



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

Focus on Infosys

October 2024



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 toward 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 the research, we present an assessment of 23 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe](#).

The full report includes the profiles of the following 23 leading digital workplace providers featured on the **Digital Workplace Services PEAK® Matrix Assessment 2024 – 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

Digital workplace services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, DXC Technology, HCLTech, Infosys, TCS, and Wipro

- 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
- Further these providers have been able to effectively leverage next-generation themes such as copilot and generative AI, backed by their expansive partnerships with technology vendors, niche providers, and start-ups to co-create solutions and engage in joint Go-to-market (GTM) in this space to deliver quick business outcomes to enterprises
- However, despite this, Leaders face tough competition from Major Contenders in both retaining and winning new deals and must continue to enhance their capabilities to offer clients unique benefits

Major Contenders

Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys

- While these providers 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, their end-to-end workplace services capabilities continue to have some visible gaps
- Further, while these providers have built meaningful capabilities across workplace segments, their portfolio and delivery capabilities are not as balanced as those of Leaders, which is reflected in their relative market success
- However, these providers continue to make targeted investments in enhancing their talent skills, delivery frameworks, internal IP, and partnerships to address capability gaps, positioning themselves as strong contenders to Leaders in workplace services

Aspirants

Microland, Mphasis, UST, and Zensar

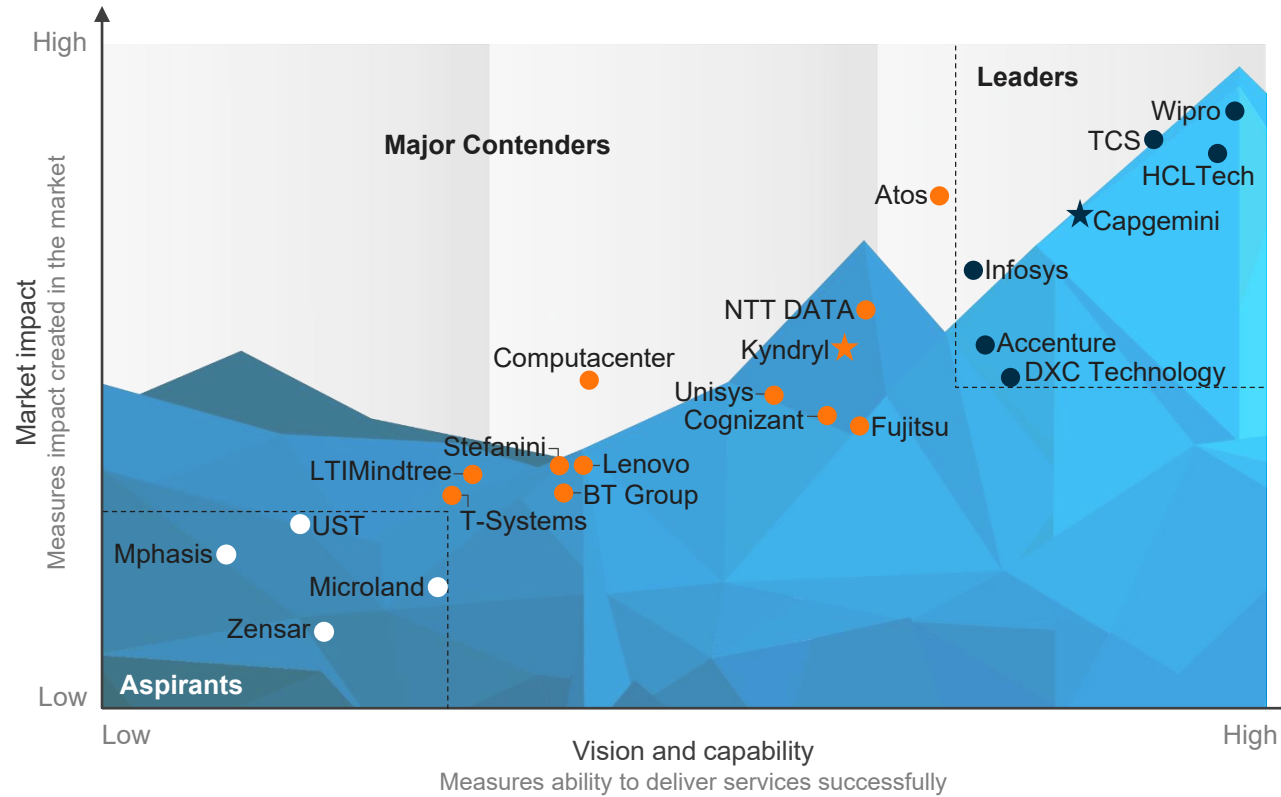
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership to strengthen and to help generate major workplace revenue and improve market positioning

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe | Infosys is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe¹

- 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)

Infosys profile – Europe (page 1 of 5)

Overview

Digital workplace services vision

Infosys' vision for the future of work is to humanize workplace experiences to build a resilient and sentient enterprise that fosters sustainability and amplifies human potential through AI. Infosys aims to focus its digital workplace services business on investing, building, and scaling up AI-first capabilities; its experience design capabilities; employee experience platforms and services; security and privacy services; Cognitive AIOps; and strategy and advisory capabilities.

Digital workplace services revenue (CY 2023)

<US\$200 million	US\$200-500 million	US\$500 million-1 billion	>US\$1 billion
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Digital workplace revenue mix (CY 2023)

● Low (0%) ● Medium (10-20%) ● High (>20%)

By industry

- | | | |
|--|--------------------------------|-------------------------------------|
| ● BFSI | ● Energy and utilities | ● Manufacturing |
| ● Electronics, hi-tech, and technology | ● Healthcare and life sciences | ● Telecom, media, and entertainment |
| ● Public sector | ● Retail and CPG | ● Travel and transport |

By buyer size

- | | | |
|---|---|--|
| ● Small (annual client revenue <US\$ 500 million) | ● Mid (annual client revenue US\$500 million-1 billion) | ● Medium (annual client revenue US\$1-5 billion) |
| ● Large (annual client revenue US\$5-20 billion) | ● Mega (annual client revenue >US\$20 billion) | |

By IT services segment

- | | | |
|---|-------------------------|---|
| ● Asset management | ● Deskside support | ● Enterprise mobility |
| ● Desktop management and virtualization | ● IT service management | ● Unified Communication and Collaboration (UCC) |
| ● Service desk | ● Smart workplace | ● Gen AI in the workplace |

By geography

- | | | |
|----------------|------------------------------|------------------|
| ● UK & Ireland | ● Nordics | ● DACH |
| ● Benelux | ● France and Southern Europe | ● Eastern Europe |

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Solutions

[REPRESENTATIVE LIST]

Proprietary solutions for digital workplace services

Solution name	Details
Infosys Live Operations	This solution is a system of systems that integrates with legacy and enables end-to-end visibility across the BSS-OSS-NMS stack, along with the ability to auto-heal.
Infosys Topaz	This solution offers 12,000+ AI use cases, 150+ pre-trained AI models, and 10+ AI platforms, helping end-users create value from innovations and connected ecosystems.
Infosys Topaz – AnswerSmart	This solution is a gen AI-powered knowledge management platform offering agent assist solutions and enabling self-service/DIY for end-users.
Infosys Topaz – Multilingual Conversation AI	This solution offers conversational AI bots enabling self-service over phone and chat, language translation/neutralization, and after-contact summarization leveraging gen AI.
Infosys Topaz – InsightSmart	This solution is a gen AI-powered data analytics for user and ticket journeys. It is a low-code/no-code visualization generator with data insights from various data sources.
Service Experience Management with CareAR	This solution integrates true AR into ITSM, CSM, and field service workflows for smart, intuitive service delivery that enables remote and self-solve resolutions, optimizing field service productivity and enhancing customer satisfaction.
Infosys Interaction Analytics	This solution offers conversation analytics for sentiment, script/compliance adherence, call/chat audits, improvement opportunities for automation, and productivity.
Infosys Digitl Operations Management (IDOM)	This solution is a cloud-based, modular, and digital ecosystem to help track, maintain, manage, and enhance end-to-end operations management. This solution offers a command center view for delivering operations excellence through effective agent/analyst life cycle management through four core modules of user management portal, knowledge management, performance management, and quality management.
WorkplaceGPT	This solution offers self-help for end-users in resolving simple issues by providing AI-recommended solutions and end-user sentiment analysis by enabling feedback and determining whether it is positive, neutral, or negative.
Copilot ReadyAssist	This solution has been built specifically to accelerate readiness, creating show-and-tell environments, and enabling teams to deliver these capabilities successfully.
DEX Management Dashboard	This solution offers real-time employee experience dashboards that measures Key Experience Indicators (KEI) across employee journeys.
Wingspan-Health Care	This solution helps healthcare organizations to effectively build a future-ready workforce equipped to deliver exceptional patient care in an ever-evolving healthcare landscape.

Other digital workplace solutions include Infosys Workplace Suite, ESM Café, Infosys Cortex, Infosys Orbit, Infosys Live Enterprise Orbit for Fieldforce Workers, and Cyber Next Platform.

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Recent investments

[REPRESENTATIVE LIST]

Digital workplace services investments

Investment name/theme	Details
Acquisitions	<ul style="list-style-type: none"> • Acquired BASE Life Sciences, a Denmark-based technology and consulting firm in the life sciences industry • Acquired Oddity, a Germany-based digital marketing, experience, and commerce agency
Investments	<ul style="list-style-type: none"> • Invested in an energy innovation center in Houston, Texas • Invested in the expansion of service desks in Mexico and Brazil • Invested in setting up nearshore delivery center in Calgary, Canada • Invested in the expansion of nearshore capabilities in Mexico, Brazil • Invested in the future of work experience design centers in the US • Invested in service desks in Romania and Poland • Invested in business experience studios in Poland and Dusseldorf • Invested in new delivery centers in Europe • Invested in an energy innovation center in London, United Kingdom
Talent development	<ul style="list-style-type: none"> • Infosys claims to have a focus on talent development and new hiring in Canada and Mexico • Infosys has partnered with Microsoft, AWS, Google, eCornell, Wharton, LinkedIn Learning, WSJ, and FT for resource training • Infosys has provided training on Infosys Cobalt and Infosys Topaz (Cloud and AI) • Infosys Springboard is a platform providing talent training for the community • Infosys has invested in explore labs enabling talent training through hands-on programs

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Partnerships

[REPRESENTATIVE LIST]


Digital workplace services partnerships

Partner name	Details
Microsoft	<ul style="list-style-type: none"> Leverages this partnership for modern work, Azure, data and security, and copilot Infosys claims to be recognized as an inner circle/key partner for M365 Copilot adoption and extensibility
Zscaler	<ul style="list-style-type: none"> Leverages this partnership for providing workplace security, SASE, and cloud security services Recognized as Zscaler EMEA international partner 2022
ServiceNow	Leverages this partnership to deliver Enterprise Service Management (ESM) solutions to clients, placing ServiceNow as a digital layer over the client's existing architecture, to record all actions and facilitate workflows in the ESM space
Citrix	Leverages this partnership to develop desktop and application virtualization solutions, technical issues support, technical training sessions, and hands-on lab solutions
Flexera	Leverages this partnership to develop application packaging and virtualization solutions, asset management, and optimization
HP	Leverages this partnership to help enterprise customers with all their End-user Computing (EUC) device lifecycle needs end-to-end; uses a Managed Print Services (MPS) partnership to drive productivity and profitability for enterprise customers wherein HP provides support services through analysis, planning, deployment, and management of print fleet
Dell	Leverages this partnership to help enterprise customers with all their EUC device life cycle needs end-to-end
Google	Leverages this partnership to design and develop cloud transformation and migration services for enterprises across industries
RICOH	Leverages this partnership for global dispatch, depot services, and end-user device life cycle management
Tenable	Leverages this partnership to provide threat and vulnerability management services
JAMF	Leverage this partnership in digital experience motoring and proactive remediation, inventory and license optimization for IT assets optimization, and digital workplace planning and sizing
Kore.ai	Leverages this partnership to implement conversational virtual assistants to gen AI applications in employee experience solutions

Some other partners include 1E, Apple, USU, Nanoheal, Compucom, CISCO, Palo Alto, Lakeside, QUEST, and IBM Watson










Infosys profile – Europe (page 5 of 5)

Everest Group assessment – Leader

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

- Infosys’ experience-centric workplace narrative further bolstered by its solutions such as Infosys Meridian and Infosys Orbit would resonate well with enterprises
- Enterprises seeking strong UCC capabilities will find Infosys’ focus in this space beneficial, highlighted by its offerings such as the Infosys Collaboration Migration
- Enterprises seeking a security-focused partner will appreciate Infosys’ strong focus on responsible AI by design, enhanced by its Cyber Next Platform offering
- Infosys’ strategic generative AI partnerships with Microsoft featuring joint GTM and solutions, and with Google offering Infosys Cobalt solutions on Google Workspace, would appeal to enterprises seeking gen AI-based transformations
- Clients continue to highlight Infosys’ flexibility in providing solutions and its overall client management capabilities as some of its key strengths

Limitations

- Despite robust growth, Infosys is not typically seen as a top-three workplace provider in Europe. It needs to further develop its vision and expand its enterprise mindshare in the region
- Infosys’ humanizing workplace experience narrative has the potential to hit the right chord with enterprises; it still has some ground to cover in terms of offering differentiated solutions and approach needed to realize it in client scenarios
- Given its greater focus and proof points for large enterprises, small and mid-sized enterprises should run further due diligence before considering it a viable option
- While Infosys offers several vertical-specific IP, enterprises must conduct further due diligence as these offerings currently lack enterprise adoption proof points
- Clients have expressed concerns that some of Infosys’ talents are not project-ready, highlighting a need for improved talent management

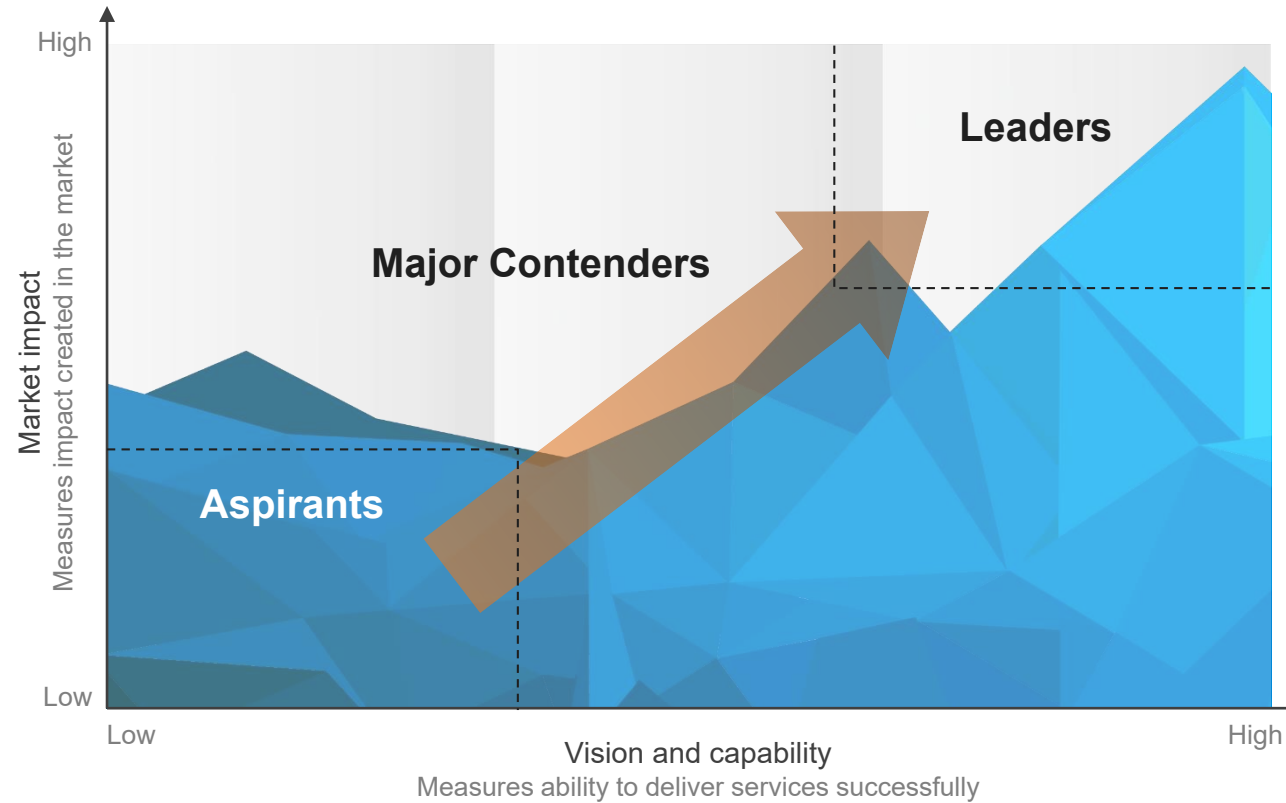
Appendix

PEAK Matrix® framework

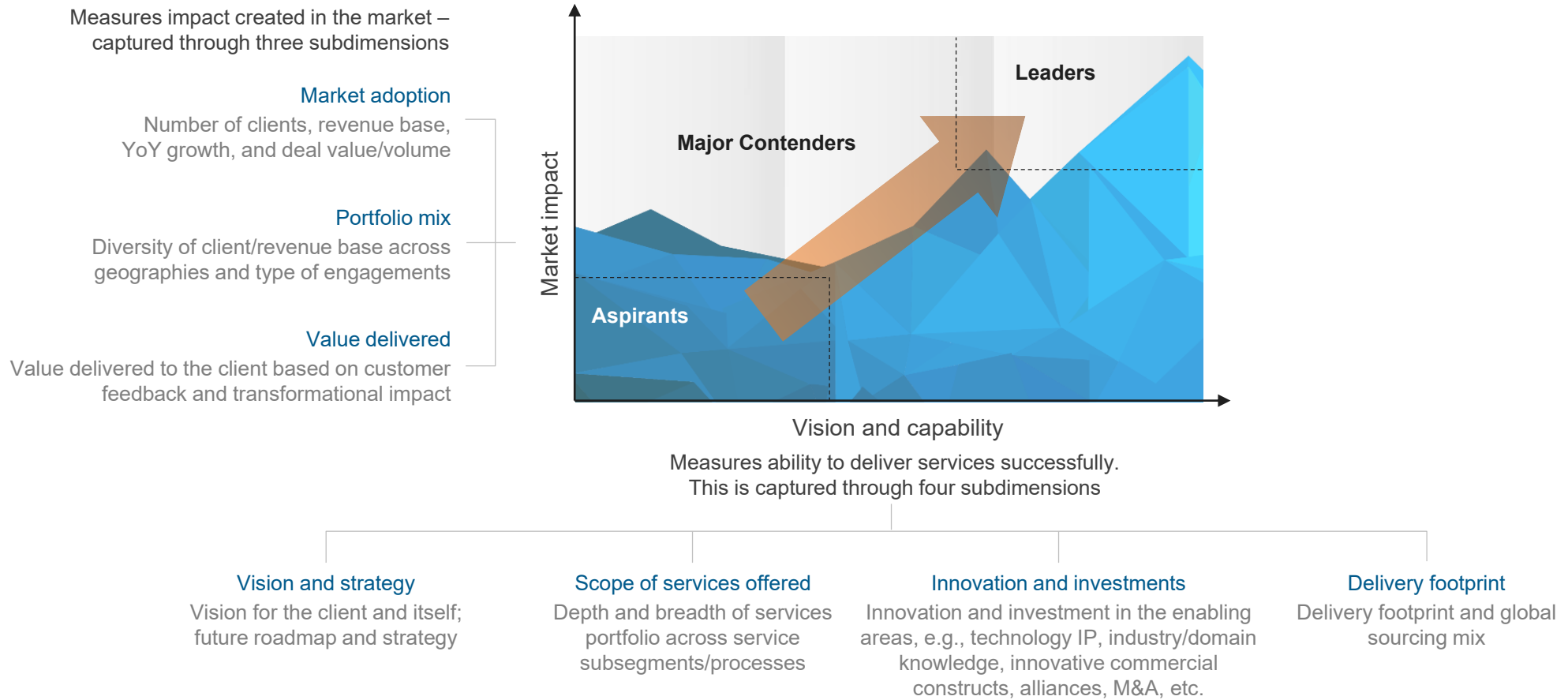
FAQs

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

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: 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.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: 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.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: 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

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: 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

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: 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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