



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

Focus on NTT DATA
November 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

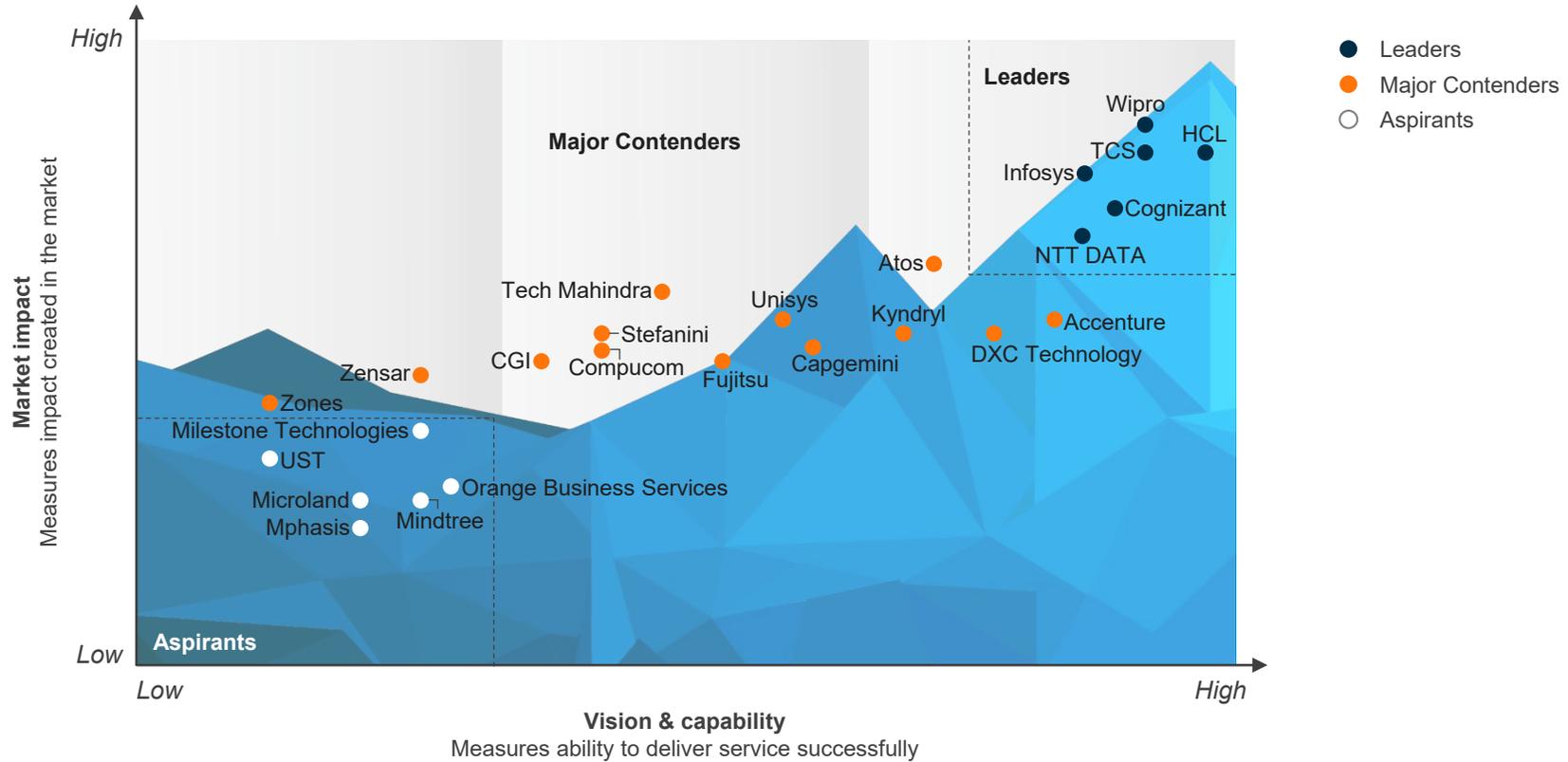
- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their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

Everest Group PEAK Matrix®

Digital Workplace PEAK Matrix® Assessment 2022 – North America | NTT DATA positioned as Leader



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – North America¹



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)

NTT DATA | digital workplace services profile – North America (page 1 of 4)

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

- NTT DATA's vision for digital workplace services, which revolves around uplifting user experience through a sustainable and secure workplace, has been resonating well with enterprises
- Enterprises seeking onshore support for digital workplace services in North America would find NTT DATA a good fit, as it has strong delivery capabilities in this region
- Enterprises looking to invest in immersive experience capabilities would benefit from NTT DATA, which has strengthened its capabilities after the acquisition of Vectorform
- It has robust capabilities within automation and is focused on enabling non-human resolutions for clients by leveraging its Nucleus platform for hyper-automation
- Enterprises can benefit from its balanced portfolio of solutions, which adequately covers high-growth segments such as mobility and UCC
- Enterprises looking to engage in next-generation themes would find NTT DATA attractive as it is investing in developing solutions across metaverse and immersive technology

Limitations

- NTT DATA's workplace portfolio is stagnating with skewed focus on automation-centric solutions and small wins, rather than big leap transformations, which might not appeal to enterprises looking for more futuristic and innovation-led transformative solutioning
- Enterprises looking for verticalized solutions might find its portfolio skewed, due to limited presence in verticals such as retail, electronics and high tech, energy and utilities, and telecom
- Small and midsize businesses should run further due diligence on NTT DATA, given its higher focus on larger clients
- Some clients have highlighted the need to be more proactive in closing deals with an outcome-based pricing model
- It needs to do a better job at building awareness around its solutions and capabilities as even some of the current clients were unaware of its scope of coverage and latest capabilities

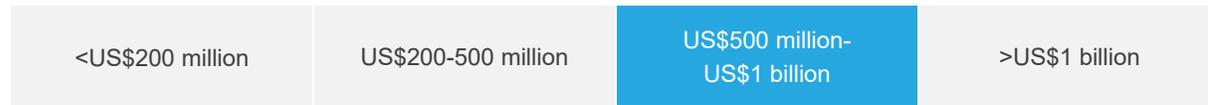
NTT DATA | digital workplace services profile – North America (page 2 of 4)

Overview

Digital workplace services vision

NTT DATA's vision for workplace services is focused on transforming its clients' experience through holistic business service support as opposed to stand-alone IT services. For the North American market, its solutions are designed to attract and retain employees by elevating their experience. This means providing services that enable convenience, collaboration, and anywhere any device accessibility with embedded security and convenient validation options. For the North American market, it also focuses on user convenience and continuous improvement by increasing automation, utilizing predictive analytics, improving service adoption, and embedding DevOps. Its goal is to take North American clients on an XLA-maturation journey by harnessing data via its data intelligence fabric (Nucleus) to unlock hidden potential and identify opportunities for hyper-automation.

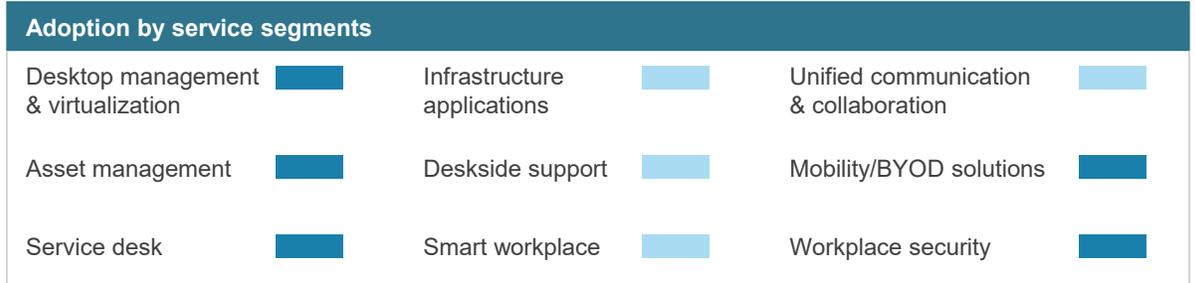
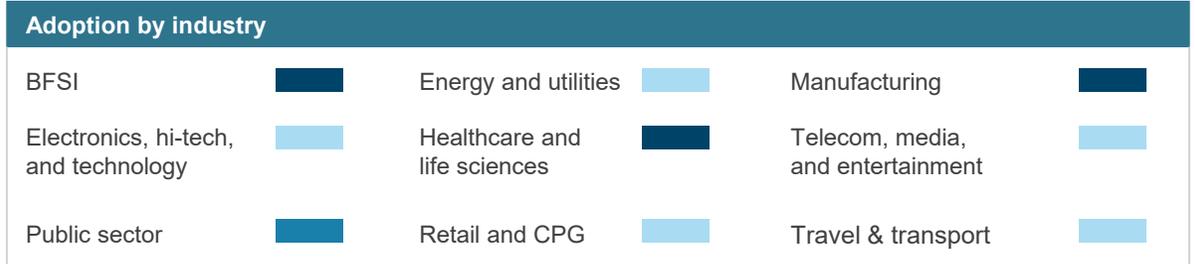
Digital workplace services revenue (2021)



Scope of coverage

- Number of users served through service desk support – ~5.7 million
- Number of service desk contacts managed – ~14.4 million
- Number of deskside/break/fix incidents managed – ~150,000
- Total number of end-user devices managed – ~3.8 million

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



Source: Everest Group (2022)

NTT DATA | digital workplace services profile – North America (page 3 of 4)

Solutions and partnerships

Proprietary digital solutions (representative list)

Solution	Details
Nucleus Platform	<ul style="list-style-type: none"> • Enables analytics-driven predictive business actions by consolidating costs and operational performance through data repositories, which results in perpetual environmental improvements including automation effectiveness • Combines IT marketplace, consumption governance, and procurement/provisioning engines through automation
NIA Assist	This solution is a series of cognitive bot capabilities to assist humans in a multi-channel environment to easily find content, help, and problem resolution.

Partnerships (representative list)

Partner name	Details
Technology partners	<ul style="list-style-type: none"> • Leverages over 50 strategic partners to provide automation solutions, baseline operations, ITSM, service integration, and security services to 100+ clients • Some of these partners include Microsoft, VMware, Nextthink, IPSof, ServiceNow, SAP, Oracle, and BMC
Co-development partners	<ul style="list-style-type: none"> • Leverages over 40 partners for co-development. It evaluates/investigates these partnerships for unique capabilities and specialized IP for high-value use cases • NTT DATA shares the details of these relationships with customers as applicable under NDA
Staffing partners	<ul style="list-style-type: none"> • Leverages over 80 regional delivery partners to provide field support for key geographies where local services are beneficial through these partnerships • Leverages local partnerships when mandated by the client or government. NTT DATA shares the details of these relationships routinely with customers as applicable under NDA

NTT DATA | digital workplace services profile – North America (page 4 of 4)

Investments and recent activities

Investments (representative list)

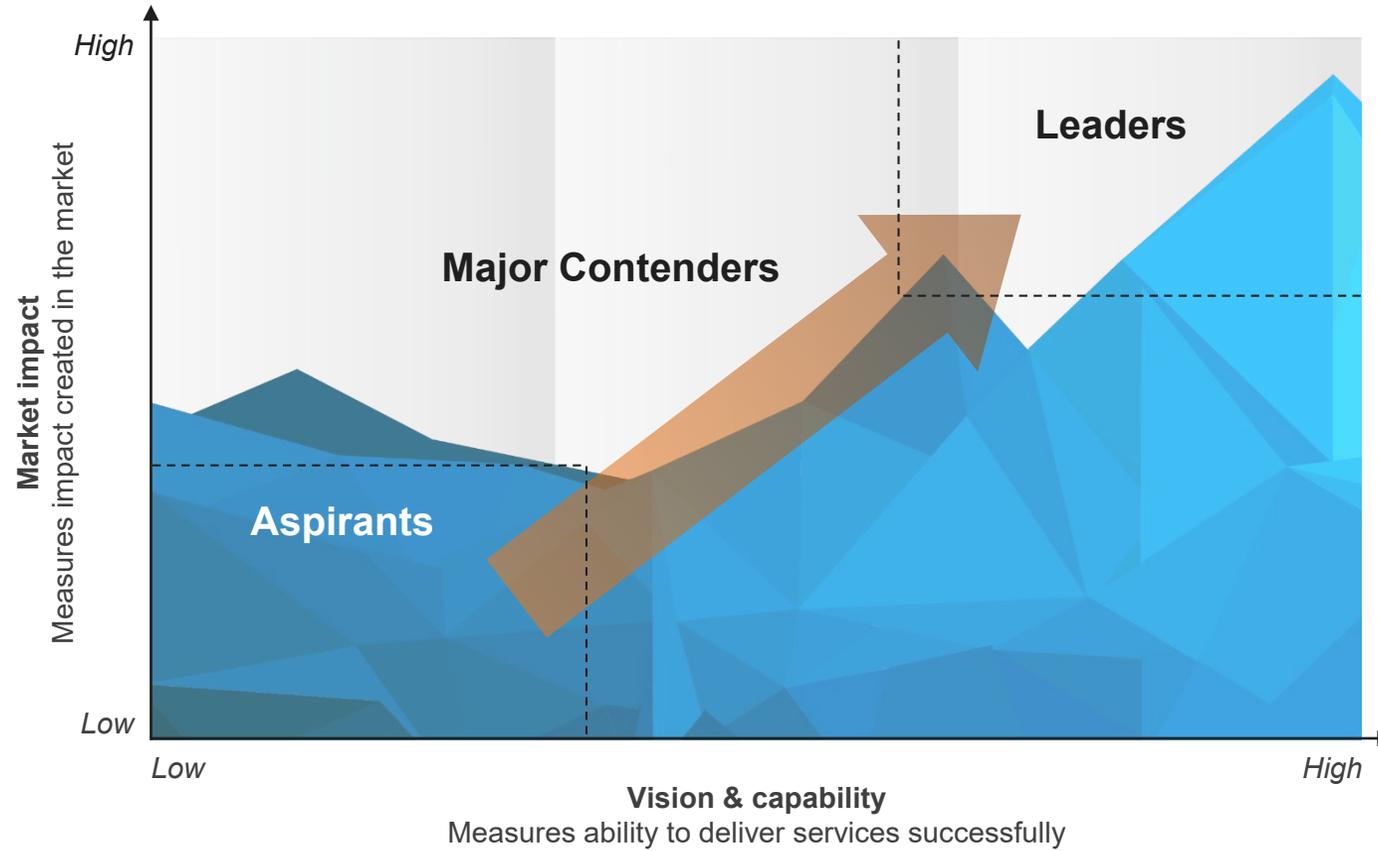
Investment name	Details
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- | | |
|---------------------------|---|
| Acquisitions | <ul style="list-style-type: none">• Acquired Chainalytics, which provides data-driven supply chain consulting services to help companies capture the maximum value from their supply chain. NTT Data claims that this helps power its DaaS strategy, as the supply chain poses as a major obstacle for many GSIs• Acquired Vectorform, which invents digital products and experiences for the world's leading brands, with a focus on immersive technologies, mobile experiences, IoT, smart homes, connected vehicles, and wearable technologies. This enables it to enhance its experience management of both the physical workplace (IoT) and the virtual workplace (metaverse) |
| Innovation/
investment | <ul style="list-style-type: none">• Invested in Nucleus: deep focus to centralize digital workplace experience score that will form the basis for XLA KPIs by data ingestion into the Nucleus Data Intelligence Fabric• Invested in automation/optimization of field service scheduling, resource skills, and resource management• Enabled consumer-grade shopping experiences by providing employees with a self-service shopping portal for end-user IT devices to work |

Appendix

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

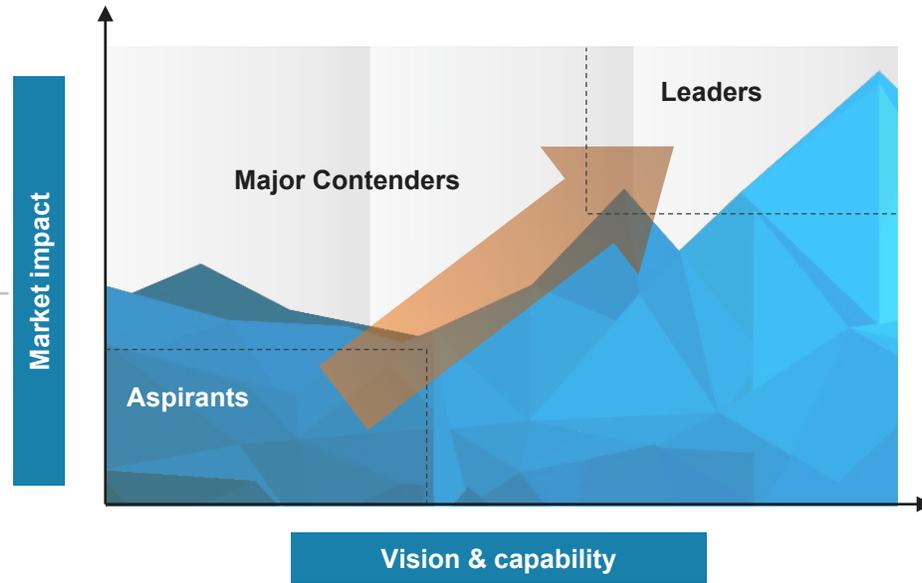
Everest Group PEAK Matrix



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

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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