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Workplace Services – Market Trends and PEAK Matrix™ Assessment

Cloud & Infrastructure Services
Market Report: June 2016 – Preview Deck

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▶ Human Resources

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▶ Contact Center

▶ Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio

- Peer analysis | Scope, sourcing models, locations

- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool

- Tracking services | Service providers, locations, risk

- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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1   Banking, financial services, and insurance

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Background of the research

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- User experience has taken center-stage in the workplace – today's enterprises are tasked with building a digital workplace that can mirror the personal digital lives of employees and help create a brand and environment that is aligned to the expectations of the millennial generation. Consequently, service providers are being pushed to think beyond offering traditional workplace services and build a transformational mindset, backed by investments in capabilities and partnerships that holistically address the next-generation technology and service requirements of clients

- In this research, we discuss the latest workplace services market trends and present the assessment and detailed profiles of 21 IT service providers featured on the workplace services PEAK Matrix. Each service provider profile gives a comprehensive picture of their workplace services vision, services suite, scale of operations, and domain investments

- The assessment is based on Everest Group's annual Request For Information (RFI) process conducted in Q1 2016, interactions with leading workplace service providers, and analysis of the workplace services marketplace

Scope of this report

- **Services:** Workplace services
- **Geography:** Global
- **Service providers:** 21 leading workplace service providers

This report includes profiles of the following 21 service providers on the workplace services PEAK Matrix:

- **Leaders:** Dell, HCL Technologies, Hewlett Packard Enterprise, IBM, and Wipro
- **Major Contenders:** Accenture, Atos, CSC, Capgemini, CGI, Cognizant, CompuCom, Fujitsu, Infosys, NTT DATA, TCS, Tech Mahindra, and Unisys
- **Aspirants:** Hexaware, Microland, and Mphasis

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Table of contents (page 1 of 2)

Table of contents (page 2 of 2)

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This report focuses on workplace services and offers insights into the prominent service providers operating in this space

Focus of this research

NOT EXHAUSTIVE

Workplace services – market definition

Design and implementation services
Design, migration, consolidation, integration, change management, and validation

Management/run services
Ongoing management, monitoring, security management, support, and other operations/services

Consulting/assessment services
Assessment & evaluation, consulting & strategy formulation, and TCO / Return on Investment (RoI) analysis

Service desk
End-to-end incident/request management, resolution support, self healing / self-help solutions, and VIP support

Desk- / client-site support services
Install, Move, Add, Change (IMAC) services, maintenance, support, and disposal services for end-user devices

Unified communications
Messaging, collaboration, telephony, and enterprise LAN/WAN

Asset management
Procurement, deployment, financial reporting, and management of IT assets (hardware/software)

Infrastructure application
Directory services, file & print services, and remote access management

Desktop management and virtualization
- *Assessment, design, and deployment services*
- *Virtual desktop management including patch & image management, and desktop-as-a-service*
- *Security management: Profile management for anti-virus, security monitoring, etc.*
- *Desktop application management including packaging, imaging, distribution, patching, and on-demand provisioning*

Mobility /
Bring Your Own Device (BYOD)
End-to-end services including assessment, strategy formulation, policy and security, platform evaluation, infrastructure implementation, and managed services

Workspace-as-a-service

This report analyzes leading service providers in the workplace services space and provides insights into their workplace services vision, delivery capabilities, scale of operations, and domain investments.

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Everest Group's workplace services research is based on four key sources of proprietary information

1
- Proprietary database of IT services contracts of major IT service providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
  – Buyer details including size and signing region
  – Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
  – Scope details including share of individual buyer locations being served in each contract, Line of Business (LoB) served, and pricing model employed

2
- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
  – Revenue and number of FTEs
  – Number of clients
  – FTE split by different lines of business
  – Revenue split by region
  – Location and size of delivery centers
  – Technology solutions developed

3
- **Service provider briefings**
  – Vision and strategy
  – Annual performance and future outlook
  – Key strengths and improvement areas
  – Emerging areas of investment

4
- **Ongoing buyer surveys and interactions**
  – Drivers and challenges for adopting workplace services
  – Assessment of service provider performance
  – Emerging priorities
  – Lessons learnt and best practices

Service providers assessed

accenture — High performance. Delivered. | Atos | Capgemini — CONSULTING.TECHNOLOGY.OUTSOURCING

CGI | Cognizant | CompuCom

CSC | Dell | FUJITSU

HCL | Hewlett Packard Enterprise | Hexaware TECHNOLOGIES

IBM | Infosys | MICROLAND — Extraordinary. Everyday.

Mphasis — Unleash the Next | NTT DATA

TATA CONSULTANCY SERVICES

Tech Mahindra | WIPRO — Applying Thought

Note: Assessment for Accenture, CGI, Fujitsu, IBM, Infosys, and NTT DATA excludes service provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers. Further, we continuously monitor market developments and track additional service providers beyond those included in the analysis (e.g., Pomeroy, ComputaCenter, Maintech, Longview Systems and C3i did not respond to our RFI requests)

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information, that is contract-specific, will be presented back to the industry only in an aggregated fashion

Twenty-one IT service providers were assessed and mapped on Everest Group's PEAK Matrix for workplace services

This report provides the assessment and detailed profiles of the 21 IT service providers featured on Everest Group's workplace services PEAK Matrix. The PEAK Matrix is specific to IT service providers, who are involved in delivering workplace services such as service desk, desk- / client-side support, unified communications, asset management, infrastructure application, desktop management and virtualization, and mobility / BYOD services.

Assessment of the service provider landscape for IT workplace services leveraging Everest Group's PEAK Matrix highlights the following categories of service providers:

- **Leaders:** Dell, HCL Technologies, Hewlett Packard Enterprise, IBM, and Wipro

- **Major Contenders:** Accenture, Atos, CSC, Capgemini, CGI, Cognizant, CompuCom, Fujitsu, Infosys, NTT DATA, TCS, Tech Mahindra, and Unisys
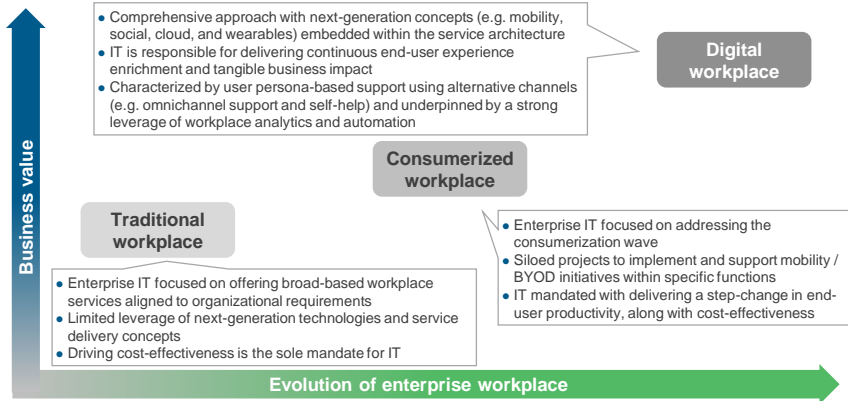
- **Aspirants:** Hexaware, Microland, and Mphasis

This research also provides fact-based trends impacting the workplace services market. It analyzes multiple aspects such as overall workplace service market size, deal sizes, deal durations, and pricing models. Buyers will gain by understanding these trends and evolving their sourcing portfolio accordingly. Service providers will benefit by aligning their strategy to cater to these trends.

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This workplace services provider compendium report has 21 IT service provider profiles, focusing on their workplace services solutions, scale of operations, and domain investments
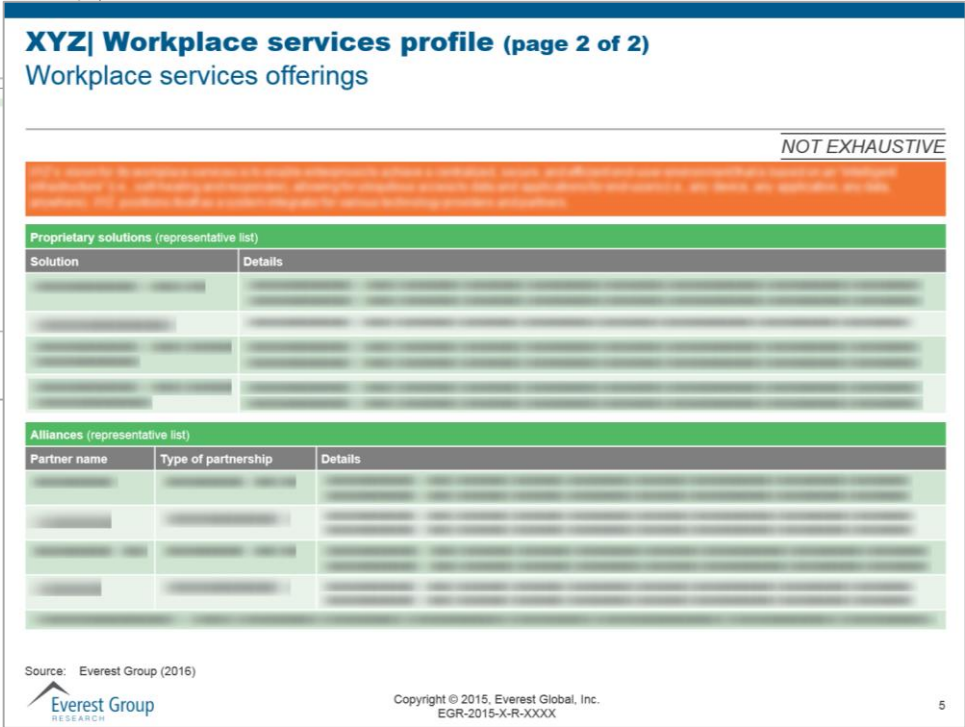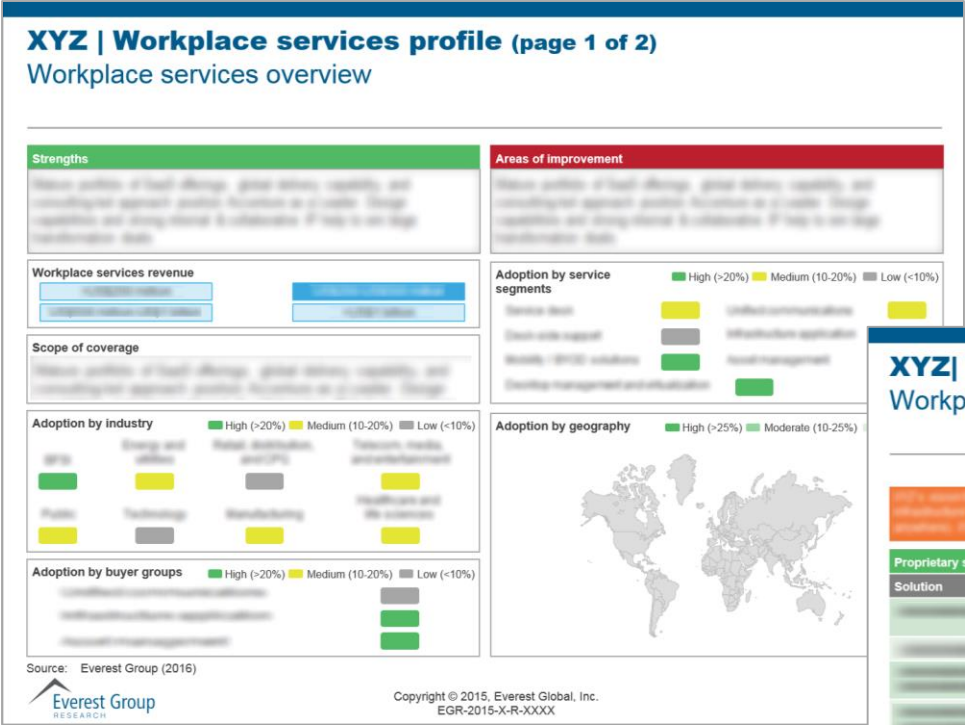
Creating a user-centric "digital workplace" is high up in the enterprise agenda

A true digital workplace assumes end-user productivity and experience as the focal point


Digital workplace
- Comprehensive approach with next-generation concepts (e.g. mobility, social, cloud, and wearables) embedded within the service architecture
- IT is responsible for delivering continuous end-user experience enrichment and tangible business impact
- Characterized by user persona-based support using alternative channels (e.g. omnichannel support and self-help) and underpinned by a strong leverage of workplace analytics and automation

Consumerized workplace
- Enterprise IT focused on addressing the consumerization wave
- Siloed projects to implement and support mobility / BYOD initiatives within specific functions
- IT mandated with delivering a step-change in end-user productivity, along with cost-effectiveness

Traditional workplace
- Enterprise IT focused on offering broad-based workplace services aligned to organizational requirements
- Limited leverage of next-generation technologies and service delivery concepts
- Driving cost-effectiveness is the sole mandate for IT

Business value → Evolution of enterprise workplace

Mobility / BYOD services is the fastest-growing segment

EUC & Workplace market split – by service segment[1]
2015; Percentage split

100% = ▓▓▓▓ billion

Indicative growth by 2020

Desk side support

Infrastructure apps
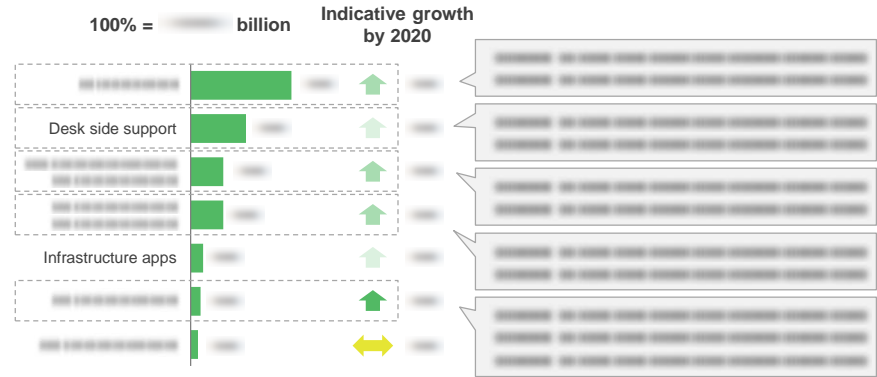
Demand for consulting services remains high

Adoption trends in workplace services engagements – inclusion of consulting services
2013-2015; Number of deals

100% = ▓▓ deals

Consulting not in scope

Consulting in scope
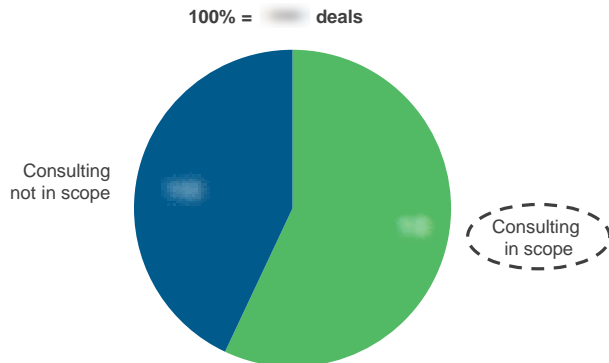
Offshore-centric delivery capabilities remain relevant

Offshore leverage in workplace services engagements – by percentage of FTEs located offshore
2013-2015; Number of deals

100% = ▓▓ deals

Less than 10%

10 to 30%

30 to 50%

More than 50%
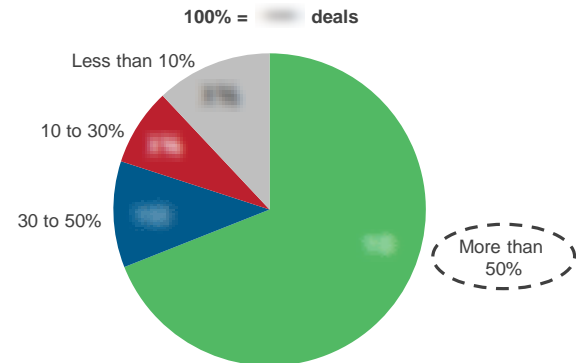
Source: Everest Group (2016)

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Cloud and Infrastructure Services research calendar

Topic   **Release date**

Topic	Release date
Private Cloud Enablement Services – PEAK Matrix™ Assessment and Profiles Compendium	September 2015
Hosted Private Cloud Services – PEAK Matrix™ Assessment and Profiles Compendium	December 2015
IT Security Services: Market Update and PEAK Matrix Assessment	January 2016
Upcoming Contract Renewals – Infrastructure Services	March 2016
Enterprise Cloud Services – Annual Report 2016: "Cloud the Bedrock of Digital Business"	March 2016
Workplace Services – Market Update and PEAK Matrix™ Assessment and Profiles Compendium	June 2016
Infrastructure Services – Annual Report 2016	Q3 2016
Private Cloud Services – Market Update and PEAK Matrix™ Assessment and Profiles Compendium	Q3 2016
IT Infrastructure Automation Market Update	Q3 2016
FIT Matrix for IT Infrastructure Automation	Q3 2016
Hosted Private Cloud Services – PEAK Matrix™ Assessment and Profiles Compendium	Q3 2016
Internet of Things (IoT) : Market Update and PEAK Matrix™ Assessment and Profiles Compendium	Q3 2016

Additional Cloud and Infrastructure Services research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents provide either additional details on the topic or complementary content that may be of interest:

1. **Enterprise Cloud Services – Annual Report 2016: "Cloud the Bedrock of Digital Business"** (EGR-2016-4-R-1728); 2016. This Everest Group research analyses the key trends in cloud services market, how cloud fits into the broader digital agenda of enterprises, which industries lead cloud adoption, and what are the major cloud services deal trends

2. **IT Security Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium** (EGR-2016-4-R-1678); 2016. This Everest Group research provides a comprehensive analysis of the cyber security market in terms of enterprise challenges, initiatives, and the growing important of security services. It also assess the capabilities of leading security services providers to serve multiple enterprise objectives

For more information on this and other research published by Everest Group, please contact us:

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