



# **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

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- 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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# Background of the research

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## 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
  - Revenue split by region
  - Number of clients
  - Location and size of delivery centers
  - FTE split by different lines of business
  - Technology solutions developed

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



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

Focus of this research

NOT EXHAUSTIVE



## Digital workplace services – market definition

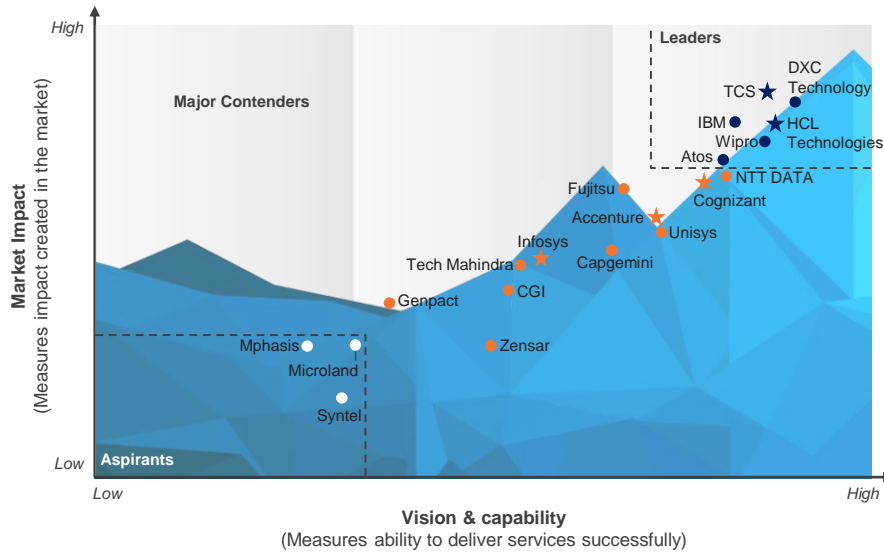
<b>Design and implementation services</b> Design, migration, consolidation, integration, change management, and validation	<b>Management/run services</b> Ongoing management, monitoring, security management, support, and other operations/services	<b>Consulting/assessment services</b> Assessment & evaluation, consulting & strategy formulation, and TCO / Return on Investment (ROI) analysis	<b>Service desk</b> End-to-end incident/request management, resolution support, self-healing/self-help solutions, and VIP support
			<b>Desk/client-site support services</b> Install, Move, Add, Change (IMAC) services, maintenance, support, and disposal services for end-user devices
			<b>Unified communications</b> Messaging, collaboration, telephony, and enterprise LAN/WAN
			<b>Asset management</b> Procurement, deployment, financial reporting, and management of IT assets (hardware/software)
			<b>Infrastructure application</b> Directory services, file & print services, and remote access management
			<b>Desktop management and virtualization</b> <ul style="list-style-type: none"> <li>• Assessment, design, and deployment services</li> <li>• Virtual desktop management including patch &amp; image management and desktop-as-a-service</li> <li>• Security management: Profile management for anti-virus, security monitoring, etc.</li> <li>• Desktop application management including packaging, imaging, distribution, patching, and on-demand provisioning</li> </ul>
			<b>Mobility / Bring Your Own Device (BYOD)</b> End-to-end services including assessment, strategy formulation, policy & security, platform evaluation, infrastructure implementation, and managed services
			<b>Workspace-as-a-Service</b>

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 RPO 2018I



● 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 industry



#### Adoption by service segments

High (>20%)   Medium (10-20%)   Low (<10%)



#### Adoption by geography

High (>25%)   Moderate (10-25%)



#### Adoption by buyer groups

High (>20%)   Medium (10-20%)   Low (<10%)



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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-heat 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 HP, 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
<b>Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment: Enterprise’s Wish is Not Service Provider’s Command! ....</b>	<b>June 2018</b>
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

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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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