iSG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges, and competitive differentiators

Customized report courtesy of:

wipro

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Executive Summary

Report Author: Jochen Steudle

Clients in Switzerland adopt hybrid model to enhance productivity

With the return-to-office programs, most enterprises realize the need to revise or even rethink the future of their work and workplace environments.

When analyzing the state of the post-pandemic work and workplace, it was observed that most employees perform part of their work remotely, especially from home. At present, companies are adopting a hybrid work model that enables employees to work from the home and office. A common practice is for two to three days at the office agreements, but some companies offer the flexibility to work remotely for four days in a week, and some offer a permanent work-from-home option.

These measures have been taken, as part of pandemic preparedness planning, to remain flexible for the future societal changes and development. This has greatly improved in the last 12 to 18 months, with increasing workplace flexibility and the changing workforce. Technological advances help tackle the talent shortage. Rapid changes in technology also enable enterprises to offer flexible workplace offerings.

Clients continue to adapt to these hybrid work standards, and employees mainly choose to work from their office to improve personal interactions and social connections. However, there are both advantages and disadvantages of the hybrid work model. While hybrid working is a norm, it reduces face-to-face interactions. Studies have found that employees working from the location of their choice have increased comfort and productivity; however, employees face challenges while interacting with

The user is at the center of the Future of Work Services

colleagues and partners. These challenges include behavioral change during hybrid interactions, for example keeping workers that are participating remotely actively engaged during meetings at a central facility. Otherwise this can impact the employee engagement and ultimately the overall employee experience.

Although advanced technologies such as 4G/5G networks, mobile devices and applications enabled work from anywhere years ago, the traditional office setup was the norm before the onset of the pandemic in 2020.

However, the way of working transitioned into the remote model during the pandemic and at present the hybrid working is gaining traction. With these changes, employees are facing challenges such as burnout and noticeable reduction in work-life balance.

To hire and retain talent, companies have started to provide flexible and collaborative work environments with a strong emphasis on employee well-being and experience.

A future of work strategy focuses on employee experience and staff wellbeing.

The demographic change in the workforce toward Generation Z (born in the late 1990s and early 2000s) is currently happening. These talents are either about to enter or have already entered the workforce. This group will grow even further and has different workplace-related requirements. Generation Z people are already familiar with social media and the virtual world before even entering employment.

Working remotely is not a concern among most people in this generation.

With its ability to socialize in general, this cohort has a different perception regarding the workplace environment. Benefits like "fruit basket in the office" or "flexible working hours and mobile working" listed in a job vacancy are no longer considered an additional advantage offered by some employers; these have become default factors in the current job market. This generation can work from anywhere seamlessly without any restrictions. Therefore, to attract people of this digital-native group, companies should focus on enhancing the workplace environment and offer benefits that are not available at any other location. The modern hybrid workplace shall provide employees with the flexibility to work from their desired location. Companies also need to ensure that they provide an office environment wherein the employees remain more productive than any other location. However, the current workplace should also address the demands and

requirements of previous generations in terms of traditional office environments and offer the flexibility they have become accustomed to during the pandemic.

By evaluating these different parameters, along with employee demands, expectations and team needs, enterprises can establish clarity and can better address the requirements related to a hybrid work model. This may lead to significant behavioral change among different groups of the workforce, and it is certain that enterprises no longer can have a standardized workplace that follows the "one size fits all" approach.

The new workplace will need co-creation across multiple stakeholders, including the workforce. The requirements of users should be the key focus area when defining the workplace – essentially putting the user into the center of thinking

Placing the User at the Centre

A transformation is underway in the workplace. Where once the experience was organised around internal needs, now the user is being placed at the centre of workplace design.

Internal Organisation

Empowered Users

Source: ISG 2022

Executive Summary

An explorative mindset will help during the current transformation of the workplace, which is focused not only on providing a new stack of technology but also on impacting the overall organization. It is recommended to involve all parts of the organization when designing, experimenting and revising the behavior model. This can ensure that hybrid workplaces can be favorable for both employees and employers alike. This will remain a continuous process, which will also involve reimagining work and workspaces with people as the key focus area, wherein both physical and digital workplaces coexist.

Therefore, enterprise IT and workplace executives are currently at the forefront of transformation due to the growing emphasis on employee retention, a tech-savvy workforce, sustainability, remote work and hybrid work. Corporate IT, which was traditionally recognized for being reactive and resolving issues, is expected to meet these requirements by playing a significant and crucial role in redefining the business and operating models of organizations across Switzerland.

Providers in the region must cope with this trend and offer services that meet the requirements.

Providers for:

- **Workplace Strategy Transformation Services** must help their client on their transformational journey, providing consulting to them on employee experience and guide them regarding the hybrid workplace.

- **Managed Workplace Services – End-user Technology** need to create and provide a customized hybrid workplace environment and fulfil the demand and requirements of diverse workforce, providing them with the right tools and technologies required to achieve increased productivity.

- **Digital Service Desk and Workplace Support Services** need to provide support services to the diverse workforce. They should focus on offering different channels considering the experience of the employee, meeting the expectations of the workforce and increasing employee productivity.

The transformation has broadened the requirements of clients and, in turn, increased the scope of traditional digital workplace technologies. The interaction with business functions has also increased.

Therefore, ISG has noticed a decline in the market for transactions that are solely focused on technology or end-user computing, and enterprises are increasingly integrating hybrid workplace initiatives into the scope of their overall organization and digital transformation.

This does not imply that customers are no longer seeking traditional technology-focused services. There is a need to integrate them with transformation initiatives, with a stronger emphasis on outcomes, including employee experience and retention.

With initiatives for the future of employment, some of the emerging trends are as follows:

- Enterprises request support to develop their plans for workplace change. Whether an employee works remotely or in an office, clients want to create an experience that fits their changing employee or user profile.

Executive Summary

- To support the hybrid workforce, enterprise IT leaders and workplace leaders invest in strategic technologies. This helps in providing enhanced employee experience and to measure that experience while workers choose to work from any location of their choice. Enterprises emphasize using end-user technologies such mobile phones, PCs, meeting room equipment, digital signage, printers and other devices in the digital workspace, and on expanding the use of automation-enabled support.

- Since the pandemic, employee well-being and empathy have become a top priority. In the hybrid working scenario, it is essential to actively deal with digital burnout and inadequate work-life balance.

- The work experience in an office setting needs to be modified when employees work from the office a few days per week. Smart workplaces that are technology enabled improve the experience based on specific purpose of the work and the individual employee needs.

- Technologies such as augmented and virtual realities (AR/VR) and the metaverse are now being explored by clients with an early adopter mindset. Initial use cases are training and onboarding.

These trends have increased the functionalities of traditional digital workplace technologies.

> A future of work strategy focuses on employee experience and staff wellbeing.

Provider Positioning   **Page 1 of 3**

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services
Accenture	Leader	Leader	Leader
adesso Schweiz AG	Product Challenger	Not In	Not In
Atos	Contender	Market Challenger	Market Challenger
Aveniq	Not In	Leader	Leader
Bechtle	Product Challenger	Leader	Leader
Capgemini	Leader	Product Challenger	Product Challenger
Cognizant	Contender	Contender	Contender
Deutsche Telekom	Market Challenger	Market Challenger	Market Challenger
DXC Technology	Market Challenger	Market Challenger	Market Challenger
ELCA	Leader	Leader	Leader

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Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services
EveryWare	Not In	Contender	Contender
Fujitsu	Leader	Product Challenger	Product Challenger
Getronics	Not In	Product Challenger	Contender
HCL	Market Challenger	Product Challenger	Product Challenger
Hexaware	Not In	Contender	Contender
Infosys	Product Challenger	Product Challenger	Product Challenger
isolutions AG	Product Challenger	Not In	Not In
ITConcepts Schweiz	Product Challenger	Not In	Not In
JMC Software AG	Product Challenger	Not In	Not In
Kyndryl	Not In	Market Challenger	Market Challenger

Provider Positioning   **Page 3 of 3**

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services
NTT DATA	Contender	Market Challenger	Market Challenger
Orange Business Services	Contender	Contender	Contender
Swisscom	Leader	Leader	Leader
TCS	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Market Challenger	Product Challenger	Product Challenger
Unisys	Leader	Leader	Leader
Wipro	Product Challenger	Leader	Leader

This study focuses on what ISG perceives as most critical in 2022 for **Future of Work - Services and Solutions**
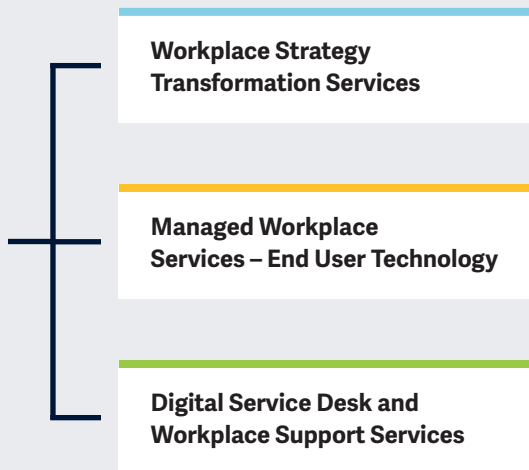
Simplified Illustration Source: ISG 2022

Workplace Strategy Transformation Services

Managed Workplace Services – End User Technology

Digital Service Desk and Workplace Support Services

Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and the future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 1): the Digital Workplace, which includes the underlying technology; Physical Workplace that defines the location or place of work that could be both in-office premises and remote; and the Human Workplace that describes the methods, processes and cultural aspects. This future of work does not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

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

Figure 1: ISG Future Workplace Framework

Digital Workplace

Tech

Changes in where people work drive technology and support change.

Changes in the tools to get things done drive how work is done.

*ISG
Future Workplace Framework

Physical Workplace

Place

Human Workplace

Method

Changes in how people interact and what they need to do drive changes in where people work.

Source: ISG 2022

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

enterprises are including requirements for it in the form of measurable experience level agreements (XLAs).

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

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

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

- Transparency on the strengths and weaknesses of relevant providers;

- A differentiated positioning of providers by segments;

- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore & Malaysia, Brazil and U.S. public sector.

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 3 (number of quadrants) quadrants on Workplace Strategy Transformation Services; Managed Workplace Services – End-user Technology; Digital Service Desk and Workplace Support Services.

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

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information

from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

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

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

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has

strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

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 Transformation Services

Workplace Strategy Transformation Services

Who Should Read This

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

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

The enterprises in Switzerland are restructuring their businesses. The hybrid working model is gaining traction in this post-pandemic era, which has brought in challenges for enterprises in terms of team collaboration and communication and ensuring employee well-being. Retaining skilled workforces, ensuring improved productivity, maintaining company culture and reducing the carbon footprint are some of the other

key concerns for enterprises. These challenges have preceded them to adopt consulting-led workplace strategies to efficiently define the future of their workplaces.

Switzerland-based enterprises are looking for flexible workplaces that will improve their operational efficiency, with a focus on enhancing employee satisfaction and productivity. Simplified technology tools and solutions, continued technology enhancements and the adoption of virtual work infrastructure are some of the key focus areas for enterprises. They need to implement digital workplace strategies and create secure workplaces to attract new talents and provide ease of communication and collaboration.

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

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

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

Cybersecurity professionals should read this report to see how service providers address the significant challenges of compliance and security, while keeping the employee experience seamless for remote workforces.

ISG Provider Lens™

Source: ISG RESEARCH

Future of Work - Services and Solutions
Workplace Strategy Transformation Services

Switzerland 2022

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

ITConcepts Schweiz
Bechtle
adesso Schweiz AG
isolutions AG
Infosys
JMC Software AG
TCS
Wipro

Unisys
Fujitsu

Capgemini
Accenture
ELCA
Swisscom

Leader

Contender

Cognizant   Atos
Orange Business Services
NTT DATA

DXC Technology
Deutsche Telekom
HCL
Tech Mahindra

Market Challenger

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star
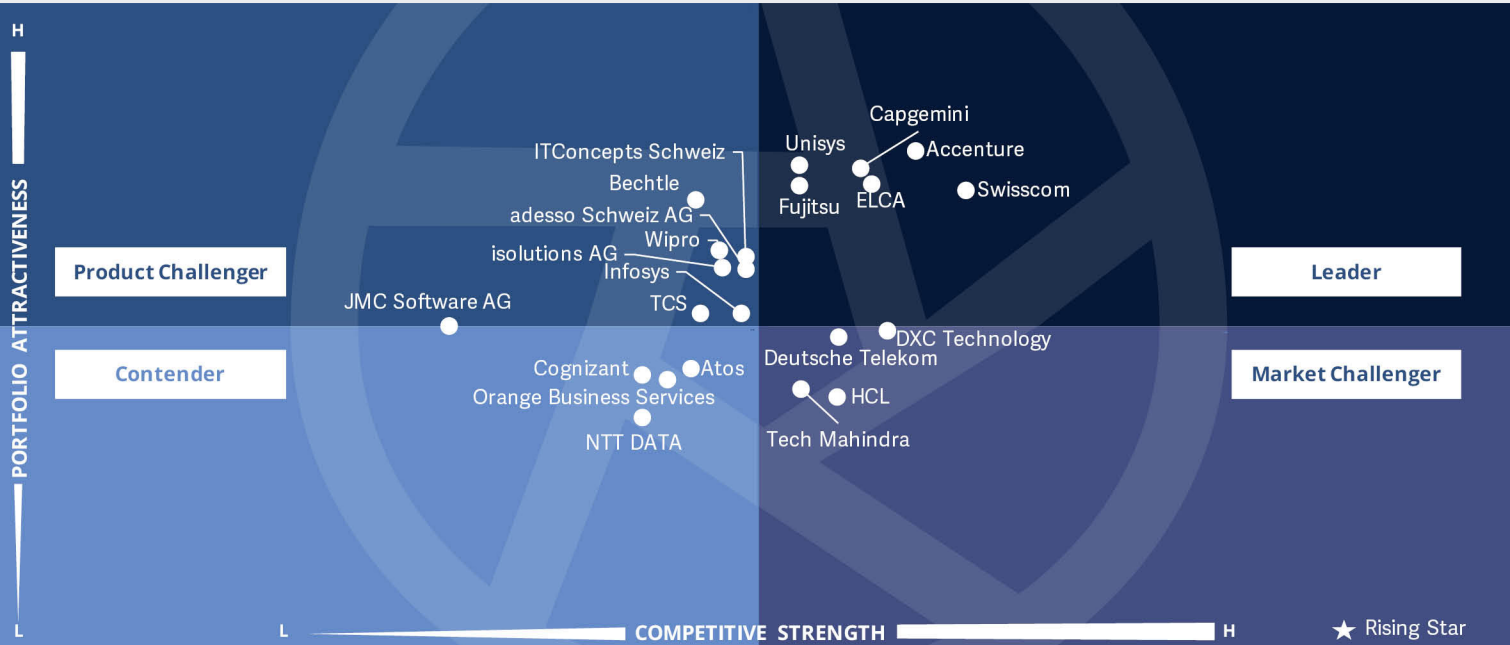
This quadrant assesses providers that offer workplace consulting services; support enterprises with **designing, implementing and realizing** digital workplace infrastructure and services; and provide business users with modern, hybrid workplace environment **focusing on employee experience.**

Jochen Steudle

Workplace Strategy Transformation Services

Definition

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

Eligibility Criteria

1. Providers should have a **vendor-neutral approach for transformation consulting and workplace assessment services.** The ability to provide associated managed or implementation/integration services can be a value add but is not a requirement

2. Providers should be able to **define and visualize clients' future of work environment,** covering areas such as hybrid working, involving remote and in-office workers, uberization of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX), associating CX with employee experience (EX), while also enhancing end-user experience

3. Provider should support **technology adoption and organizational change/ behavior management services** through its consulting portfolio

4. Provider should offer solutions to address **employee empathy and well-being**

Observations

Workplace strategy transformation services providers continuously develop and enhance their consulting capabilities to strengthen their position in this quadrant. This quadrant includes specific elements of hybrid work enablement by service providers that help clients adapt to the hybrid work model and enhance employee experience.

Providers positioned as Contenders have strong service implementation capabilities. They focus on further developing their portfolios, and showcase an adequate number of reference cases for the same to be viewed as strategic partners for the future of work model among enterprises in Switzerland.

The Product Challengers have strong consulting, benchmarking and outcome-oriented service capabilities. However, they lack an adequate number of clients for their strategy services.

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

From more than 100 companies assessed for this study, 23 have qualified for this quadrant with six being identified as Leaders.

accenture

Accenture offers business strategy and strategy consulting services focused on customer experience and employee experience. Aligned with future of work trends across the market, its design-thinking approach supports clients in quickly realizing benefits.

Capgemini

Capgemini focuses on transformation and gamification techniques. It also has a strong market presence. Combined with continuous improvement built upon a detailed analytic foundation, the company supports clients in transforming to modern workplaces and strengthens its positions in the market.

DXC Technology

DXC Technology is a globally recognized company and offers a design-thinking approach for workplace strategy and transformation. With its data-driven approach and analytics and design-led thinking, it offers its clients a well-defined strategy for digital transformation.

ELCA

ELCA supports its customers in Switzerland on their digital transformation journeys by offering consulting on architecture, migration and security. With 50 years of experience in this space, a DevOps approach and close proximity to its customers, it has become an established provider in the region.

Workplace Strategy Transformation Services

Fujitsu

Fujitsu's Journey Builder and Result Chain offer client-centric strategy consulting services. These services help clients throughout the transformation, from design and planning to execution and success.

Swisscom

Swisscom supports clients in their journeys toward digital and hybrid working, from conception to implementation, including adapting to the cultural change. It takes a holistic approach to transformation and provides tangible recommendations for the new way of working.

UNISYS

Unisys' user-centric consulting services and design thinking approach help support clients in the modern workplace transformation. It focuses on workplace equality and offers business and technology consulting on organizational change management to help users fully engage, regardless of work location.

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Managed Workplace Services – End User Technology

Who Should Read This

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

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

As the hybrid work model is gaining traction, the pressing need to access enterprises' applications and data has become a key challenge for enterprises in Switzerland. Consequently, the security of organizational data and devices has become important for enterprises. They are relying on the Zero Trust framework for threat prevention and multi-factor authentication. To this end, they are considering technologies like automation and analytics to avoid unauthorized access. Maintaining system stability and performance and employee productivity are the other key concern areas for these enterprises. To overcome these challenges, they need managed workplace services that ensure end-to-end digital workplace transformation.

Enterprises in the region are seeking digital workspaces that will leverage cloud technologies and drive innovation. They are looking to improve productivity and efficiency through remote virtual desktops services, both on premises and on the cloud. They are also looking for secure and agile support systems to maintain business resilience.

Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services.

Digital professionals, including digital transformation and facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives and how they are compared with one another.
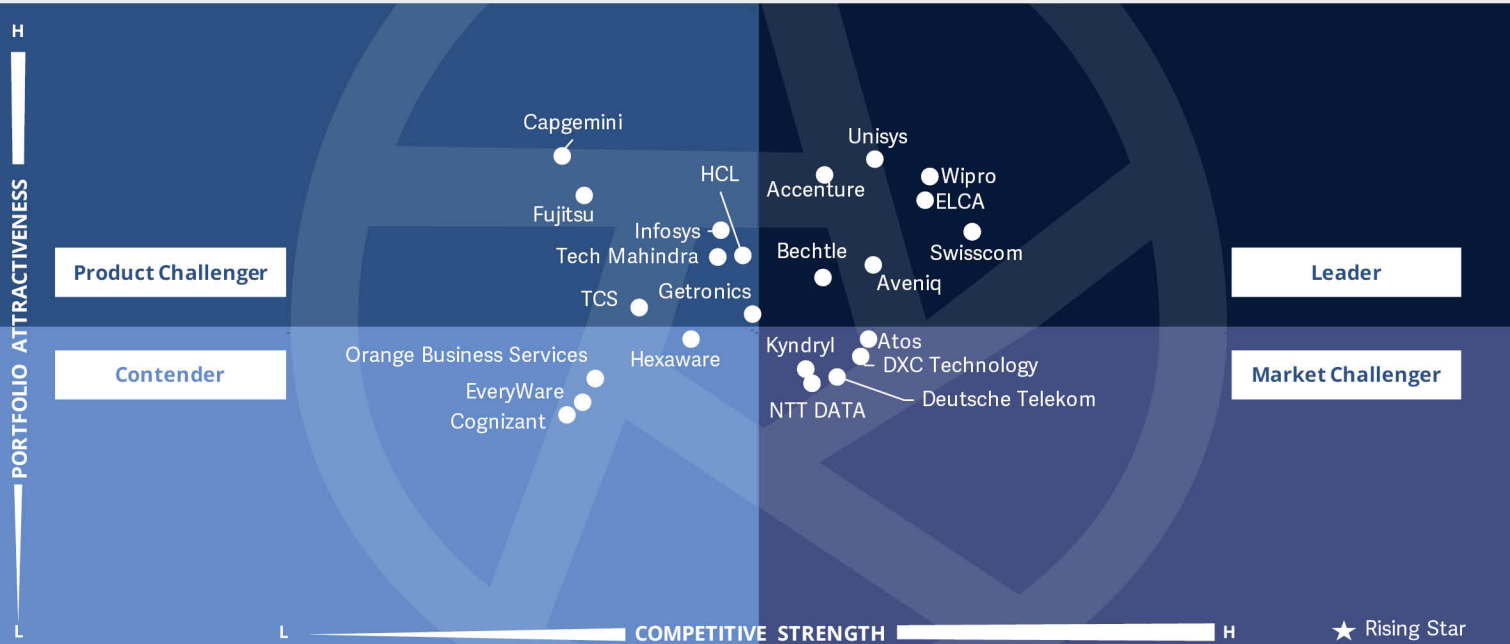
Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed workplace service providers in Switzerland.

Cybersecurity professionals should read this report to see how service providers address the significant challenges of compliance and security, while keeping the employee experience seamless for remote workforces.

ISG Provider Lens™
Future of Work - Services and Solutions
Managed Workplace Services - End User Technology

Source: ISG RESEARCH

Switzerland 2022

This quadrant assesses providers that deliver managed workplace services. These providers support large enterprises with **end-user technology** aspects of the digital workplace to provide business users with **modern, hybrid workplace**.

Jochen Steudle

Managed Workplace Services – End User Technology

Definition

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

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

Eligibility Criteria

1. Provide **endpoint management and security services** supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management

2. Provide complete **device lifecycle management services,** including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management

3. Demonstrate experience in providing **remote virtual desktop services,** both on-premises and in the cloud

4. **Manage devices in the respective countries** in the study, with at least 25 percent of the devices managed outside the provider's home region

5. Support **endpoint security services** by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach

6. Offer services to support **modern network and unified communication** as a foundation for a digital workplace

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

Managed Workplace Services – End User Technology

Observations

Providers for managed workplace services – end-user technology continuously improve their capabilities in providing complete device lifecycle management services to enhance their position in this quadrant. They cover all devices such as meeting room equipment, digital signage and all company- and employee-owned physical, virtual and mobile devices; and BYOD. They also address all aspects of end-user enablement and provision through the entire lifecycle of hybrid work environment.

Providers positioned as Contenders have strong managed services portfolios related to the end-user technology ecosystem. They need to further develop their capabilities for automation and integration and showcase an adequate number of reference cases to be viewed as strategic partners for the future of work model among enterprises in Switzerland.

The Product Challengers have strong portfolios that leverage automation, AI and machine learning technologies, along with AR/VR capabilities. However, they lack an adequate number of clients for their strategic managed services. Therefore, these service providers should aggressively pursue the market in Switzerland to win more clients and expand their local presence.

Market Challengers in this space are well-positioned to offer traditional managed workplace services, but they must further develop their offerings to address post-pandemic-induced changes in an organization's future of work model.

From more than 100 companies assessed for this study, 26 have qualified for this quadrant with seven being identified as Leaders.

accenture

Accenture delivers a holistic managed workplace service, in addition to business strategy and CX/EX-focused strategy consulting services. Aligned with future of work trends across the market, its design-thinking approach helps clients realize benefits rapidly.

AVENIQ

Aveniq provides managed services based on modern digital technologies. It helps transform clients' traditional workplaces to cloud managed workplaces with a particular focus on Microsoft-based modern workplace solutions.

BECHTLE

Bechtle provides a broad set of managed workplace services, covering the full lifecycle of the respective devices accompanied with device-as-a-service offerings, modern meeting solutions, including efficient room management, and solutions such as "360° workplace of the future".

ELCA

ELCA manages and supports a variety of services in the workplace environment for its clients on their digital transformation journeys, ranging from Microsoft 365 tenant management, device management and lifecycle, endpoint security and more. It has 50 years of experience in this space, close proximity to its customers and focuses on sustainability.

Swisscom

Swisscom provides managed services for cloud- and/or hybrid-based workplaces with a built-in zero trust architecture, envisioning a workspace integrated into clients' business applications that provide a unique collaborative workspace experience for clients' employees.

UNISYS

Unisys is a well-known managed services provider in Switzerland. It has a strong local presence and offers comprehensive range of digital workplace services that meet future workplace demands. It can be considered as an established market leader.

wipro

Wipro is a reputable global provider. It offers market-leading managed workplace services through its LiVE Workspace™ platform. The company has a strong market presence in Switzerland.

Wipro

Leader

"Wipro's managed services offering leverages innovation to meet the changing needs for future of work."

Jochen Steudle

Overview

Wipro offers managed digital workplace services as part of its LiVE Workspace™ offering. The company is committed to bringing in innovative technology solutions. Its workplace services cover intellectual properties and accelerators such as LiVE Workspace™, VirtuaDesk™ and Smart-i-Connect. Wipro manages users and devices for notable clients in Switzerland, with double-digit growth in the last year.

Strengths

Successful workplace transformation: Analytics-powered orchestration solutions automate complex workplace processes, covering seven distinct areas — UEM, application modernization and management, enterprise application store, security, updates and servicing, workspace evergreening services, telemetry, analytics and visualization.

Cloud-enabled VDI: Wipro has built a next-generation cloud-native virtual desktop infrastructure (VDI) solution that enables a flexible working model for employees working remotely as part of its digital transformation initiative.

Digital transformation: Wipro assists its clients in moving from in-house legacy VDI solutions to cloud-enabled VDI. This also helps improve employee experience and their productivity and reduce the related cost.

Comprehensive portfolio: Wipro provides digital workplace services to help clients modernize their existing workspaces environment, successfully transition to a hybrid working model, provide seamless collaboration and update their support function. Additionally, Wipro helps ensure employee well-being.

Caution

Wipro focuses on transformational engagements and contracts. However, it must ensure that these engagements do not affect any short-term market growth.

Digital Service Desk and Workplace Support Services

Digital Service Desk and Workplace Support Services

Who Should Read This

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

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

In this post-pandemic phase, enterprises in Switzerland are facing challenges in terms of enhancing employee experiences while shifting to the work-from-anywhere model. Employee satisfaction and productivity and work and cost efficiency are some of the priority areas for enterprises. To generate data-driven insights for enhancing employee support and deliver personalized experiences, enterprises are looking for advanced technologies such as analytics. They are also seeking modernized digital service desk and workplace support services to ensure desired business outputs and support end users.

Switzerland-based enterprises are looking for AI-based assistants to automatically resolve tickets and automate the process of interacting with users, which, in turn, allows operational and business efficiency. They are also looking for onsite field support and in-person technical assistance that will resolve issues fast so that resources can focus on critical tasks. AR/VR technologies are also gaining traction by enabling visual guides and support for remote users. Enterprises in Switzerland are looking for these technologies to successfully execute the hybrid work model.

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

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

Field service professionals should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.
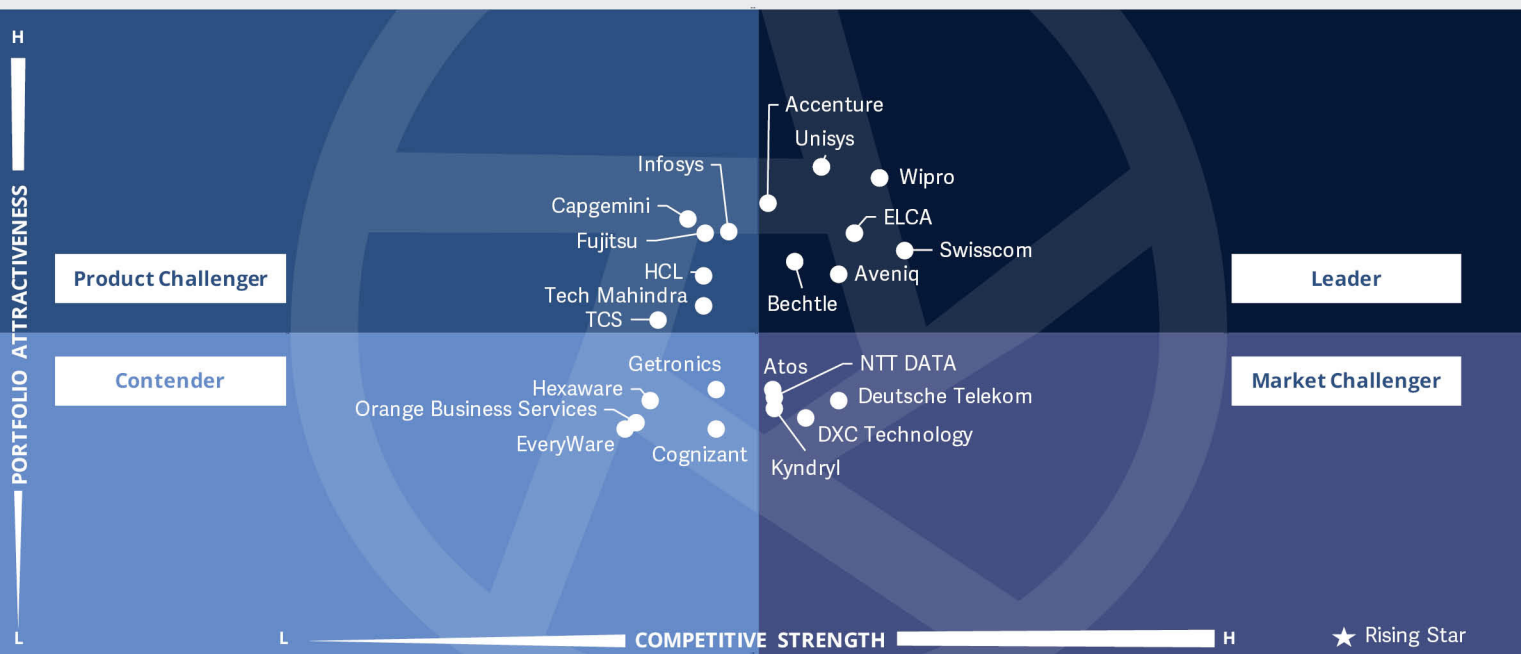
Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of digital service desk and workplace support service providers in Switzerland.

ISG Provider Lens™

Future of Work - Services and Solutions
Digital Service Desk and Workplace Support Services

Source: ISG RESEARCH

Switzerland 2022

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Accenture
Unisys
Infosys
Wipro
Capgemini
ELCA
Fujitsu
Swisscom
HCL
Aveniq
Tech Mahindra
Bechtle
TCS

Getronics
Atos
NTT DATA
Hexaware
Deutsche Telekom
Orange Business Services
DXC Technology
EveryWare
Cognizant
Kyndryl

Leader

Market Challenger

L

L

COMPETITIVE STRENGTH

H

★ Rising Star

This quadrant assesses providers that deliver digital service desk and support workplace services. Providers support large enterprises with **service desk** skills, experience and operations to provide business users with a **well-operated workplace**.

Jochen Steudle

Digital Service Desk and Workplace Support Services

Definition

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

Eligibility Criteria

1. Ability to provide **managed service desk and workplace support services** through a hybrid workforce, including virtual agents

2. Offer **remote and onsite field support** plus in-person technical assistance, leveraging augmented reality and/or virtual reality (AR/VR)

3. Capability to set up and support **self-help kiosks, tech-bars, IT vending machines and locker stations**

4. **Data-driven enriched analytics** to support self-service, automatically resolve tickets and generate actionable insights among users

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

6. **Ability to quantify workplace support function performance** beyond traditional service metrics

Digital Service Desk and Workplace Support Services

Observations

Providers for digital service desk and workplace support services continuously enhance their support capabilities in all areas, ranging from service desk and remote support to in-person, tech kiosks and field services support to strengthen their position in this quadrant. It also includes support for meeting room equipment, digital signage, AI, company- and employee-owned physical, virtual and mobile devices, and BYOD within the hybrid work environment.

Providers positioned as Contenders have strong managed services portfolios around end-user support. They focus on further developing their capabilities in automation and integration and showcase an adequate number of reference cases for the same to be viewed as strategic partners for the future of work model among enterprises in Switzerland.

The Product Challengers have strong portfolios that leverage automation, AI and machine learning technologies, along with other capabilities, to provide many different channels of support and offer users the required contact method of their choice. However, they lack an adequate number of clients for their strategic managed services. Therefore, these service providers should aggressively pursue the market in Switzerland to win more clients and expand their local presence.

Market Challengers in this space are well-positioned to offer traditional workplace support and service desk services, but they must further develop their offerings to address post-pandemic-induced changes in an organization's future of work model.

From more than 100 companies assessed for this study, 26 have qualified for this quadrant with seven being identified as Leaders.

accenture

Accenture's digital service desk and workplace support services are provided as next-generation capabilities. Its Workplace Experience is an experience-centric offering powered by automation; users can benefit from improved productivity and ease of use.

AVENIQ

Aveniq provides managed support services based on modern digital workplace technologies, embracing support channels such as virtual assistants and chatbots, vending machines and digital lockers. It also offers remote support to meet the traditional requirements of enterprise clients.

Bechtle provides a broad set of managed workplace services, covering the full lifecycle of the respective devices accompanied with device-as-a-service offerings and modern meeting solutions, including efficient room management; all of which is supported via the company's 24x7 Service Desk.

ELCA

ELCA supports its customers in Switzerland on their digital transformation journeys and manages their architecture, infrastructure and security. With 50 years of experience in this space, a DevOps approach and close proximity to its customers, it has become an established provider in the region.

Swisscom

Swisscom provides central point of contact with remote support and also on-site intervention to support all the managed cloud- and/or hybrid-based workplaces. Swisscom uses its built-in zero-trust architecture, envisions a workspace and provides a unique collaborative workspace experience for clients' employees.

UNISYS

Unisys has a strong local presence with its large field service team that is assisted with AI, analytics and automation by its support platform. The company can be considered as an established market leader.

Wipro is a reputable global provider. It offers market-leading managed workplace services and has an array of intellectual property-led solutions such as VirtuaDesk™ to offer support services. The company has a strong market presence in Switzerland.

Wipro

Overview

Wipro offers managed digital workplace services as part of its LiVE Workspace™ offering. The company is committed to bringing in innovative technology solutions. Its workplace services cover intellectual properties and accelerators such as Realview, Virtual Walk, ExperienceNXT, myUniHub and a virtual agent, Liva.

Strengths

Support transformation: Driving next-generation interactions with enterprise clients, Wipro makes use of tools such as Liva or myUniHub. Liva provides a smart conversational agent via chat/voice with AI to drive employee experience and accelerate incident resolution. myUniHub offers an API bridge for delivering personalized, omnichannel interactions and also offers continuous improvements based on user sentiments.

Digitalizing services: Wipro offers on-site support with digital kiosks for direct access points. It manages peripherals and hardware devices to users via vending machines. Locker stations that are integrated with myUniHub are used for break/fix and replacements. Realview delivers an intelligent visual support solution to further transform the field service experience with a digital suite of tools powered by enterprise augmented reality and AI.

Focus on experience: With ExperienceNXT – the data-driven, analytics-powered experience platform – Wipro continuously improves experience and drives XLA-led outcomes through holistic experience measurement.

Caution

To demonstrate the value delivered in Switzerland, Wipro should further showcase its client success stories.

Appendix

Methodology & Team

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

Lead Author:
Jochen Steudle

Editors:
Sajina B. and John Burnell

Research Analyst:
Sonam Chawla

Data Analyst:
Anirban Choudhury

Project Manager:
Ridam Bhattacharjee

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

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

The study was divided into the following steps:

1. Definition of Future of Work - Services and Solutions market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Author

Jochen Steudle
Senior Consultant

In addition to his profound technical and business expertise, Jochen Steudle brings a wealth of experience from 22 years as an IT consultant, project manager and management consultant to the projects of ISG customers. His main focus is on the areas of IT service performance and IT strategy. His technological focus is in the area of End User Computing, including Mobile Devices (MDM & EMM).

At ISG, Jochen Steudle analyzed the strategic end user computing alignment for a leading international financial services provider and evaluated its future viability. He has also successfully conducted numerous benchmarking projects. Most recently, he was responsible for the comprehensive analysis of the IT services of two companies in the manufacturing sector that were in the process of merging.

Research Analyst

Sonam Chawla
Senior Analyst

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

IPL Product Owner

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

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

ISG Provider Lens™

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

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

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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 www.isg-one.com.

ISG Provider Lens™

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