



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

Focus on DXC Technology
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 Europe has distinct characteristics such as significantly higher focus on employee experience and engagement compared to other geographies, preference for local service delivery model, high language variations within regions, focus on ESG-centric initiatives, strong need for cultural alignment, and high variance in region-specific demands
- In this research, we present an assessment of 22 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2022 – Europe](#).

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 European region.

This report assessed the following 22 service providers on the digital workplace services PEAK Matrix :

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

Scope of this report



Geography
Europe



Service providers
22 leading digital workplace
service providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® (Europe) characteristics

Leaders:

Accenture, Atos, Capgemini, DXC Technology, HCL Technologies, 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, showcase 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:

Cognizant, Computacenter, Fujitsu, Getronics, Infosys, Kyndryl, NTT DATA, Orange Business Services, Stefanini, Tech Mahindra, and Unisys

- 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, Mindtree, UST, and Zensar

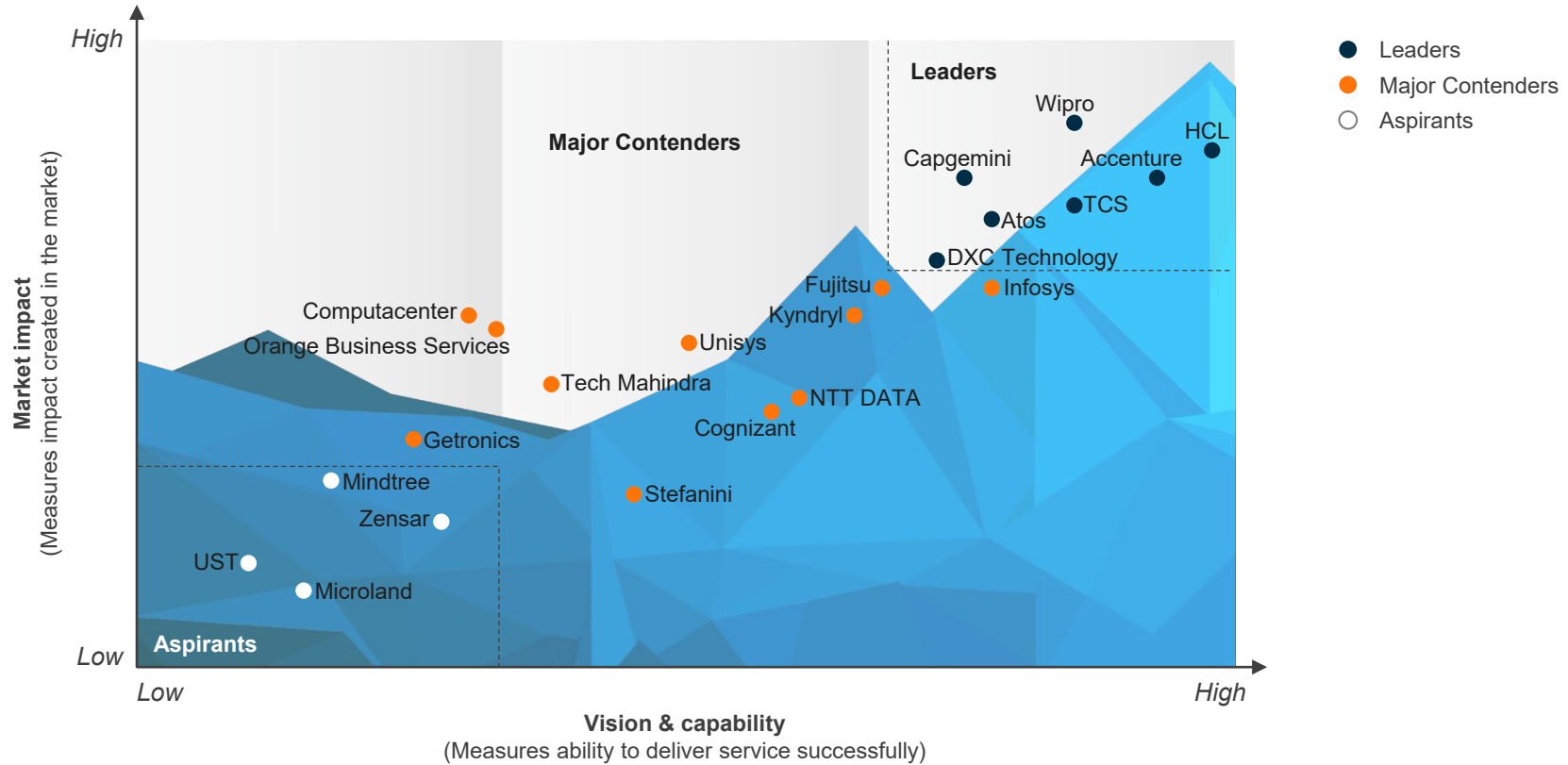
- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their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

Everest Group PEAK Matrix®

Digital Workplace PEAK Matrix® Assessment 2022 – Europe | DXC Technology positioned as Leader



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – Europe¹












¹ Assessments for Capgemini, Computacenter, Fujitsu, Getronics, 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)

DXC Technology | digital workplace services profile – Europe (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

- DXC Technology has a strong employee experience-centric narrative and focus on XLAs, well-supported by investments in relevant IP such as Uptime
- Enterprises can benefit from its strong network with vendors such as Microsoft, Citrix, and Dell, which strengthens its solutions. It has also integrated Qualtrics' EmployeeXM™ experience management platform in its Modern Workplace service solution
- Large enterprises spread across multiple geographies, looking to outsource their end-to-end managed workplace services, will find DXC suitable due to its vast scale and size
- It has managed to stabilize its attrition rate through investment in hiring and upskilling its talent, also enabling it to deliver complex and transformation-oriented services
- Enterprises looking to implement metaverse-led solutions will find DXC relevant, given its recognition as an official sponsor for Microsoft HoloLens Mixed Reality Partner Program
- Clients have appreciated the improvement in service delivery over the last 12-18 months

Limitations

- In comparison to its peers, DXC Technology lacks referenceable clients who can act as brand ambassadors and vouch for its quality of services
- It needs to reduce its dependence on deskside services to align its portfolio with market demand
- Given DXC Technology's focus on legacy infrastructure services, learning from other client engagements and co-innovation opportunities are limited
- Some clients have highlighted that it needs to improve on its quality of talent and focus on building project-ready resources for faster onboarding in critical projects
- Enterprises seeking mature industry-contextual and verticalized solutions or use cases may not find DXC Technology to be a suitable partner
- Multiple clients have highlighted that DXC Technology needs to have better alignment between its pitch, solutioning, pricing, and delivery

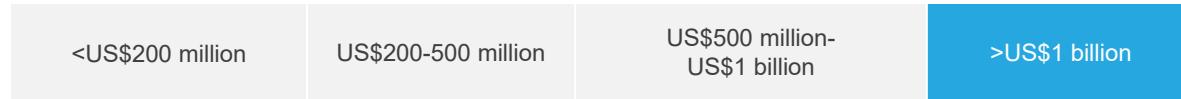
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Overview

Digital workplace services vision

DXC Technology’s modern workplace vision puts the employee experience first to achieve new levels of productivity, engagement, and collaboration, in order to help enterprises win the war for talent. With a diverse Fortune 1000 customer base and a global footprint, it leverages its insights to create a personalized employee experience while driving economies of scale. DXC Technology claims that it relentlessly focuses on the customer’s employee experience while providing the outcomes that complex businesses need to achieve their goals. It leverages the DXC Uptime™ solution to transform how employees interact with IT while at the same time harnessing automation, process efficiencies, and global scale to continuously improve and innovate for its customers.

Digital workplace services revenue (2021)

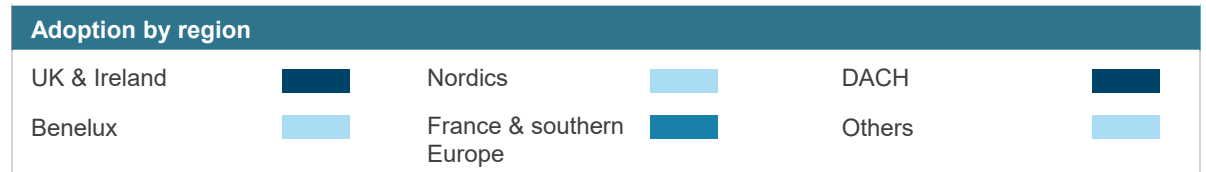
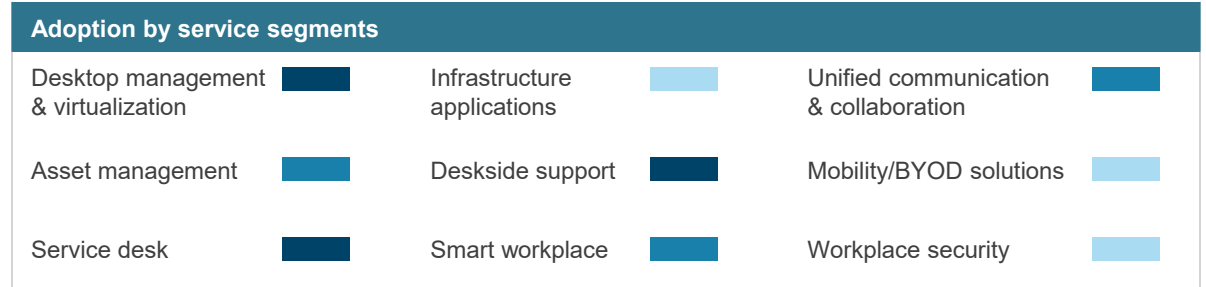
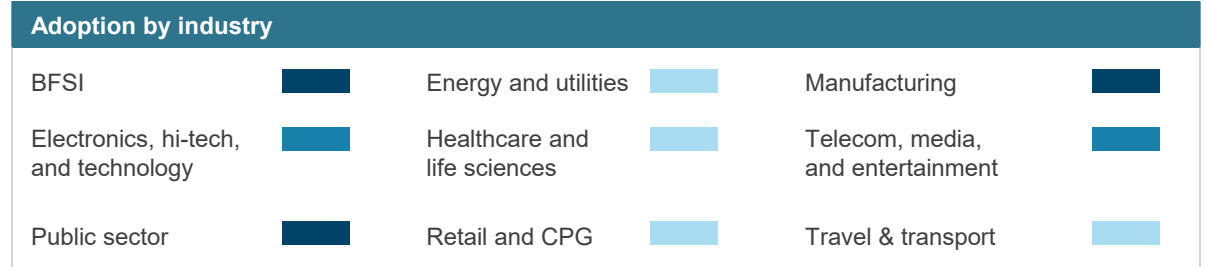


Scope of coverage

- Number of users served through service desk support – ~2.8 million
- Number of service desk contacts managed – ~15.2 million
- Number of deskside/break/fix incidents managed – ~5.2 million
- Total number of end-user devices managed – ~4 million

Source: Everest Group (2022)

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



DXC Technology | digital workplace services profile – Europe (page 3 of 4)

Solutions and Partnerships

Proprietary digital solutions (representative list)

Solution	Details
Uptime™	<ul style="list-style-type: none"> This solution helps employers create a more efficient workplace with a better employee experience, which allows them to reduce turnover and absenteeism DXC Technology claims that this platform increases job applications by 60%, productivity by 30%, and reduces IT support costs by 30% DXC Technology claims that this platform automates up to 80% of service requests, reduces onboarding time by over 80%, and reduces IT support costs by 30% DXC Technology is leveraging DXC Uptime™ to proactively automate incidents before they occur, thus effectively eliminating 50%+ of the incidents arriving at the service desk, increasing employee productivity by over 10% and employee satisfaction by over 14% DXC Technology's Uptime™ experience platform delivers the portfolio of XLAs that DXC has created to measure services delivered from a user experiential perspective

Partnerships (representative list)

Partner name	Details
Microsoft	<ul style="list-style-type: none"> Has been a global strategic partner of Microsoft for over 30 years and has won several Microsoft partner awards including the Gold Partner designation in 18 of 18 categories Provides an array of services around Microsoft products such as Microsoft 365, Azure, Dynamics 365, and Windows 10. DXC is also one of the 35 Microsoft partners to have achieved Azure Expert Managed Service Provider (MSP) status
Dell	<ul style="list-style-type: none"> Dell Partner of the Year and Titanium Partner. Leverages Dell as hardware partner for providing end-user devices, factory services, and on-premise virtual desktop backend configurations Certifies 10,000 staff annually on the Dell technology
HP	Claims to be the number one deployer of HP laptops. Expedites digital transformation to create an adaptable and secure work environment by integrating HP's offerings of printers, copiers, laptops, and other similar services with DXC Technology's solutions for data management, cloud, mobility, and security
Lenovo	Uses Lenovo as hardware partner for providing end-user devices and factory services
IBM	Uses IBM as a hardware partner for providing end-user devices and factory services
ServiceNow	Collaborates with ServiceNow for providing ITSM solutions to clients. Completed over 4,000 ServiceNow migrations
VMware	Leverages VMware as a service partner for providing virtual desktop service (cloud and on-premise)
Amazon	Leverages Amazon as a service partner for IT service desk call center platform
Apple	Is an Apple Managed Service Provider and offers Apple Professional Services and Apple device and life cycle management and maintenance services

Other digital workplace partnerships include Boomi, Flexera, Citrix, Qualtrics, Expressive, Cisco, and 1E.

DXC Technology | digital workplace services profile – Europe (page 4 of 4)

Investments and recent activities

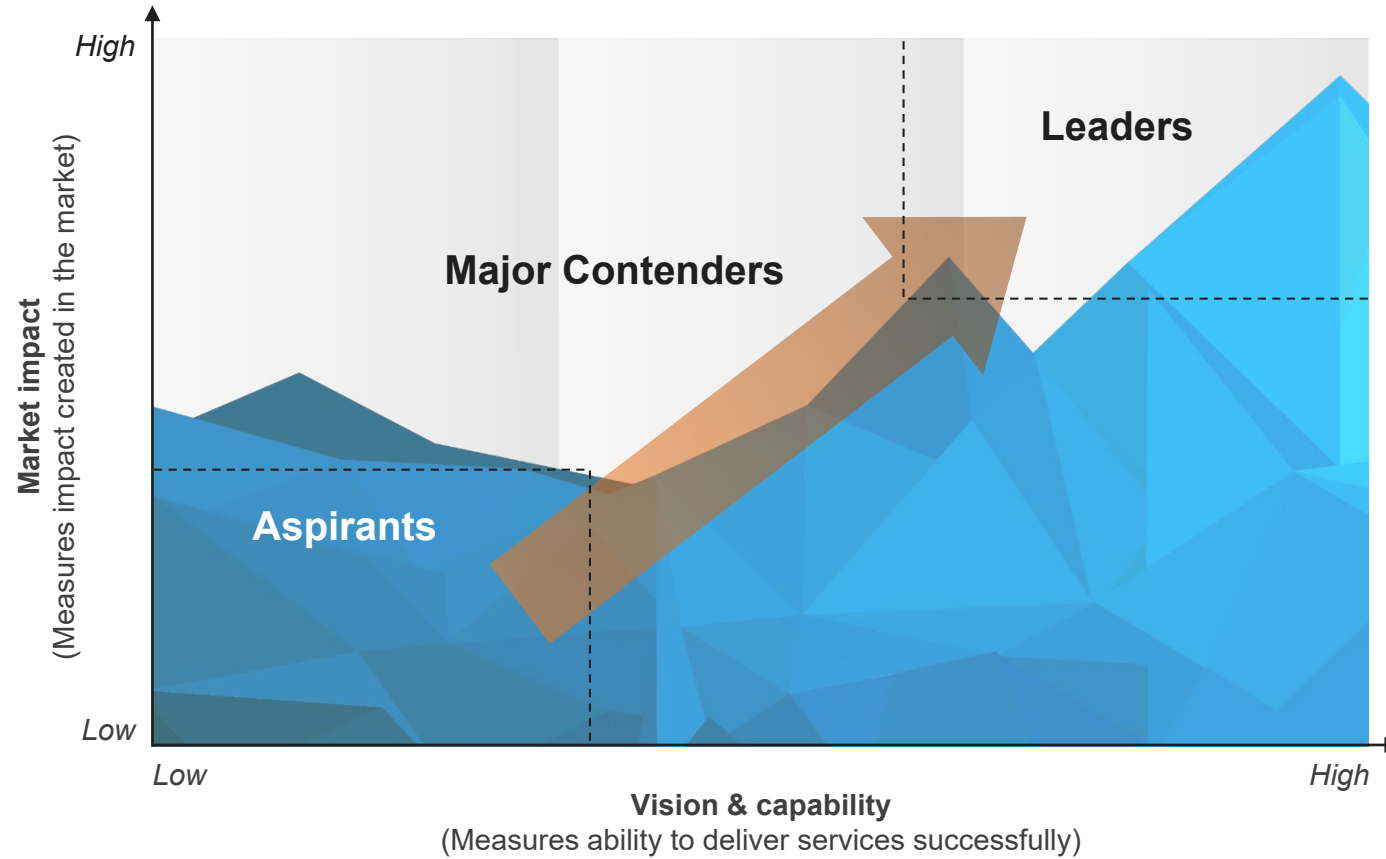
Investments (representative list)

Investment name	Details
Apple GTM Partnership	New partnership driving user choice. Refresh the overall market messaging
VDA Modernization	Use WVD to drive customer transformations and new use cases
DXC Uptime™	Creation of a new experience platform that proactively creates automation and fixes to create a new unified and consumer-based work experience
Talent/Training	Investment in talent, technology, and organization to create a more agile development environment. This then drives more innovation and a robust roadmap that allows DXC to better anticipate customer's needs. DXC also works with customers to help them modernize their environment and keep them on a continuous modern workplace journey
Automation	Accelerated automation to proactively fix issues and automate top customer issues to reduce cost and complexity for customers. Create and deploy new automation capabilities to enhance the user experience while driving a higher level of efficiency
UCaaS Innovation (CoEs/digital labs/innovation hubs)	Investment in new talent, technology, skill sets, and governance on the alignment to modernize communications. Enable skill investment and offerings around Microsoft Viva, Power Platform, and the business process. Enhance customer experience and collaboration through new technology and services
Experience management	Create and utilize XLA framework and process to provide better experience and optimize processes
Collaboration - Smart Working Spaces	Create optimize collaboration experience for employees in the office or in remote locations to provide simple and easy to use tools and integrated processes
Virtual agent	Next-generation conversational agent using multiple AI systems to provide a personalized automated support service
Innovation	<ul style="list-style-type: none"> • Creation and development of modern workplaces and a new digital studio where DXC develops, tests, and showcases the next set of innovations in the into portfolio • Continued investment against an optimized plan to retool and integrate engineering tools to accelerate development time inside an agile framework • Next-generation digital user experiences including AR/VR and wearables as well as workplace IoT platforms

Appendix

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

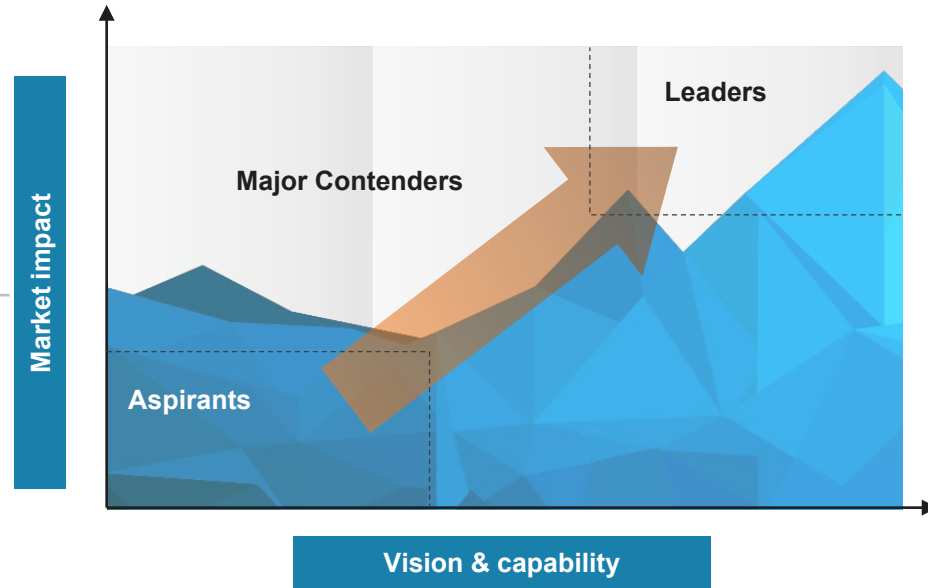
Everest Group PEAK Matrix



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.



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