a frequent voice on the topic of employee experience and digital experience management.

Research Analyst

Ayushi Gupta
Senior Research Analyst

Ayushi is a Senior Research Analyst at ISG. She is responsible for supporting Provider Lens™ studies on the Future of Work. Ayushi has 3 years of experience conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure, and Finance. Along with a rich understanding of various business verticals, she has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape, and evolving needs of the potential target audience.

She is good at collaborating seamlessly with stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualization, storyboarding and analysis.

Author & Editor Biographies

Study Sponsor

Iain Fisher
Director

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.

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.

About Our Company & Research

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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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 AI and 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 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.

ISG Provider Lens™