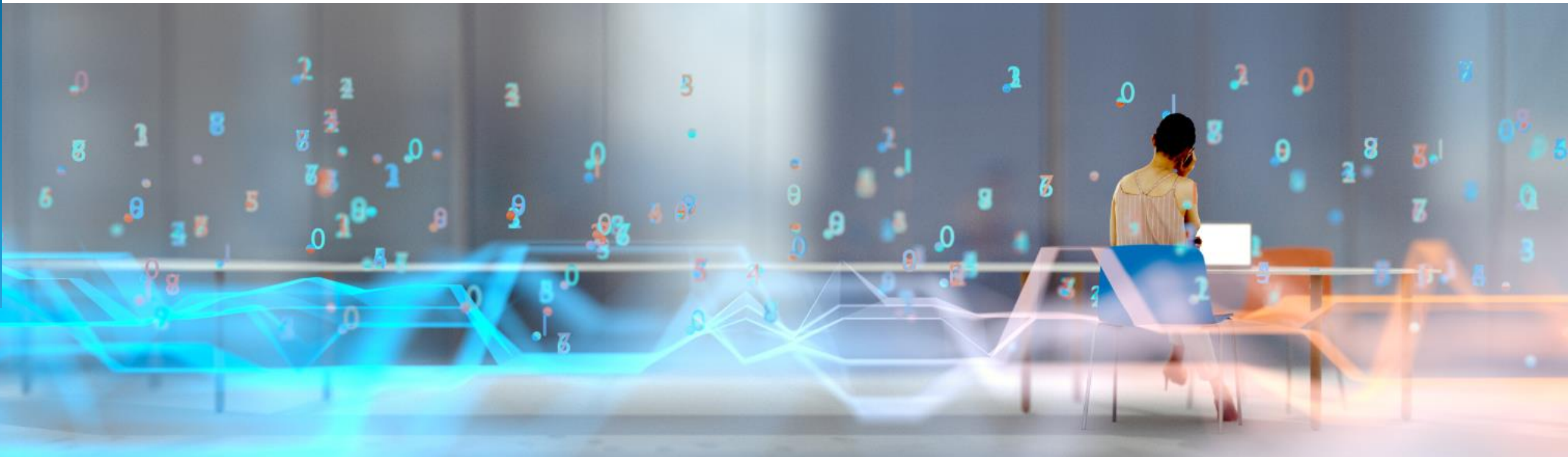


# Digital Workplace Services – Provider Compendium 2023 – Europe

October 2023: Complimentary Abstract / Table of Contents



# Our research offerings

This report is included in the following research program(s):

## Digital Workplace

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Services Executive Insights™
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
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- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
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risk, technologies

Locations: costs, skills,  
sustainability, portfolios

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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.

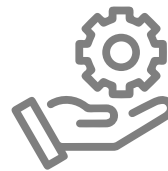
**This report includes the profiles of the following 22 leading service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe](#):**

- **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

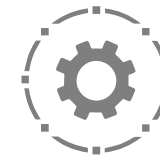
### Scope of this report



**Geography**  
Europe



**Providers**  
22 leading digital  
workplace service  
providers



**Services**  
Digital workplace  
services

## Overview and abbreviated summary of key messages

In this report, we assess 22 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® Assessment – Europe and highlight the strengths and limitations of each service provider. Each profile offers a comprehensive picture of the digital workplace service provider’s vision and strategy, scope of services offered, digital workplace offerings, innovation and investments, partner network, and strengths and limitations.

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

### Digital Workplace Services – Provider Compendium 2023 – Europe

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

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

### Service Provider Characteristics

- Leaders 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
- Major Contenders have built meaningful capabilities to deliver workplace services by 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, however, their service portfolios are not as balanced and comprehensive as those of Leaders
- Aspirants are at a relatively nascent stage and is not a leading revenue generator for such service providers, but they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market
- Star performers are based on Year-on-Year (YOY) movement of different service providers on the PEAK Matrix®. Everest Group identified three service providers as the “2023 Digital Workplace Services market Star Performers for Europe”

# The digital workplace service provider compendium report has over 22 service provider profiles

Digital Workplace Services – Provider Compendium 2023 – Europe

## Provider profile (page 1 of 5) Overview

**Digital workplace services vision**  
XYZ's digital workplace services focuses on helping organization experiences and build a resilient and sentient enterprise by digitizing workspaces, and prioritizing organizational well-being. XYZ enabled, persona-based, and industry-aligned. It is also focused on continuously evolves to deliver proactive analytics & insights, SLAs to Experience Level Agreement (XLA/BLA) mobility experience anytime, anywhere, and on any device.

**Digital workplace services revenue (2022)**

|                  |                     |                  |
|------------------|---------------------|------------------|
| <US\$200 million | US\$200-500 million | US\$500 million+ |
|------------------|---------------------|------------------|

Source: Everest Group (2022)  
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Digital Workplace Services – Provider Compendium 2023 – Europe

## Provider profile (page 2 of 5) Solutions

**Proprietary digital solutions (representative list)**

| Solution | Details  |
|----------|--|
| XYZ      | The solution automates the as                                |
| XYZ      | The system provides visual co forecasts service desk costs a |
| XYZ      | An online marketplace for wor vendor/device / user location, |
| XYZ      | Converses with end users usir situational awareness          |
| XYZ      | Orchestrates patch managem                                   |

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Digital Workplace Services – Provider Compendium 2023 – Europe

## Provider profile (page 3 of 5) Partnerships

**Partnerships (representative list)**

| Partner name | Details  |
|--------------|--|
| XYZ          | <ul style="list-style-type: none"> <li>As a XYZ Managed Service unified collaboration service</li> <li>Included in the XYZ and XY</li> </ul> |
| XYZ          | <ul style="list-style-type: none"> <li>Premier professional service</li> <li>Leverages unified workplac</li> </ul>                           |

Other digital workplace partnerships include XYZ, XYZ, XYZ, X

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Digital Workplace Services – Provider Compendium 2023 – Europe

## Provider profile (page 4 of 5) Investments and recent activities

**Investments (representative list)**

| Investment name            | Details  |
|----------------------------|--|
| Innovation and Investments | <ul style="list-style-type: none"> <li>Invested in setting up and la</li> <li>Invested in elevating use ca</li> <li>Invested in building XYZ in (</li> </ul> |
| Acquisition                | <ul style="list-style-type: none"> <li>Acquired XYZ for consulting</li> <li>Acquired XYZ for AI-power</li> </ul>   |

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Digital Workplace Services – Provider Compendium 2023 – Europe

## Provider profile (page 5 of 5) Everest Group assessment – Aspirant

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**

- XYZ has undergone organization restructuring with the aim of focusing on high-growth segments, and is trying to build an app and cloud-led workplace narrative to position itself as a strategic partner of choice for cloud-led workplaces
- XYZ has bolstered its workplace consulting expertise through strategic acquisitions and investments. As a result of these moves, the company has achieved tangible success, particularly in the area of experience transformation services
- Enterprises would benefit from its strong focus on delivering value via total experience management, augmented through offerings such as XYZ and XYZ

**Limitations**

- XYZ IP and solutioning approach lacks robustness and expertise. While a lot of solutioning and IP may work in specific scenarios with less than expected benefits in other cases
- XYZ needs to embed client context in its pitch, and focus on client-centric transformation
- XYZ has a greater focus on large deals which might not resonate well with the small and midsize enterprises
- Enterprises from the telecom, media and entertainment, public sector, and travel and transport

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# 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      |
| Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe  | September 2023      |
| Digital Workplace Services Provider Compendium 2023 – North America   | September 2023      |
| <b>Digital Workplace Services – Provider Compendium 2023 – Europe</b>   | <b>October 2023</b> |
| Exploring the Business Case for Workplace Transformation  | Q4 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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