TOUGHBOOK

NAVIGATING THE SHIFT:

THE BUSINESS CASE FOR UPGRADING TO WINDOWS 11

Understanding the High Cost of Standing Still –

Why Organisations MUST Transition to Windows 11

Introduction –

Chris Turner, Head of Go-to-Market, Panasonic TOUGHBOOK Europe

Support for Microsoft's Windows 10 operating system will end on 14th October 2025. After this date, Microsoft will no longer provide security updates, technical assistance, or feature improvements for this operating system.

There are several serious implications when Windows 10 reaches end-of-life.

One major issue is security; without critical updates and patches, Windows 10 devices will be more vulnerable to cyber threats, malware, and ransomware – which could have significant financial, operational and security implications for maintaining an outdated operating system.

Due to the nature of Panasonic TOUGHBOOK customers' working environment, this risk is probably even more severe. Many of our customers are utilities, power companies, and organisations in critical national infrastructure, which, if hacked, resulting in the nation losing power, electricity or access to water, could cause a national emergency!

There will also be software compatibility issues for organisations to contend with, as some applications will stop receiving updates and support for Windows 10, leading to performance and reliability concerns. In fact, application and software business compatibility was the top challenge for nearly half **(47%)** of the IT decision-makers that we recently surveyed.

This is one of the reasons Panasonic TOUGHBOOK offers customers transition support to ensure a seamless migration experience. This includes thorough application testing to verify compatibility and identify potential issues before deployment, as well as custom image creation tailored to meet specific organisational requirements.

Additionally, businesses operating in heavily regulated industries will face compliance risks if they continue using an unsupported operating system. Older devices running Windows 10 will experience slower performance and inefficiencies over time, whilst Microsoft 365 applications will also stop receiving updates on Windows 10, which will affect productivity. Business continuity and incident recovery may be hindered by a lack of OS support.

47%

Application and software business compatibility was the top challenge for nearly half of the IT decision-makers surveyed.

The longer organisations delay, the HIGHER THE RISK of rushed, costly deployments under pressure.

There are of course upgrade options, whereby businesses can:

1. Upgrade to Windows 11 with current hardware.

2. Remain on Windows 10 and pay for Extended Security Updates (ESU). This is a per-device, yearly subscription that provides important security updates only, doubling in price every year for a maximum of three years.

3. Invest in new hardware which will be compatible with Windows 11.

But one of the biggest risks facing organisations is doing nothing because of decision paralysis while trying to determine the best approach. While maintaining the status quo may appear cost neutral, the reality is that businesses that fail to modernise their infrastructure risk falling behind as this significantly reduces device and operational security within their organisation.

Furthermore, staying on Windows 10 incurs increasing annual support costs, making delaying the inevitable a financially unsustainable, risky and uncompetitive choice.

However, it is important to recognise that managing Windows 10 end-of-life is not a straightforward exercise. This is especially the case for organisations with large teams of hyper mobile field workers who rely heavily on their devices to undertake daily tasks.

Nevertheless, upgrading devices to Windows 11 is essential for organisations to stay secure, efficient, and competitive. Furthermore, delays or poorly planned transitions can increase IT support demands, costs, and risk organisations falling behind in their digital transformation efforts.

To get a clear picture of the issues facing organisations, Panasonic TOUGHBOOK commissioned independent research to explore the trends, challenges and opportunities around user migration to the Windows 11 operating system. Respondents were from the UK and Germany, working in organisations that hadn't fully completed their migration to Windows 11.

It was keen to gauge the general take-up of Windows 11, the number of devices organisations will need to upgrade or replace, the pain points experienced – including cost and security implications – and how such an exercise should be approached when operating a large mobile device ecosystem.

Methodology

200 decision makers from the UK and Germany (100 each) were surveyed in March 2025. Respondents are involved with purchasing decisions and working for organisations with 1,000+ employees, in field services and utilities; defence; emergency services; automotive; supply chain and logistics; and manufacturing sectors.

KEY FINDINGS

Standing Still Presents Significant Security Risks

Nearly all **(98%)** organisations surveyed say they are 'likely to some extent' to invest in Microsoft's Extended Security Update (ESU) if migration to Windows 11 is not completed by October 2025. More than half **(51%)** say they are 'very likely'.

Concerns about managing device security through other means are significant. Over half **(58%)** are not fully confident in their ability to manage device security without migrating to Windows 11 or investing in ESU, while **43% are completely confident.**

The most significant danger of standing still and not upgrading is the security risk this presents - with unsupported systems a prime target for cybercriminals.

If organisations were not able to fully migrate to Windows 11 by October 2025 (and did not invest in Microsoft's ESU), **94% would be concerned to some extent** about the increased vulnerability to ransomware and malware, while **62% admit to being extremely concerned.**

Other concerns are around potential data breaches **(93%)**, a lack of security patches for new threats **(91%)**, compliance and regulatory risks **(89%)** and the impact on business reputation **(88%)**.

Panasonic TOUGHBOOK enhances security performance and future-proofs device ecosystems through innovative features and robust design:

Enhanced Performance and Security:

Upgrading to Windows 11 on TOUGHBOOK devices provides access to advanced features like improved security patches, better credential protection, and enhanced cloud security.

Advanced Security Features:

TOUGHBOOK devices integrate biometric authentication to ensure secure access to sensitive data. They also support Intel vPro Technology, which provides hardware-based security and remote management capabilities.
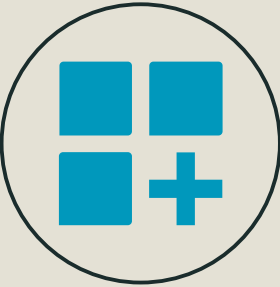
Security Customisation:

The modular design allows organisations to tailor devices to their specific security needs, such as adding encryption modules or secure data transfer peripherals. The rugged design helps to secure devices against data breaches in challenging environments.

Software Change Means Hardware Change

Despite the evident benefits of migrating to Windows 11, organisations must navigate challenges to ensure a smooth transition with minimal operational impact.

62%
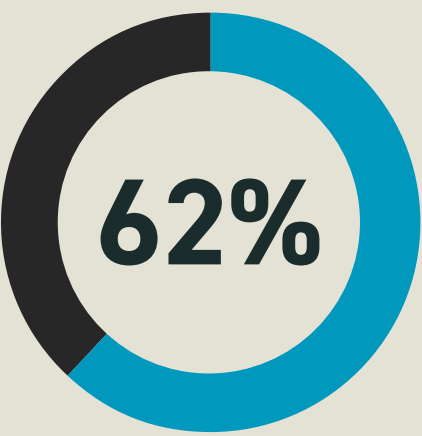
On average, nearly two-thirds of devices have been, or will need to be, replaced or upgraded to be compatible with Windows 11. The research found that the average number of devices across each surveyed organisation is around 4,000.

On average, **56%** of devices will need to be upgraded/replaced for respondent organisations with less than 5,000 employees, and **76%** will need to be upgraded/replaced for those with 5,000 employees and over. This has the potential to be a significant organisational and financial disruptor.

Balancing Productivity with Downtime

Every organisation surveyed **(99.5%)** said they are taking a staggered approach to migration, with three quarters **(75%)** of organisations upgrading devices in various phases. Twenty-five percent stated that they will only upgrade devices when they are due for a hardware refresh.

When questioned about their approach to upgrades, respondents said that device migrations would be managed via a combination of remote upgrades **(averaging 46%)** and in-person upgrades **(averaging 54%)**. To facilitate this process, businesses plan to heavily utilise support from device manufacturers **(64%)** alongside their internal IT teams **(62%)**.

Key Benefits of Migrating

Respondents currently migrating to Windows 11 are primarily looking for the following benefits:

- **44%** are looking to increase security and protection.

- **36%** said an upgrade would increase performance and processing power.

- **36%** are looking to take advantage of a future-proofed device ecosystem once the migration is completed.

Migration Not Without its Challenges

Despite the evident advantages, respondents are encountering several difficulties. In terms of challenges either experienced or expected during the migration, the top three cited were:

- Application and business software compatibility **(47%)**

- Device downtime limiting productivity **(45%)**

- Waiting to coincide migration with end of device lifecycle **(40%)**

Staying on Windows 10 Impacts Productivity:

- Limited support for modern collaboration tools

- Slower boot times and app performance

- Higher helpdesk volumes due to OS instability and compatibility issues

- Incompatibility with newer CPUs and energy-efficient hardware

**While delaying migration introduces risk, early adoption offers a competitive advantage.
Benefits for customers include:**

- Access to full support and documentation from Microsoft

- More time to pilot and test mission-critical applications

- Ability to train staff and prepare for hardware upgrades in advance

- Avoidance of migration resource bottlenecks. As the deadline approaches, organisations will rush to migrate.

Delaying Migration Presents a Budget Black Hole

Any migration inevitably incurs additional costs. **(52%)** of organisations who expected their migration to be complete by October 2025 anticipated additional costs. Surprisingly, 24% expected costs to decrease.

For those organisations that predict their overall operational costs will decrease, should their migration be completed by October 2025, they may be looking to take advantage of potential cost savings in hardware, maintenance, and cybersecurity support.

Organisations delaying the switch to Windows 11 until after October 2025 are predicting higher costs **(66%)**.

This increase in cost is driven by higher cybersecurity expenses **(55%)**, increased support costs **(48%)** and business continuity risks **(46%)**, as well as increased maintenance **(40%)** and hardware costs **(38%)**. Ultimately these costs represent money spent mitigating risk rather than advancing innovation or business value.

AI Benefits of Migrating

A third of organisations **(34%)** are hoping to take advantage of AI features such as Microsoft Copilot or Bing AI, whereas **29%** are looking forward to utilising edge AI capabilities in the field. Customers therefore see future-proofing their platform as a real benefit to upgrading. **AI and edge technologies** will be crucial for maximising productivity in the field, but many companies are still exploring the exact benefits that these can deliver.

The Journey to Migration

On average, over half **(52%)** of respondent devices have already been migrated to Windows 11, with approximately six months to go until Windows 10 reaches end-of-life.

52%
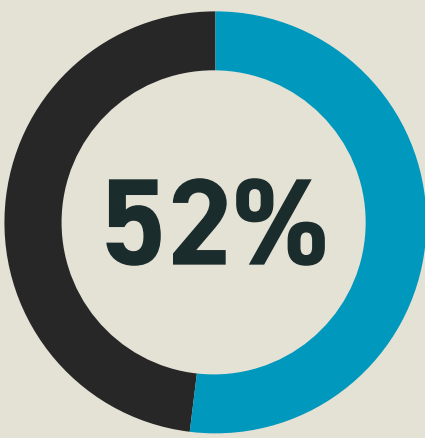
The Window is Closing

This research highlights that the cost of standing still is real, measurable and growing every quarter.

The risk of doing nothing means:

- Security exposure increases
- Cost of ESUs double every year
- Regulatory scrutiny is tightening
- Productivity is lagging behind

The smart move is to act now, plan migration timelines, audit application compatibility and start deploying Windows 11. Why risk staying on an insecure, expensive and unstable operating system?

£ **For an enterprise with 1,000 devices the estimated ESU cost would equate to £340,000+ in unbudgeted expense.**

Source: Microsoft

UK AND GERMANY COMPARISONS

Security Concerns are Lower in Germany

German businesses that are either not migrating to Windows 11 or not investing in Microsoft's ESU have fewer concerns about the impact on their security posture, or the overall business implications, than the UK.

The research found German respondents were not as 'extremely concerned' **(47%)** about increased vulnerability to ransomware and malware, as their UK counterparts **(76%)**.

Financial Impact Higher for UK Respondents

Eighty nine percent of UK businesses expect costs to increase for Windows 11 migrations that will not be completed before October 2025. This compares to **43%** of German businesses that expect costs to rise.

German respondents expect costs to rise mainly due to higher cybersecurity expenses **(63%)**, followed by business continuity risks, and the cost of third-party software support **(both 44% respectively)**.

In the UK the top three reasons for rising costs were: increased support costs **(55%)**, higher cybersecurity expenses **(51%)**, and business continuity risks **(47%)**.

Device Upgrades and Migration Plans

On average, fewer devices in Germany **(56%)** will need to be replaced or upgraded to be compatible with Windows 11, than in the UK **(68%)**.

Migration Challenges

In the UK, the top four challenges that organisations expect are:

42%
Application/business software compatibility
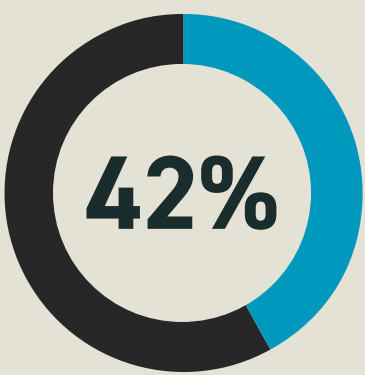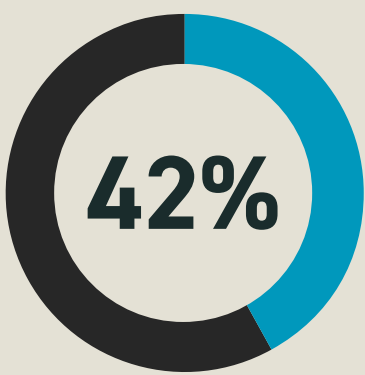
42%
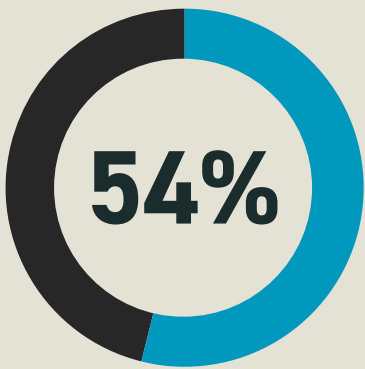Waiting to migrate to coincide with end of current device lifecycle
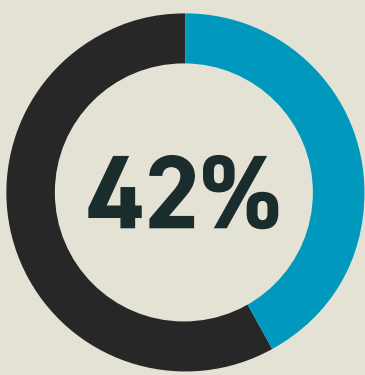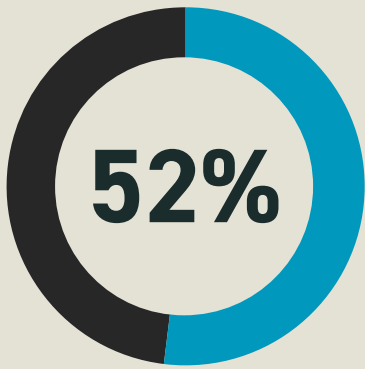
42%
Migration taking longer than planned
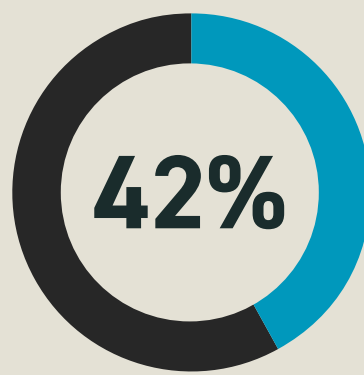
42%
Devices are in a remote location with limited connectivity

In Germany, the top four challenges that organisations expect are:

54%
Device downtime limits productivity

52%
Application/ business software compatibility
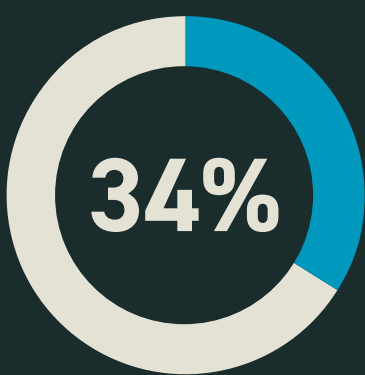
48%
A lack of third-party support
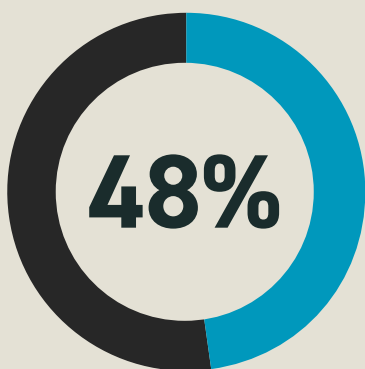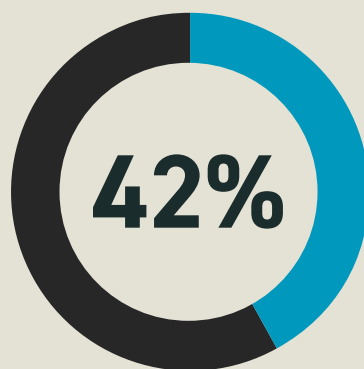
42%
Strict minimum device hardware requirements for migrating
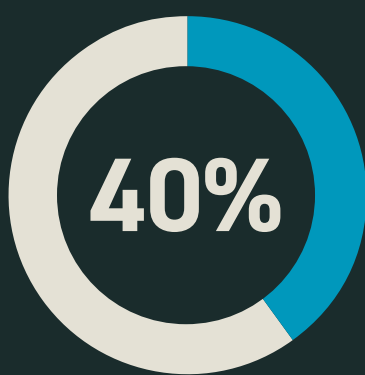
Migration Benefits

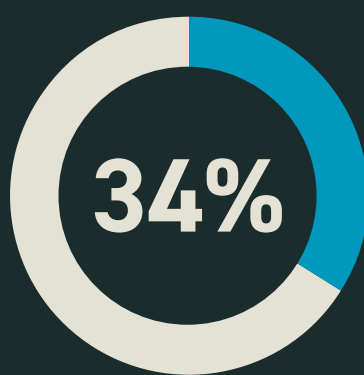**In the UK, the top four benefits that organisations expect are:**
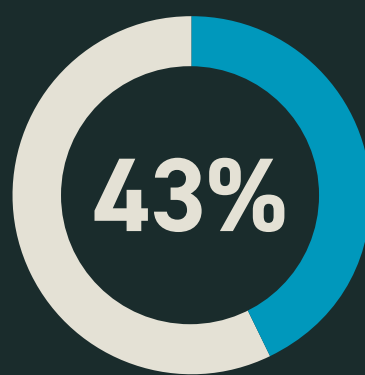
43%
Increased performance and processing power

34%
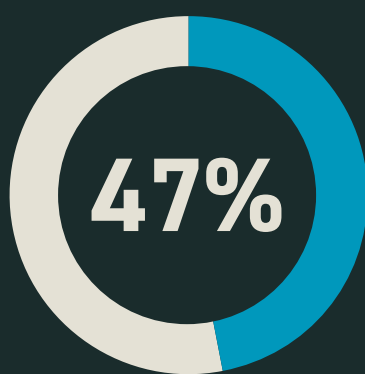Taking advantage of AI features

40%
Increased security and protection

34%
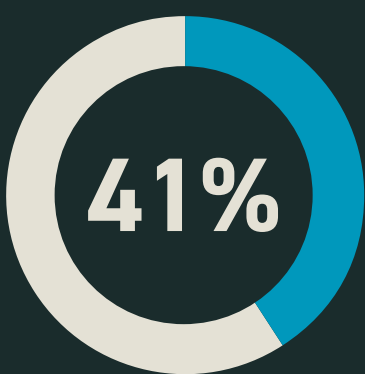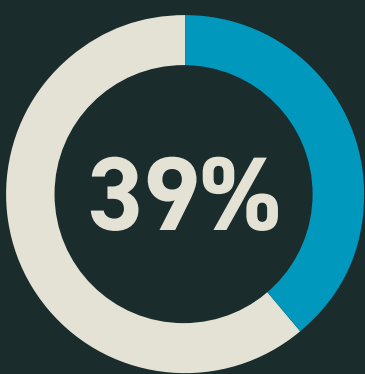Better multi-tasking capabilities

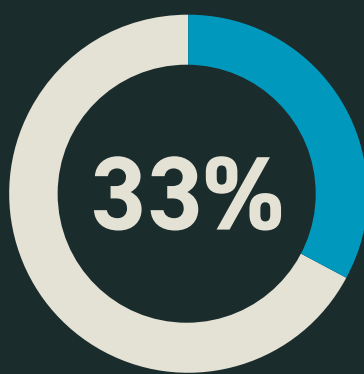**In Germany, the top four benefits that organisations expect are:**

47%
Increased security and protection

41%
Increased device usage by end user

39%
A future-proofed device ecosystem

33%
Taking advantage of AI features

KEY FINDINGS: EMERGENCY SERVICES

The Emergency Services sector is a critical barometer for the deployment of Windows 11. Given its pivotal role in maintaining public safety and operational continuity, key insights have been included below on how it's handling the migration to Windows 11.

Migration Plans

- Emergency services organisations report that **67%** of their devices have been, or will need to be, replaced/ upgraded to be compatible with Windows 11.

- Around two-thirds of respondents **(65%)** will stagger their migration to Windows 11, with **40%** of migrations undertaken remotely. And **68%** of respondents said they would use device manufacturer support to achieve this, whilst **58%** say they will use their internal IT team (respondents could select more than one option).

- All respondents are, to some extent, likely to invest in Microsoft ESU should Windows 11 migration be delayed beyond October 2025.

Security Concerns and Costs

- More than two-thirds **(68%)** of emergency services respondents are not completely confident that they can manage device security through other means, if Windows 11 migration is not completed before October 2025 and they do not invest in Microsoft's ESU.

  - They are concerned, to some extent, about increased vulnerability to ransomware and malware **(94%)**; a lack of security patches for new threats **(84%)**; compliance and regulatory risks **(87%)**; potential data breaches **(81%)**; and the impact on business reputation **(84%)**

- If there are any delays in migrating to Windows 11, **68%** of emergency services respondents would expect costs to increase.
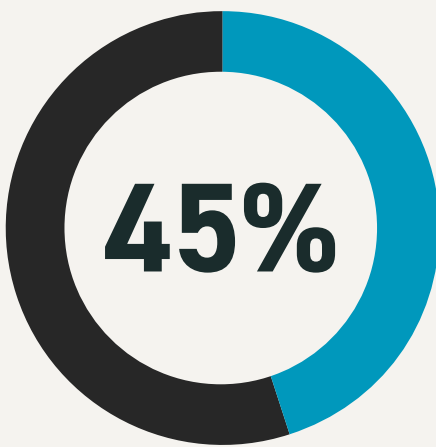
Key Challenges

The primary challenges for emergency services respondents when migrating to Windows 11 are:
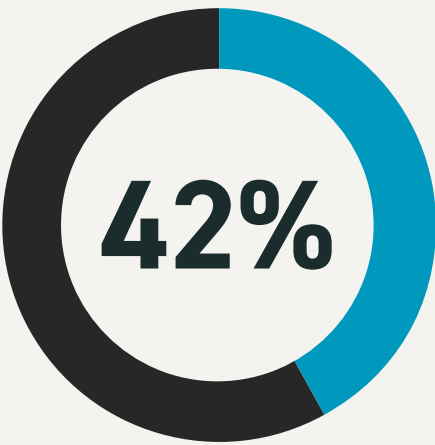
48%
A lack of third-party support

45%
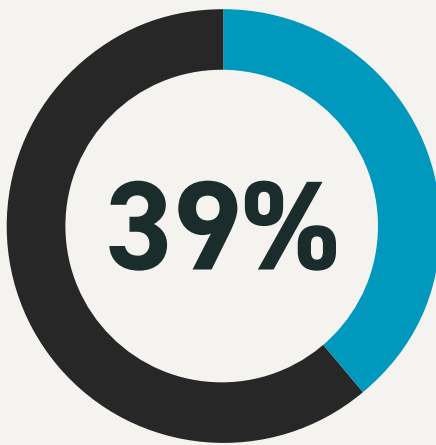Device downtime limits productivity
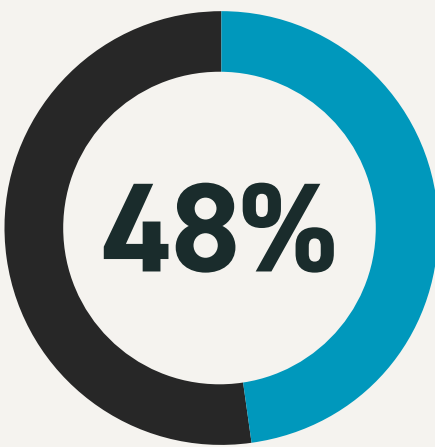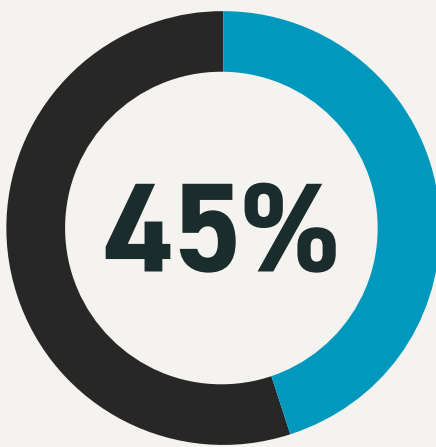
45%
Application/ software business compatibility
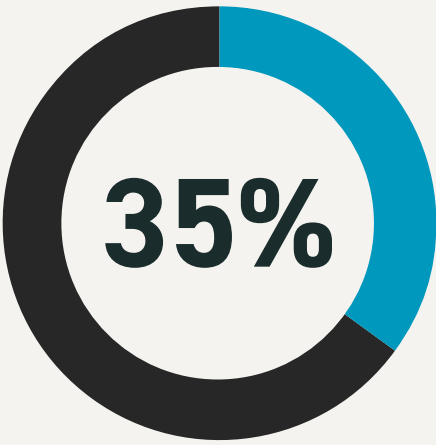
Key Benefits

The primary benefits for emergency services respondents when migrating to Windows 11 are:

42%
Increased device usage by end user

39%
Taking advantage of AI features
(e.g. Windows Copilot, Bing AI etc.)

35%
Increased performance and processing power

Panasonic TOUGHBOOK is a trusted partner for emergency services, providing rugged and reliable technology solutions tailored to the unique demands of police, fire, and ambulance teams.

TOUGHBOOK devices are durable in extreme conditions, can be customised with in-vehicle integrations, enhanced connectivity and support for critical emergency services applications.

> "Upgrading to Windows 11 was a daunting task, especially with our remote teams relying heavily on their rugged devices when attending callouts. Panasonic TOUGHBOOK not only ensured full hardware and software compatibility but also provided proactive support throughout the migration. This delivered a smooth, stress-free upgrade with minimal downtime, with our first responders now able to take advantage of increased performance and security."

Digital Transformation Lead, Emergency Services

EXPERIENCE THE TOUGHBOOK DIFFERENCE

Panasonic TOUGHBOOK offers several advantages to organisations transitioning from Windows 10 to Windows 11, particularly for those managing devices in remote and demanding environments. Here is a recap of some of the benefits of working with Panasonic:

- **Hardware Compatibility:** All new TOUGHBOOK devices are optimised for Windows 11, ensuring seamless upgrades without compatibility issues.

- **Enhanced Performance:** The latest TOUGHBOOK models feature advanced Intel processors, edge AI capabilities, and extended battery life, all tailored to maximise Windows 11's efficiency.

- **Minimal Disruption:** TOUGHBOOK devices maintain consistent form factors across generations, reducing the need for hardware customisation and minimising downtime during the transition.

- **Image Creation and Transition Support:** Panasonic TOUGHBOOK offers customers transition support to ensure a seamless migration experience. This includes thorough application testing to verify compatibility and identify potential issues before deployment, as well as custom image creation tailored to meet specific organisational requirements.

  In many cases, this comprehensive support can be co-funded, further easing the transition process and reducing the financial burden on customers.

- **Stable OS Support:** Panasonic TOUGHBOOK collaborates with Microsoft to offer Windows 11 IoT Enterprise Long-Term Service Channel (LTSC), providing up to 10 years of stable and secure OS support.

- **Simplified Migration for Large Fleets:** Panasonic TOUGHBOOK devices are designed to streamline migration for organisations managing extensive device fleets, ensuring operational continuity. They deliver in-field support to assist customers directly at their work sites or operational environments.

  This includes deploying specialised teams to provide hands-on assistance with device upgrades, troubleshoot any issues arising during the migration process, and ensuring all systems are functioning optimally.

- **Future-Ready:** The Panasonic TOUGHBOOK ecosystem of peripherals and products supports both current and previous device generations, ensuring long-term compatibility and investment protection.

- **Panasonic TOUGHBOOK Mobile-IT As-a-Service (MaaS):** Panasonic's MaaS offers a suite of comprehensive services including maintenance, integration and IT planning to ensure seamless operations and essential applications are up-to-date and available to enhance productivity and efficiency for mobile workers.

> " The transition from Windows 10 to Windows 11 across our mobile workforce was a major concern – until we partnered with Panasonic TOUGHBOOK. Its expert team handled the migration end-to-end, ensuring zero disruption to our field operations. The devices performed flawlessly post-upgrade, and the predictable service model eliminated any surprising costs. It's been a game-changer for our IT strategy."

IT Manager, Utilities Sector

These features make Panasonic TOUGHBOOK the ideal strategic partner for organisations looking to upgrade from Windows 10 to Windows 11 confidently, efficiently and securely.