FORRESTER®

FOR SOURCING & VENDOR MANAGEMENT PROFESSIONALS

The Forrester Wave™: EMEA Workplace Services, Q4 2015

The 13 Providers That Matter Most And How They Stack Up

by Wolfgang Benkel and William Martorelli
December 17, 2015

Why Read This Report

In Forrester's 27-criteria evaluation of Europe, Middle East, and Africa (EMEA) workplace services vendors, we identified the 13 most significant providers — Atos, Capgemini, Computacenter, CSC, Fujitsu, the Getronics Workspace Alliance (GWA), HCL Technologies, Hewlett Packard Enterprise (HPE), IBM, T-Systems, Tata Consultancy Services (TCS), Unisys, and Wipro — and analyzed their offerings.

Many workplace services in the EMEA region are still delivered centrally and lend themselves well to outsourced delivery. However, today's services mix is a blend of traditional and newer services like virtual desktop models, cloud and mobility services, and an increasing range of new end devices like smartphones and tablets, and traditional devices like notebooks and desktops. Thus, the roster of market leaders and strong performers has evolved, and most vendors are supporting sourcing and vendor management (SVM) and CIO organizations in their shift to digital.

Key Takeaways

Atos, Wipro, And Fujitsu Lead The Pack
Forrester's research uncovered a market in which Atos, Wipro, and Fujitsu lead the pack. Unisys, Capgemini, IBM, CSC, TCS, HCL, and HPE offer competitive options. Computacenter, T-Systems, and GWA follow close behind.

Historic Leadership Doesn't Guarantee Future Success
The workplace services market is an important segment of the overall infrastructure management market because SVM leaders often need a partner to serve their key customers and build the digital workforce. Expectations have changed radically, and past prominence and leadership doesn't guarantee vendors' future success.

Key Differentiators Are Delivery Excellence And Advances In Innovations
Most suppliers have done a good job with traditional desktop service delivery and have solid current offerings in place covering most EMEA customer requirements. What makes the difference is how quickly and efficiently vendors can deliver innovative solutions to customers.

The Forrester Wave™: EMEA Workplace Services, Q4 2015

The 13 Providers That Matter Most And How They Stack Up

by Wolfgang Benkel and William Martorelli
with Eveline Oehrlich, Elinor Klavens, and Vanessa Wegner

December 17, 2015

Table Of Contents

Notes & Resources

Forrester conducted service evaluations in September and October of 2015 and interviewed 12 vendor and user companies: Atos, Capgemini, Computacenter, CSC, Fujitsu, The Global Workspace Alliance (GWA), HCL Technologies, Hewlett Packard Enterprise, Tata Consultancy Services (TCS), T-Systems, Unisys, and Wipro.

Related Research Documents

Demand Innovation From Your Workplace Services Supplier

The Forrester Wave™: EMEA Workplace Services, Q2 2013

Prepare For The Evolution Of Workplace Services Pricing Models

FORRESTER®

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA
+1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com

Workplace Services Help Propel The Digital Workforce

Workplace services is a commodity that must make the shift to digital. Instead of a fixed location, the workplace is wherever the end user is, whether in the office, at the airport, in the car, on the train, or in public locations such as cafes, hotels, and public places, using whatever device they have available (e.g., smartphone, tablet, or notebook). Thus, workplace service providers face an increasing challenge in delivering effective and useful services to increasingly empowered end users and must use advanced data analytics to understand end user preferences (e.g., persona-based workplace services). SVM organizations need to consider the following trends and market forces:

› **Automation plays a key role as suppliers embrace “zero touch” models.** New automation solutions proliferating among leading infrastructure management services suppliers are targeted squarely at workplace services, where suppliers increasingly pursue zero-touch models (e.g., HCL and T-Systems) with minimal human intervention, while next-generation service desk models promise to deliver predictive and even preemptive incident resolution. Despite these promises, however, call volumes have yet to decline significantly. Vendors like TCS build their own tools using AI technology to monitor and automate service delivery and support the inclusion of workplace services. For example, Wipro automates around 16% of its service-desk-ticket volume in European outsourcing relationships.

› **India-based firms enter the European workplace service train.** Vendors with well-distributed staff — either their own or leveraging partners’ (e.g., TCS with Computacenter and GWA with Getronics in Europe and CompuCom in North America) have entered the European market. These vendors receive very good client feedback. Vendors such as HCL, TCS, and Wipro have increased their footprint in the European workplace services market.

› **Vendors build their standard offering around clients’ needs and expectations.** SVM and CIO organizations need to become true business partners for their business customers. Thus, most vendors have services such as cloud readiness assessments and digital transformation services to help businesses better serve their internal customers. Vendors also provide innovation and continuous improvement and service integration and management (SIAM) for multisourced workplace service environments to support the intention of the SVM and CIO organization to become the service orchestrator, innovator, and integrator for the business.

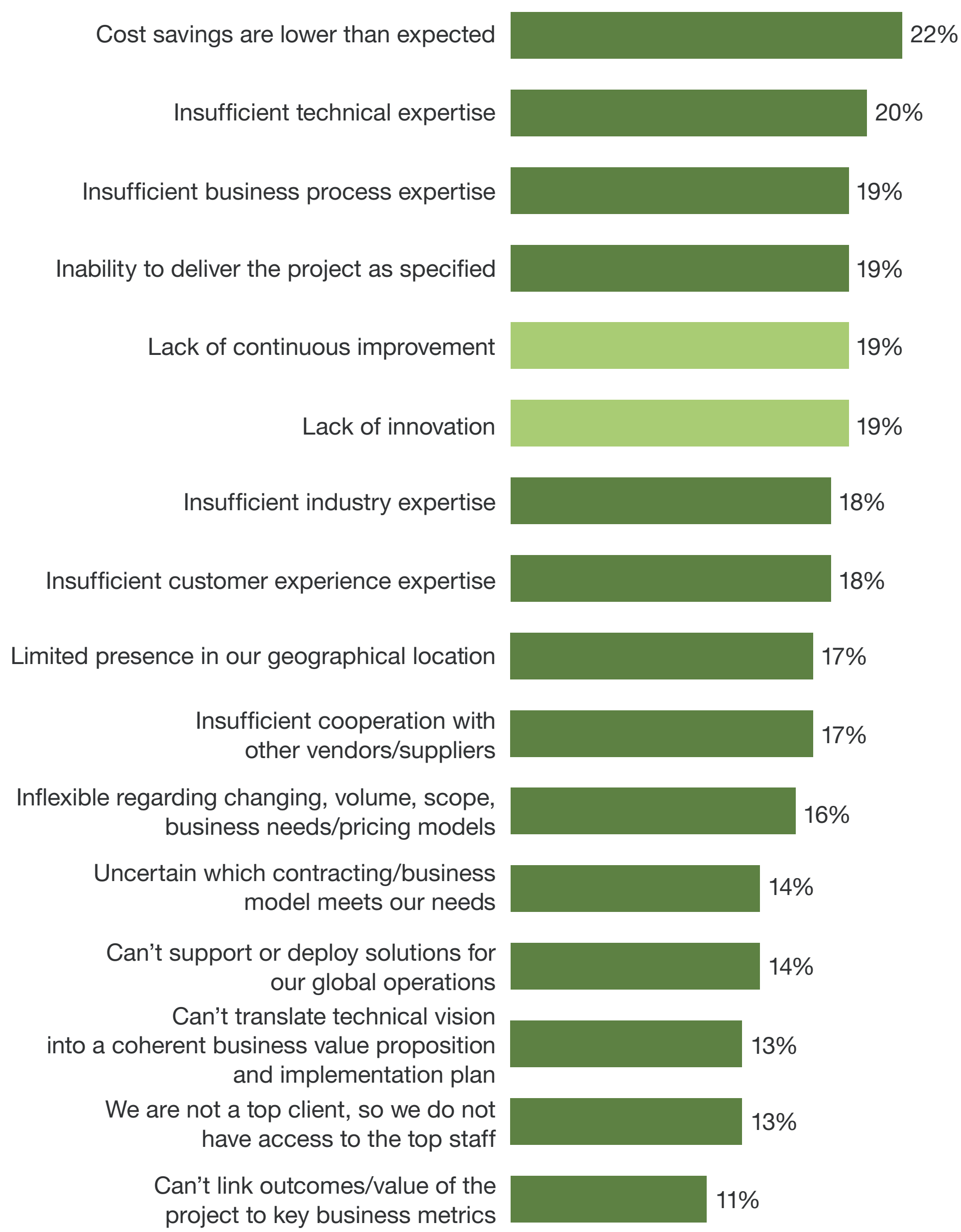
› **Business innovation and continuous improvement remain big challenges.** Business innovation and good and stable service delivery quality are important elements in the age of the customer. Workplace services as the front end to the employee play an important role in building new, innovative applications (e.g., smartphone apps or connected devices) to improve customer experience and grow revenue. But Forrester’s annual surveys and interviews with reference customers for this analysis show that business innovation and continuous improvement are still challenges in managed services delivery; in Forrester’s annual Global Business Technographics®

Business And Technology Services Survey, 19% of European service decision-makers said that business innovation and continuous improvement are challenges in their existing outsourcing relationships (see Figure 1).

› **Many vendors mix business innovation and continuous improvement.** Many vendors mix business innovation for their customers and innovation in service delivery, which merely increases their own service delivery efficiency in order to decrease the delivery cost for in-scope services.[1] Only a few vendors separate customer-based business innovation from vendor-based innovation effectively, which, from the customer perspective, represents true continuous improvement from which they can gain.

FIGURE 1 Innovation And Continuous Improvement Challenge European Outsourcing Relationships

“Which of the following are your IT dept’s/business unit’s biggest challenges with your existing third-party consultants, agencies or tech services providers?”



Base: 871 European services decision-makers

Source: Forrester’s Global Business Technographics® Business And Technology Services Survey, 2015

EMEA Workplace Services Evaluation Overview

To assess the state of the workplace services market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top workplace services vendors in the EMEA market.

Evaluation Criteria Emphasize Depth And Breadth Of Capabilities

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 27 criteria, which we grouped into three high-level buckets:

› **Current offering.** We evaluated the vendors' expertise in delivering workplace services such as a regional EMEA delivery model, and their regional EMEA-wide geographic staffing distribution, regional EMEA-wide client geographic distribution, the completeness of their workplace services offering, ecosystem participation, capabilities for SIAM, and capabilities for business innovation based on the needs and expectations of customers. We qualified all of these attributes with Forrester client feedback on implementation, account and relationship management, service quality, and general satisfaction.

› **Strategy.** For this set of criteria, Forrester examined each vendor's strategy to understand how the vendor approaches its fundamental value proposition, planned enhancements, and capabilities for continuous improvement and the supplier's vision for workplace services.

› **EMEA market presence.** For the EMEA market presence criteria, Forrester analyzed providers' relative overall presence in the core EMEA workplace services markets like France, Germany, the UK, Austria, Switzerland, Benelux, Scandinavia, Italy, and Spain. Additionally, Forrester examined firms' financial stability by measuring their workplace management revenue and overall corporate revenue and profitability.

Evaluated Vendors Had To Demonstrate Market Presence And Commitment To Service

Forrester included Atos, Capgemini, Computacenter, CSC, Fujitsu, GWA, HCL, HPE, T-Systems, TCS, Unisys, and Wipro in its assessment. We also evaluated IBM as a nonparticipating vendor. Each of these vendors (see Figure 2):

› Is among the top 13 vendors in number of EMEA clients.

› Has at least $200 million in applicable workplace services revenue.

› Has sufficient interest from the Forrester EMEA client base.

› Market presence in the following areas: desktop software management, service desk, field support, software and service provisioning, mobility services, desktop infrastructure services, file and print services, virtual desktop services, and voice services.

FIGURE 2 Evaluated Vendors: Selection Criteria

Vendor selection criteria

Is among the top 13 vendors in number of EMEA clients	
Has at least $200 million in applicable workplace services revenue	
Has sufficient interest from the Forrester EMEA client base	
Market presence	Desktop software management, service desk, field support, software and service provisioning, mobility services, desktop infrastructure services, file and print services, virtual desktop services, and voice services.

Traditional And Emerging Suppliers Converge In Market Leadership

The evaluation uncovered a market in which (see Figure 3):

- **Atos, Wipro, and Fujitsu lead the pack.** Wipro, among the leading India-heritage suppliers active in infrastructure management, is translating that market presence into a leadership position in the EMEA workplace services market. Atos, which is the largest of the main European-based workplace vendors, is often placed on the longlist of European clients because of its strong staff distribution in countries like France, the UK, Germany, and the Nordics and its global capabilities (based on its largest global client, Siemens). Wipro received this position based on its high scores for strategy and current offering, which is based on its positive customer reference feedback.
- **Unisys, Capgemini, IBM, CSC, TCS, HCL, and HPE offer competitive options.** A number of suppliers, including established global multinationals and India-heritage providers, have similarly strong capabilities but received less positive customer reference feedback.
- **Computacenter, T-Systems, and GWA follow close behind.** The capabilities of these vendors overall were closely matched. In some cases, these suppliers also had less positive customer references coupled with a smaller current offering, a relatively weak strategy, or some combination thereof.

This evaluation of the EMEA workplace services market is intended to be a starting point only. We encourage clients to view detailed service evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

FIGURE 3 The Forrester Wave™: EMEA Workplace Services, Q4 '15

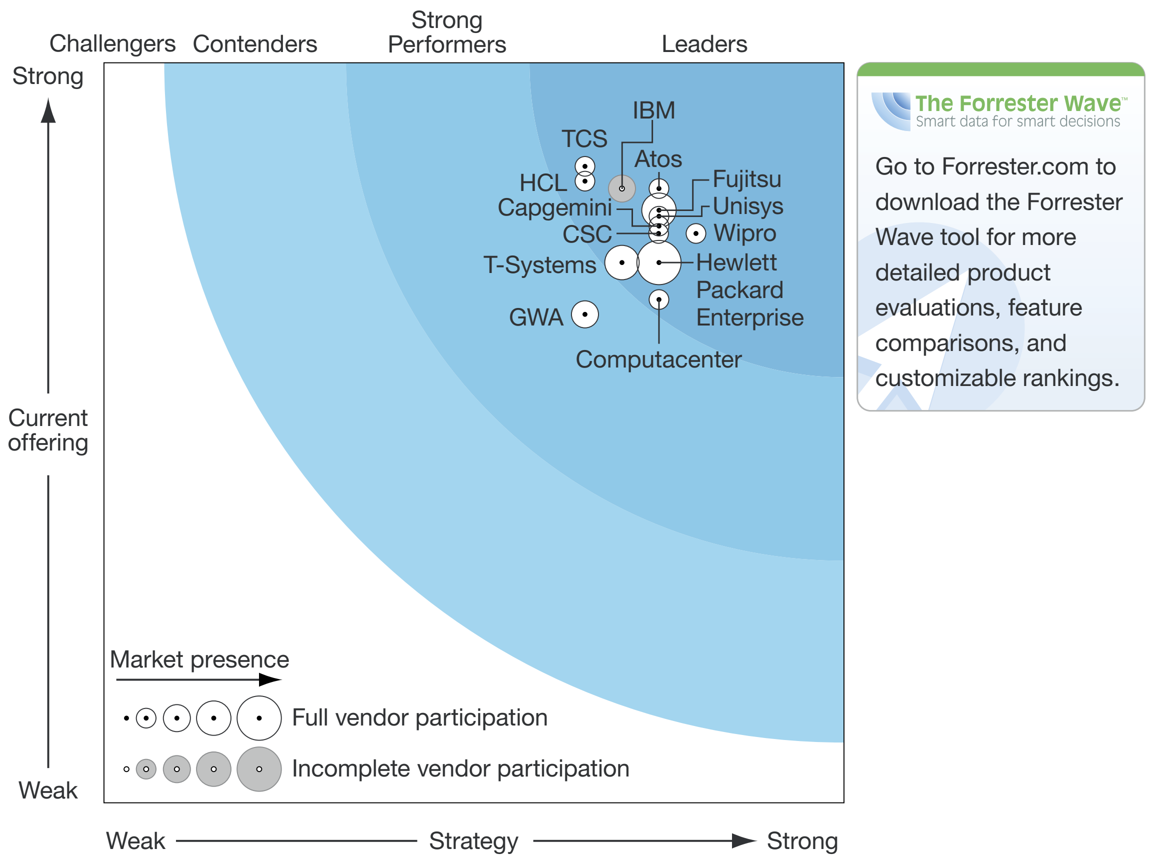


FIGURE 3 The Forrester Wave™: EMEA Workplace Services, Q4 ’15 (Cont.)

	Forrester’s Weighting	Atos	Capgemini	Computacenter	CSC	Fujitsu	GWA	HCL	Hewlett Packard Enterprise	T-Systems	TCS	Unisys	Wipro
CURRENT OFFERING	50%	4.15	3.90	3.40	3.85	4.00	3.30	4.20	3.65	3.65	4.30	3.95	3.85
Regional EMEA delivery model	10%	5.00	5.00	4.00	4.00	5.00	4.00	3.00	5.00	5.00	5.00	5.00	3.00
Regional EMEA geographic staffing distribution	10%	5.00	5.00	3.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	5.00	3.00
Regional EMEA client geographic distribution	10%	5.00	5.00	3.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	5.00	5.00
Ecosystem participation	10%	3.00	3.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00	3.00	3.00	3.00
Service integration and management (SIAM) capabilities	15%	3.00	5.00	3.00	4.00	3.00	4.00	4.00	4.00	3.00	5.00	4.00	4.00
Business innovation	15%	5.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	4.00	3.00	3.00
Completeness of Workplace services offering	10%	4.00	4.00	5.00	4.00	4.00	5.00	4.00	4.00	3.00	4.00	5.00	4.00
Client feedback on implementation	5%	4.00	3.00	3.00	3.00	4.00	2.00	5.00	3.00	4.00	4.00	3.00	5.00
Client feedback on account management	5%	4.00	3.00	4.00	3.00	3.00	3.00	5.00	1.00	3.00	4.00	3.00	5.00
Client feedback on service quality	5%	4.00	3.00	3.00	4.00	4.00	1.00	5.00	3.00	4.00	4.00	3.00	5.00
Client feedback on general satisfaction	5%	3.00	1.00	4.00	4.00	3.00	3.00	4.00	1.00	2.00	3.00	3.00	5.00
STRATEGY	50%	3.75	3.75	3.75	3.75	3.75	3.25	3.25	3.75	3.50	3.25	3.75	4.00
Customer value proposition and industry momentum	25%	3.00	3.00	4.00	4.00	4.00	4.00	4.00	4.00	3.00	3.00	4.00	4.00
Planned enhancements	25%	4.00	4.00	3.00	3.00	3.00	3.00	2.00	4.00	5.00	3.00	4.00	3.00
Continuous improvement	25%	4.00	4.00	4.00	4.00	4.00	3.00	4.00	4.00	2.00	3.00	3.00	5.00
Vision for workplace services	25%	4.00	4.00	4.00	4.00	4.00	3.00	3.00	3.00	4.00	4.00	4.00	4.00
MARKET PRESENCE	0%	1.82	1.28	1.44	1.99	3.25	2.84	1.90	4.25	3.04	1.24	1.35	1.50
Service market presence	60%	2.20	1.30	1.40	1.65	3.25	2.90	1.50	4.25	2.40	1.40	0.75	1.00
Financial strength	40%	1.25	1.25	1.50	2.50	3.25	2.75	2.50	4.25	4.00	1.00	2.25	2.25

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Profiles

Leaders

- **Atos.** Atos received high current offering marks for its well-distributed staff in the European region, as well as its strong commitment to business innovation. Although primarily a European provider, Atos is also active in North America and Asia Pacific — its workplace services capabilities were expanded in 2011 with the acquisition of Siemens IT Solutions and Services (SIS). Atos has a strong commitment to continuous improvement and a strong vision for workplace services. Atos emphasizes flexibility in commercial contractual arrangements. The vendor has a strong road map for its future investments in workplace services, including integrated social networking, automation, and application stores.

- **Wipro.** Wipro's strong current offering is supported by its well-balanced staff distribution over all the core markets in the EMEA region and the highest overall customer reference scores of any supplier evaluated in this analysis. Wipro's strategy scores are based on strong customer value proposition and its commitment to continuous improvement and strong vision for workplace services.

- **Fujitsu.** Fujitsu has a strong market presence in workplace services, with very strong capabilities in EMEA and Asia Pacific. Fujitsu's current offering is supported by its ecosystem participation and its approach to continuous improvement. For its strategy grade, Fujitsu also demonstrated a strong vision for the future of workplace services. Its market presence is reinforced by its strong support of the service desk category. Global customers may find Fujitsu's relative lack of presence in North America a concern, but it is growing as the company expands its foothold through strategic deals. The company is well suited for customers with European-centric requirements. Fujitsu has an enlightened view on the importance of measuring customer experience and a uniquely far-reaching vision for workplace services.

- **Unisys.** Workplace services are a top priority for Unisys' services business. Unisys' strong current offering is supported by its well-balanced staff distribution over the core EMEA workplace services market countries, and emphasizes its use of partnerships to cover additional geographies. Unisys also boasts a strong commitment to SIAM services, in which its VantagePoint solution serves as the focal point of the company's approach to service management and its ability to provide a consistent user experience across myriad devices. Unisys' relatively high strategy scores are grounded in a strong customer value proposition as well as a solid vision for workplace services, with a focus on end user enablement.

- **Capgemini.** Capgemini is a broad-based outsourcing supplier with significant activities in workplace services. Although primarily a European provider, Capgemini is growing in other regions as well. Capgemini has a very strong current offering that includes strong SIAM capabilities and a strong commitment to continuous improvement. Capgemini has a very strong focus in service management across both the Remedy on Demand and Service Now tool sets. Capgemini's value proposition addresses customer experience, customer empowerment, and improvements combined with innovation.

- **IBM.** IBM retains a strong focus on workplace services, as evidenced by its large service market presence, among the largest of the suppliers surveyed, as well as a typically broad range of capabilities. Among them, IBM has very strong geographic client and staff distribution, as well as a relatively strong vision for the future of this category of service. IBM also has extensive capabilities in SIAM. IBM is pursuing an approach offering highly personalized interaction using its many technological capabilities, including its cognitive platforms and walkup service in a variety of client locations.
- **CSC.** CSC is on the heels of its split into two entities: CSRA, which focuses on US government clients, and CSC, which focuses on clients in the commercial and international public sectors. CSC retains its role as one of the leading broad-based suppliers of infrastructure services and transformation with a robust portfolio of offerings, including workplace services. The company's recent acquisition of Fruition, a leading ServiceNow implementation firm, reinforces an already strong focus on service management. CSC has a strong vision for the future of workplace services and boasts a well-balanced geographic distribution of integrated delivery.
- **TCS.** TCS is a leading global application and infrastructure service provider making strides in infrastructure services outsourcing and increasing its footprint for all infrastructure services, especially workplace services in EMEA. A well-distributed staff and client base in the core EMEA countries in the workplace services market and a strong commitment to workplace and SIAM services are among the primary reasons for TCS's high score in the current offering category. With a strong vision for workplace services in the digital era, TCS's planned enhancements address the important aspects of automation, consumerization, end user empowerment, and customer experience.
- **HCL.** As an India-centric provider, HCL is among the leaders in infrastructure services delivery, and this leadership position extends to its role in workplace services delivery, where it is similarly well-equipped to compete head on with the global multinational suppliers. HCL's geographic staff and client distribution are relative strengths compared with its direct competitors, as is its strong approach to ecosystem participation. HCL is well received among its reference clients, who give the firm high marks for implementation, account management, and service quality.
- **Hewlett Packard Enterprise.** HP, a long-standing participant in the workplace services market, retains a strong value proposition for the service category, which it now offers out of the new company Hewlett Packard Enterprise. HPE's service market presence remains in the upper range of competing suppliers included in our analysis. The company combines very strong client and staff distribution with wide-ranging global delivery. A key differentiator is HPE's Propel, a service app store that forms the basis for HPE's converged service management tooling strategy.

- **Computacenter.** Computacenter has a strong history in workplace services in EMEA. The workplace service offering is complete and service centers are located in Germany, the UK, France, Spain, South Africa, Benelux, and Malaysia. Computacenter works with partners covering the workplace services requirements of its global clients. Computacenter has a strong customer value proposition addressing outcome, cost reduction, improvement, and support for different platforms (e.g., Apple). Continuous improvement is incubated in Computacenter's standard service delivery and client participation.

- **T-Systems.** T-Systems is a broad-based outsourcing supplier with significant activities in workplace services and a large market presence in EMEA. Although primarily a European provider (e.g., Germany, France, Spain, the UK, and Eastern Europe), T-Systems is growing in other regions and follows the customer wherever needed. T-Systems offers a very strong current offering supported by strong regional delivery capabilities with well-balanced staff distribution in all the core EMEA countries in the workplace services market, and strong market presence for virtual desktop and mobility. T-Systems' vision for workplace services covers all major aspects for future workplace services addressing cloud, automation, and heterogeneity of end user devices.

Strong Performer

- **The Global Workspace Alliance.** The Global Workspace Alliance is a consortium of 10 companies: CompuCom Systems, Getronics, SPIE, Tecnocom, AGCN, Centric, EIRE Systems, Infocare, NSC, and S&T. Based on this alliance, GWA has both remote and field-services staff in almost all of the core EMEA countries in the workplace services market. GWA's strong history in workplace services is manifested in its strong services market presence, in which it was one of the top performers in the EMEA region. The supplier also enjoys great strength in specific core workplace service elements such as user-centric and proactive desktop management, help desk, field support, LAN and voice services, and others. In addition, GWA offers a full range of tiered support options and innovation solutions, and is a good choice for customers seeking a supplier with high maturity and broad geographic capability.

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

Ask a question related to our research; a Forrester analyst will help you put it into practice and take the next step. Schedule a 30-minute phone session with the analyst or opt for a response via email.

Learn more about inquiry, including tips for getting the most out of your discussion.

Analyst Advisory

Put research into practice with in-depth analysis of your specific business and technology challenges. Engagements include custom advisory calls, strategy days, workshops, speeches, and webinars.

Learn about interactive advisory sessions and how we can support your initiatives.

Supplemental Material

Survey Methodology

For its Global Business Technographics Business And Technology Services Survey, 2015, Forrester conducted an online survey fielded in June through August 2015 of 2,812 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with 500 or more employees.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of the survey results in this document. To inquire about receiving full data results for an additional fee, please contact data@forrester.com or your Forrester account manager.

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with at least three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] To learn more about innovation in existing outsourcing relationships, see the "How To Implement Successful Innovation In Outsourcing Relationships" Forrester report.

FORRESTER®
CHALLENGE THINKING. LEAD CHANGE.

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

- Core research and tools
- Data and analytics
- Peer collaboration
- Analyst engagement
- Consulting
- Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals
CMO
B2B Marketing
B2C Marketing
Customer Experience
Customer Insights
eBusiness & Channel Strategy

Technology Management Professionals
CIO
Application Development & Delivery
Enterprise Architecture
Infrastructure & Operations
Security & Risk
› Sourcing & Vendor Management

Technology Industry Professionals
Analyst Relations

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.

124641