Digital Workplace Services PEAK Matrix® Assessment 2020
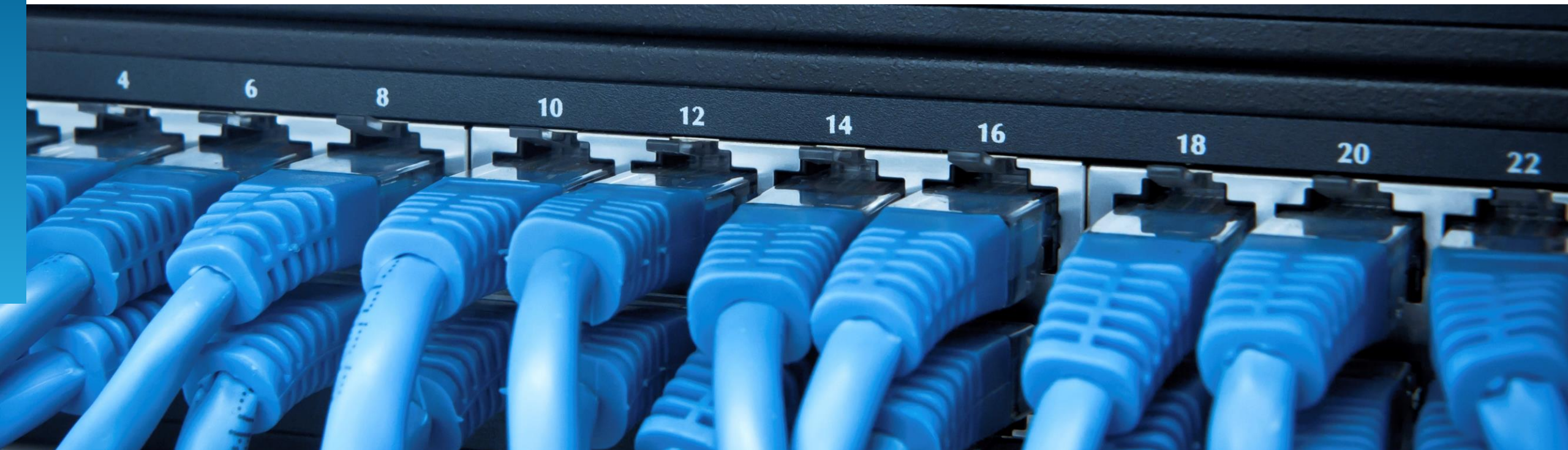
August 2020: Complimentary Abstract / Table of Contents

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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	▶ Finance & Accounting
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▶ Enterprise Platform Services	▶ Service Optimization Technologies

Membership information

- This report is included in the following research program(s)
  – Cloud and 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**

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

Contents

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Background of the research

- COVID-19 crisis has been a wake-up call for enterprises, with their Business Continuity Planning (BCP) being put to the test. Admirably, most enterprises were able to weather workplace-related disruptions, albeit with a knee-jerk reaction through Work From Home (WFH) enablement. However, the current WFH model allows employees to only remain operational from home. With WFH bound to play an essential role in the future of workplace services, enterprises need to reinvent their long-term vision and approach to WFH and leverage it as an enabler of employee growth, productivity, and experience

- Given the crisis, driving connected experiences within the digital workplace is clearly amongst the top IT priorities for enterprises across industries. Transitioning to a digitally enabled workplace was the first step; now enterprises need to focus on driving connected experiences, underpinned by work from anywhere, anytime, and on any device to realize the full potential of a digital workplace

- In this research, we present an assessment of 23 digital workplace service providers featured on the digital workplace services PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2020, interactions with leading digital workplace service providers, and analysis of the digital workplace services marketplace

This report assessed the following 23 service providers on the digital workplace services PEAK Matrix:

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

Scope of this report:

Geography
Global

Service providers
23 leading digital workplace service providers

Services
Digital workplace

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

Consulting/assessment services

Assessment & evaluation, consulting & strategy formulation, and TCO / Return on Investment (ROI) analysis

Design and implementation

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

Management and monitoring services

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

Digital workplace services – market definition

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 communication and collaboration

Messaging, collaboration, telephony, and enterprise LAN/WAN

Desktop management and virtualization

Virtual desktop management: VDI implementation, patch and image mgmt.
Desktop application management: packaging, imaging, distribution, patching, and on-demand provisioning.

Asset management

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

Infrastructure application

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

Mobility / Bring Your Own Device (BYOD)

End-to-end services including assessment, strategy formulation, policy & security, platform evaluation, infrastructure implementation, and managed services
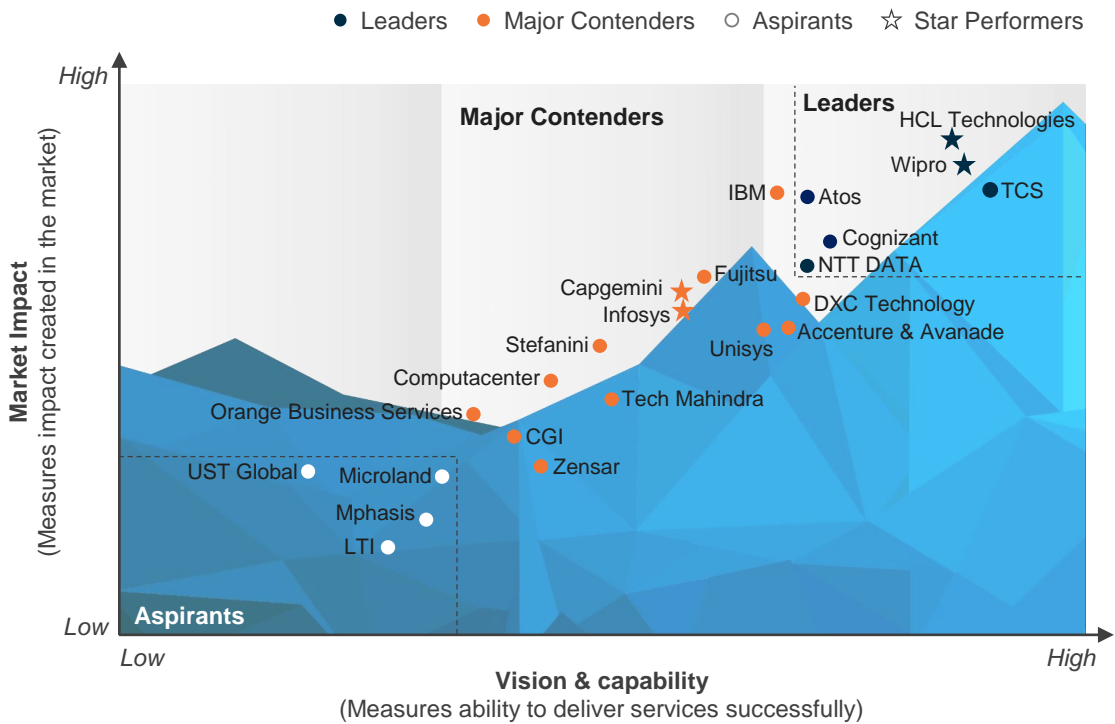
Connected workplace

Workspace-as-a-service, work from anywhere, anytime, and any device, IoT in workplace, immersive collaboration, AR/VR in workplace, etc.

Workplace security

Identify and access management (IAM), multi-factor authentication, endpoint security, profile management for anti-virus, security monitoring etc.

This study offers 23 distinct chapters providing a deep dive into key aspects of digital workplace services market; below are three charts to illustrate the depth of the report

Digital Workplace Services PEAK Matrix® Assessment 2020

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants   ☆ Star Performers

Market Impact (Measures impact created in the market)

Vision & capability (Measures ability to deliver services successfully)

High / Low axes

Leaders
- HCL Technologies ★
- Wipro ★
- Atos
- TCS
- Cognizant
- NTT DATA

Major Contenders
- IBM
- Capgemini ★
- Fujitsu
- Infosys ★
- DXC Technology
- Accenture & Avanade
- Stefanini
- Unisys
- Computacenter
- Tech Mahindra
- Orange Business Services
- CGI
- Zensar

Aspirants
- UST Global
- Microland
- Mphasis
- LTI

Note: Assessment for CGI, Computacenter, Fujitsu, IBM, and Tech Mahindra excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2020)

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

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

Strengths
- Has a scaled and balanced workplace services portfolio with a credible set of technology partnerships and investment in traditional and emerging workplace technologies
- Has made significant investments in cloud-based technologies such as Desktop-as-a-service, where it offers a complete OPEX model, embedding hardware and software investments

Areas of improvement
- Although service provider 1 automation story is improving, the value proposition lacks sharpness/sophistication when articulated as part of the broader transformation/solutioning storyline
- Has added multiple solutions to expand its capabilities across end-user analytics; however, the feedback from clients has been lukewarm for these offerings

Everest Group® RESEARCH

Research calendar
Cloud and Infrastructure Services

Flagship CIS reports	Release date
Network Transformation and Managed Services PEAK Matrix® Assessment 2020 – Focus on Communications Service Providers	March 2020
IT Security Services PEAK Matrix® Assessment 2020	June 2020
State of the Market: IT Infrastructure Services	July 2020
State of the Market: IT Security Services	August 2020
Digital Workplace Services PEAK Matrix® Assessment 2020	**August 2020**
Aware IT Infrastructure Automation Services PEAK Matrix® Assessment 2020	Q3 2020
State of the Market: Digital Workplace Services 2020	Q3 2020
Service Integrator Capabilities on AWS PEAK Matrix® Assessment 2020	Q4 2020
Service Integrator Capabilities on Azure PEAK Matrix® Assessment 2020	Q4 2020
Service Integrator Capabilities on GCP PEAK Matrix® Assessment 2020	Q4 2020

Thematic CIS reports	Release date
Connected Workplace – The Next Experience Frontier	January 2020
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2020
Upcoming Contract Renewals – Infrastructure Services	March 2020
Security Operations for a Digital World	Q3 2020

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

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