Everest Group PEAK Matrix® for Digital Workplace Service Provider 2022 – North America

Focus on HCL Technologies
September 2022

Background of the research

- With enterprises focusing on digital transformation initiatives, the digital workplace services market recovered rapidly in 2021. It is expected to continue its strong growth trajectory in 2022, as enterprises attempt to drive maximum value in the hybrid work model, from their recent workplace investments done during the pandemic, through partnership with a right-fit service provider

- The digital workplace market in North America has higher preference for shorter transformation timelines, agile work methodologies, and process optimization. Also, due to the recent Great Resignation Movement and a heightened talent war, there is a higher demand for employee experience-centric solutions and transformations within this region. Further, considering the maturity of this market, the propensity to adopt next-generation workplace offerings remains high

- In this research, we present an assessment of 25 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2022 – North America](#).

The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2022, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

The full report assessed the following 25 service providers on the digital workplace services PEAK Matrix® – North America:

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

Scope of this report:

Geography
North America

Service providers
25 leading digital workplace service providers

Services
Digital workplace services

Digital workplace services PEAK Matrix® (North America) characteristics

Leaders:

Cognizant, HCL Technologies, Infosys, NTT DATA, TCS, and Wipro

- The digital workplace services Leaders have established a successful business, driven by years of capability building and experience across different workplace services segments
- These providers have a highly balanced portfolio, display coherent vision, and continue to invest in technology and services capability development (internal IP/tools, partnerships, acquisitions, etc.). They are also focused on talent empowerment, solution contextualization, and sales and marketing enablement
- 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
- That said, 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:

Accenture, Atos, Capgemini, CGI, Compucom, DXC Technology, Fujitsu, Kyndryl, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones

- The Major Contenders segment includes a mix of global and regional service providers
- These service providers 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 providers (vis-a-vis Leaders)
- However, these service providers are making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps. They also provide a competitive and innovative pricing structure to clients, thereby positioning themselves as strong challengers to the Leaders in this space

Aspirants:

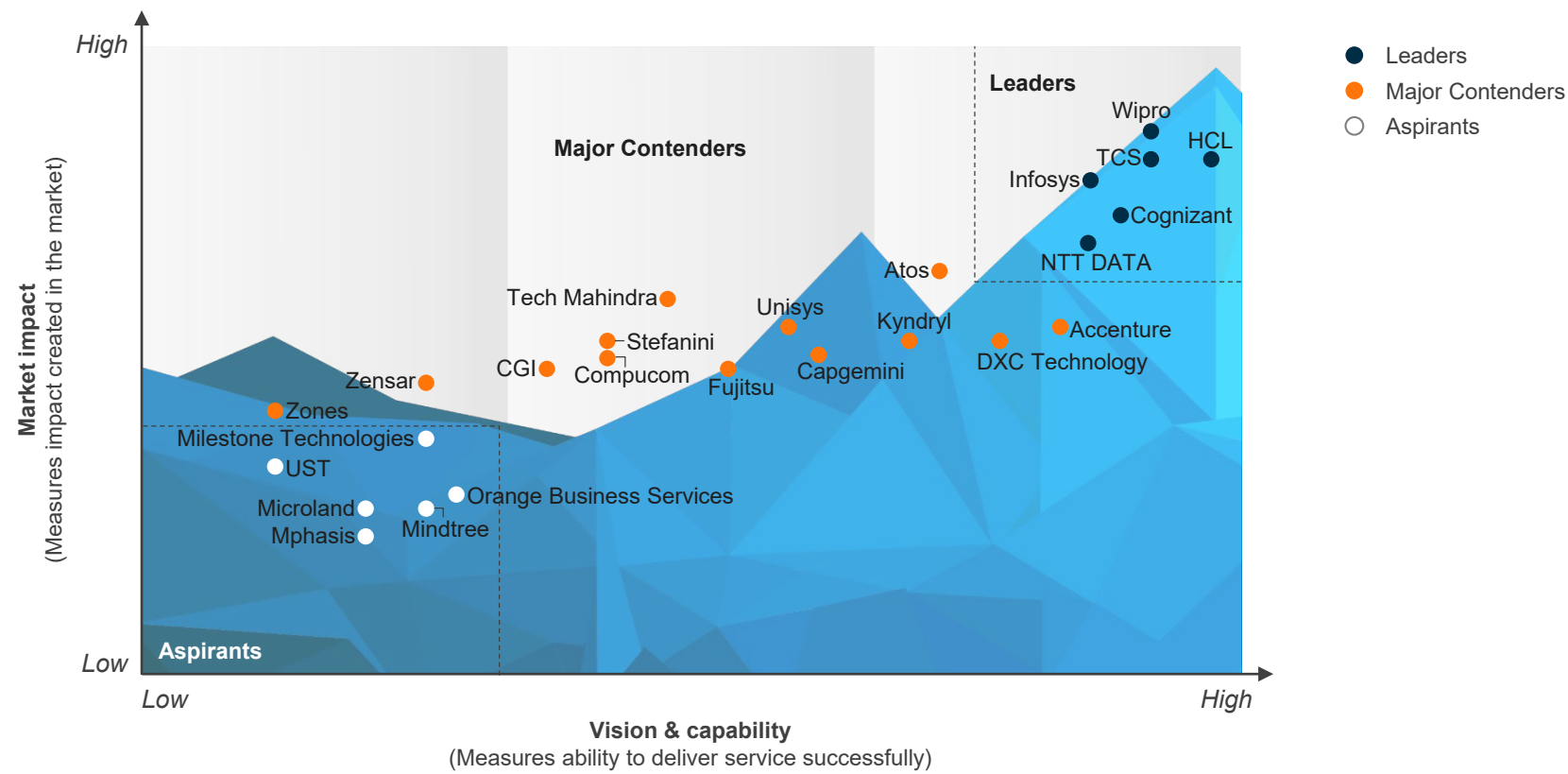Microland, Milestone Technologies, Mindtree, Mphasis, Orange Business Services, and UST

- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market

Everest Group PEAK Matrix®

Digital Workplace PEAK Matrix® Assessment 2022 – North America | HCL Technologies positioned as Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – North America[1]

Legend:
- Leaders
- Major Contenders
- Aspirants

Y-axis: **Market impact** (Measures impact created in the market) — High / Low

X-axis: **Vision & capability** (Measures ability to deliver service successfully) — Low / High

Quadrants: Leaders, Major Contenders, Aspirants

Data points:
- Leaders: Wipro, TCS, HCL, Infosys, Cognizant, NTT DATA
- Major Contenders: Atos, Tech Mahindra, Unisys, Kyndryl, Accenture, Stefanini, CGI, Compucom, Fujitsu, Capgemini, DXC Technology, Zensar, Zones
- Aspirants: Milestone Technologies, UST, Orange Business Services, Microland, Mphasis, Mindtree

1 Assessments for Capgemini, CGI, Fujitsu, and Kyndryl exclude service provider inputs and are 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 (2022)

HCL Technologies | digital workplace services profile – North America (page 1 of 5)
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 and investments	Delivery footprint	Overall
●	◔	●	●	●	●	●	◔	●

Strengths

- HCL Technologies has adopted a co-creation mindset and forged strategic partnerships with players such as Microsoft, Apple, and HP, which is being well-received by enterprises

- Enterprises looking for verticalized solutions can benefit from its credible portfolio of workplace-specific solutions such as Retail Enterprise Collaboration for the retail sector and HCL Risk and Compliance Management for BFSI

- Enterprises seeking to explore next-generation themes would benefit from its strong partnerships with established vendors such as Microsoft and Intel as well as niche vendors, which makes it suitable for capabilities such as remote field services, metaverse, and immersive collaboration

- It is focused on delivering carbon-neutral workplaces using its catalog of internal solutions, which makes it a good fit for enterprises looking to invest in themes such as sustainability

- Enterprises focused on improving the experience of their employees can benefit from HCL Technologies' strong EX-centric digital workplace vision and solution portfolio

Limitations

- Despite having a strong value proposition and PoC-driven approach, HCL Technologies has not been able to bridge the gap between the promised roadmap and the actual solution delivery

- Its IP proliferation can be a cause of confusion for enterprises seeking a clear roadmap on digital workplace transformation approach. Beyond marquee IP such as Lucy and WorkBlaze, IP maturity and client feedback for bulk of the IP is a mixed bag

- It is better suited to serve clients that like to own the decision-making and leverage their outsourcing partner for execution versus clients that want their outsourcing partner to shape their thinking and provide strategic guidance

- Clients expect better talent management, faster onboarding process for projects, and timely communication from HCL Technologies stakeholders

- Clients have highlighted the need to proactively implement greater innovation and best practices in its solutioning

HCL Technologies | digital workplace services profile – North America (page 2 of 5)
Overview

Digital workplace services vision

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

Digital workplace services revenue (2021)

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

Scope of coverage

- Number of users served through service desk support – ~3.4 million
- Number of service desk contacts managed – ~16.7 million
- Number of deskside-break/fix incidents managed – ~2.3 million
- Number of end-user devices managed – ~4.4 million

Legend: ■ Low (<10%) ■ Medium (10-20%) ■ High (>20%)

Adoption by industry

BFSI	Medium	Energy and utilities	Medium	Manufacturing	High
Electronics, hi-tech, and technology	Medium	Healthcare and life sciences	Medium	Telecom, media, and entertainment	Low
Public sector	Low	Retail and CPG	Medium	Travel & transport	Low

Adoption by service segments

Desktop management & virtualization	Medium	Infrastructure applications	Low	Unified communication & collaboration	Medium
Asset management	Medium	Deskside support	High	Mobility/BYOD solutions	Medium
Service desk	High	Smart workplace	Low	Workplace security	Low

Adoption by buyer group

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

Adoption by region

| United States | High | Canada | Low | Mexico | Low |

Source: Everest Group (2022)

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Solutions

Proprietary digital solutions (representative list)	
Solution	**Details**
HCL Rendezvous	This solution is used for proactively monitoring, analyzing, and troubleshooting/self-healing the entire UCaaS environment.
MySentient Workplace	This is a unified, intelligent, and integrated user enablement platform that provides employees with a consumer-grade user interface.
Blue Collar Companion	• Acts as an AI for frontline workforce • Puts real-time technical and domain intelligence in the hands of frontline workers and drives digital literacy and improves employee time to proficiency
RetailNXT	• Is a comprehensive solution for organizations ensuring the modernization of their store, workforce, and back-end Infrastructure • Entails tech estate management, inventory & performance management, usage analysis, real-time UX feedback using facial recognition technology, and sentiment analysis
Unified Workplace Intelligence	• Leverages advance AI & security analytics to give a bird's eye view across the workplace for security consulting, deployment, and simplified management • Entails identity protection, secure remote access, device protection through AI-enabled EDR, data & information protection, and user & entity behavior analytics

HCL SafeSense	• These are precision-focused contactless workplace solutions that bring the essential workforce back to office; this includes the following components:
	  – 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 upholding experiences such as virtual IntelliZone

HCL WorkBlaze	• This solution 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 experience of users • It incorporates smart sensors (AI-enabled) that monitor in real-time and intelligently identifies patterns
DRYiCE OptiBot	This solution is an end-user enablement suite of products, which empowers users to solve IT issues themselves. It aims to employ a shift-left strategy in order to solve PC problems.
DRYiCE LUCY	This solution is 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	This solution facilitates users with an end-to-end meeting solution starting from room booking, visitor management, in-room collaboration experience, and AI-enabled meeting assistant.
HCL FlexSpace	This is a complete device life cycle management offering that bundles devices with HCL Technologies' IPs and offers it in a subscription model. This service takes end-to-end ownership of hardware procurement (desktop/laptop/mobile devices), deployment, support, maintenance, refresh, and disposal issues.

Other digital workplace solutions include Plant WorkBlaze, DigiPrint, Digital Literacy Buddy, Profile Kaleidoscope, HCL Athena, and HCL Onsight.

HCL Technologies | digital workplace services profile – North America (page 4 of 5)
Partnerships

Partner name	Details
Partnerships (representative list)	
Microsoft	• Leverages its partnership with Microsoft and claims to be the third largest Global Systems Integrator (GSI) recognized by Microsoft in terms of the number of seats managed for a modern workplace matrix and the earliest partner to engage with Microsoft for creating an offering on Microsoft Viva for adoption • Claims to have four advanced specializations for M365 (teamwork deployment, teams calling, modernize endpoints, and Azure virtual desktop) • Claims to be the earliest partner to engage with Microsoft for creating an offering on MS Viva for adoption • Drives E3 to E5 migration for customers, its unified workplace intelligence and new workplace security solution are based on Azure Sentinel & Microsoft ATP
Apple	• Claims to be the first Indian-origin service provider to formally onboard Apple as a strategic partner • Provides an alternate stack on MacOS and iOS for design-oriented functions, mobile workforce, and experience consulting for Apple-powered enterprises • End-to-end life cycle management with proactive analytics for MacBooks, iPhones, and iPads
HP	• HCL Technologies' Experience-as-a-Service (EaaS) offering in partnership with HP delivers devices bundled with HCL's IPs and services in a subscription-based OPEX model • Provides smart tech cafés and automated dispensing solutions powered by vending machines and digital lockers
Intel	• Selected by Intel to be a part of the 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	HCL Technologies leverages Citrix's technology for enhancing virtualization capabilities to provide intelligent digital workspaces on cloud driven by Citrix workspace and Citrix virtual applications and desktops.
VMware	HCL Technologies leverages VMware's Horizon and Workspace ONE to power HCL LibreSpace GTM to deliver software-defined workspaces and to ensure a contextual any place, any device, and any time workplace for all end-users.
Google	HCL Technologies leverages Google's cloud strategy and is a workplace-on-the-go partner for engagements such as Google Workspace implementations and adoption and Chromebooks for enterprises.
Nutanix	HCL Technologies jointly developed LibreSpace as a fully-managed, end-to-end VDI-as-a-Service, with the Nutanix Hyper-converged Infrastructure (HCI) and Citrix technologies as the foundation, to deliver fluid digital workspaces with micro-personalized user experience and modernized security, thereby addressing the needs of a distributed workforce.
Cisco	HCL Technologies leverages Cisco as unified communication and collaboration partner and benefits from Cisco's expertise to deliver complex global IT transformation projects.
Contexture	HCL Technologies leverages this partnership for developing AI-based smart watches for manufacturing users.
HappySignals	HCL Technologies leverages this partnership for NPS solutions based on end-user feedback, capturing user sentiments, measuring experience, and mapping with XLAs.

Other digital workplace partnerships include Move Works, IP Soft, Avoma, Condeca, Dell, and WalkMe.

HCL Technologies | digital workplace services profile – North America (page 5 of 5)
## Investments and recent activities

Investments (representative list)	
Investment name	**Details**
Acquisitions	• Acquired Australian IT firm DWS Ltd to further expand its digital offerings, especially in the ANZ region • Acquired Symantec to enhance expertise across endpoint security, web security services, cloud security, and Data Loss Protection (DLP) • Acquired Strong Bridge Envision to enhance its existing consulting portfolios into 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 centers	HCL Technologies has opened various new delivery centers in Hamilton (New Zealand), Toronto and New Brunswick (Canada), Hartford (Connecticut), Vietnam, Sri Lanka, and Lithuania, which have helped it scale its local delivery capabilities.

Innovation and investments	• Invested in Kalido, which is an AI-enabled liquid workforce & skills development platform product that will help create future-proof workplace technology and soft skills
	• Invested in FLUID centers, which are next-generation workplace skills and scale centers built on the MAS3 framework
	• Invested in the following innovation labs:
	   – Digital experience center and innovation lab
	   – Workplace FLUID experience center
	   – Customer co-innovation lab
	   – Security fusion center
	   – Networks lab
	   – IoT accessibility lab
	   – DRYiCE labs
	• Microsoft advanced specializations: HCL Technologies claims to have four advanced specializations for M365 (teamwork deployment, teams calling, modernized endpoints, and Azure virtual desktop)
	• Workplace experience consulting: HCL Technologies expanded its B2E consulting arm in multiple regions for creating user journeys, launching consulting catalog & integration (with a strong bridge envision portfolio),t transitioning from SLA to XLA, and enabling compassionate change management
	• Sustainable digital workplace: this is an exclusive catalog of solutions aimed at delivering carbon-neutral workplaces
	• Technology consulting: this team is instituted for day 0 support and onboarding of large transformative accounts. It has expanded its security consulting portfolio with the Symantec acquisition

Appendix

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

Everest Group PEAK Matrix
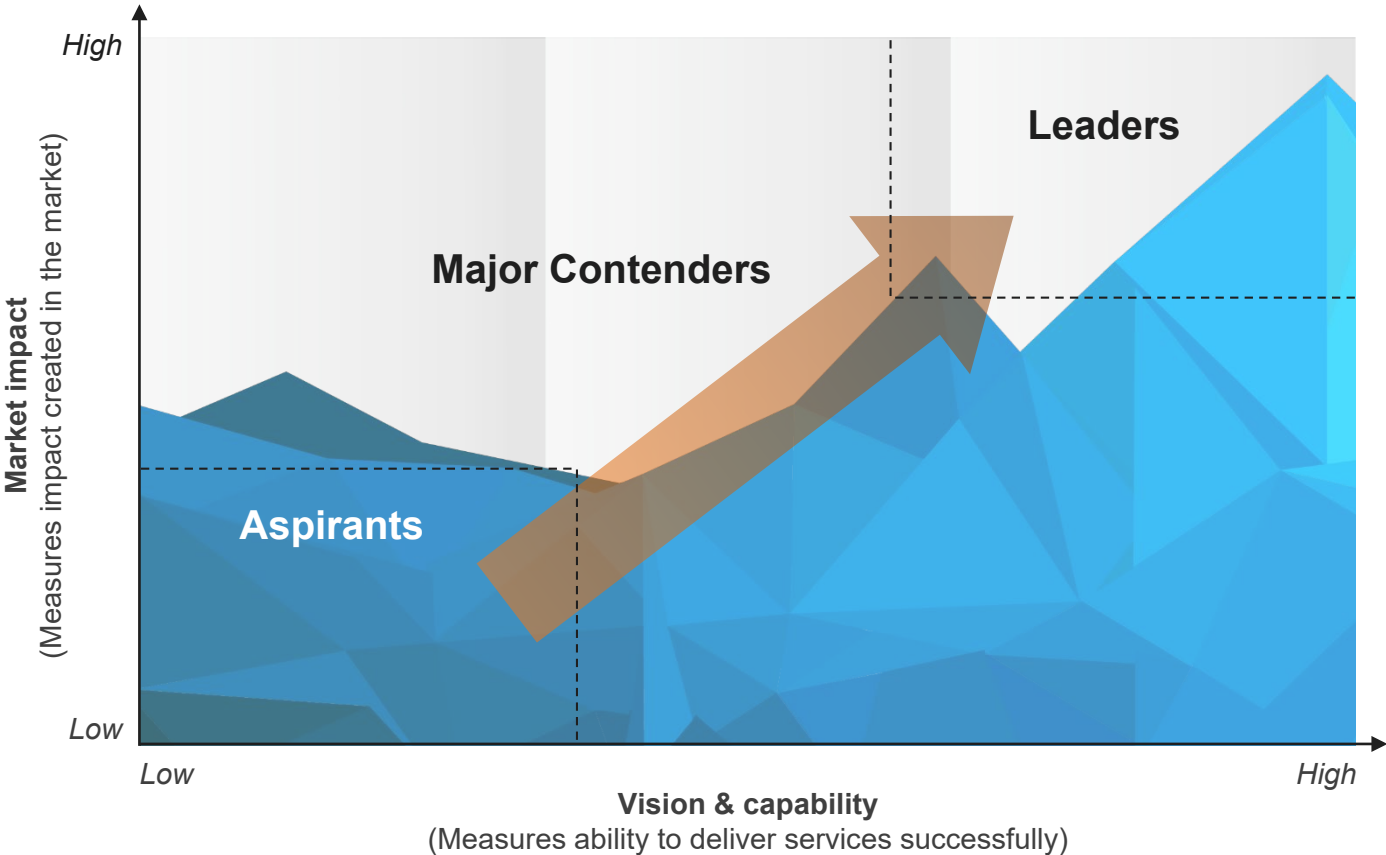
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions
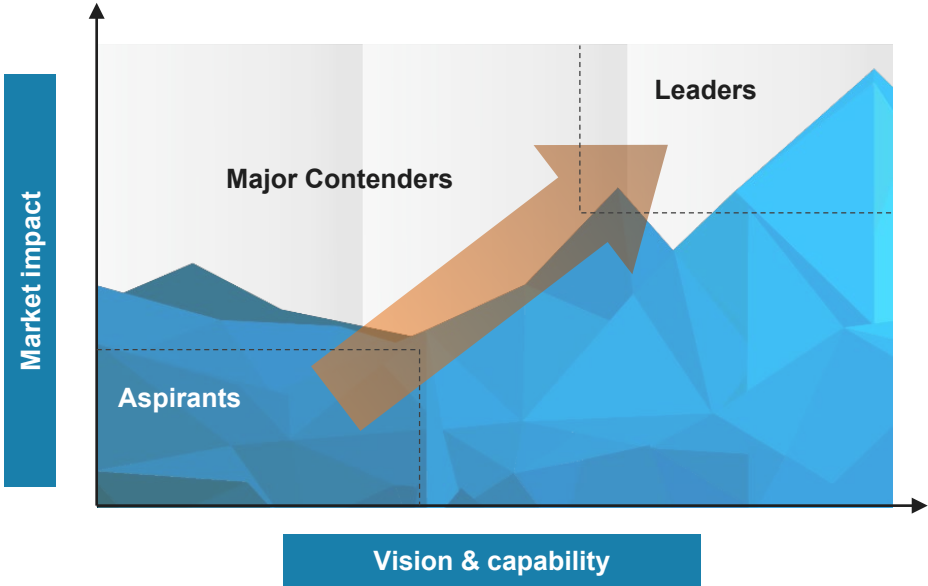
Market adoption

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

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability

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

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?
A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
  - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
  - In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?
- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
  - Issue a press release declaring positioning; see our citation policies
  - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
  - Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

Everest Group®

With you on the journey

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