



Workplace Services – PEAK Matrix™ Assessment and Profiles Compendium

Cloud and Infrastructure services
Market Report: June 2015 – Preview Deck

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¹ Banking, financial services, and insurance

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Background of the research

Background of the research

- Today's enterprise workplace is characterized by a strong focus on improving the overall end-user experience by offering secure and on-demand access to applications and data across the devices of choice, based on the individual personas of the users. Spiralling IT costs and a weak economic environment are pushing enterprise IT to look for means to drive end-user productivity, while optimizing the operating costs within their environments
- Service providers need to think beyond “keeping the lights green” and drive meaningful productivity improvements across the enterprise workplace environment by leveraging automation, industrialization, and technology/service standardization. Consequently, investments in building a strong technology/service partnership network as well as IP/tools (to drive effective workplace transformation and management) have become more important than ever before
- In this research, we present the assessment and detailed profiles of 23 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 RFI process conducted in Q1 2015, interactions with leading workplace service providers, and analysis of the workplace services marketplace

Scope of this report

- **Services:** Workplace services
- **Geography:** Global
- **Service providers:** Leading 23 workplace service providers

This report includes the profiles of the following 23 service providers on the workplace services PEAK Matrix:

- **Leaders:** Atos, CSC, HCL Technologies, Dell, HP, IBM, and Wipro
- **Major Contenders:** Accenture, Capgemini, CGI, Cognizant, CompuCom, Fujitsu, Infosys, NTT DATA, TCS, Tech Mahindra, T-Systems, and Unisys
- **Aspirants:** IGATE, L&T Infotech, Microland, and NIIT Technologies

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

NOT EXHAUSTIVE

Focus of this research

Workplace services – market definition

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

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

1. Everest Group's annual RFI process with leading IT infrastructure and workplace service providers, followed by briefing sessions with their leadership teams
 - Key elements covered in these interactions include:
 - Focus areas and initiatives for workplace delivery models
 - Scale of workplace operations and delivery locations
 - Areas of investment within the workplace space
2. Everest Group's proprietary transaction intelligence database that tracks publicly-announced outsourcing deals
 - The database has more than 22,000 IT and BPO contracts. Over 8,000 of these contracts have infrastructure outsourcing in scope
 - The database provides insights on:
 - Buyers
 - Industry verticals
 - Scope of services (datacenter, network, end-user, etc.)
 - Geographic scope
 - Contract details (deal size, duration, etc.)

Service providers assessed



Note: Assessment for Capgemini, Fujitsu, IBM, Infosys, NTT DATA, and T-Systems excludes service provider inputs on this particular study and is based on Everest Group's estimates that leverage proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, public disclosures by service providers, and interaction with buyers. Further, we continuously monitor market developments and track additional service providers beyond those included in the analysis (e.g., Pomeroy, CompuCenter, 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

23 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 23 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 service desk and deskside services, desktop management and virtualization, mobility/BYOD solutions, asset management, infrastructure application services, and unified communication services to enterprises

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

- **Leaders:** Atos, CSC, HCL Technologies, Dell, HP, IBM, and Wipro
- **Major Contenders:** Accenture, Capgemini, CGI, Cognizant, CompuCom, Fujitsu, Infosys, NTT DATA, TCS, Tech Mahindra, T-Systems, and Unisys
- **PEAK Matrix Aspirants:** IGATE, L&T Infotech, Microland, and NIIT Technologies

This workplace service provider compendium report has 23 IT service provider profiles, focusing on their workplace service suite, scale of operations, and domain investments

XYZ | Workplace services profile (page 1 of 2)

Workplace services overview

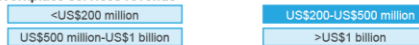
Strengths

- Strong capabilities and experience in providing transformation services across workplace services segments, leveraging next-generation technologies such as cloud, analytics, and mobility
- Global delivery network leveraged to offer desktop management and virtualization, unified communications, and mobility services

Areas of improvement

- Workplace services is not as well entrenched within XYZ's services portfolio, compared to its peers
- XYZ is still not considered as the default provider of choice for workplace management services by enterprises – XYZ needs to strengthen its management capabilities and market them more effectively in order to do change this perception

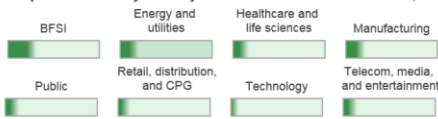
Workplace services revenue



Scope of coverage

XYZ is estimated to have more than 5,700 FTEs dedicated to workplace services. XYZ claims to offer mobility management services to about 10 million subscribers

Workplace services by industry



Relative focus: Buyer groups

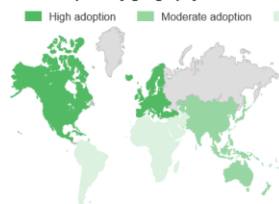


Source: Everest Group (2015)

Workplace service segments



Workplace services adoption by geography



XYZ | Workplace services profile (page 2 of 2)

Workplace services capabilities

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XYZ's vision for its workplace services is to enable enterprises to achieve a centralized, secure, and efficient end-user environment that is based on an "intelligent infrastructure" (i.e., self-healing and responsive), allowing for ubiquitous access to data and applications for end-users (i.e., any device, any application, any data, anywhere). XYZ positions itself as a system integrator for various technology providers and partners

Proprietary solutions (representative list)

Solution	Details
Workplace modernization	A comprehensive solution that helps clients in upgrading the existing workplace environment, including migration and virtual desktop implementation services
User-centric collaboration	A solution for enabling on-premise and cloud-based communication and collaboration amongst users

Alliances (representative list)

Partner name	Type of partnership	Details
Partner 1	Technology partnership	Jointly provide IT solutions ranging from application and system monitoring, to user provisioning, enterprise scheduling, and IT service management
Partner 2	Technology partnership	XYZ leverages its joint venture with Microsoft (Avanade) to provide Windows migration services and productivity applications in complex architectures
Partner 3	Technology partnership	Partnership to provide solutions for the automatization of Cloud Requests and software for desktop and application virtualization
Partner 4	Technology partnership	Partnership to provide solutions for Intelligent networks and technology architectures, including unified communications, and wireless & mobile communications
Partner 5	Technology partnership	Partnership to jointly provide IT workplace management capability, shared services functions and enterprise service management to enterprises

Source: Everest Group (2015)



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Source: Everest Group (2015)



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Cloud and Infrastructure Services research calendar

Topic	Published	Current	Release date
Enterprise Cloud Infrastructure Services – PEAK Matrix Assessment and Profiles Compendium	■	■	November 2014
Infrastructure Services – PEAK Matrix Assessment and Profiles Compendium	■	■	December 2014
Optimizing IT Service Delivery: Technology is the Answer	■	■	February 2015
Enterprise Cloud Adoption – Solving the Pricing Conundrum	■	■	March 2015
Upcoming Contract Renewals – Infrastructure Services	■	■	March 2015
Enterprise Cloud Services – Annual Report 2015: “Contracting Remains Cloudy”	■	■	March 2015
Workplace Services – PEAK Matrix™ Assessment and Profiles Compendium	■	■	June 2015
Workplace Services – Market Update	■	■	Q2 2015
Workplace Services in Europe – PEAK Matrix Assessment and Profiles Compendium	■	■	Q2 2015
Contracting for Cloud	■	■	Q2 2015
Infrastructure Services – Annual Report 2015	■	■	Q2 2015
Private Cloud Services – PEAK Matrix Assessment and Profiles Compendium	■	■	Q3 2015
Private Cloud Services in Europe – PEAK Matrix Assessment and Profiles Compendium	■	■	Q3 2015
Infrastructure and cloud automation – managing tomorrow’s IT	■	■	Q3 2015

Additional Cloud and Infrastructure Services research references

The following documents are recommended for additional insight on 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 Infrastructure Services – PEAK Matrix™ Assessment and Profiles Compendium** ([EGR-2014-4-R-1278](#)); 2014. This Everest Group research provides a comprehensive assessment of cloud delivery capabilities of IT service providers and system integrators specifically for cloud infrastructure services such as scale of operations, adoption across enterprise segments and geographies, types of services provided, and domain investments
2. **Infrastructure Outsourcing – Annual Report 2014: “The Future is Software”** ([EGR-2014-4-R-1137](#)); 2014. This annual research deep dives into the infrastructure outsourcing landscape. It provides data-driven facts and perspectives on the overall market. The research covers IO adoption trends, demand drivers, and buyer expectations. The research analyses buyer challenges, trends shaping the market, and also provides an outlook for 2015 for the broader IT as well as IO market

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At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories

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