



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America

Focus on HCLTech
December 2023



Background of the research

- With the ongoing changes in the workplace, various trends have driven transformations. The upcoming years are poised to be remarkable for the digital workplace, marked by the third wave of value-centric transformation. This phase will see enterprises adopting a fully digital future of work, prioritizing improved employee experience, value realization, productivity, cost efficiency, and workplace cohesion. Realizing this goal would require collaboration with suitable Service Providers (SPs)
- In North America, existing economic headwinds such as increasing inflation, banking crisis, a steep rise in interest rates, and intense competition for talent have prompted enterprises to scrutinize their spend and intensify their focus on business value outcomes and value creation throughout their workplace transformation journey. At the same time, there is a growing interest in industry-specific workplace solutions, AI-driven innovations, and product-oriented approaches. SPs are focusing on strengthening their capabilities to aid enterprises in their workplace engagements
- In this research, we present an assessment of 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – North America

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

The full report includes the profiles of the following 26 leading digital workplace providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2023 – North America](#):

- **Leaders:** Cognizant, HCLTech, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

Scope of this report



Geography
North America



Providers
26 leading digital
workplace service
providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® – North America characteristics

Leaders

Cognizant, HCLTech, 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 service cost optimization

Major Contenders

Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, 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

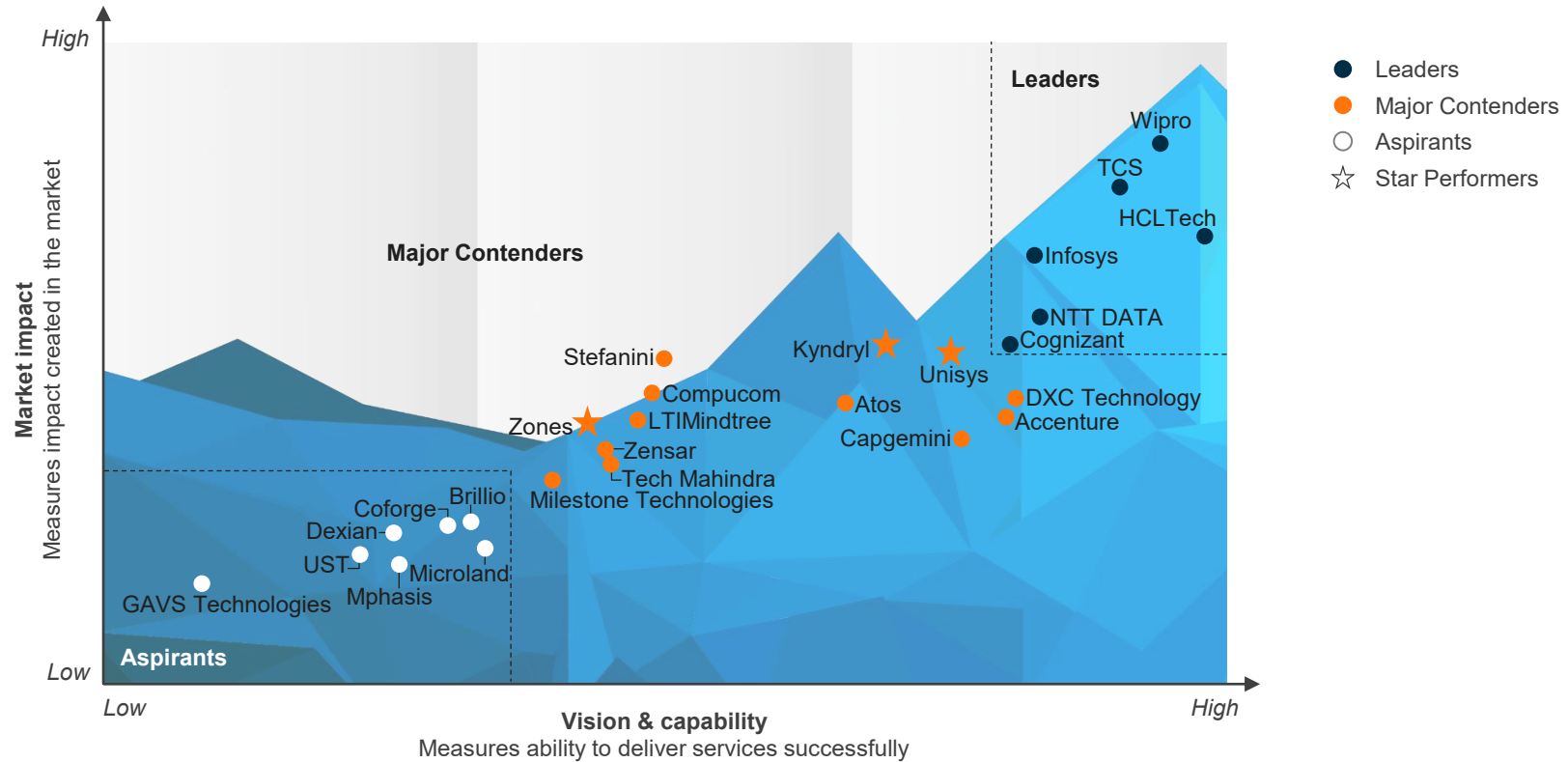
Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such 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 Services PEAK Matrix® Assessment 2023 – North America | HCLTech is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America^{1,2,3,4}



1 Assessments for Tech Mahindra and UST excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
 2 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
 4 We have not considered LTIMindtree for Star Performer title since erstwhile Mindtree participated as a separate entity in the 2022 refresh of the assessment
 Source: Everest Group (2023)

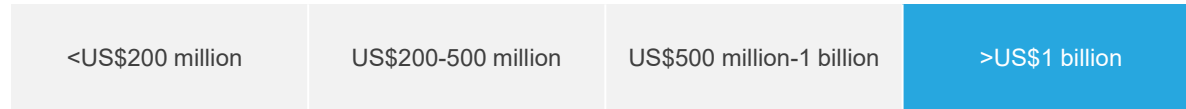
HCLTech profile – North America (page 1 of 5)

Overview

Digital workplace services vision

HCLTech’s vision is to provide digital workplace services that facilitate a fluid, intuitive, personalized, on-demand, and sustainable workplace. This is consistent with its strategy for a human-centered and hybrid workplace that offers a consumer-grade experience and enterprise-level security, respects user demographics, and prioritizes employee wellness.

Digital workplace services revenue (2022)

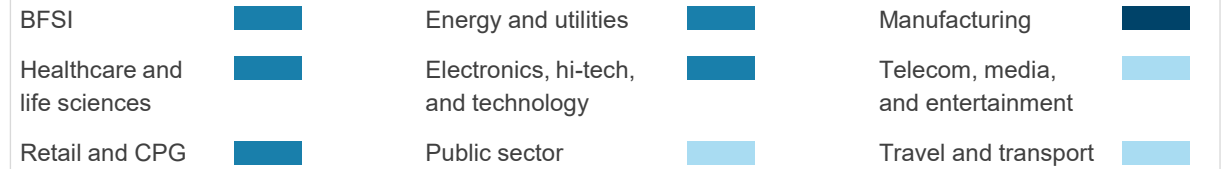


Low (<10%) Medium (10-20%) High (>20%)

Adoption by region



Adoption by industry



Adoption by service segments



Adoption by buyer group



Source: Everest Group (2023)

HCLTech profile – North America (page 2 of 5)

Solutions

NOT EXHAUSTIVE

Proprietary digital solutions (representative list)

Solution	Details
HCLTech Rendezvous	This solution is used for proactively monitoring, analyzing, and troubleshooting/self-healing the entire Unified Communication as-a-Service (UCaaS) environment, while also improving experience for employees to make collaboration more productive.
DRYiCE Lucy powered by GPT	This is a conversational generative AI-powered enterprise bot leveraging large language models such as M2M100, LLaMA, RoBERTa, and DeBERTa.
Smart Support Hub	This is a one-stop solution for digitization of Field Service Optimization (FSO) that equips customers with video conferencing solutions and KVM functionality, with quick responses to all IT issues.
HCLTech eSense	The solution is used for measuring user experience rather than SLAs. It also records employee productivity loss for various parameters.
Secure Shield	This is HCLTech's AI-enabled data security solution for hybrid work environment. It addresses security and compliance threats posed by humans (external physical threats).
Svalinn	This solution offers a reliable, resilient work-from-anywhere experience by ensuring maximum security and uncompromised productivity.
Sustainability	It is a single platform that provides detailed monitoring, reporting, and governance on key sustainability parameters. It pulls data across devices, spaces, and applications to provide a sustainability score for users and administrators.
HCLTech WorkBlaze	<ul style="list-style-type: none"> • 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 identify patterns
HCLTech FlexSpace	This is a complete device lifecycle management offering that bundles devices with HCLTech's IP 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.
RetailNXT	<ul style="list-style-type: none"> • Is a comprehensive solution for organizations ensuring the modernization of their store, workforce, and back-end infrastructure • Entails tech estate management, inventory and performance management, usage analysis, real-time UX feedback using facial recognition technology, and sentiment analysis
Plant Workblaze	This solution offers a digital convergence center for IT and OT operations, as well as centralized data-driven maintenance models that minimize downtime by reducing reliance on multiple support touchpoints for various issues, resulting in greater RoI.
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.
Digitally Enabled Front-line Workers	This solution serves front-line workers across industries such as retail, healthcare, and transportation and logistics.

Other digital workplace partnerships include HCLTech SafeSense, HCLTech BeeHive, Profile Kaleidoscope, HCLTech Athena, DigiPrint, HCLTech OnSight, and Virtuality.

HCLTech profile – North America (page 3 of 5)

Partnerships

NOT EXHAUSTIVE

Partnerships (representative list)

Partner name	Details
Microsoft	<ul style="list-style-type: none"> • Leverages 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 the modern workplace matrix • Earliest partner to engage with Microsoft on creating an offering on Microsoft Viva for adoption • Claims to have five advanced specializations for M365 (teamwork deployment, teams calling, modernized endpoints, meeting and meeting rooms, and Azure Virtual Desktop) • It has a preview access to all AI tools by MS – Azure AI Studio service, Azure AI prompt flow service, Azure Open AI Plugin service, and M365 copilot • Its unified workplace intelligence and new workplace security solution are based on Azure Sentinel and Microsoft ATP
Apple	<ul style="list-style-type: none"> • 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 DW experience consulting for Apple-powered enterprises • End-to-end lifecycle management with proactive analytics for MacBooks, iPhones, and iPads
HP	<ul style="list-style-type: none"> • HCLTech's Experience-as-a-Service (EaaS) offering, in partnership with HP, delivers devices bundled with HCLTech's IP and services in a subscription-based OpEx model • Provides sustainable device lifecycle management, smart tech cafés, and automated dispensing solutions powered by vending machines and digital lockers
Poly	Leverages Poly to provide support for UCC / meeting room devices, device procurement, and devices for remote working employees
Zebra	Leverages its partnership with Zebra Technologies to provide UCC devices and support for front-line workers
Signifi/IVM Inc.	Leverages IVM to provide automated solutions and smart vending solutions powered by digital lockers and smart kiosks
Swish.AI	Leverages Swish.AI to provide a hyper-automation intelligence platform
Intel	<ul style="list-style-type: none"> • Selected by Intel for being a strategic board of advisors where HCLTech will be presenting its roadmap / key strategy elements • Built its comprehensive solution jointly with Intel under FlexSpace that covers Intel vPRO
Google	Leverages Google's cloud strategy and is its workplace-on-the-go partner for engagements such as Google workspace implementations and adoption and Chromebooks for enterprises
Nutanix	Leverages this partnership for developing LibreSpace as a fully managed, end-to-end VDI-as-a-Service (VDIaaS), with Nutanix hyper-converged infrastructure and Citrix technologies as the foundation, to deliver fluid digital workspaces with micro-personalized user experience and modernized security, addressing the needs of a distributed workforce
Cisco	Leverages Cisco as a unified communication and collaboration partner and benefits from Cisco's expertise to deliver complex global IT transformation projects
HappySignals	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 Lenovo, VMware, Citrix, Move Works, IP Soft, Avoma, Condeca, Dell, and WalkMe.	

HCLTech profile – North America (page 4 of 5)

Investments and recent activities

NOT EXHAUSTIVE










Investments (representative list)

Investment name	Details
Acquisition	<ul style="list-style-type: none"> 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 Prevention (DLP) Acquired Strong Bridge Envision to enhance its existing consulting portfolios into customer experience strategy, business transformation, and change management. With this acquisition, HCLTech now provides strategy, design, and implementation of enterprise-wide solutions that are designed to deliver meaningful RoI in a digital economy Acquired C3i solutions to enhance vertical capabilities in life sciences and CPG; it has also strengthened its delivery presence in new locations such as Bulgaria, and increased delivery capabilities in China and Japan Acquired IBM portfolio of products (such as BigFix, HCL Realtime, and HCL Domino) to enhance its collaboration, workload automation portfolio, and many other folios in its basket
Delivery centers	HCLTech has opened various new delivery centers in New Zealand, Canada, Hartford, Vietnam, Sri Lanka, and Lithuania, which have helped it scale its local delivery capabilities.
Innovation and investments	<ul style="list-style-type: none"> Invested in Kalido, which is an AI-enabled liquid workforce and 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: <ul style="list-style-type: none"> Digital experience center and innovation lab UCC experience studio Workplace FLUID experience center Customer co-innovation lab Security fusion center Networks lab IoT, accessibility lab DRYiCE labs Microsoft advanced specializations: HCLTech has four advanced specializations for M365 (teamwork deployment, teams calling, modernized endpoints, and Azure virtual desktop) Workplace experience consulting: HCLTech expanded its B2E consulting arm in multiple regions for creating user journeys, launching consulting catalog and integration (with strong bridge envision portfolio), 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 Invested in CoEs SkunkWorks @FLUID Digital Workplace <ul style="list-style-type: none"> Open AI / generative AI Workplace sustainability

HCLTech profile – North America (page 5 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 offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Enterprises can benefit from HCLTech’s robust partnership system with providers such as Microsoft, Apple, HP, and Google as well as niche vendors such as Prysm, SpacelQ, and Nerdio
- Enterprises looking for verticalized solutions can benefit from its credible portfolio of workplace-specific solutions such as Retail Enterprise Collaboration and RetailNxt for the retail sector, BigFix and HCLTech’s Risk & Compliance Management for BFSI, and Plant Workblaze for the manufacturing sector
- It is focused on delivering carbon-neutral workplaces leveraging its dedicated workplace solution called Sustainability. It also has forged a strong partnership with Circular Computing for green lifecycle management which makes it an attractive option for enterprises interested in sustainability
- HCLTech has invested in building multiple delivery centers in nearshore regions such as Mexico, which enterprises from the North American region will find beneficial
- Clients have appreciated HCLTech’s capabilities to provide L1 and L2 level support across multiple geographies and languages
- Clients have highlighted HCLTech’s understanding of their requirements, client management, and responsiveness to requests as its key strengths

Limitations

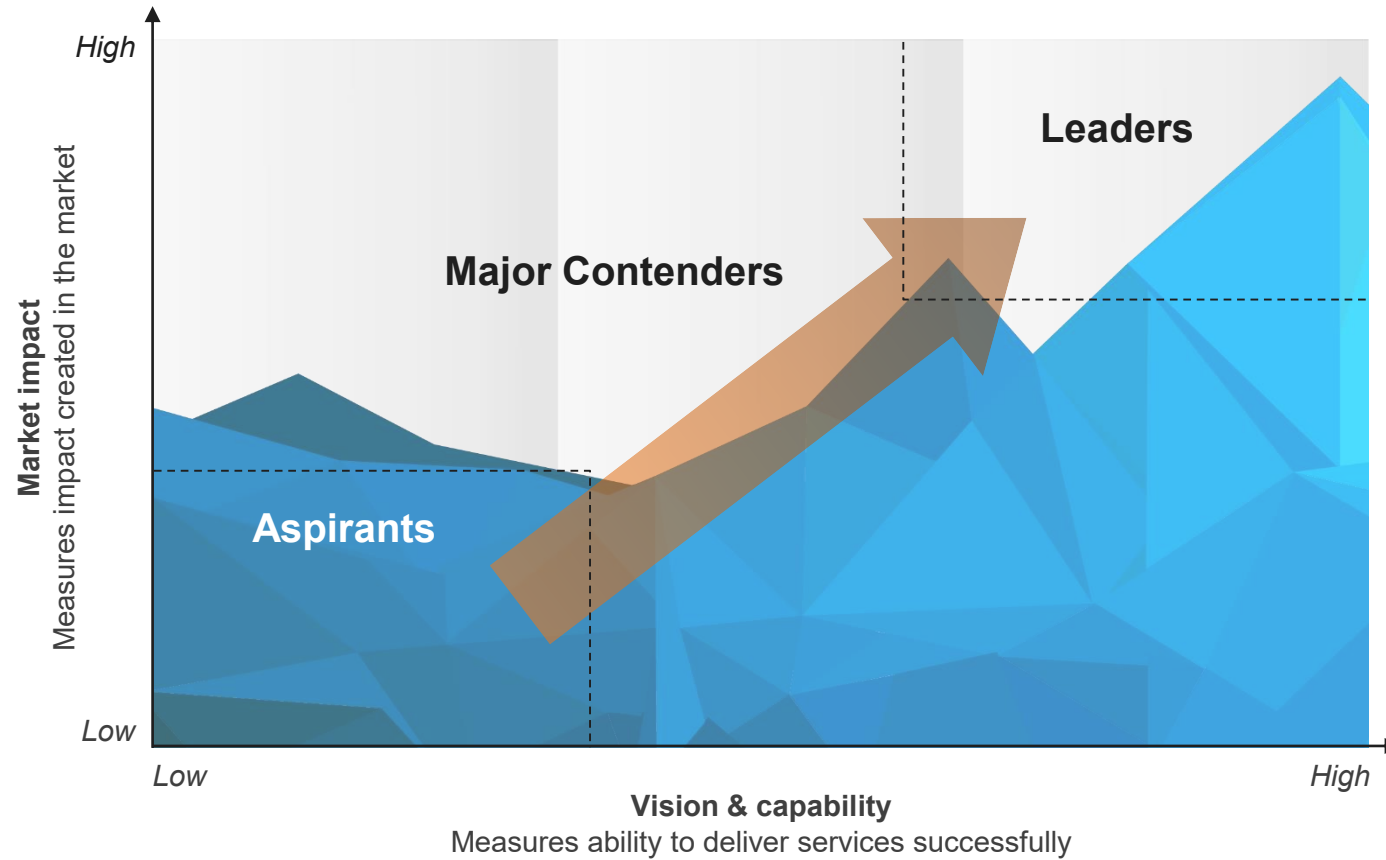
- HCLTech has a named IP for all major, prevalent, and emerging use cases with some IP such as OptiBot and Lucy garnering good enterprise mindshare. However, there have been multiple cases where existing and potential clients are unaware of its IP and capabilities
- HCLTech’s inclination to engage in extreme price aggression has, at times, resulted in understaffed teams and increased challenges in maintaining service delivery quality
- Enterprises from verticals such as telecom, media and entertainment, and public sector will need to do further due diligence due to its limited presence and proof points in these verticals
- Clients have highlighted HCLTech’s approach to workplace transformation as sales-oriented with a push for its available in-house solutions and offerings, rather than acting as a strategic partner to help them in navigating the best course for their transformation journey
- While delivery services for legacy technologies are satisfactory, clients have expressed displeasure over the lack of proactiveness from HCLTech in terms of proposing and providing innovative solutions
- Clients have also expressed concerns about the lack of coordination among the various teams providing services, along with a tendency to pass issues on to other teams

Appendix

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



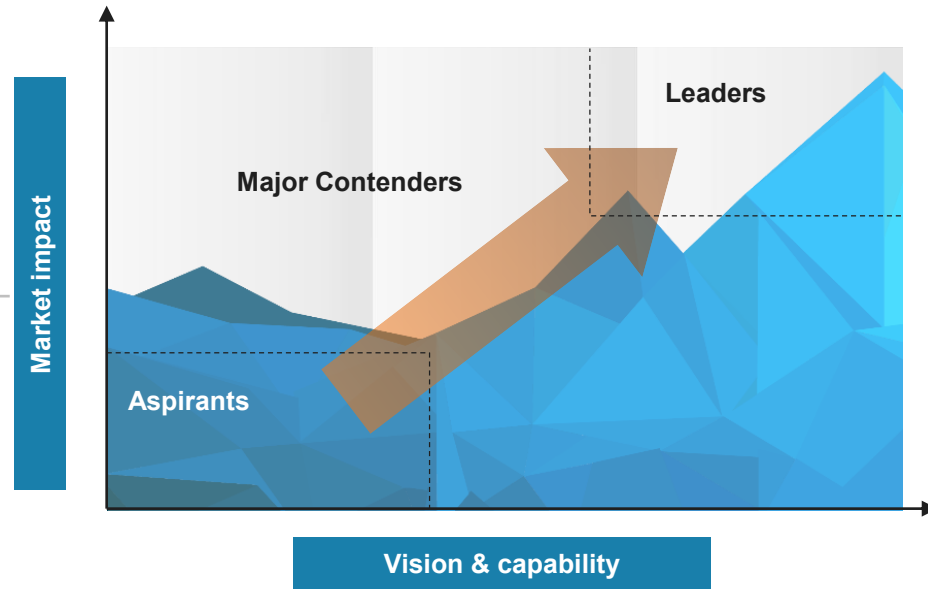
Everest Group PEAK Matrix



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



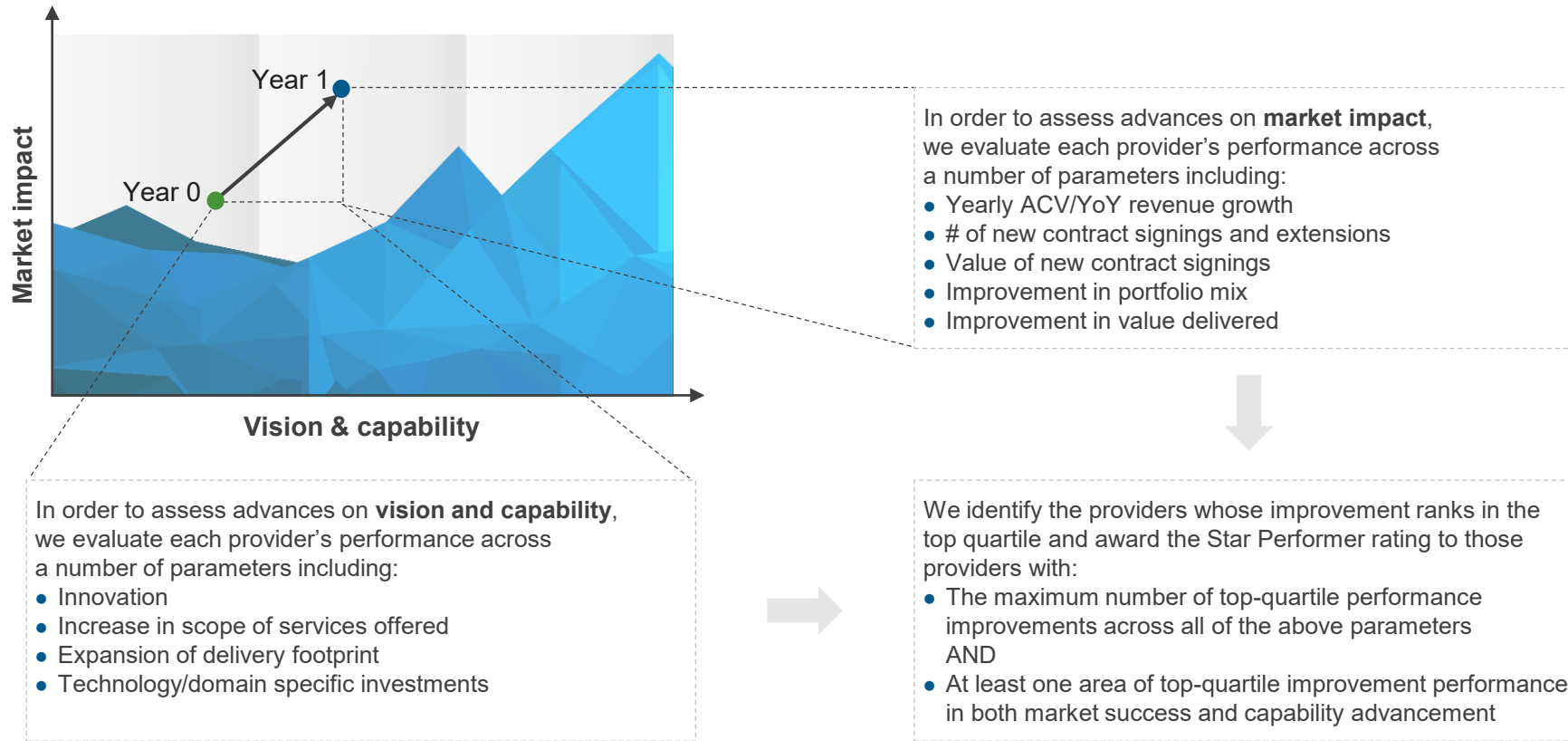
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 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 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 is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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