Everest Group®

Everest Group PEAK Matrix® for Workplace Communication and Collaboration (WCC) Service Provider 2023

Focus on Infosys
January 2023

Everest Group
PEAK MATRIX®

Background of the research

- As the field of digital workplace is plunging into a new world of opportunities, enterprises have realized that the hybrid workplace model is here to stay, and with this, efficient communication and collaboration services within organizations have become paramount. Earlier, cost optimization and productivity were some of the key drivers dictating the adoption of WCC services; however, the gears have recently shifted, and employee engagement and experience have taken the center stage

- The WCC market is seeing higher than anticipated demand across all regions and industries and is expected to continue its strong growth trajectory in 2023, as enterprises attempt to keep up with the ever-evolving WCC landscape. This growth is marked by the advent of Metaverse and immersive collaboration, increased adoption of cloud-based communication models such as UCaaS and CPaaS, focus on platform consolidation, and challenges related to virtual culture building. Enterprises are hence looking for strong capabilities from service providers across WCC covering consulting, infrastructure design/build, cloud modernization, and management services for individual WCC segments to enable them in this journey

- In this research, we present an assessment of 14 WCC service providers featured on the Workplace Communication and Collaboration (WCC) Services PEAK Matrix® Assessment 2023

The assessment is based on Everest Group's annual RFI process conducted over Q3 and Q4 2022, interactions with leading WCC service providers and an analysis of this marketplace.

The full report assessed the following 14 service providers on the WCC services PEAK Matrix®:

- **Leaders:** HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, DXC Technology, Kyndryl, Microland, Orange Business Services, Tata Communications, Tech Mahindra, and Unisys
- **Aspirants:** GAVS Technologies and UST

Scope of this report

Geography
Global

Providers
14 leading WCC
service providers

Services
WCC services

WCC services PEAK Matrix® characteristics

Leaders:

HCLTech, Infosys, TCS, and Wipro

- The WCC services Leaders have established a successful business, driven by years of capability building and experience across WCC segments

- These providers have a highly balanced WCC solution portfolio, display a coherent vision, and continue to invest in technology and services capability development (internal IPs/tools, as-a-Service models, partnerships, acquisitions, etc.). They are also focused on ensuring solution contextualization, platform interoperability, and cloud-based services

- Leaders are highly proactive in taking their innovations and next-generation service offerings like immersive collaboration and cloud-based communication to clients to help them future-proof their communication and collaboration environments. In addition to this, they are increasingly focusing their services on enhancing the experience for end-users

- However, 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:

Atos, DXC Technology, Kyndryl, Microland, Orange Business Services, Tata Communications, Tech Mahindra, and Unisys

- The Major Contenders segment includes a mix of overall workplace and telecommunication service providers

- These service providers have built meaningful capabilities to deliver WCC 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 WCC services segments and/or capabilities in different platforms/technologies) – 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 IPs and tools, taking a consulting-led solutioning approach, leveraging their telecommunication heritage, building niche expertise areas, 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:

GAVS Technologies and UST

- The WCC services business of Aspirants is at a relatively nascent stage

- Nevertheless, they are focused on ensuring customer-centricity and strengthening ancillary functions such as analytics/automation to strengthen their mindshare and positioning

Everest Group PEAK Matrix®
Workplace Communication and Collaboration (WCC) Services PEAK Matrix® Assessment 2022 | Infosys positioned as Leader

Everest Group Workplace Communication and Collaboration (WCC) Services PEAK Matrix® Assessment 2022[1,2]
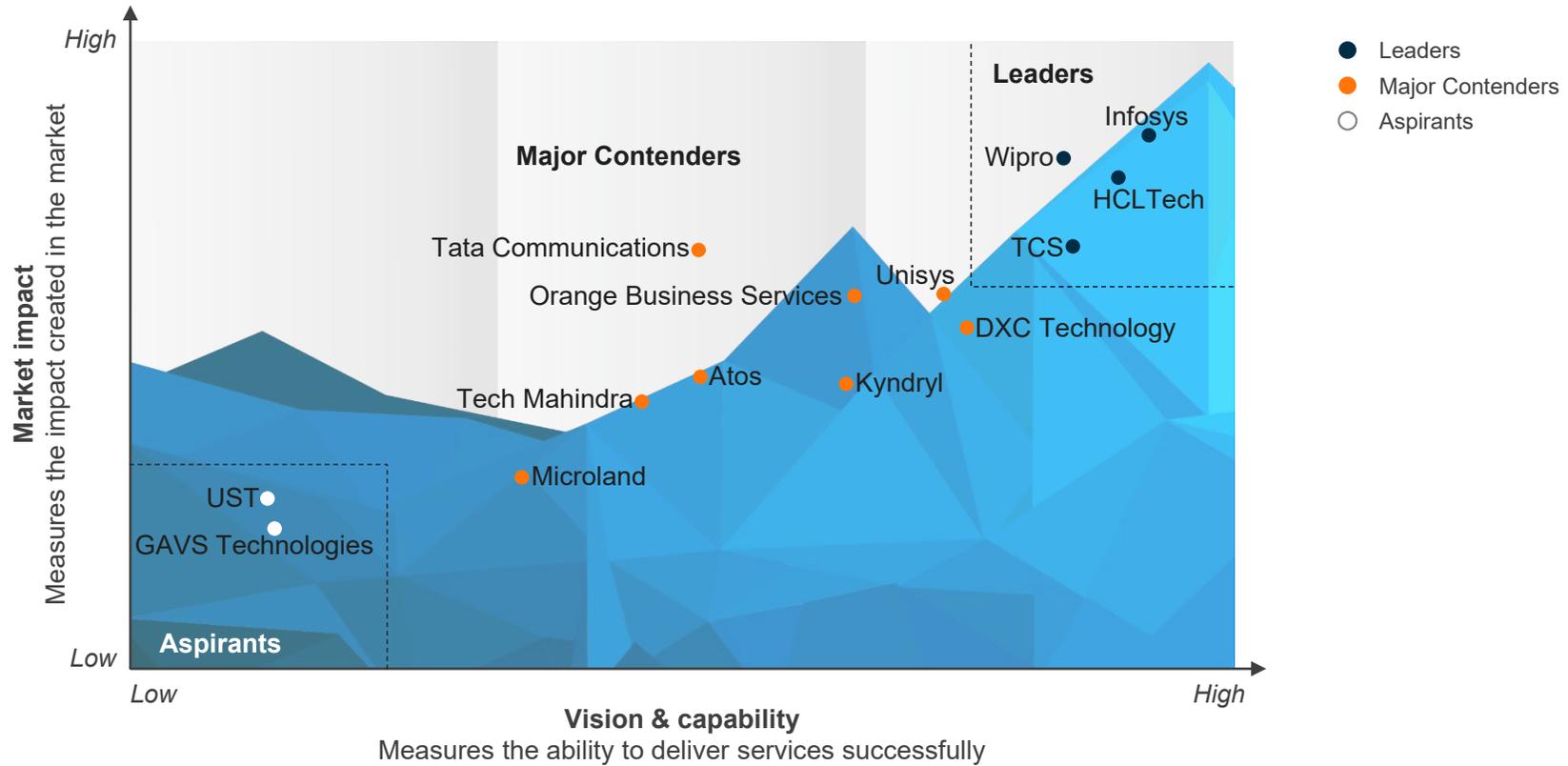
1   Assessment for Kyndryl excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
2   There are no Star Performers in this PEAK Matrix assessment since this was the inaugural year
Source: Everest Group (2022)

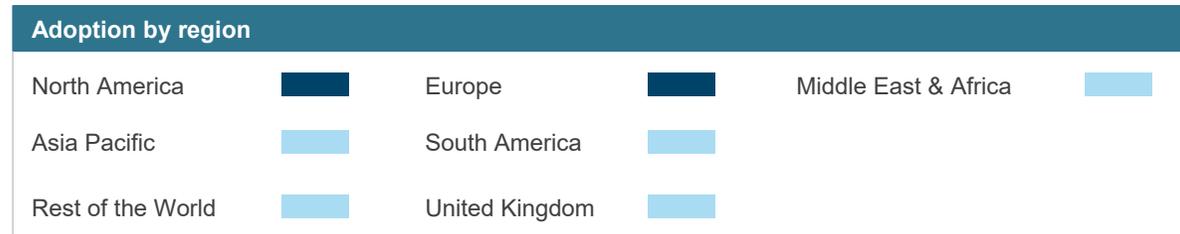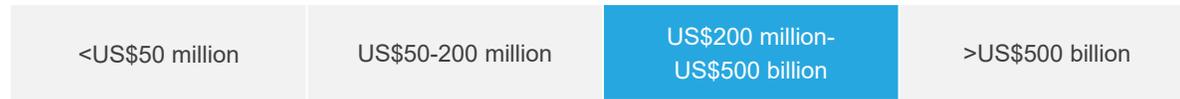# Infosys | WCC services profile (page 1 of 5)
Overview

WCC vision

Infosys' WCC vision is to enable borderless and seamless human collaboration through digital workplaces that amplify human potential; are experience-led, persona-based, and aligned to industry workstyles; and continuously learn and evolve to deliver secure mobility of experience anytime, anywhere, and on any device.
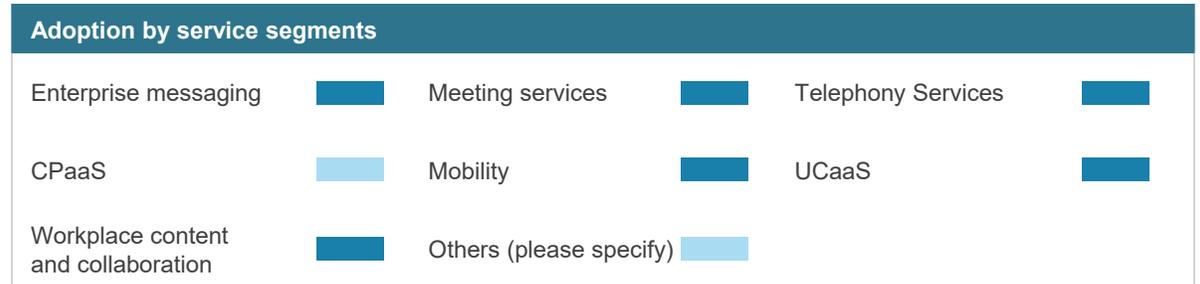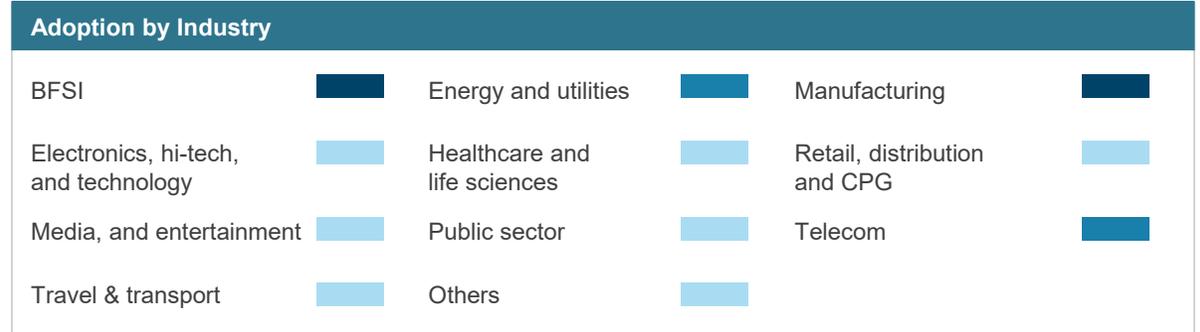
Scope of coverage

- Number of users served – 4.5 million
- Total number of end-user devices managed – 1.7 million

Workplace Communication and Collaboration services revenue (2021)

<US$50 million	US$50-200 million	US$200 million-US$500 billion	>US$500 billion

Legend: Low (<10%) | Medium (10-20%) | High (>20%)

Adoption by region

Region		Region		Region	
North America	High	Europe	High	Middle East & Africa	Low
Asia Pacific	Low	South America	Low		
Rest of the World	Low	United Kingdom	Low		

Adoption by Industry

BFSI	High	Energy and utilities	Medium	Manufacturing	High
Electronics, hi-tech, and technology	Low	Healthcare and life sciences	Low	Retail, distribution and CPG	Low
Media, and entertainment	Low	Public sector	Low	Telecom	Medium
Travel & transport	Low	Others	Low		

Adoption by service segments

Enterprise messaging	Medium	Meeting services	Medium	Telephony Services	Medium
CPaaS	Low	Mobility	Medium	UCaaS	Medium
Workplace content and collaboration	Medium	Others (please specify)	Low		

Adoption by buyer group

Small (annual revenue < US$500 million)	Low	Medium (annual revenue = US$500million-1 billion)	Low	Large (annual revenue > US$1 billion)	High

Infosys | WCC services profile (page 2 of 5)
Solutions

Proprietary solutions/IPs/products (representative list)	
Solution name	**Details**
Infosys Collaboration Migration Manager	This solution minimizes the total cost of infrastructure transformation and risk management by providing: • Automated backup of user, dial plan, and routing data during migration (user migration across platforms to preserve directory numbers and user logins across platforms) • Active directory integration (creates and updates users)
Infosys Voice Test Automation Framework	This framework gives customers the capability to run their call verifications from a single place and has enough scalability to handle any future requirements such as the following: • Helps in faster automation of the existing test cases • Integration with Jenkins and Jira gives the solution end-to-end capabilities of doing the scheduling, running, and publishing of the test failures into Jira • Integration with report portals gives the solution the capability of ML-based log analysis • Tagging-based approach allows the customer to choose and pick the test cases to run, thereby giving more control over the execution
Infosys CPaaS Integrator	This solution helps enterprises to prevent calls to fraudulent and premium numbers by detecting the risk factor of the number through CPaaS integration and provides messaging, via both SMS and WhatsApp, with connectivity to UCaaS and CCaaS.
Infosys Remote Assistance and Control tool	This solution enables remote assistance to end-user phones, thereby eliminating field-support services for the majority of phone issues.
Infosys Microsoft Teams Migration	This solution helps clients migrate their Microsoft Teams workloads between M365 tenants seamlessly. It also enables the migration of the Teams chat history and Teams custom tabs across M365 tenants.
Infosys Workplace Suite	This solution provides frameworks and platforms that will drive adoption through automation & AIOps and bring insights that can help enterprise clients drive more value from their workplace, faster. The suite of solutions includes the Office 365 dashboard & report, AIOps-led service automation, governance policies, alerts management, and a self-help chatbot.
Infosys Migration Factory	This solution automates on-premises to O365 migration and tenant-to-tenant migration, which helps tenant consolidation or split. The automation is integrated with third-party migration tools such as ShareGate and Quest to perform the migration task. The solution breaks the migration tasks into smaller entities, thereby distributing the workload evenly among all the migration agents.
Infosys Collaborative App Factory	This solution helps organizations to become more productive and create experiences that enable the flow of work, such as the ability to find, update, share, and collaborate without switching work contexts. It enables industries to embrace the modern hybrid workstyle that puts people first and drives better business results.
Other solutions include Infosys Document Digitization, Infosys Xtract Edge, and Infosys Digital Assistant.	

Infosys | WCC services profile (page 3 of 5)
Partnerships

Partnerships (representative list)	
Partner name	**Details of the partnership**
TCL	Leverages this GTM partnership for providing joint solutions for UCaaS and for providing Public Switched Telephone Network (PSTN) connectivity as well as data center services for hosting Session Border Controllers (SBCs), including Session Border Controller as-a-Service (SBCaaS) and operator connect services
Nectar	Leverages its status as a Gold partner of Nectar. Infosys' GTM strategy with the partner includes a demo lab for monitoring services for UCaaS products, providing integrated solutions for monitoring UCaaS products, and giving joint pitches to customers with UCaaS needs
Crestron	Leverages Creston as a GTM partner for providing integrated next-generation Conference Room as-a-Service (CRaaS) solutions with a focus on fusion-based monitoring and reporting, a lab for demonstrating Virtual Circuit (VC) equipment capabilities, and giving joint pitches to customers with conference room needs
Ribbon	Leverages its Gold partner status with Ribbon. Infosys partnered with Ribbon for providing Microsoft Teams-based direct routing solutions
Meetyoo	Partnered with Meetyoo, a European live streaming solution provider for the manufacturing industry. The partnership has helped Infosys innovate for New Account Opening (NAO) accounts
Vyopta	Leverages Vyopta as a GTM partner for proposing and delivering integrated solutions to customers with UCaaS needs and taking joint offerings to respective customers
Quest/BinaryTree	Leverages Quest and their other acquisitions such as Metalogix for transforming clients' digital journey from legacy systems to Microsoft 365 and tenant-to-tenant migrations, including the following: Exchange on-premise to Exchange Online, O365 tenant-to-tenant migration, one drive migrations, public folder migration, G Suite to O365 migration, and transformation from Lotus Notes to Microsoft 365
Citrix	Leverages its status as a Global System Integrator (GSI) partner with Citrix. Infosys provides secure mobility from any location, on any device through Citrix app virtualization and Unified Endpoint Management (UEM) solutions. Infosys has built a dedicated CoE for the development of new offers and capabilities to provide its clients integrated as-a-service offerings
Microsoft	Leverages this alliance to work with Microsoft O365 experts to build joint solutions and implement these joint solutions through Infosys offerings and Microsoft recommendations
Google	Leverages this partnership for designing and developing cloud transformation and migration services for enterprises across industries. As a part of Infosys Cobalt, Infosys offers solutions and services on Google Workspace, creating a scalable and on-demand cloud model that helps enterprises navigate digital transformation and adopt a cloud-first strategy
Cisco	Leverages its partnership with Cisco to provide UC on-premise and UCaaS, including the required peripherals and Webex services for meetings
Other partnerships include Poly, Bit Titan, AvePoint, ShareGate, Verinon, Valo, Vectra, Nanoheal, Lakeside, Nexthink, Aternity, and VMware.	

Infosys | WCC services profile (page 4 of 5)
Investments and recent activities

Investments and recent activities (representative list)	
Investment name	**Details**

Investments/Skill development	• **Delivery center**: started operations in Canada and plans to leverage Canada as the delivery center for most of its North American customers.
	  – This digital development center will train, upskill, and reskill employees in the technologies needed to help Canadian businesses accelerate their digital transformation.
	  – It will also enable Infosys to better collaborate with clients to develop cross-functional solutions to pressing business challenges.
	• Partnered with Meetyoo and Call Tower, which are events, webinars, and audio-conferencing solution providers in EMEA and the North American markets
	• Invested in Infosys CoE for modern collaboration, which has been incubating both in-house and partner solutions that help in the digitization of content, enable cognitive capabilities, enhance user experience, and build intelligent knowledge networks. Infosys is leveraging Microsoft, third-party, and open-source solutions to build this reusable capability across industries.
	• Invested in AI@Work, which are next-generation solutions that help develop digital assistants for personal and business productivity

Infosys | WCC services profile (page 5 of 5)
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 offered	Innovation and investments	Delivery footprint	Overall
●	◕	●	●	●	◔	●	◑	◕

Strengths

- Infosys' increased focus on the WCC business, innovative pricing and sales strategy, and talent-related investments, is resonating well with enterprises and has translated into strong growth in revenue generation and new logo acquisition

- Enterprises would benefit from its ability to offer customized solutions through its strong partnership ecosystem of marquee, niche, start-up, and telco providers such as Microsoft, Cisco, Google, Nectar, Bit Titan, Avaya, AT&T, and BT

- Enterprises seeking to invest in Metaverse would find Infosys to be a suitable partner owing to its heightened investments in this domain such as its dedicated Metaverse foundry

- Infosys has robust migration capabilities bolstered through its internal IPs and solutions such as Migration Factory and Collaboration Modernization, which could benefit enterprises going through M&As or looking for workplace modernization

- Infosys has strong UCaaS solutions with multiple credible proof points of implementations, which can be considered for evaluation by enterprises looking to engage in this domain

- Clients have appreciated Infosys' overall client and talent management capabilities

Limitations

- Enterprises seeking strong consulting capabilities within WCC will need to carefully evaluate Infosys as it lags peers in consulting/assessment services. It needs to enhance its consulting capabilities by making consulting-specific investments and building partnerships

- Enterprises from travel and transport, public sector, and healthcare and life sciences, need to be wary of Infosys due to its limited presence in these verticals

- Despite having a good partnership with CPaaS providers, Infosys lacks enterprise adoption proof points in this segment when compared to peers, which can be a cause of concern for enterprises seeking strong CPaaS capabilities

- Enterprises looking for a strong sustainability suite might not find confidence in Infosys owing to its limited focus and enterprise adoption proof points in this domain

- Some clients have highlighted that Infosys needs to be more proactive in pitching innovative WCC solutions

Appendix

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

Everest Group PEAK Matrix
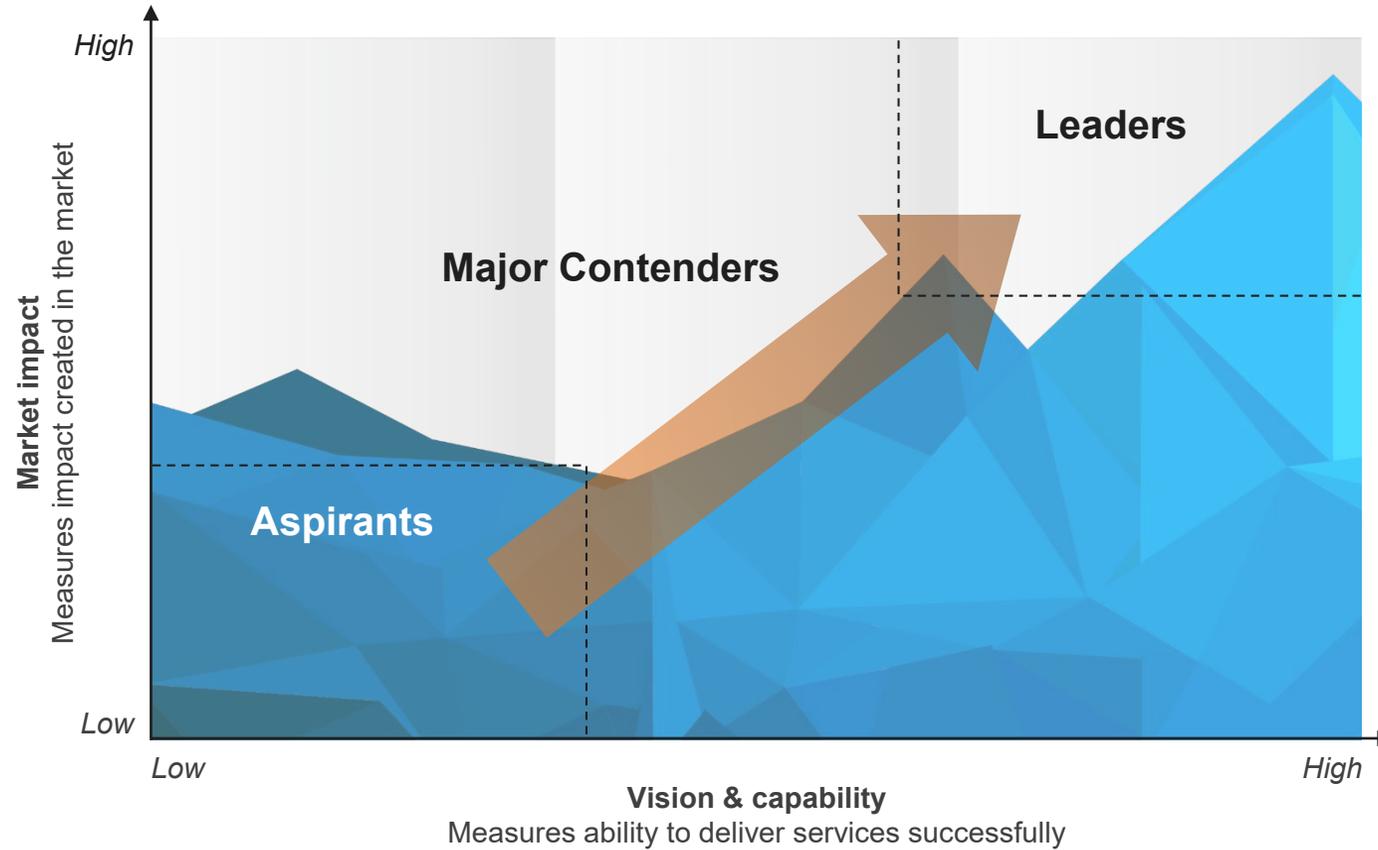
Services PEAK Matrix® evaluation dimensions

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

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability
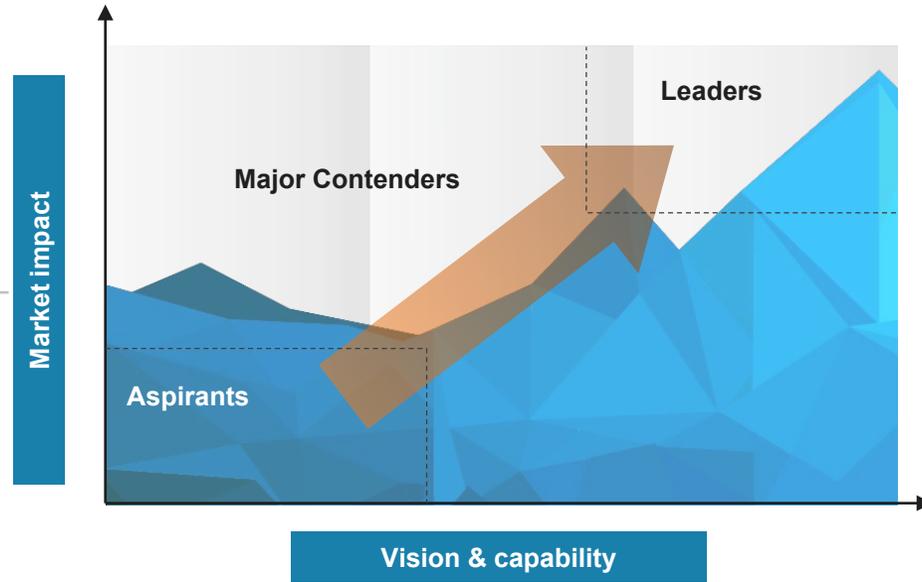
Measures ability to deliver services successfully.
This is captured through four subdimensions

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 in 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.

Everest Group®

With you on the journey

Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at **www.everestgrp.com**.

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