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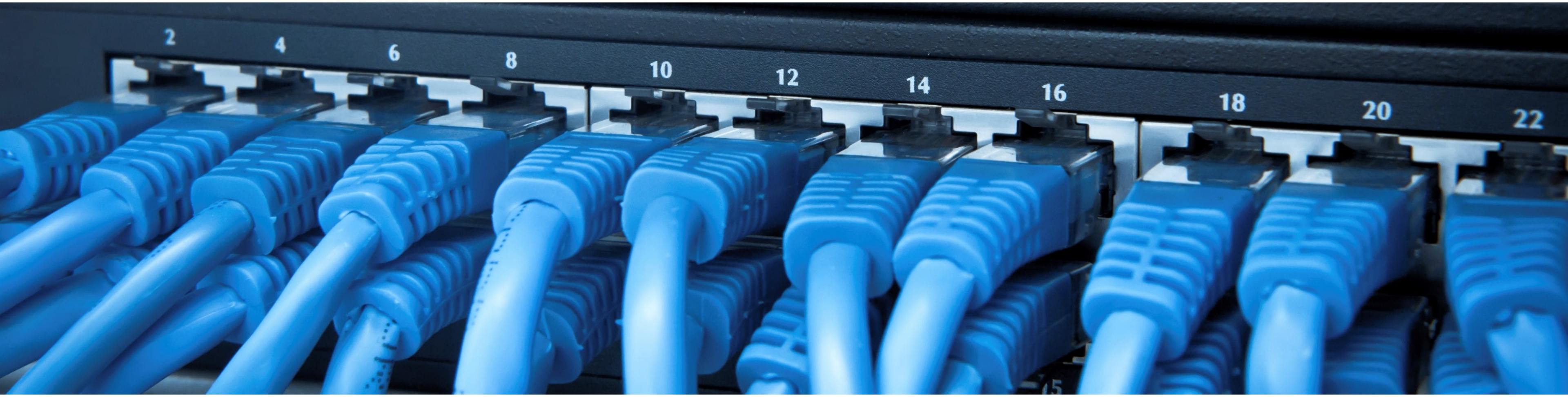

Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience

Cloud & Infrastructure Services (CIS)
Market Report – June 2019: Complimentary Abstract / Table of Contents

Everest Group®
PEAK MATRIX™

EGR-2019-29-CA-3219

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
BPS | Banking & Financial Services	ITS | Banking & Financial Services
BPS | Healthcare & Life Sciences	ITS | Healthcare
BPS | Insurance	ITS | Insurance
Catalyst™	IT Services Executive Insights™
Cloud & Infrastructure services	ITS | Life Sciences
Customer Experience Management Services	Locations Insider™
Data & Analytics	PricePoint™
Digital Services	Procurement
Engineering Services	Recruitment & Talent Acquisition
Finance & Accounting	Service Optimization Technologies

Membership information

- This report is included in the following research program(s)
  – Cloud & Infrastructure Services (CIS)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model™ reports
- PriceBook
- 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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Background of the research

- Although the focus of workplace services has shifted from user productivity to user experience, the consumers of these services are still viewed as users, rather than as humans. Enterprises need to understand that employees are not mere units of productivity, and that they deserve a humanized workplace experience – where empathy is a core part of the whole design
- Many enterprises are mislead into adopting a workplace service model based on user productivity – camouflaged as user experience. As a result, current workplace offerings provide short-term productivity gains at the cost of the employee's wellness, happiness, and morale. In order to humanize the workplace experience, the workplace design needs to be in sync with the human attributes of employees – with technology acting as an enabler
- In this research, we discuss the latest digital workplace services market trends and present the assessment and detailed profiles of 21 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 2019, 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:
21 leading workplace service providers

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

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

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

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 (DaaS)
- 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

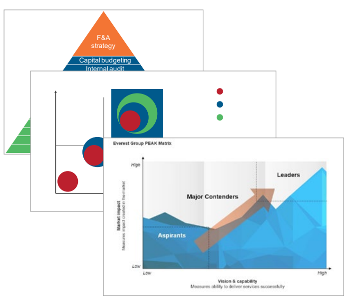
Workplace security – Identify and access management (IAM), end-point security, etc.

This report analyzes leading service providers in the digital workplace services space

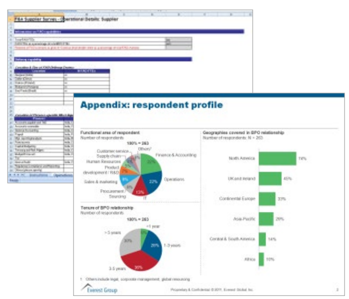
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

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

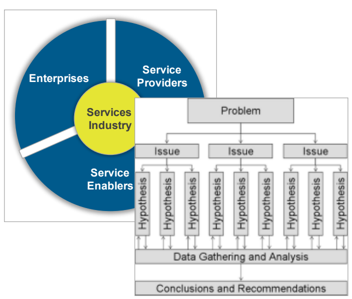
1 Robust definitions and framework
(PEAK Matrix, market maturity, and technology adoption/investment)



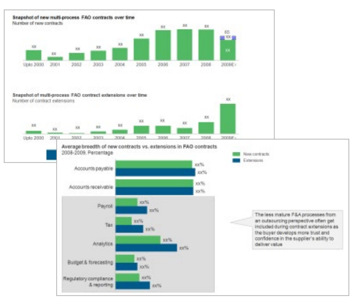
2 Primary sources of information
(Annual contractual and operational RFIs, service provider briefings, and market feedback)



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 LOBs
  - 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 adopted

Service providers assessed[1]

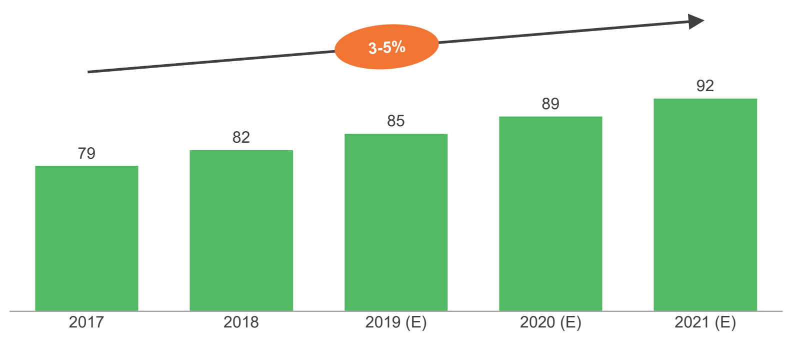
accenture, Atos, Capgemini, CGI, Cognizant, Computacenter, DXC.technology, FUJITSU, HCL, IBM, Infosys, MICROLAND, Mphasis, NTT Data, stefanini, TATA CONSULTANCY SERVICES, Tech Mahindra, UNISYS, UST Global, wipro, Zensar Technologies

Note: Assessment for Atos, CGI, Fujitsu, and IBM 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

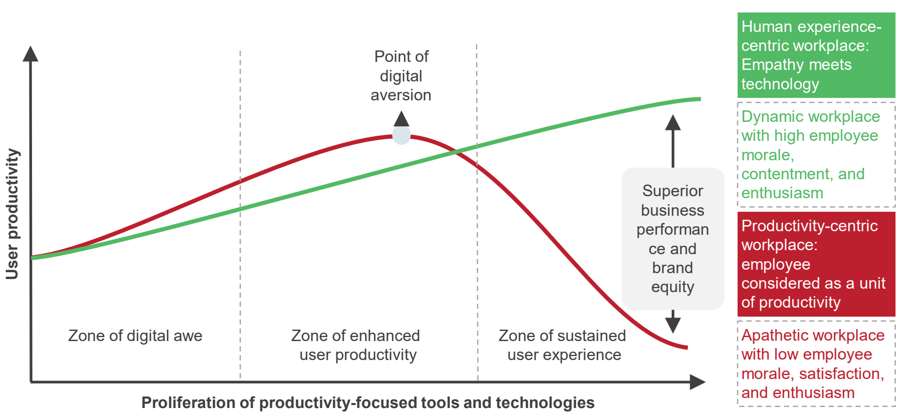
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information that is contract-specific will be presented back to the industry only in an aggregated fashion

This study offers four distinct chapters providing a deep dive into key aspects of workplace services market; below are four charts to illustrate the depth of the report

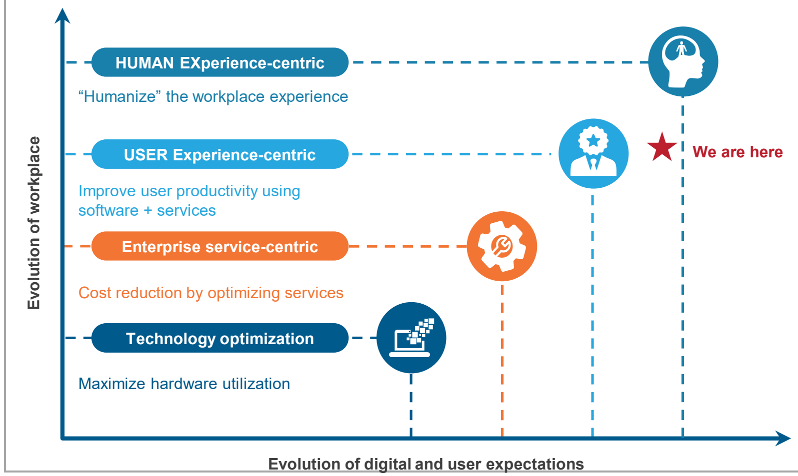
Global workplace services market growth in US$ billion



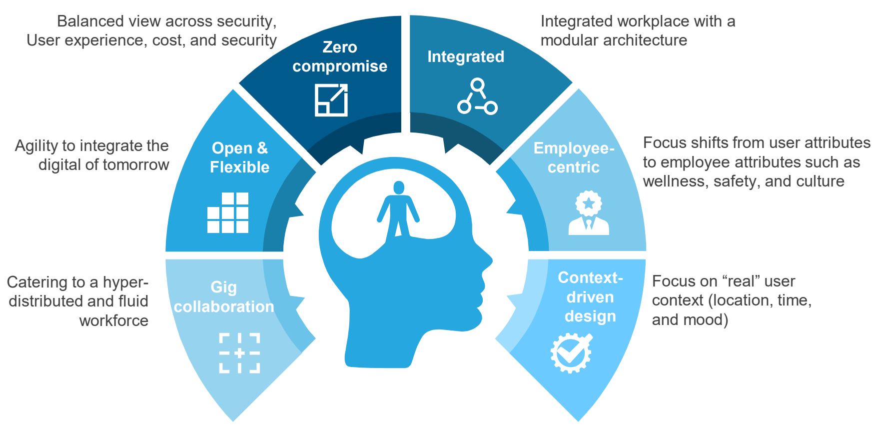
The digital employee experience continuum



Evolution of workplace services

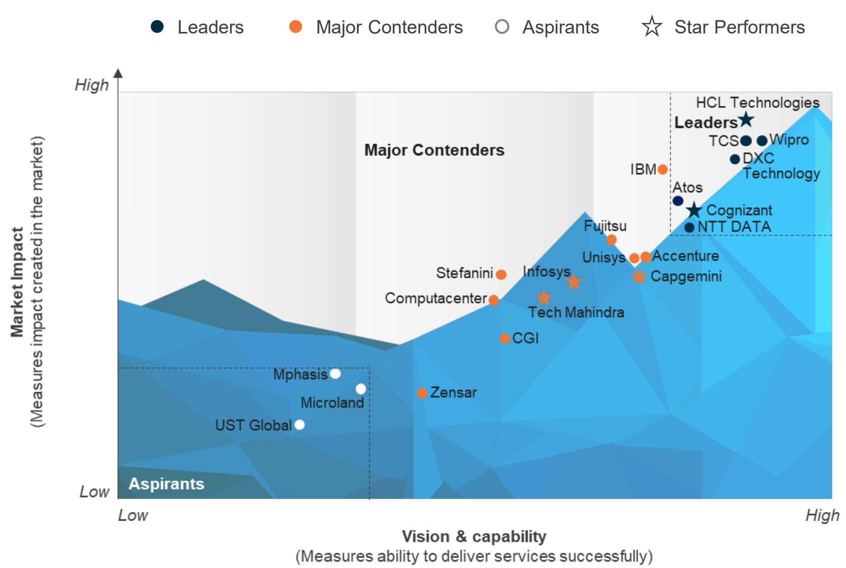


Key tenets for designing the next-generation workplace



The report focuses on the digital workplace services market trends and presents the assessment and detailed profiles of 21 IT service providers

Everest Group PEAK Matrix™ for Digital workplace services 2019



1 Assessment for Atos, CGI, Fujitsu, and IBM 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
Source: Everest Group (2019)

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

BFSI	Energy and utilities
Technology	Healthcare and life sciences
Manufacturing	Retail, distribution, and CPG
Public	Telecom, media, and entertainment

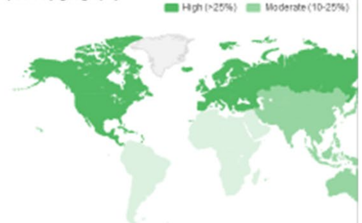
Adoption by buyer groups (High (>20%) | Medium (10-20%) | Low (<10%))

- Small (annual revenue < US$1 billion)
- Medium (annual revenue = US$1-5 billion)
- Large (annual revenue > US$5 billion)

Adoption by service segments (High (>20%) | Medium (10-20%) | Low (<10%))

Service desk	Unified communications
Desk-side support	Infrastructure application
Mobility/BYOD solutions	Asset management
Desktop management and virtualization	

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



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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
Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience	**June 2019**
DevOps Enablement Services PEAK Matrix™ Assessment 2019 and Market Trends	Q2 2019
Cloud and Infrastructure Services Annual Report 2019	Q2 2019
Next-generation Infrastructure Services for Insurance PEAK Matrix™ Assessment 2019 and Market Trends	Q2 2019
Next-generation Infrastructure Services for BFS – PEAK Matrix™ Assessment 2019 and Market Trends	Q2 2019
Digital Workplace Services Trailblazers	Q3 2019
Cloud Services PEAK Matrix™ Assessment 2019 and Market Update	Q4 2019
Next-generation Network Transformation Services PEAK Matrix™ Assessment 2019 and Market Trends	Q4 2019

Thematic CIS reports	
Upcoming Contract Renewals – Infrastructure Services	January 2019
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2019
Viewpoint – The Rise of Edge	February 2019
Viewpoint – Security Operations for the Digital World	Q3 2019
Big Tech Wars – Artificial Intelligence Platforms	Q3 2019
Viewpoint - Workplace services: SLA is Dead; Long Live SLAs	Q4 2019

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

Additional ITS research references

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

1. **Digital Workplace Services– Market Trends and PEAK Matrix™ Assessment 2018: "Enterprise's Wish is Not Service Provider's Command!"** (EGR-2018-29-R-2659): Despite all the clamor around the digital workplace, there seems to a significant gap between the definition of a true digital workplace and its interpretation by market participants. Most service providers still provided half-hearted digital workplace solutions that revolve around enforced self-service, homogenous persona-based service partitioning, and automation & analytics on reactive, ticket-based service delivery models. Enterprises are equally responsible for this situation as they want to achieve the benefits of digital transformation without necessarily driving the right strategic intent and investments. This report provides a market trend assessment of digital workplace services along with the detailed profiles and assessment of 20 IT service providers featured on Everest Group's PEAK Matrix for digital workplace services.

2. **Upcoming Contract Renewals – Cloud & Infrastructure Services 2019** (EGR-2019-29-R-3050); 2019. Every year a large portion of the sourced services market comes back to the planning/negotiating table, as contracts keep expiring. Most of these deals had originally been procured via a competitive process involving Request for Proposals (RFPs), capability assessment, and short-listing of service providers. Renewals and recompetes provide opportunity for non-incumbent players to expand their wallet share amidst disruptive factors such as saturation, slowing growth rate, and new and more agile competitors. This research analyses renewals coming up in the next two years, with a focus on infrastructure services (IS) contracts.

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

Chirajeet Sengupta, Partner — chirajeet.sengupta@everestgrp.com

Yugal Joshi, Vice president — yugal.joshi@everestgrp.com

Ashwin Venkatesan, Practice Director — ashwin.venkatesan@everestgrp.com

Udit Singh, Senior Analyst — Udit.Singh@everestgrp.com

ITS research: — ITSresearch@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765

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Blog
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