

# Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe

September 2023: Complimentary Abstract / Table of Contents



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## Digital Workplace

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- ▶ Asset and Wealth Management
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- ▶ Healthcare Business Process
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- ▶ Insurance Business Process
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- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
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- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
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## Introduction

- Despite the global macroeconomic conditions resulting in increasing cost pressures and Return on Investment (RoI) scrutiny, enterprise demand for digital workplace services remains high. The recent technological advances and digital transformations have led to the third wave of value-based transformation, where enterprises recognize value realization, productivity, and cost optimization to be critical to tackle and survive the slowdown. At the same time, industry-specific workplace accelerators, AI-backed solutions, and product-centric operations are gaining traction among enterprises
- In the European digital workplace market, enterprises are prioritizing Employee Experience (EX), a mix of global and local service delivery, and higher cultural alignment while also dealing with higher region-specific nuances, increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes
- The digital workplace service providers are focusing on strengthening their geographically contextualized and industry-specific capabilities to assist enterprises in their digital workplace engagements. Additionally, providers are seeking to enhance their consulting and advisory capabilities in an effort to position themselves as strategic partners to their enterprise customers
- In this research, we present an assessment and detailed profiles of 22 digital workplace services providers featured on the digital workplace services PEAK Matrix® – Europe

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace services providers, client reference checks, and ongoing analysis of the digital workplace services market.

**This report includes the profiles of the following 22 leading service providers featured on the digital workplace services PEAK Matrix® – Europe:**

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

### Scope of this report



**Geography**  
Europe



**Providers**  
22 leading digital  
workplace service  
providers



**Services**  
Digital workplace  
services

## Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 22 SPs featured on the Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe. The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace services providers, client reference checks, and ongoing analysis of the digital workplace services market.

Some of the findings in this report, among others, are:

### Everest Group Digital Workplace Services PEAK Matrix® Assessment

This report includes the profiles of the following 22 leading SPs featured on the Digital Workplace Services PEAK Matrix® :

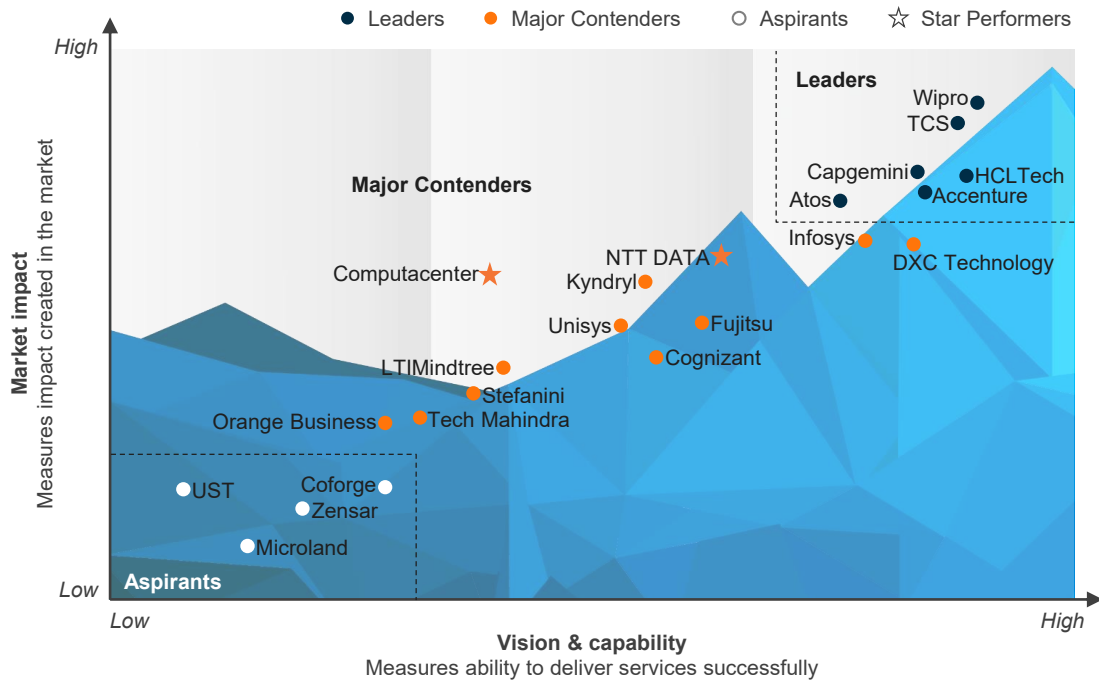
- **Leaders:** Accenture, Atos, Capgemini, HCLTech, TCS, and Wipro
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- **Aspirants:** Coforge, Microland, UST, and Zensar

### Service provider characteristics

- Leaders continue to showcase expertise across the workplace segments with a highly balanced portfolio, coherent vision, credible suite of IP, and contextualized solutions. They are also focusing their services on enhancing the EX along with making headway into disruptive themes such as generative AI to optimize their operational efforts and workflows in client’s environments
- Major Contenders are augmenting their workplace capabilities with continued investments in developing internal IP, expanding their partnership network, and delivery capabilities; however, their service portfolio and end-to-end workplace capabilities have some visible gaps
- Aspirants are approaching the market with a higher focus on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market
- Star Performers have demonstrated the most improvement over time, based on their relative YoY improvement, on the PEAK Matrix®

# This study offers four distinct chapters providing a deep dive into key aspects of digital workplace services market in Europe; below are three charts to illustrate the depth of the report

Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe<sup>1,2,3,4</sup>



- Assessments for Fujitsu, Orange Business, 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
  - Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
  - Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
  - 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)

Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	●	●	●	●	●	●	●	●	●
Provider 2	☐	●	●	●	☐	●	●	●	●
Provider 3	☐	●	●	●	●	●	●	●	●
Provider 4	☐	●	●	●	●	●	●	●	●
Provider 5	●	●	●	●	●	●	●	●	●
Provider 6	●	●	●	●	●	●	●	●	●
Provider 7	●	●	●	●	●	●	●	●	●
Provider 8	●	●	●	●	●	●	●	●	●
Provider 9	☐	●	●	●	●	●	●	●	●

Everest Group's remarks on providers

Illustrative example

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**

- Provider 1, has a robust delivery presence in Europe with multiple delivery centers across UK, enabling it to service client requirements efficiently
- Enterprises seeking a partner to enable sustainability-focused workplace initiatives will find it relevant, considering the company-level mandates and ESG objectives of European enterprises

**Limitations**

- Enterprises seeking mature industry-contextual and verticalized solutions or use cases, may not find Provider 1 to be a suitable partner
- Enterprises looking for innovative pricing constructs might not benefit from Provider 1 as it has a disproportionate percentage of deals with traditional pricing constructs

# Research calendar

## Digital Workplace

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Workplace Communication and Collaboration (WCC) Services – Provider Compendium 2023	January 2023
Workplace Communication and Collaboration (WCC): Enabling Employee Engagement and Belongingness with Metaverse Adoption	March 2023
Digital Workplace Enterprise Pulse 2023: from Provider to True Partner – the Road not Taken	March 2023
Workplace Employee Experience Management (WEEM) Platforms PEAK Matrix® Assessment 2023	April 2023
Workplace Employee Experience Management (WEEM) Platforms – Provider Compendium 2023	July 2023
Digital Workplace State of the Market: Are Value Leakages Sinking Your Workplace Strategy?	July 2023
Empowering the Future Workforce: The Transformative Impact of Generative AI	August 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – North America	September 2023
<b>Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe</b>	<b>September 2023</b>
Digital Workplace Services Provider Compendium 2023 – North America	Q3 2023
Digital Workplace Services Provider Compendium 2023 – Europe	Q3 2023
Exploring the Business Case for Workplace Transformation	Q3 2023
Moving from SLAs to XLAs: Market Report	Q4 2023
Unified Communication & Collaboration (UCC) Specialist Services Peak Matrix® Assessment 2023	Q4 2023
Unified Communication & Collaboration (UCC) Specialist Services Provider Compendium 2023	Q4 2023

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