Everest Group® RESEARCH

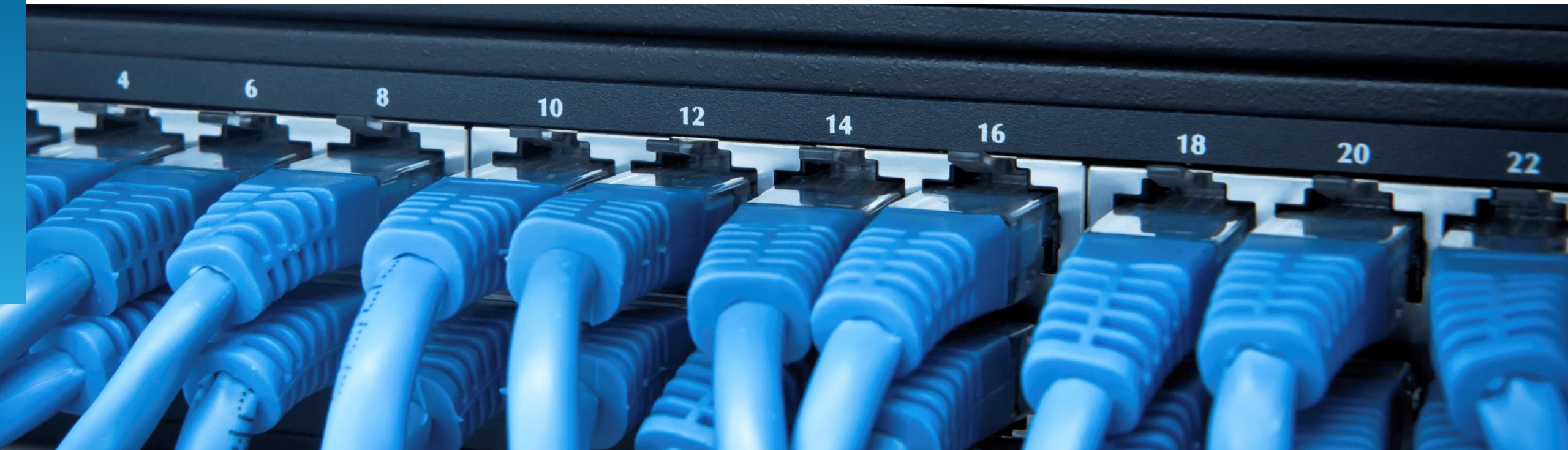# Digital Workplace – Service Provider Compendium 2020

September 2020: Complimentary Abstract / Table of Contents

EGR-2020-29-CA-3952

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

▶ BPS | Banking & Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Customer Experience Management Services

▶ Contingent Workforce Management

▶ Data & Analytics

▶ Digital Services

▶ Engineering Services

▶ Enterprise Platform Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | Banking & Financial Services

▶ ITS | Healthcare

▶ ITS | Insurance

▶ IT Services Executive Insights™

▶ ITS | Life Sciences

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment Process Outsourcing

▶ 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

Everest Group® RESEARCH

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

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RESEARCH

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 services

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

NOT EXHAUSTIVE

Consulting/assessment services

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

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

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 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)

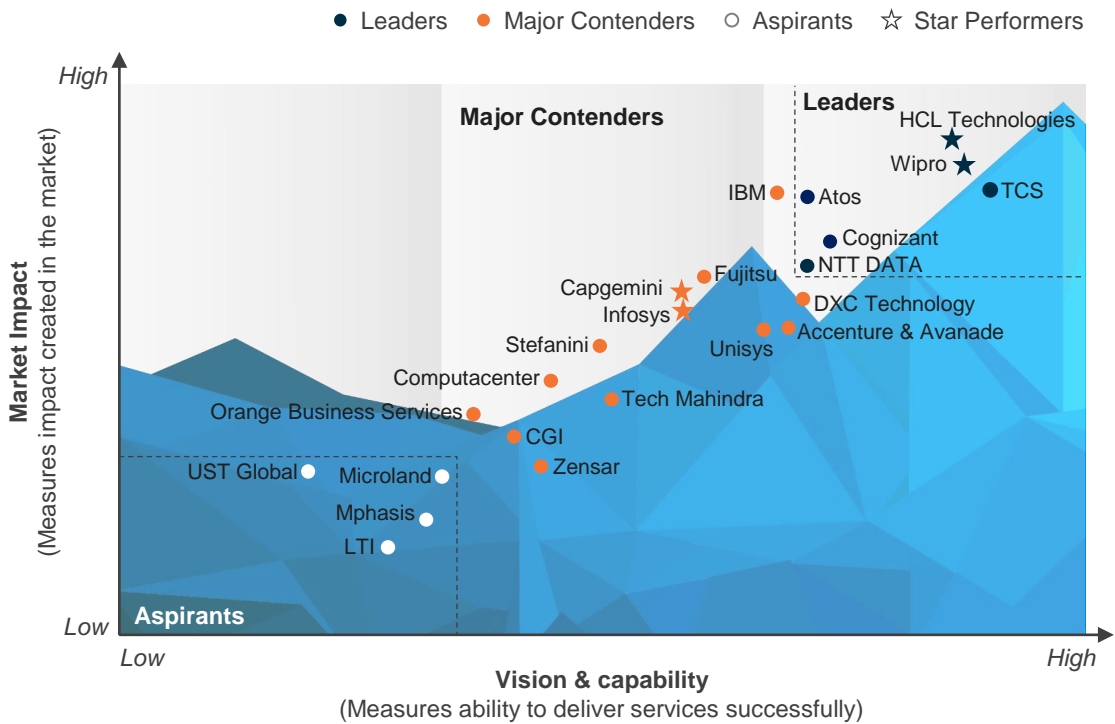End-to-end services including assessment, strategy formulation, policy & security, platform evaluation, infrastructure implementation, and managed services

Workspace-as-a-service

Connected workplace – remote work enablement (anywhere, anytime, and on any device), IoT in workplace, immersive collaboration, AR/VR in workplace, etc.

Workplace security – identify and access management (IAM), endpoint security, 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) vs **Vision & capability** (Measures ability to deliver services successfully)

Leaders: HCL Technologies, Wipro, Atos, TCS, Cognizant, NTT DATA, DXC Technology, Accenture & Avanade

Major Contenders: IBM, Fujitsu, Capgemini, Infosys, Stefanini, Unisys, Computacenter, Orange Business Services, Tech Mahindra, 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
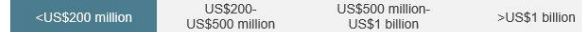
The digital workplace service provider compendium report has over 23 service provider profiles

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

Service provider's vision for digital workplace is to empower end-users by providing a complete digital experience through a "secure-by-design" solution. Its current strategy provides provision for virtual and integrated workplaces with personalized interactions and a multi-device collaborative environment.

Workplace services revenue

<US$200 million	US$200-US$500 million	US$500 million-US$1 billion	>US$1 billion

Scope of coverage
- Number of users served through service desk support: 57,921
- Number of service desk contacts managed: 230,978
- Number of desk-side/break fix incidents managed: 49,023
- Number of desktop support incidents managed through remote resolution: 80,782
- Total number of end-user devices managed: 89,821

Adoption by industry — High (>20%) Medium (10-20%) Low (<10%)

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

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 | Workplace security
Connected workplace | Workplace-as-a-service

Adoption by geography — High (>20%) Medium (10-20%)

Service Provider | Digital workplace services profile (page 2 of 2)
Solutions and partnerships

Proprietary solutions (representative list)

Solution	Details of the tool/solution
Platform	An omnichannel virtual assistant that uses AI and cognitive computing for self-healing and self-adaption to interact with different personas and provides personalized end-user experiences.
D3	Monitors endpoint systems in real-time and analyzes their performance to provide proactive and reactive solution, resource optimization, and customer support.

Partnerships (representative list)

Partner name	Type of partnership	Details of the partnership
Automatos	Technology	Leverages Automatos' desktop and application virtualization solutions.
Lakeside	Technology	Provides end-user computing environment for desktop transformation to Windows 10, DaaS, and VDI using Lakeside's SysTrack.
DELL	Technology	OEM partnership with Dell.
BMC Helix	Technology	Utilizes BMC Helix ITSM to provide proactive service resolution, persona-based user experience, cloud service management, and cognitive automation capabilities.
ServiceAide	Technology	Uses ServiceAide's intelligent service management offering, which includes helpdesk-oriented customer support and ITSM.
Woopi	Technology	An omnichannel chatbot that provides internet application, portals, and software for the digital market and was critical in creation of virtual assistant Sophie.

Research calendar
Cloud and Infrastructure Services

Published   Planned   Current release

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
Digital Workplace – Service Provider Compendium 2020	**September 2020**
Aware IT Infrastructure Automation Services PEAK Matrix® Assessment 2020	Q4 2020
State of the Market: Digital Workplace Services 2020	Q4 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	Q4 2020

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

Everest Group®

With you on the journey

Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **everestgrp.com**.

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