

Digital Workplace Services PEAK Matrix[®] Assessment 2024 – Europe

August 2024: Complimentary Abstract / Table of Contents

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- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
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- ▶ Life Sciences Business Process
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Introduction

Aftermath a period of substantial growth, the digital workplace market has witnessed a period of slowdown largely in turn to the prevalent global macroeconomic conditions which has accelerated the cycle of realization among enterprises who are now striving towards realization of their prior investments. However, the upcoming years are poised to witness a resurgence in enterprise investment trends. Notably, this resurgence will be marked by a heightened emphasis on a strategic combination of cost optimization and transformative initiatives. At the forefront of this paradigm shift stands the integration of generative Artificial Intelligence (gen AI), signifying a pivotal force driving change within the organizational landscape.

In the European digital workplace market, while there has been an increased focus on cost optimization, improving Employee Experience (EX) remains the top priority, with added focus on maintaining an ideal mix of global and local service delivery to deal with the cultural nuances. While also dealing with increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes

Digital workplace service providers are focusing on strengthening their geographical capabilities while offering enterprises industry-specific and persona-specific solutions that follow a security-by-default approach and ESG compliance. Additionally, providers are enhancing their consulting and advisory capabilities to position themselves as strategic partners to their enterprise customers.

In this research, we present an assessment of 23 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – Europe.

This report includes the profiles of the following 23 leading digital workplace providers featured on Digital Workplace Services PEAK Matrix – Europe:

- **Leaders:** Accenture, Capgemini, DXC Technology, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys
- **Aspirants:** Microland, Mphasis, UST, and Zensar

Scope of this report

Geography: Global

Industry: 23 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 23 SPs featured on the Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe. The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2024, 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 – Europe

- This report includes the profiles of the following 23 leading service providers featured on the Digital Workplace Services PEAK Matrix® – Europe:
 - **Leaders:** Accenture, Capgemini, DXC Technology, HCLTech, Infosys, TCS, and Wipro
 - **Major Contenders:** Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys
 - **Aspirants:** Microland, Mphasis, UST, and Zensar

Service provider characteristics

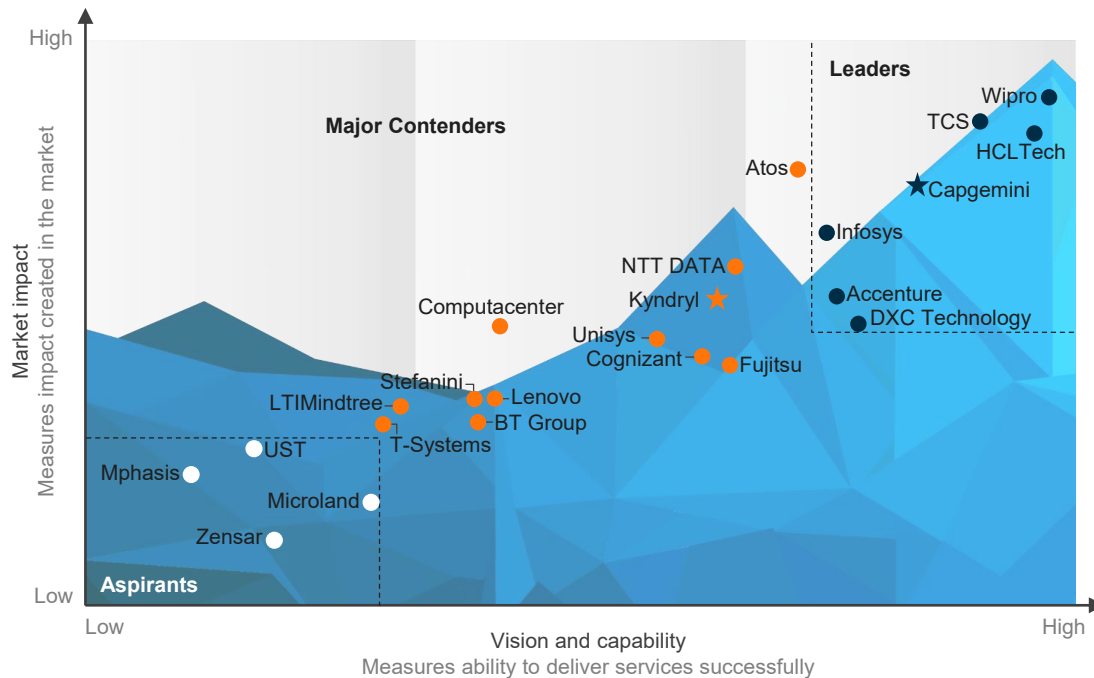
- Leaders continue to showcase high expertise and experience in delivering end-to-end workplace engagements, while maintaining client satisfaction through their balanced portfolio, coherent vision, and robust suite of agnostic and contextualized IP and solutions, supported by skilled talent and strong delivery capabilities
- Major contenders continue to strive to augment their broader workplace capabilities with targeted investments in developing their suite of IP and technology, delivery capabilities, and partnership ecosystem
- Workplace services capabilities of Aspirants show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies.

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

Everest Group PEAK Matrix® Assessment 2024

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



1 Assessments for Accenture, Microland, and Zensar excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and 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	○	○	●	○	●	○	○	●	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and 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	Current release	Planned
Reports title	Release date		
Digital Workplace Enterprise Pulse 2024: Top 5 Service Providers Delivering Superior Value across North America and Europe			February 2024
Unified Communication & Collaboration (UCC) Specialist Services Peak Matrix® Assessment 2024			March 2024
Contextualizing Your Workplace			March 2024
Digital Workplace State of the Market: Trust Loss in the More-with-Less Era			March 2024
Enterprise Playbook to Adopting Copilots			April 2024
Unified Communication & Collaboration (UCC) Specialist Services Provider Compendium 2024			June 2024
Conversational AI for IT Management Products PEAK Matrix® Assessment 2024			July 2024
Conversational AI Platforms for IT Management Provider Compendium 2024			August 2024
Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe			August 2024
Digital Workplace Services PEAK Matrix® Assessment 2024 – North America			Q3 2024
Digital Workplace Services for Mid-market Enterprises PEAK Matrix® Assessment 2024			Q3 2024
Digital Workplace Services Provider Compendium 2024 – North America and Europe			Q3 2024
Digital Workplace Services – Mid-market Enterprises Provider Compendium 2024			Q4 2024

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