digital workspace

IGEL®
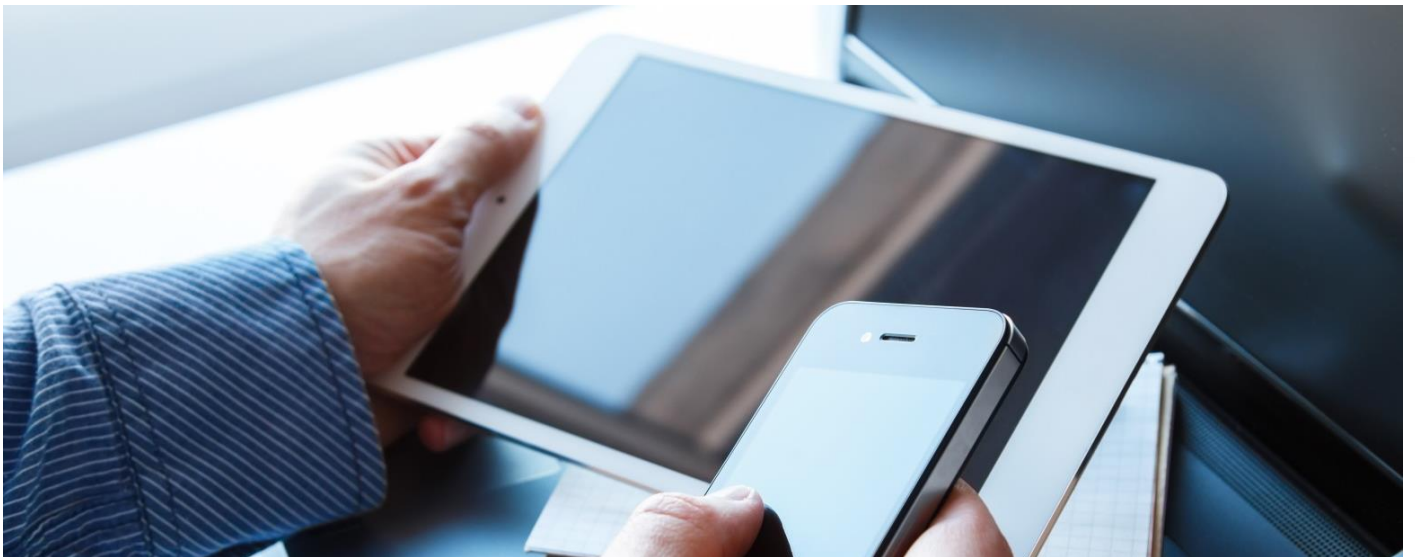TECHNOLOGY

Digital Workspace Vendor Benchmark 2016 Strategy Paper

Germany

Digital Workspace
Rising Star Germany

2016

experON
G R O U P
an ISG business

A Study
by Experton Group AG
An ISG Business

Munich, Germany
September, 2016
**Author: Dr. Hennig Dransfeld**

Preface

Many new questions about the workplace are currently arising, since the technological possibilities and economic and sociological parameters have changed and will continue to change. That is why the digital workspace is being discussed again in many places – in particular now.

On the road to a digital economy, the IT workstation – if this term can be used in the first place – will change strategically. The digital workspace is mainly impacted by and ultimately driven by three sub-topics. They are:

More flexible work models: There have been enormous changes in the past years, in particular in how "knowledge workers" want to work. Work-life balance plays a major role here, as does the possibility of working in flat, interdisciplinary hierarchies, benefiting from home office regulations, yet still being able to work productively. At the same time, however, digitization measures mean that workspaces that used to have no or only simple IT solutions, such as warehouse jobs or fork-lift trucks, but also company cars, are being connected up to IT.
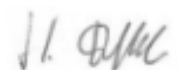
```
        Work
        models
          |
        Digital
       Workspace
      /          \
 Design of        IT
 workspace
```
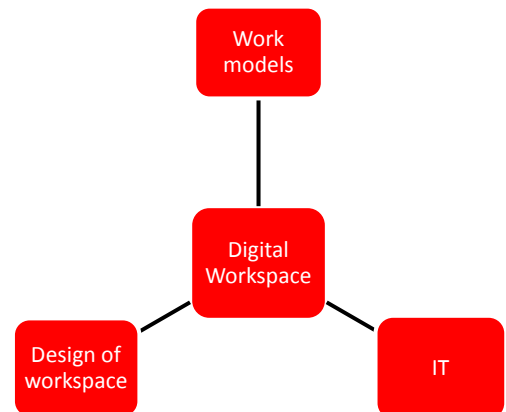
Partial equipment with mobile ICT hardware and software: The imminent death of the conventional PC and notebook was proclaimed until recently. In the meantime, there is a somewhat more relaxed attitude toward tablets and the areas they are used; decision-makers are again taking a more sober look at their client infrastructure. Experton Group continues to recommend a role-based approach here. What hardware and software, cloud services and delivery models are needed for a specific work role and how can they be provided as efficiently as possible? The requirements for an employee in the Finance department are bound to be completely different to those of a sales executive or warehouse operative. The result is usually a pretty heterogeneous picture, since in some areas the traditional PC or notebook is still the ideal tool, SBC or VDI offer calculable monetary advantages in other areas, whereas in others tablets, data glasses, smart watches and smartphones – perhaps together with connected cars – enable employees to give their best. All in all, the client IT will therefore tend to become more heterogeneous, which necessarily entails new management methods.

Design of the workspace: The office of the 1960s by no means results in optimally motivated and productive employees, while open-plan offices are not always the be-all and end-all. Google and many creative agencies have shown the way – rest zones, individual workplaces that can be used flexibly, discussion areas as a relaxed ambiance for agreeing matters, and work rooms for meetings are just as important as IT-based communications solution for telephone/video conferences, chats and collaboration solutions.

Various tools are still used to manage end-user devices: MDM for smartphones and tablets, management suites for notebooks and desktops, other management suites for networks, servers and storage, and special tools for special devices. Experton Group expects 2016 to bring the first usable all-round solutions for all devices to be managed, with best-of-breed solutions being replaced in the years 2017 to 2018. In 2016, Experton there produced its first-ever study relating to an evaluation of solution providers for the digital workspace.

Many workspace topics have already been analyzed in adjacent fields, such as mobile enterprise, in the past years. Yet the workspace is not only becoming a more and more vital issue in the market, but its importance is also growing for the whole of IT, including infrastructure budgets.

This year, 13 vendors were included in the final assessment in the "**Digital Workspace Management Solutions**" quadrant. IGEL was named by Experton as a **rising star** in this category. That means Experton envisages that IGEL will post above-average growth in the SME sector thanks to a flexible, easy-to-use solution covering all important end-user devices. At the time of the award, IGEL boasted a highly promising portfolio, including the necessary roadmap geared suitably to key market trends and customer requirements. The company also has an excellent management that understands the local market and it is definitely a possibility that it can become one of the absolute top leaders in the market in 12 to 24 months.

Kassel, October 2016

Dr. Henning Dransfeld
Manager Advisor
Program Manager Mobile Enterprise

Digital workspace management solutions

Overarching device management is the field where the formerly separate functionalities of mobile device management and desktop management converge. There is growing demand for central solutions for all end-user devices, including smartphones, tablets, PCs and MACs. The ability to carry out remote maintenance is particularly important here. Digital workspace management solutions must have the following functions:

- Integration of key ITIL processes for all physical, virtual, mobile and cloud-based workspaces (incident management, problem management, change management, request fulfillment, service asset & configuration management, service level management, service portfolio management, IT service catalog management)

- Self-provisioning with an integrated approval process and internal enterprise app store

- Provision of the main MDM functions

The key assessment criteria and requirements demanded of vendors can be summarized as follows:

- Strategy and vision

- Coverage of the relevant workspace technologies

- Breadth and depth of the workspace management portfolio

- Innovative potential

- Business value

- References

- Footprint and awareness

- Sales partnerships

Detailed assessment: IGEL

Strengths/opportunities:

Advisor statement

"IGEL is very well positioned in the German SME sector with a highly agile digital workspace solution."

- IGEL has operated successfully in the zero and thin client software market for many years and can fall back on a lot of customer-oriented experience in a wide range of diverse industries (banking, insurance, retail, research and teaching).

- Another extremely positive aspect is also that it has its own development department in Germany, which underscores the vendor's local footprint.

- The internationally operating company, which is headquartered in Bremen, Germany, can leverage partnerships with IT service providers, most of them very active in the upper medium-sized sector, in marketing its solution.

- IGEL software offers an agile thin client solution for digital workspace management that has already become well established on the German market.

- Compared to the market, its portfolio is already relatively complete, being integrated with the most common collaboration, productivity and SaaS applications. In addition, IGEL offers a flexible pricing model based on users or devices.

- IGEL boasts good references in the public sector in Germany and Switzerland. IGEL's software expertise is proven by the well-prepared lighthouse project with Dachser and other international references.

Trend assessment:

Positive – Since the topic of digital workspace is of particular importance for IGEL and consistent management of all clients is of sharply growing relevance, it can be assumed that the company will continue to perform above-average. IGEL is well able to leverage its specific strengths and experience in the German market.

Experton Market Insight
Digital Workspace Vendor Benchmark 2017 – Deutschland
Digital Workspace Management Solutions

About IGEL

IGEL Technology is one of the world's fastest-growing vendors of endpoint management software and thin and zero client hardware solutions which companies and authorities can use to permanently reduce their workstation-related IT costs. IGEL has local subsidiaries and offices in around 10 countries. Its products are distributed via a reliable global partner network made up of more than 1,000 trained system consultants as well as around 3,000 other resellers in more than 50 countries.

With the IGEL Universal Desktop Converter (UDC) software, PCs, notebooks and thin clients from other manufacturers can be operated more efficiently and securely. The cross-product IGEL Universal Management Suite (UMS) software which is supplied as standard enables consistent and efficient remote endpoint management of all IGEL workplaces. IGEL's Linux and Microsoft Windows-based thin client operating systems feature industry-leading connectivity, security and peripheral systems support. Continued software maintenance, upgrade options and IGEL's typical diverse range of access to central IT environments, cloud services, such as SaaS and DaaS, and legacy host systems ensure that companies' IT systems are even more future-proof. IGEL's technology partners include Citrix, Microsoft and VMware as well as Red Hat and Parallels.

More than 20,000 companies, administrative bodies and public institutions throughout the world use IGEL products, including international and large companies such as Arcadia, Les Schwab Tire, Luxottica, Hamburg Süd, DAK, Deutsche Börse Systems and HSBC. IGEL generates more than 45 percent of its revenue outside Germany.

IGEL Technology is an active member of Germany's BITKOM IT association. Apart from headquarters and the development department in Germany, IGEL has branches in San Francisco for the Americas region and in Sydney for the APAC region, as well as numerous branches in key European countries. For further information, please go to **www.igel.com**, **www.facebook.com/igel.technology** and **twitter.com/IGEL_Tech_DACH** or **twitter.com/IGEL_Technology**.

Experton Group

Experton Group is the leading fully integrated research, advisory and consulting company for large enterprises and midmarket businesses. It supports its customers through innovative, neutral and independent expert consulting to help them maximize the business value of their ICT investments.

Experton Group provides market research, advisory services, assessments, benchmarks, conferences, seminars and publications on information and communications technology topics. The scope of services includes technology, business processes, management and M&A.

Experton Group was founded in 2005 by very experienced market research and consulting experts and has been a subsidiary of Information Services Group since March 2016.

For more information on our research please visit:

http://experton-group.de

http://blog.experton-group.de

https://twitter.com/ExpertonGroup