IDC MarketScape

IDC MarketScape: Asia/Pacific (Excluding Japan) Digital Workplace Services 2017 Vendor Assessment

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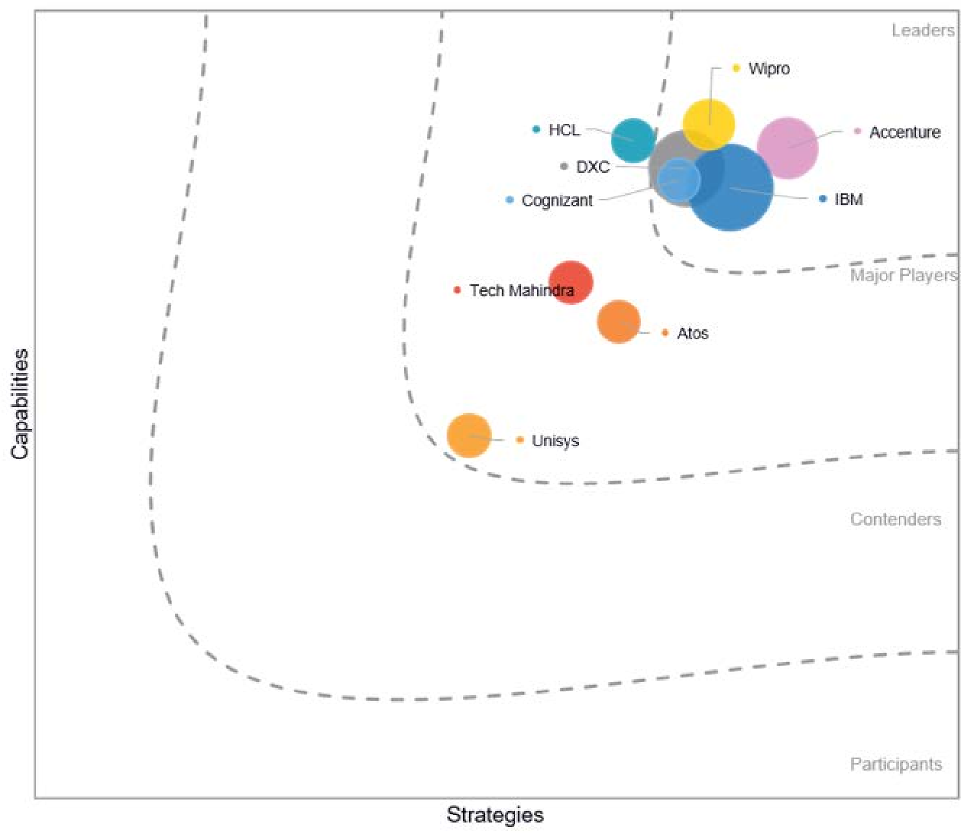
THIS IDC MARKETSCAPE EXCERPT FEATURES: IBM

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific (Excluding Japan) Digital Workplace Services 2017 Vendor Assessment



Source: IDC, 2017

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific (Excluding Japan) Digital Workplace Services 2017 Vendor Assessment (Doc # AP42165717). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents an assessment of digital workplace services (DWS) capabilities of vendors in the Asia/Pacific excluding Japan (APEJ) market through the IDC MarketScape model. This research includes both qualitative and quantitative assessment of the vendor across 18 scoring elements across DWS strategy and delivery capability dimensions. The evaluation assesses vendors on both the strength of their current offerings and how well placed they are to deliver the next generation of digital workplace capabilities. Keeping with our view that the exercise needed to identify the transformative potential of DWS capabilities of the assessed vendors, particular attention has been paid to assessing vendors on their ability to incorporate cloud-based workplace capabilities and delivery models, automation, analytics, and cognitive enablement in their service offerings. This report features nine DWS vendors in the APEJ, and the key findings include:

- Among all the measurement criteria, DWS vendors assessed well on the capability axis, suggesting that most had robust DWS offerings and provided a broad spectrum of services around these offerings.
- The area in which the greatest improvement might be made is "growth strategy" in APEJ. This suggests that the DWS market in APEJ is still nascent and evolving and that vendors, in general, need to refine their regional DWS strategy and delivery capabilities to support their growth strategies.
- It was observed that the participating vendors demonstrated the greatest variability in the "portfolio benefits" criteria of their capabilities, indicating that there was a noticeable difference in the feature richness and amount of choice supported within the DWS offerings and services from different vendors.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape exercise profiles and assesses nine DWS providers in APEJ. A key expectation of vendors for participation in the study was that they offer the full breadth of DWS, spanning consulting and advisory services, implementation/systems integration (SI) services, migration services, managed workplace services, and service desk/support services. The emphasis on the delivery of full-spectrum services in APEJ is the reason this study does not include the DWS capabilities of digital workplace product and solutions vendors (cloud-delivered or otherwise), such as Citrix, VMware, Microsoft, Cisco, Amazon Web Services (AWS), Google, Facebook, and so forth. The IDC MarketScape does, however, take into account participating vendors' support for offerings from these product/solution vendors as part of the assessment process.

Vendor inclusion also mandates that they are able to demonstrate at least two current customers with over 5,000 end users/seats each in at least one subregion among Australia and New Zealand (ANZ), the Greater China region and South Korea (GCR + Korea), and Southeast Asia and India (SEA +

India). The assessment process also delves into vendors' demonstrated strategy and capability for incorporating key elements of digital transformation (DX) — predictive analytics, self-healing capabilities, high degree of automation, and cognitive enablement — throughout their delivery of DWS.

Advice for Technology Buyers

The tidal wave of technology-fueled DX dramatically reshaping the way enterprises conduct business, create innovative experiences for their customers, and effectively interact with their business ecosystem is a central and unifying theme across industries, geographies, and enterprise size segments. Although most of the attention in the context of enterprise DX is focused on the enterprise's external ecosystem — suppliers, partners, customers, and even competitors — a critical part of this picture of enterprise DX is the transformation of the internal ecosystem of the enterprise, in other words, the enterprise workplace and its connection to the external ecosystem. We define DWS as an aggregate set of activities whose end goal is to provide enterprises with an experience-centric, dynamic, and boundaryless yet secure, automated, and intelligent work environment that enhances employee creativity and productivity. In this context, we offer the following pieces of advice to enterprise end users on the DWS options available to them:

- **Select the right services differentiators for your workplace**. Although all the prominent vendors generally provide a decent spread of both digital workplace capabilities and services, every vendor has specific capabilities that it is strongest at, such as employee experience-centric workplace design, secure mobile workplace, cloud-delivered browser-based workplace, workplace customizability, extensive end-user support capabilities, and so forth. IDC recommends that enterprises identify their key objectives from a DWS engagement and use this document to assess which vendors might be best equipped to help achieve those objectives.
- **Regional delivery capability is key**. During our research, we found that DWS vendors varied significantly in terms of their regional footprint (current business and business growth), presence (delivery centers and datacenters), delivery and support capability (regional resources, local support/field service partnerships), and so forth across APEJ. Enterprises need to evaluate and reassure themselves that the DWS vendor they choose to engage with can deliver the services in their geography.
- **Plan for an intelligent workplace**. Although today's workplace already features a high degree of automation across user onboarding, service provisioning, operations, and self-service support, the workplace of tomorrow will heavily feature cognitive enablement of the end user. In IDC's *2017 APEJ End-User IT Services Survey* of over 1,300 enterprises, over 51% of the respondents rated 7 or more (on a scale of 1–10, 10 being most likely) their likelihood of "selecting a services provider based on its demonstration of cognitive capabilities for unlocking business value rather than just demonstrating cost improvements." Closed-loop, cognitive-enabled automation promises to unleash the next wave of productivity within the enterprise workplace, and IDC recommends that enterprises pay closer attention to prospective DWS vendors' current enablement of cognitive capabilities within their offerings as well as their road map for an intelligent workplace environment.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. Although every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of one vendor's strengths and opportunities.

IBM

According to IDC analysis and buyer perception, IBM is positioned as a leader in the IDC MarketScape for DWS in APEJ.

IBM's DWS practice spans across the breadth of capabilities from consulting to implementation and managed services, and brings together its diverse capability set across platforms, systems infrastructure, point solutions, and third-party integrations to present a comprehensive DWS offering set to its customers.

IDC has observed that IBM approaches the DWS segment from a managed mobility perspective, consciously avoiding the temptation of treating it as an extension of traditional outsourcing/managed services engagements. This approach is unique among its peers and allows IBM to create a differentiated position for its DWS by integrating it with IBM Cloud, Watson, Analytics, and QRadar security to address the holistic needs of its enterprise-class customer's digital workplace vision.

IBM has positioned the IBM cloud as the "platform for the next era of business" that aligns with a variety of digital workspace–related services. For example, it provides application and desktop virtualization services in a multitude of deployment modes leveraging the IBM cloud and managed by IBM's next-generation of multicloud management tools.

IBM’s positioning as a digital workplace enabler is focused on personal choice of devices, user-centric support, superior consumer–like experience, and security and compliance. IBM also brings in cognitive computing capabilities, such as Watson Workspace, to build cognitively enabled team spaces and Workplace Support Services with Watson to enable predictive management of incidents. The core technology of Workplace Support Services with Watson is built from IBM Bluemix APIs and hosted on the IBM cloud. It can also be integrated with chat services such as LiveEngage, Skype, the ServiceNow chat solution, and Slack. It is interesting to note that the primary focus of IBM workspace is "integration," which is a concrete example of how IBM's traditional strength in support and service desk services has evolved over the years.

Strengths

Mobility + Security + Cognitive

IBM provides a comprehensive set of mobility services to its clients built on IBM MaaS360 or using third-party solutions (VMware AirWatch, Microsoft Intune, MobileIron, and so forth. IBM's focus on providing a holistic security architecture through the integration of cognitive capabilities of IBM Watson and QRadar has been a key value proposition for its mobility services portfolio. MaaS360, Watson, and QRadar are all extremely well-regarded offerings, which some of IBM's competitors leverage as bedrocks of its offerings. Native capability and integration of these elements offer IBM a unique advantage.

IDC has also observed that IBM provides support for a broader set of mobility management solutions, virtualization platforms, OSs, and enterprise productivity and collaboration tools than several of its competitors. IBM has also established some key partnerships with Cisco, VMware, Microsoft, Apple, and ServiceNow to strengthen its digital workplace offerings.

Some of the clients praised IBMs experience and knowledge in handling some of the workplace services products the clients had evaluated.

Challenges

IBM's digital workplace offerings are premised on its mobility services even though there is much focus and investment in the areas of cognitive, cloud, and analytics. This mobility-centric approach to workplace services might confuse customers looking for a more evolutionary workplace transformation engagement. IBM needs to have a balanced GTM strategy in place to attract clients looking for general services, such as collaboration, desktop virtualization, and support services from a reliable partner.

A customer IDC spoke to also mentioned that IBM could do more to support a broader portfolio of third-party offerings.

Consider IBM When

IBM's suite of DWS is an ideal fit for enterprises that desire a secure, mobility-centric, and highly automated digital and collaborative workplace environment that is infused with strong cognitive and analytics capabilities.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and GTM plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape is a visual representation of the relative market shares of each individual vendor within the specific market segment being assessed but should not be taken to represent proportionate absolute market shares.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

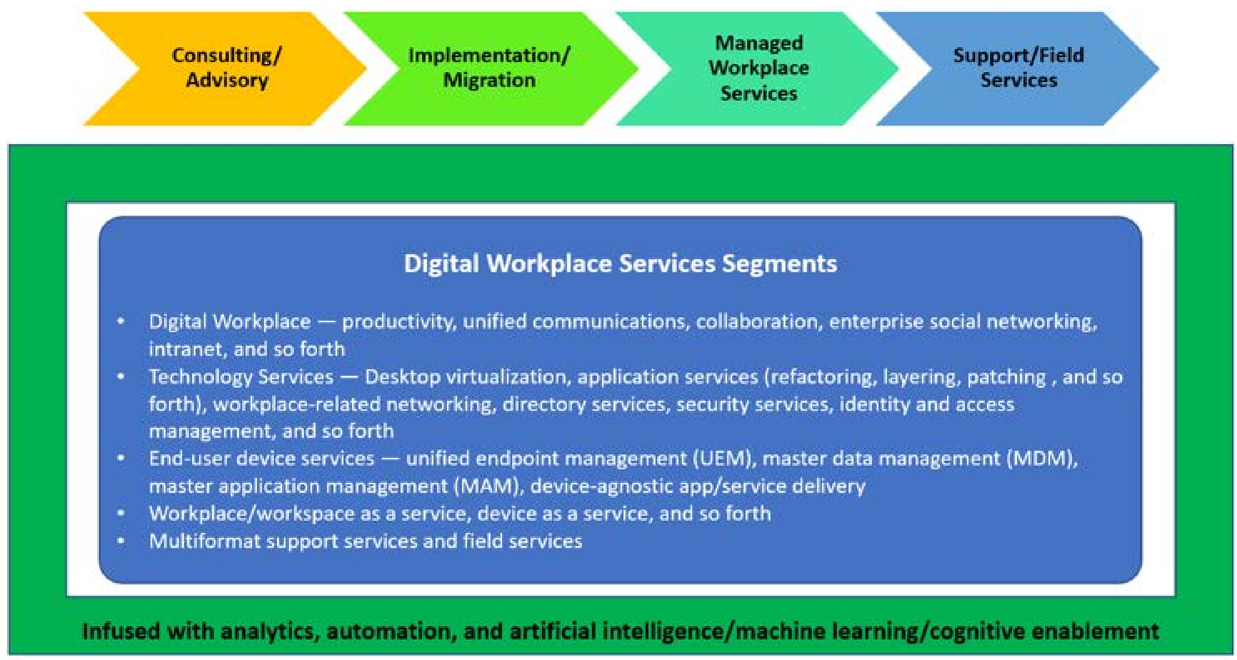
Market Definition

The definition for DWS as employed in this IDC MarketScape leverages as its foundation, the model of enterprise DX enablement by business, and IT services as described in more detail in *IDC's Worldwide Services Taxonomy, 2017* (IDC #US42356617, March 2017). For the purposes of this IDC MarketScape study, we define DWS as an aggregate set of activities whose end goal is to provide enterprises with an experience-centric, dynamic, and boundaryless yet secure, automated, and intelligent work environment that enhances employee creativity and productivity.

Figure 2 attempts to capture the breadth of services and the depth of digital workplace capabilities that make up the universe of DWS in the context of this exercise. The four categories of activities (consulting/advisory, implementation/migration, managed workplace services, and service desk/support/field services) as applied to the encapsulated segments listed, and infused with automation, analytics, and cognitive intelligence, make up the scope of this IDC MarketScape evaluation.

FIGURE 2

DWS: Definition



Source: IDC, 2017

LEARN MORE

Related Research

- *IDC MarketScape: Asia/Pacific Digital Strategy and Agency Services 2017 Vendor Assessment* (IDC #US41462217, August 2017)
- *What Are the Top Enterprise Priority Areas for Transformation Through Digital Technologies?* (IDC #AP42536917, May 2017)
- *IDC's Worldwide Services Taxonomy, 2017* (IDC #US42356617, March 2017)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of ITSPs participating in the digital workplace services (DWS) market with specific offerings and capabilities in the segment. This assessment discusses both quantitative and qualitative characteristics that explain success in the ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market during both the short and long term.

"As enterprises look to leverage technology to transform the way they do business, they will increasingly demand workplace environments that will empower their workforce to participate in and effect this business transformation. DWS providers that invest in the conceptualization and delivery of the next generation of optimized, automated and intelligent workplace capabilities and services will thrive in this new digital–focused market," says Pushkaraksh Shanbhag, senior research manager of Business and IT services research, IDC Asia/Pacific.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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