Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment: Enterprise's Wish is Not Service Provider's Command!

Cloud & Infrastructure Services (CIS)
Market Report – June 2018 – Complimentary Abstract / Table of Contents

EGR-2018-29-CA-2659

Our research offerings for global services

- **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

Application Services	**Human Resources**
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BPS | Healthcare & Life Sciences	**ITS | Healthcare & Life Sciences**
BPS | Insurance	**ITS | Insurance**
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Digital Services	**Procurement**
Engineering Services	**Recruitment & Talent Acquisition**
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In addition to a suite of published research, a membership may include

- Price book
- Pinnacle Accelerators
- Data cuts
- Analyst access
- Virtual Roundtables
- Workshops

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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Section II: Profiles of digital workplace service providers (continued)

Background of the research

Background of the research

- There is significant confusion in the market in terms of what digital workplace entails. Many enterprises are misled into adopting a workplace service model with second-generation, cost effectiveness-centric solutions, overlaid with a veneer of next-generation concepts, rather than a fundamental shift in approach with user experience enrichment as the objective function
- Even as the workplace services market has gradually started moving toward the "third generation", most service providers have not been able to truly understand the key underlying tenets of digital workplace and integrate them to create a mature and holistic suite of services encompassing front-to-back office workplace requirements. The workplace design will need to be increasingly characterized by leverage of enterprise data, AI, and analytics to offer personalized services, underpinned by end-to-end operations automation, innovative business-aligned metrics, and choice of support channels – which defines a **truly "digital" workplace, where end-users are essentially viewed as valued customers by IT**
- In this research, we discuss the latest digital workplace services market trends and present the assessment and detailed profiles of 20 IT service providers featured on the digital workplace services PEAK Matrix. Each service provider profile gives a comprehensive picture of their digital workplace services vision & strategy, scope of services offered, innovation & investments, and delivery capabilities
- The assessment is based on Everest Group's annual Request For Information (RFI) process conducted in Q1 and Q2 2018, interactions with leading workplace service providers, and analysis of the digital workplace services marketplace

Scope of this report

- **Services:** Digital workplace services
- **Geography:** Global
- **Service providers:** 20 leading workplace service providers

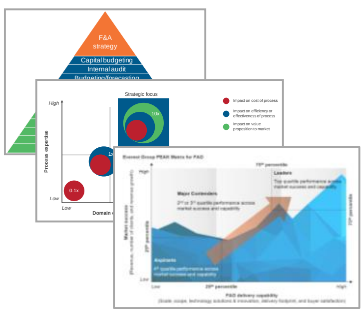
This report includes profiles of the following 20 service providers on the digital workplace services PEAK Matrix:

- **Leaders:** Atos, DXC Technology, HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Accenture, Capgemini, CGI, Cognizant, Fujitsu, Genpact, Infosys, NTT DATA, Tech Mahindra, Unisys, and Zensar
- **Aspirants:** Microland, Mphasis, and Syntel

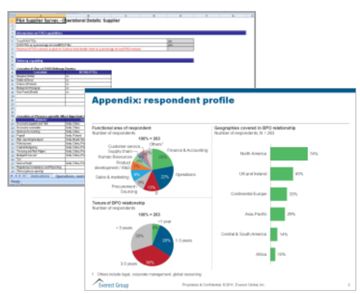
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

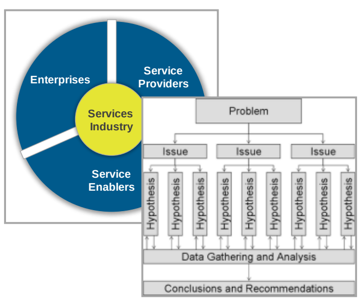
1 **Robust definitions and framework**
(PEAK Matrix, market maturity, and technology adoption/investment)



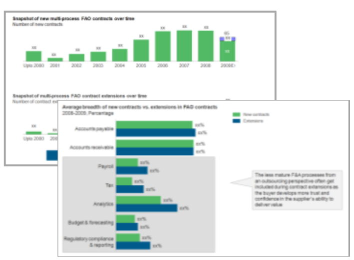
2 **Primary sources of information**
(Annual contractual and operational RFIs, service provider briefings, and market feedback)



3 **Diverse set of market touchpoints**
(Ongoing interactions with key stakeholders, input from a mix of perspectives and interests, as well as support via data analysis and thought leadership)



4 **Fact-based research**
(Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers)



- Annual RFI process and interaction with leading IT infrastructure and cloud service providers
- Dedicated team for IT infrastructure and cloud services adoption trends
- Over 25 years of experience in advising clients on global services decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

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

- Proprietary database of IT services contracts of major IT service providers with digital 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

- 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

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

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
  - Drivers and challenges for adopting digital workplace services
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learnt and best practices

Service providers assessed

accenture, Atos, Capgemini, CGI, Cognizant, DXC.technology, FUJITSU, HCL, IBM, genpact, Infosys, MICROLAND, Mphasis, NTT Data, SYNTEL, TATA CONSULTANCY SERVICES, Tech Mahindra, UNISYS, wipro, ZenSar Technologies

Note: Assessment for Capgemini, CGI, Fujitsu, Genpact, IBM, and Syntel excludes service provider inputs in 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

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

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

NOT EXHAUSTIVE

Focus of this research

Digital 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

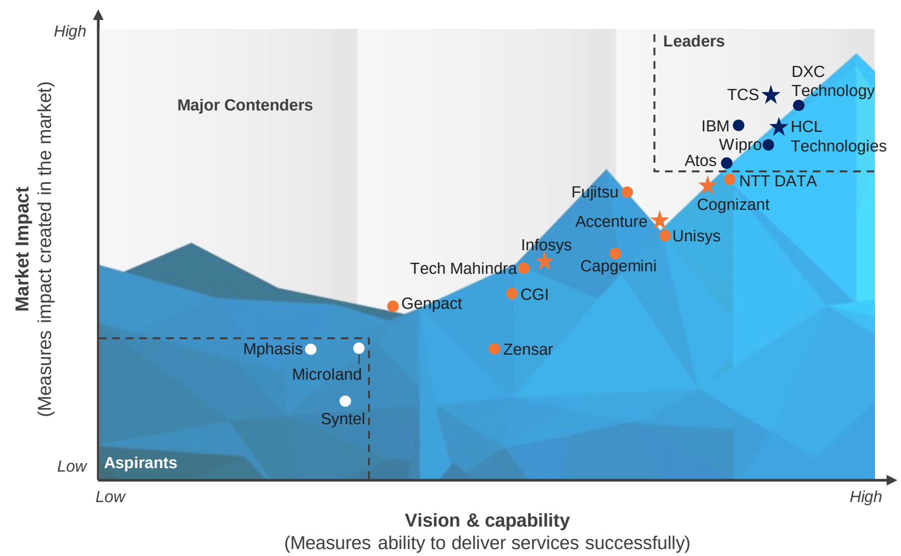
Mobility / Bring Your Own Device (BYOD)
End-to-end services including assessment, strategy formulation, policy & security, platform evaluation, infrastructure implementation, and managed services

Workspace-as-a-Service

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

The report focuses on the digital workplace services market trends and presents the assessment and detailed profiles of 20 IT service providers

Everest Group PEAK Matrix™ for Digital Workplace Services 2018



● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers

Notes Assessment for Capgemini, CGI, Fujitsu, Genpact, IBM, and Syntel excludes service provider inputs for 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

Capability assessment

ILLUSTRATIVE EXAMPLE **Measure of capability:** ● High ◔ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers

ILLUSTRATIVE EXAMPLE **Measure of capability:** ● High ◔ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall

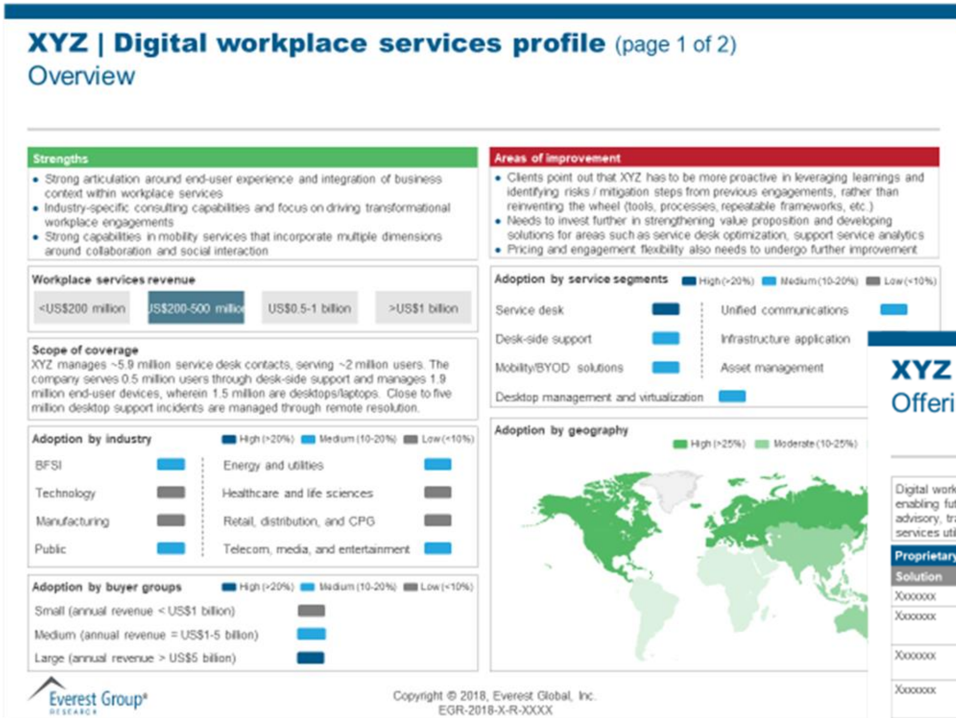
Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

This workplace services compendium report has 20 IT service provider profiles focusing on their workplace services solutions, partnerships, and recent investments



XYZ | Digital workplace services profile (page 1 of 2)
Overview

Strengths
- Strong articulation around end-user experience and integration of business context within workplace services
- Industry-specific consulting capabilities and focus on driving transformational workplace engagements
- Strong capabilities in mobility services that incorporate multiple dimensions around collaboration and social interaction

Areas of improvement
- Clients point out that XYZ has to be more proactive in leveraging learnings and identifying risks / mitigation steps from previous engagements, rather than reinventing the wheel (tools, processes, repeatable frameworks, etc.)
- Needs to invest further in strengthening value proposition and developing solutions for areas such as service desk optimization, support service analytics
- Pricing and engagement flexibility also needs to undergo further improvement

Workplace services revenue
<US$200 million | US$200-500 million | US$0.5-1 billion | >US$1 billion

Scope of coverage
XYZ manages ~5.9 million service desk contacts, serving ~2 million users. The company serves 0.5 million users through desk-side support and manages 1.9 million end-user devices, wherein 1.5 million are desktops/laptops. Close to five million desktop support incidents are managed through remote resolution.

Adoption by service segments High (>20%) Medium (10-20%) Low (<10%)
Service desk
Desk-side support
Mobility/BYOD solutions
Desktop management and virtualization
Unified communications
Infrastructure application
Asset management

Adoption by industry High (>20%) Medium (10-20%) Low (<10%)
BFSI
Technology
Manufacturing
Public
Energy and utilities
Healthcare and life sciences
Retail, distribution, and CPG
Telecom, media, and entertainment

Adoption by geography High (>25%) Moderate (10-25%)

Adoption by buyer groups High (>20%) Medium (10-20%) Low (<10%)
Small (annual revenue < US$1 billion)
Medium (annual revenue = US$1-5 billion)
Large (annual revenue > US$5 billion)

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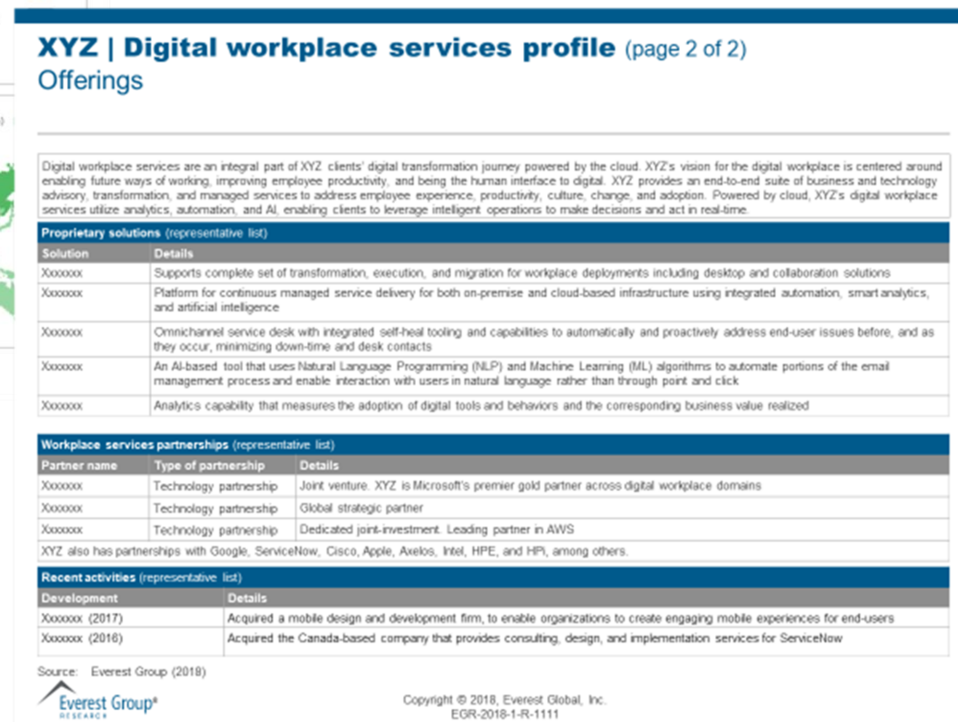

XYZ | Digital workplace services profile (page 2 of 2)
Offerings

Digital workplace services are an integral part of XYZ clients' digital transformation journey powered by the cloud. XYZ's vision for the digital workplace is centered around enabling future ways of working, improving employee productivity, and being the human interface to digital. XYZ provides an end-to-end suite of business and technology advisory, transformation, and managed services to address employee experience, productivity, culture, change, and adoption. Powered by cloud, XYZ's digital workplace services utilize analytics, automation, and AI, enabling clients to leverage intelligent operations to make decisions and act in real-time.

Proprietary solutions (representative list)

Solution	Details
Xxxxxxx	Supports complete set of transformation, execution, and migration for workplace deployments including desktop and collaboration solutions
Xxxxxxx	Platform for continuous managed service delivery for both on-premise and cloud-based infrastructure using integrated automation, smart analytics, and artificial intelligence
Xxxxxxx	Omnichannel service desk with integrated self-heal tooling and capabilities to automatically and proactively address end-user issues before, and as they occur, minimizing down-time and desk contacts
Xxxxxxx	An AI-based tool that uses Natural Language Programming (NLP) and Machine Learning (ML) algorithms to automate portions of the email management process and enable interaction with users in natural language rather than through point and click
Xxxxxxx	Analytics capability that measures the adoption of digital tools and behaviors and the corresponding business value realized

Workplace services partnerships (representative list)

Partner name	Type of partnership	Details
Xxxxxxx	Technology partnership	Joint venture. XYZ is Microsoft's premier gold partner across digital workplace domains
Xxxxxxx	Technology partnership	Global strategic partner
Xxxxxxx	Technology partnership	Dedicated joint-investment. Leading partner in AWS
XYZ also has partnerships with Google, ServiceNow, Cisco, Apple, Axelos, Intel, HPE, and HPI, among others.		

Recent activities (representative list)

Development	Details
Xxxxxxx (2017)	Acquired a mobile design and development firm, to enable organizations to create engaging mobile experiences for end-users
Xxxxxxx (2016)	Acquired the Canada-based company that provides consulting, design, and implementation services for ServiceNow

Source: Everest Group (2018)

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Research calendar – Cloud and infrastructure services

Published | Planned | Current release

Flagship CIS reports	Release date
Top 30 IT Security Trailblazers: Rise of the "Digital" Security Paradigm	January 2018
Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment: Enterprise's Wish is Not Service Provider's Command!	**June 2018**
IT Infrastructure Services Automation – Market Update and PEAK Matrix™ Assessment for Solutions (Focus on IT service providers)	Q2 2018
Cloud & infrastructure Services Annual Report 2018	Q2 2018
IT Security Services – Market Trends and PEAK Matrix™ Assessment	Q3 2018
Cloud Enablement Services – Market Trends & PEAK Matrix™ Assessment	Q3 2018
Cloud Identity and Access Management (IAM) Trailblazers	Q4 2018
Software Defined Infrastructure (SDI) solutions – Market Trends & PEAK Matrix™ Assessment	Q4 2018

Thematic CIS reports	
Upcoming Contract Renewals – Infrastructure Services	February 2018
Enterprise Pulse	March 2018
Enterprise primer for Artificial Intelligence & Machine Learning	Q2 2018
BigTech Wars - Container orchestration	Q2 2018
Viewpoint - Demystifying IT infrastructure services automation	Q2 2018
Viewpoint - Security services automation and analytics: hype vs reality	Q3 2018

Note: For a list of all CIS reports published by us, please refer to our website page

Additional ITS research references

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

1. **Cloud & Infrastructure Services – Annual Report 2017: "The Future of Stack is No Stack!"** (EGR-2017-4-R-2423), 2017. This annual research deep dives into the cloud & infrastructure services landscape. It provides data-driven facts and perspectives on the overall market. The research covers cloud and IS adoption trends, demand drivers, next-generation themes such as, containers and SDI. The research analyzes buyer challenges, trends shaping the market, and also provides an outlook for 2017-2018 for the broader IT services as well as cloud & services market

2. **Upcoming Contract Renewals – Infrastructure Services:** (EGR-2018-29-R-2555), 2018. The report 'Upcoming Contract Renewals – Infrastructure Services' includes data and insights, specific to deals nearing end of term, expanding on analysis of ITS and BPS deals nearing end of term by buyer geography and buyer industry, trends in IS and bundled deal renewals by buyer industry, buyer geography, and service provider category, and analysis of infrastructure services contract renewals by scope across geographies

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