

Everest Group PEAK Matrix® for Digital Workplace Service Provider 2022

Focus on HCL Technologies
December 2021



Background of the research

- The pandemic has been a catalyst for enterprises to recalibrate their perception of the workplace. Over 75% enterprises¹ are reviewing their current workplace model for more flexible options. Considering that the business case for workplace transformation is well established now, enterprises are now focused on conceptualizing the target state of their workplace environment and the journey required to achieve it
- The post-pandemic workplace is going to be a consequence of significant overhaul across tools, processes, talent requirements, security mechanism, and governance frameworks. This multi-year transformation journey will be underpinned by location-agnostic services and significant focus on employee experience and wellness
- In this research, we present an assessment of 26 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 Q2 and Q3 2021, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace.

This report assessed the following 26 service providers on the digital workplace services PEAK Matrix:

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

Scope of this report:



Geography
Global



Service providers
26 leading digital workplace service providers



Services
Digital workplace services

¹ Everest Group key enterprise issue survey 2021.

Characteristics of Leaders, Major Contenders, and Aspirants

Leaders:

Accenture, Atos, Cognizant, HCL Technologies, NTT DATA, TCS, and Wipro

- The digital workplace services Leaders have established a successful global business, driven by years of capability building and experience across different workplace services segments
- These players have a highly balanced portfolio, and continue to keep pace with the market dynamics through continued investments in technology and services capability development (internal IP/tools, partnerships, etc.)
- Leaders are highly proactive in taking their innovations and next-generation service offerings to clients to help them future-proof their workplace environments. In addition, they are increasingly focusing their services on enhancing the workplace experience for end-users
- However, the current Leaders face a stiff challenge from Major Contenders, in both new and rebid deal situations alike. Leaders need to continue focusing on building effective solutions that are well-balanced, and address the seemingly conflicting dual mandate from enterprises for enhanced user experience and services cost optimization

Major Contenders:

Capgemini, CGI, Compucom, Computacenter, DXC Technology, Fujitsu, IBM/Kyndryl, Getronics, Infosys, Microland, Orange Business Services, Stefanini, Tech Mahindra, Unisys, and Zensar

- The Major Contenders segment includes a mix of global and regional players
- These players have built meaningful capabilities to deliver workplace services (both management/run and transformation services); however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across workplace services segments or geographies or both) – this is also reflected in the scale of market success achieved by these players (vis-a-vis Leaders)
- However, all these players are making continued investments in developing internal IPs and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps, and thereby, positioning themselves as strong challengers for the Leaders in this space

Aspirants:

LTI, Milestone Technologies, Mphasis, and UST

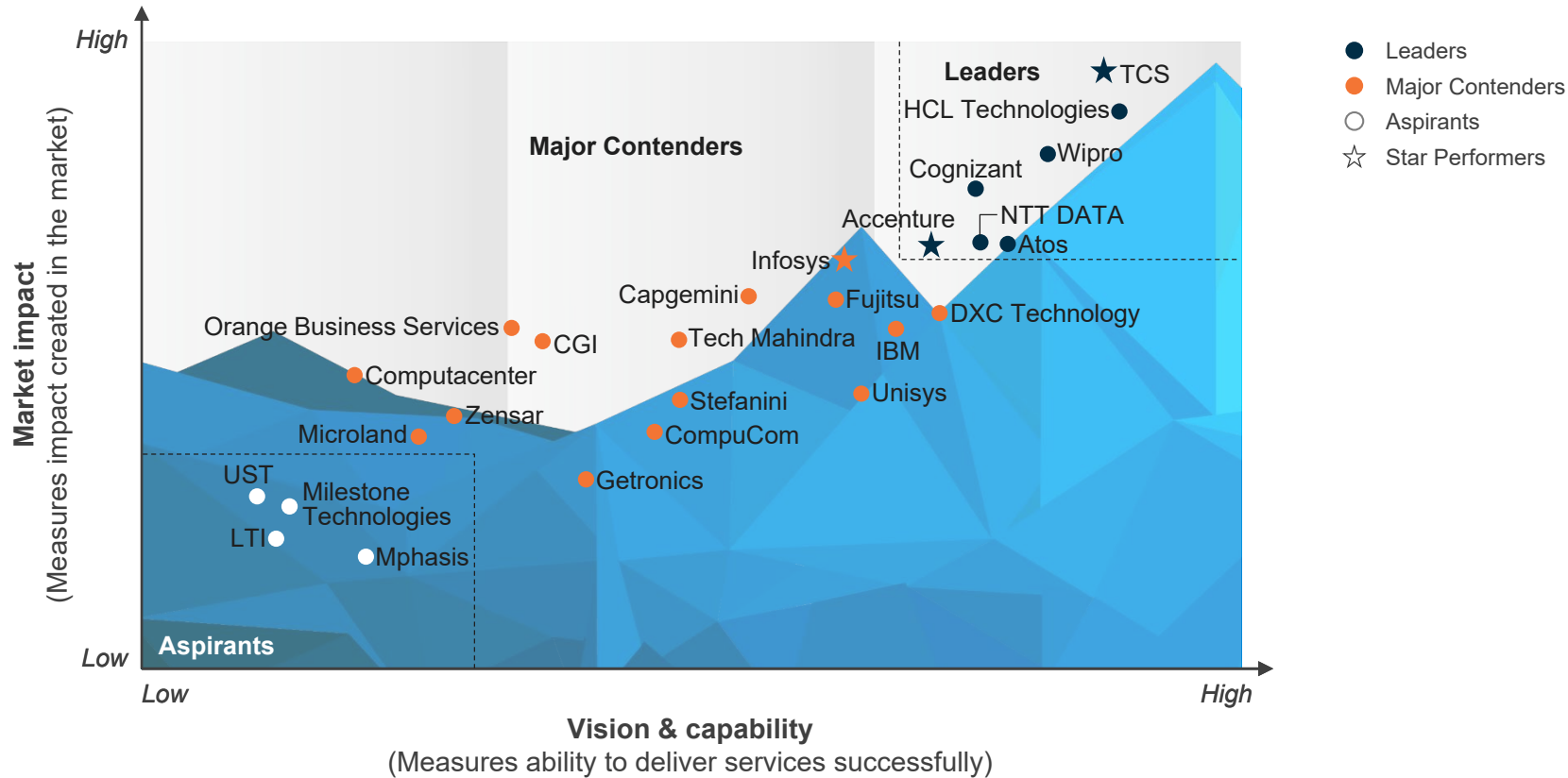
- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such players
- Nevertheless, these companies are making investments to build broader capabilities to cater to buyers (through service and technology partnerships as well as internal IPs/tools)

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2022 | HCL Technologies positioned as Leader



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022











Note: Assessment for Capgemini, CGI, Computacenter, IBM/Kyndryl, LTI, Mphasis, and Unisys 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 (2021).

HCL Technologies | digital workplace services profile (page 1 of 6)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
								

Strengths

- HCL Technology has invested in building solutions and services to effectively support customers working in remote and hybrid workplace model
- Has a mature sales organization with strong decision-making capabilities; Has a dedicated Workplace Experience Consulting (WXC) to improve consulting expertise
- It has invested in talent retention by extensively leveraging its Talent Development CoE to tackle the attrition challenge
- Clients have appreciated the flexibility in service delivery, especially with the challenges posed by pandemic such as supporting WFH users and providing zero touch support
- Some of the other key strength areas focus on outcome-based pricing, global delivery capability, and strong partner network
- It has diversified its deal portfolio by winning deals of values (1-5M USD), reducing its risk and dependency on larger deals

Limitations

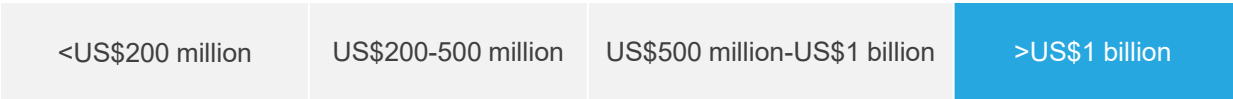
- Clients have pointed out that HCL Technologies acts as an order-taker rather than a true strategic partner; it needs to be more involved in shaping the strategic direction of the clients and not merely executing it
- Some of the clients believe that its consulting expertise & talent is below par in comparison to peers
- Some of the clients have also experienced lower efficiency in service transition and knowledge transfer
- Its presence is concentrated in NA and Europe, and it needs to enhance its presence in rapidly growing markets of APAC and EMEA
- Some enterprise clients believe that HCL Technologies needs to bring in more industry-vertical nuances to its workplace portfolio

HCL Technologies | digital workplace services profile (page 2 of 6)

Overview

HCL Technologies' vision is to provide digital workplace services, which enable a fluid workplace that is intuitive, personalized, and available on-demand. This is in line with its strategy for a workplace that is human-centered & hybrid, which delivers consumer-grade experience, provides enterprise level security, respects user demographics, and focusses on employees' well being.

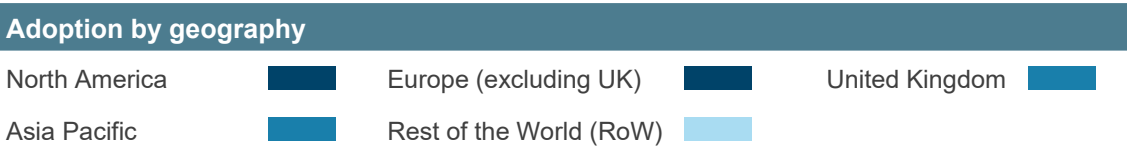
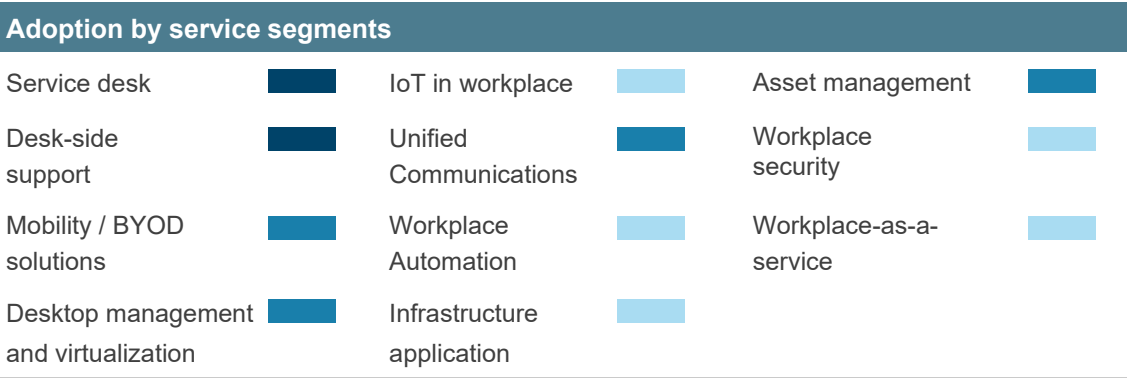
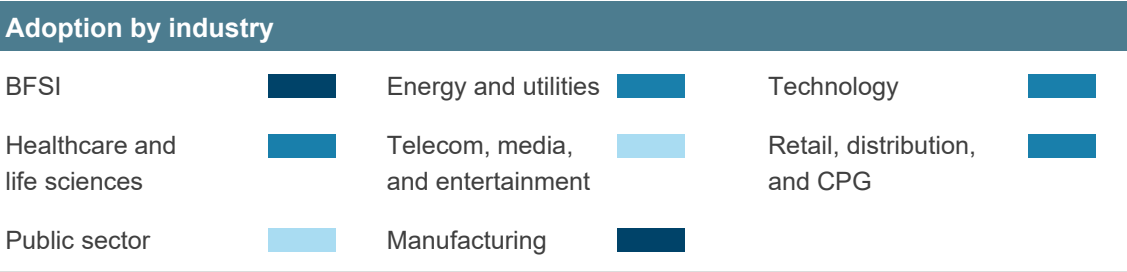
Workplace services revenue



Scope of coverage

- Number of users served through service desk support – ~5.9 million
- Number of service desk contacts managed- ~32 million
- Number of users served through desk-side support- ~4.3 million
- Number of end-user devices managed – ~8 million

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



HCL Technologies | digital workplace services profile (page 3 of 6)

Case studies

Case study 1

Reinvented workplace services to improve user experience

Client: an American organization with retail stores spread across the globe.

Business challenges/requirements

- Needed service desk support based on user location, profile, and other user details
- Service desk agents were not aptly skilled to resolve the tickets in time, and they therefore breached SLAs
- Encountered poor monitoring and management of end-user devices and lack of automation tools
- Required efficient usage of IT services to gain value by focusing on core business
- Required improvement in IT security through utilization of professional and standard IT services

Solution

- Facilitated user persona-led site support to identify the needs of each persona and provide contextual services
- Started an automation suite that provided self-heal capabilities, omnichannel cognitive virtual bot, predictive, and preventive analytics
- Delivered a digital experience office that focused on monitoring, measuring, and enhancing the UX through preventive measures, proactive health monitoring, and remediation
- Provided retail service desk, distribution centers, and end-to-end field support services
- Delivered WorkspaceONE-based Windows 10 modern management services
- Deployed Click2Connect, a mobile digital platform that enabled end-users to access IT-related solutions

Impact

- Provided persona-based support model and allocation of devices
- Enabled secure access to data, applications, and endpoints
- Enabled single point of contact with sole accountability for all services related to end-user devices
- Improved the SLA framework, increased user productivity, and enhanced UX

Case study 2

Transformation of client's workplace services and device landscape

Client: a multinational consumer goods company.

Business challenges/requirements

- Needed complete device refresh and mobility enablement for work-from-home or remote users
- Required cost saving initiatives on managed print solutions
- Needed to transition from standardized end-user support and devices to a customized workplace stack
- Lacked the monitoring of end-user devices and applications from a performance and UX perspective
- Required proactive IT support for end-users with financial benefits

Solution

- Enabled a consultancy-driven assessment of ecosystem leveraging HCL Kaleidoscope™ to define user personas
- Enabled the introduction and usage of devices such as iPhone 11 in the client environment during COVID-19, via field support, and home delivery and management via Apple Business Manager and Microsoft Intune
- Deployed HCL BeeHive, for modern management of 600+ meeting rooms including sensor-driven occupancy analytics and proactive monitoring of meeting room equipment
- Enabled device refresh for devices in scope to Microsoft Surface devices via Ingram
- Proactively monitored, detected, and resolved endpoint events through HCL WorkBlaze
- Promoted shift-left by empowering end-users with self-help and self-heal through HCL OptiBot platform
- Provided managed print services, pay per page model, and enabled the refresh of printer hardware

Impact

- Provided high support responsiveness leading to lower MTTR and faster resolution time
- Enabled the CAPEX to OPEX model for device as a service
- Enabled proactive problem analysis for user and meeting devices and improvement in UX score

HCL Technologies | digital workplace services profile (page 4 of 6)

Solutions

Proprietary digital solutions (representative list)	
Solution	Details
RetailNXT	A comprehensive solution for organizations ensuring the modernization of store, workforce, and backend infrastructure. The solution includes tech estate management, inventory & performance management, usage analysis, real-time UX feedback, and sentiment analysis.
Plant WorkBlaze	A solution that provides a digital convergence center for IT and Operational Technology (OT) operations. It offers centralized data-driven maintenance models, which ensure greater Rol and minimized downtime by reducing dependency on multiple support touchpoints for different issues.
Unified Workplace Intelligence	A solution that leverages advanced AI & security analytics to give a bird’s eye view across the workplace for security consulting, deployment, and simplified management. It entails identity protection, secure remote access, device protection through AI, data & information protection, and user & entity behavior analytics.
HCL SafeSense	Precision-focused contactless workplace solutions that brings the essential workforce back to office; this includes the following components: <ul style="list-style-type: none">• ThermoSense offers contactless and precise body temperature screening• DistSense caters to smart ID cards-powered social distancing and contact tracing• QueueSense takes care of the digital queuing system to avoid crowds at bottlenecks• OccuSense looks after hot desking and occupancy management for confined spaces• WorkSense ensures contact-free IT services to eliminate risks while enabling experiences such as virtual IntelliZone
Profile Kaleidoscope	A digital-led, data-driven assessment of an enterprise to measure digital dexterity index, which focuses on individual need.
HCL WorkBlaze	This platform manages the end-user IT environment through proactive real-time detection of events, endpoint device performance, application performance, and user activities for the investigation of probable causes of incidents and improving the overall UX. It incorporates smart AI-enabled sensors that monitor the user environment in real-time and intelligently identify patterns.
DRYICE OptiBot	An end-user enablement suite of products, which empowers users to solve IT issues themselves. It aims at employing a shift-left strategy in order to solve PC problems.
DRYICE LUCY	An AI-enabled enterprise cognitive virtual assistant with the ability to understand user issues and provide resolution for both IT and non-IT use cases.
HCL BeeHive	An end-to-end meeting solution that assists users with room booking, visitor management, in-room collaboration experience, and AI-enabled meeting assistants.
HCL OnSight	An AR-/VR-based immersive support solution that provides virtual assistance on any device including smart wearables, and reduces the travel costs by solving the issues remotely.
HCL FlexSpace	A complete device life cycle management offering, which bundles devices with HCL Technologies’ IPs and offers it in a subscription model. This services takes end-to-end ownership of hardware procurement (desktop/laptop/mobile devices), deployment, support, maintenance, refresh, and disposal issues.
Other digital workplace solutions include DigiPrint, HCL IntelliZone, HCL Pulse, Workplace Experience Consulting, Cloud Workspaces, and Intelligent Asset Tracking.	

HCL Technologies | digital workplace services profile (page 5 of 6)

Partnerships

Partnerships (representative list)		
Partner name	Type of partnership	Details of the partnership
Microsoft	Technology	<ul style="list-style-type: none">• Leverages its partnership with Microsoft, and claims to be the 3rd-largest Global Systems Integrator (GSI) recognized by Microsoft in terms of number of seats managed for the modern workplace matrix, and being the earliest partner to engage with Microsoft on creating an offering on Microsoft Viva for adoption• Claims to be one of the 4 Microsoft chosen global partners for the Microsoft managed desktop program and preferred partner for the Microsoft WVD program• Claims to be overarching the workplace stack 360-degree partnership that covers PC management, modern desktop management, OS migration, messaging, and collaboration stack, including Microsoft Teams adoption, modern devices with Windows 10, Windows 10 migration, application and user virtualization solutions, and surface hub engagement• Drives E3 to E5 migration for customers; its unified workplace intelligence, new workplace security solution is based on Azure Sentinel & Microsoft ATP
Apple	Technology	<ul style="list-style-type: none">• Claims to be the first Indian origin service provider to formally onboard Apple as a strategic partner• Provides alternate stack on MacOS and iOS for design-oriented functions, and a mobile workforce and experience consulting for Apple-powered enterprises• End-to-end life cycle management with proactive analytics for MacBook's, iPhones, and iPads
HP	Technology	Leverages this partnership for its experience-as-a-service offering to deliver devices bundled with its IPs and services in a subscription-based OPEX model. The partnership also enables smart technology cafés and automated dispensing solutions powered by vending machines and digital lockers.
Intel	Technology	<ul style="list-style-type: none">• Selected by Intel for their strategic board of advisors where HCL Technologies will be presenting its roadmap/key strategy elements• Builds its comprehensive solution jointly with Intel under “FlexSpace” that covers Intel vPRO
Citrix	Technology	Leverages Citrix’s technology for enhancing virtualization capabilities to provide intelligent digital workspaces on the cloud driven by Citrix workspace and Citrix virtual applications and desktops.
VMware	Technology	Leverages VMware’s Horizon and Workspace ONE to power HCL LibreSpace GTM, and to deliver software-defined workspaces to ensure a contextual any place, any device, and anytime workplace for all end-users.
Google	Technology	Leverages Google’s cloud strategy and is the workplace-on-the-go partner for engagements such as G-Suite implementations and providing Chromebooks for enterprises.
Nutanix	Technology	Jointly developing LibreSpace as a fully managed, end-to-end VDI-as-a-Service, with Nutanix HyperConverged Infrastructure (HCI) and Citrix technologies as the foundation, to deliver fluid digital workspaces with micro-personalized UX and modernized security, addressing the needs of a distributed workforce.
Cisco	Technology	Leverages Cisco as a unified communication and collaboration partner, and benefits from Cisco’s expertise to deliver complex global IT transformation projects.
Nexthink	Technology	Leverages its partnership for UX management, self-healing and automation, workplace analytics, proactive support, and virtualization fitment.
Lakeside	Technology	Leverages Lakeside for UX management, self-healing & automation, workplace analytics, proactive support, and virtualization fitment.
HappySignals	Technology	Leverages HappySignals for user perception management for improving IT services, implementing XLAs, and benchmarking user experience.
Other digital workplace partnerships include Dell, Nerdio, Condecó, Circular Computing, and WalkMe.		

HCL Technologies | digital workplace services profile (page 6 of 6)

Investments and recent activities

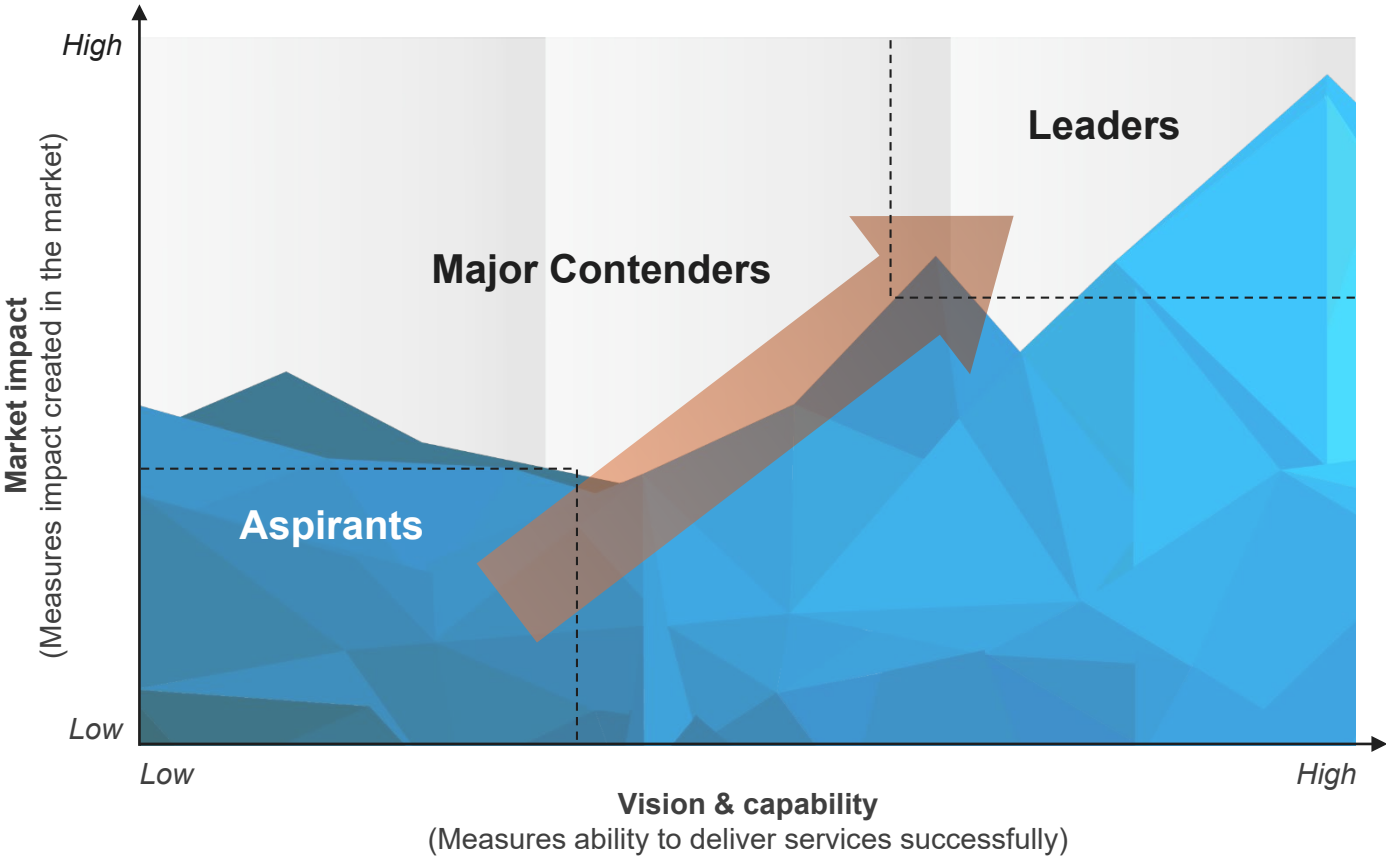
Investments and recent activities (representative list)	
Partner name	Details of the partnership
Acquisition	<ul style="list-style-type: none">• Australian IT firm DWS Ltd: increased digital offerings especially in Australia and New Zealand• Symantec: enhanced its expertise across endpoint security, web security services, cloud security, and Data Loss Prevention (DLP)• Strong Bridge Envision: enhanced the existing consulting portfolios with its customer experience strategy, business transformation, and change management. With this acquisition, HCL Technologies now provides strategy, design, and implementation of enterprise-wide solutions that are designed to deliver meaningful RoI in a digital economy
Delivery center	HCL Technologies has opened various new delivery centers in New Zealand, Canada (Hamilton, Toronto, and New Brunswick), the US (Hartford), Vietnam, Sri Lanka, and Lithuania, which have helped it to scale its local delivery capabilities.
Investment	<ul style="list-style-type: none">• Kalido: HCL Technologies invested in Kalido, a liquid workforce management company, that enables organizations to reimagine how to acquire, retain, and develop talent and skills. It is an AI-powered platform that matches individuals with work and growth opportunities through personas. It promotes organizational productivity, employee-wellbeing, and frictionless movement of talent• HCL Domino and HCL Realtime: launched a revamp of HCL Realtime. The next version of HCL Domino is planned for its existing customer base with a major update
Talent and skills	<ul style="list-style-type: none">• Workplace Experience Consulting: expanded its B2E consulting arm in specific regions for creating user journeys, launched a consulting catalog, and integrated with the Strong Bridge Envision portfolio. This will enable SLA to XLA transition and compassionate change management for customers• Technology Consulting: a team was instituted for day 0 support and onboarding of large transformative accounts. This will also enable the expansion of security consulting portfolio while leveraging the recently acquired Symantec• HCL FLUID Centers: built next-generation workplace skills and scale centers underpinned by the MAS3 framework

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



Measures impact created in the market – captured through three subdimensions

Market adoption

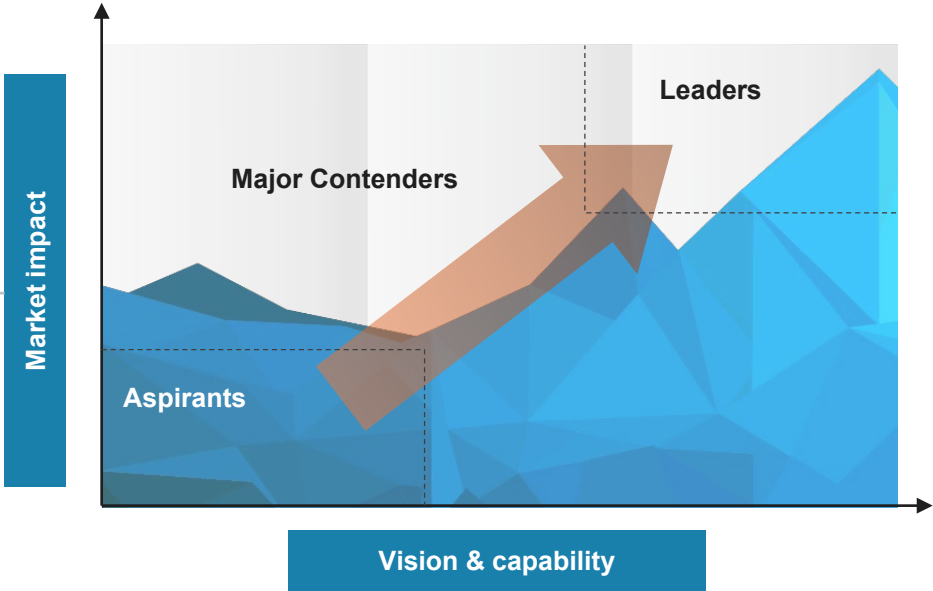
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

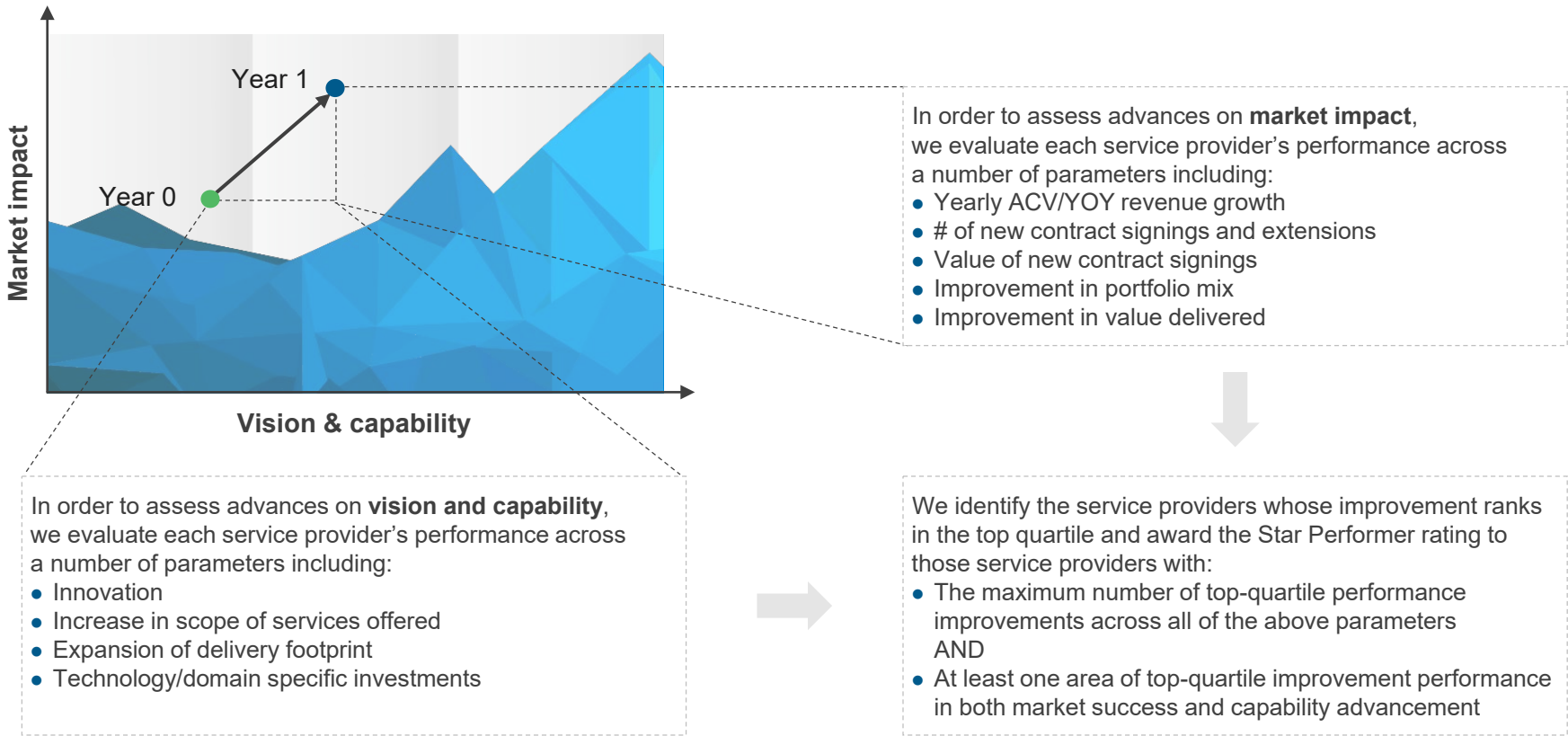
Delivery footprint

Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix



The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global companies, service providers, and investors. Clients use our services to guide 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 www.everestgrp.com.

Stay connected

Website

everestgrp.com

Social Media

 @EverestGroup

 @Everest Group

 @Everest Group

 @Everest Group

Blog

everestgrp.com/blog

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

Toronto

canada@everestgrp.com

+1-647-557-3475

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.