



Everest Group PEAK Matrix[®] for Digital Workplace Service Provider 2022 – North America

Focus on Infosys
October 2022



Background of the research

- With enterprises focusing on digital transformation initiatives, the digital workplace services market recovered rapidly in 2021. It is expected to continue its strong growth trajectory in 2022, as enterprises attempt to drive maximum value in the hybrid work model, from their recent workplace investments done during the pandemic, through partnership with a right-fit service provider
- The digital workplace market in North America has higher preference for shorter transformation timelines, agile work methodologies, and process optimization. Also, due to the recent Great Resignation Movement and a heightened talent war, there is a higher demand for employee experience-centric solutions and transformations within this region. Further, considering the maturity of this market, the propensity to adopt next-generation workplace offerings remains high
- In this research, we present an assessment of 25 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2022 – North America](#).

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2022, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

The full report assessed the following 25 service providers on the digital workplace services PEAK Matrix® – North America:

- **Leaders:** Cognizant, HCL Technologies, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, CGI, Compucom, DXC Technology, Fujitsu, Kyndryl, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Microland, Milestone Technologies, Mindtree, Mphasis, Orange Business Services, and UST

Scope of this report:



Geography
North America



Service providers
25 leading digital workplace
service providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® (North America) characteristics

Leaders:

Cognizant, HCL Technologies, Infosys, NTT DATA, TCS, and Wipro

- The digital workplace services Leaders have established a successful business, driven by years of capability building and experience across different workplace services segments
- These providers 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
- Leaders are highly proactive in taking their innovations and next-generation service offerings to clients to help them future-proof their workplace environments. In addition, they are increasingly focusing their services on enhancing the workplace experience for end-users
- That said, 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:

Accenture, Atos, Capgemini, CGI, Compucom, DXC Technology, Fujitsu, Kyndryl, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones

- The Major Contenders segment includes a mix of global and regional service providers
- These service providers have built meaningful capabilities to deliver workplace 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 workplace services segments or geographies or both) – 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 IP and tools, 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:

Microland, Milestone Technologies, Mindtree, Mphasis, Orange Business Services, and UST

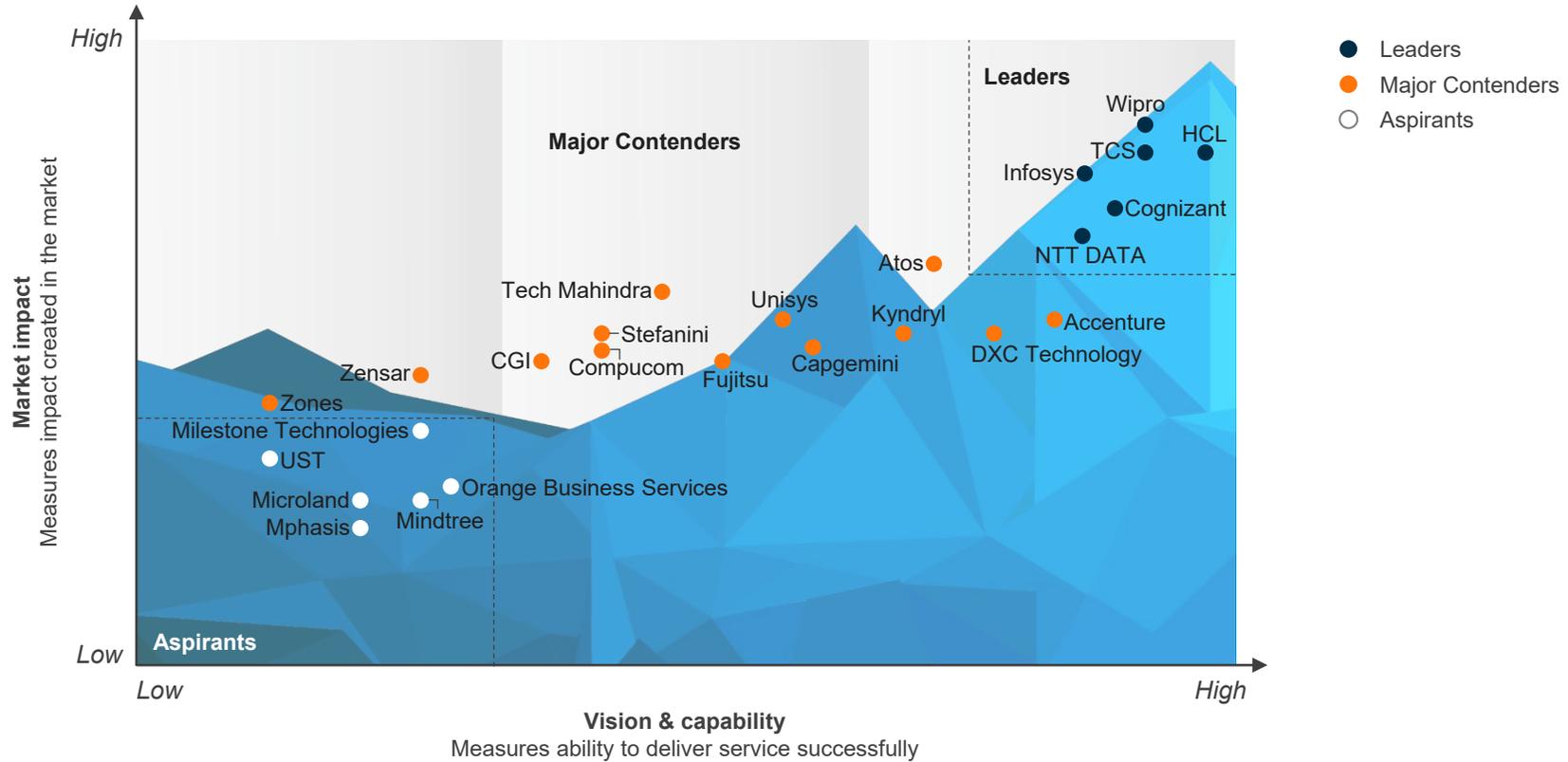
- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market

Everest Group PEAK Matrix®

Digital Workplace PEAK Matrix® Assessment 2022 – North America | Infosys positioned as Leader



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – North America¹



¹ Assessments for Capgemini, CGI, Fujitsu, and Kyndryl exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2022)

Infosys | digital workplace services profile – North America (page 1 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	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Infosys has leveraged the pandemic as a springboard to accelerate the growth of its workplace portfolio in the last two years, owing to contextualized solutioning, sales enablement, strong partnership with Microsoft, and continuous investments in in-house accelerators/migrators
- Enterprises looking to engage a provider for a multi-tower workplace deal will find credibility in Infosys' robust partnership suite across all these segments
- Infosys has increased its focus on building human-centric experience design for workplace by acquiring entities such as Oddity, building design hubs, and Metaverse foundry
- It has forged strategic partnerships with Microsoft and Google for workplace security solutions and set up a center of excellence to meet global customer requirements
- Enterprises seeking innovative pricing constructs will find Infosys to be a good fit due to its increased focus on output- and outcome-based pricing models
- Large enterprises can expect significant amount of flexibility and contractual innovation while engaging with Infosys

Limitations

- Enterprises looking to engage in segments such as mobility, infrastructure applications, and asset management might find it lagging peers due to lack of enterprise adoption proof points in these segments
- Enterprises in Canada and Mexico will need to run further due diligence on regional proof points, given Infosys' portfolio skewness in the US
- Infosys needs to garner better mindshare from enterprises through marketing efforts across social media, investing in workshops, events, and creating a differentiated pitch
- Most of its new IP such as Wingspan and Orbit are still evolving and might not be suitable for enterprises of all sizes
- Clients have highlighted the need to improve talent management to be able to deliver quality transformation projects
- While Infosys has been setting up multiple CoEs, clients have raised concerns around gap in expectations and actual solution delivery

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Overview

Digital workplace services vision

Infosys' digital workplace services focus on helping organizations humanize their employees' workplace experiences and build a resilient and sentient enterprise by digitizing hybrid workplaces, redesigning physical workspaces, and prioritizing organizational well-being.

Infosys envisions a digital workplace that is experience-led, persona-based, and industry-aligned. It is also focused on enabling a collaborative hybrid workplace that continuously evolves to deliver a secure mobility experience anytime, anywhere, and on any device.

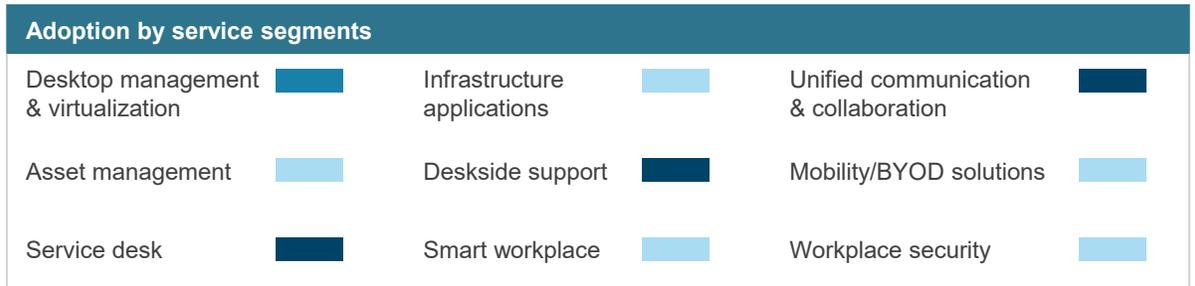
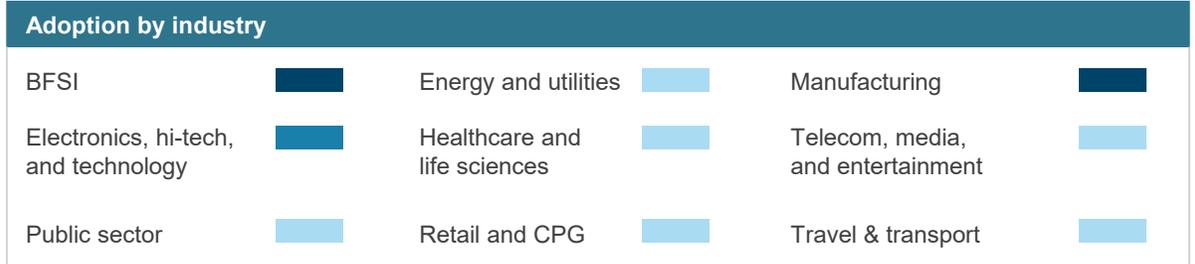
Digital workplace services revenue (2021)



Scope of coverage

- Number of users served through service desk support – ~770,000
- Number of service desk contacts managed – ~10 million
- Number of users served through desk-side support – ~1.6 million
- Total number of end-user devices managed – ~10.8 million

Low (<10%) Medium (10-20%) High (>20%)



Source: Everest Group (2022)

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Solutions

Proprietary digital solutions (representative list)

Solution	Details
Virtual Showroom	This solution is an immersive showroom with an AR/VR-based near-physical product experience, allowing manufacturers to launch new products and showcase their product line virtually.
Digital Classroom	This solution enables virtual learning sessions through digital classrooms and provides a platform for deeper interactions between the participants and the instructors.
Virtual Hub	<ul style="list-style-type: none"> Helps organizations and clients to adapt to the changing needs of their digital audience regardless of their location Powered by Infosys Meridian, the Virtual Hub enables a digital experience for partners to access exclusive events and create new digital experiences
Cyber Watch	<ul style="list-style-type: none"> Ready to onboard platform for monitoring and managing security incidents across the enterprise infrastructure Its services are offered 24x7 to help customers detect, manage, and respond to threats across multiple vectors, and monitor networks, applications, and assets regardless of where they are – office/campus, remote users, data center, cloud, or SaaS Its standardized incident response processes and automation using playbooks ensure quick detection and response to attacks Its use cases are aligned with Cyber Kill Chain and MITRE ATT&CK framework for standardization, both pre-attack and post-attack
Cyber Intel	<ul style="list-style-type: none"> A cyber threat intelligence and analysis service that tracks, monitors, and informs the organization about the security threats and enables security planning and decision-making Enriches the events and incidents in SIEM/SOAR (Cyber Watch in the case of Infosys) by correlating the fields with the threat Indicators, understanding the TTPs used, and mapping them to known threat actors, in alignment with the MITRE ATT&CK framework for enterprise Assists enterprises in moving to a proactive security posture by blocking known threat indicators
Infosys Workplace Suite - OneTouch Management	<ul style="list-style-type: none"> A one-touch managed service for M365 and brings in the following value proposition for the clients: <ul style="list-style-type: none"> Enhanced employee experience & increased user adoption of Office 365 services Reduction in overall support ticket volume through self-service Faster ticket resolution time Governance management The suite of solutions includes Office 365 dashboard & reports, service request automation, governance policies, alerts management, and self-help chatbot

Other digital workplace solutions include Virtual Support for Medical Devices, XtractEdge Commercial Insurance, Infosys Intelligent Workplace Platform Solutions, Infosys Orbit (Employee Experience Platform), and Infosys Workplace Suite - Desired State Configuration.

Infosys | digital workplace services profile – North America (page 4 of 5)

Partnerships

Partnerships (representative list)

Partner name	Details
Microsoft	<ul style="list-style-type: none"> • Leverages its status as a Microsoft Gold Partner. Infosys and Microsoft have formed a joint task force to deliver maximum value from the workplace, provide faster service, and enhance employee experience • Leverages this partnership for Security Operations Center (SOC) services through the CyberNext platform, digital workplace security, Azure security services, and managed IAM services
ServiceNow	Leverages this partnership for IT service management, which includes service catalog, incident, problem, change, knowledge, Configuration Management Database (CMDB), asset release, service level management, service mapping, orchestration, and event management
Citrix	Leverages this partnership for developing desktop and application virtualization solutions, technical issues support, technical training sessions, and hands-on lab solutions
Flexera	Leverages this partnership for: <ul style="list-style-type: none"> • Developing application packaging and virtualization solutions • Asset management & optimization
HP	<ul style="list-style-type: none"> • Leverages this partnership for helping enterprise customers with all their End User Computing (EUC) device life cycle needs • Partnered with HP for its Managed Print Services (MPS) to drive productivity and profitability for enterprise customers wherein it claims to provide support services through analysis, planning, deployment, and management of the print fleet
Dell	This partnership entails helping enterprise customers with all their EUC device life cycle needs.
Compucom	Leverages this partnership for hands and feet support for PC and AV services
Google	<ul style="list-style-type: none"> • 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, on-demand cloud model that helps enterprises navigate digital transformation and adopt a cloud-first strategy

Other technology partners include Apple, CrowdStrike, Automation Anywhere, Cisco, Palo Alto, Savyint, Nanoheal, Nextthink, Aternity, Lakeside, and 1E. It also has strategic partnerships with Hemmersbach, ADSL, AOIT, WWTS, and NCR.

Infosys | digital workplace services profile – North America (page 5 of 5)

Investments and recent activities

Investments (representative list)

Investment name	Details
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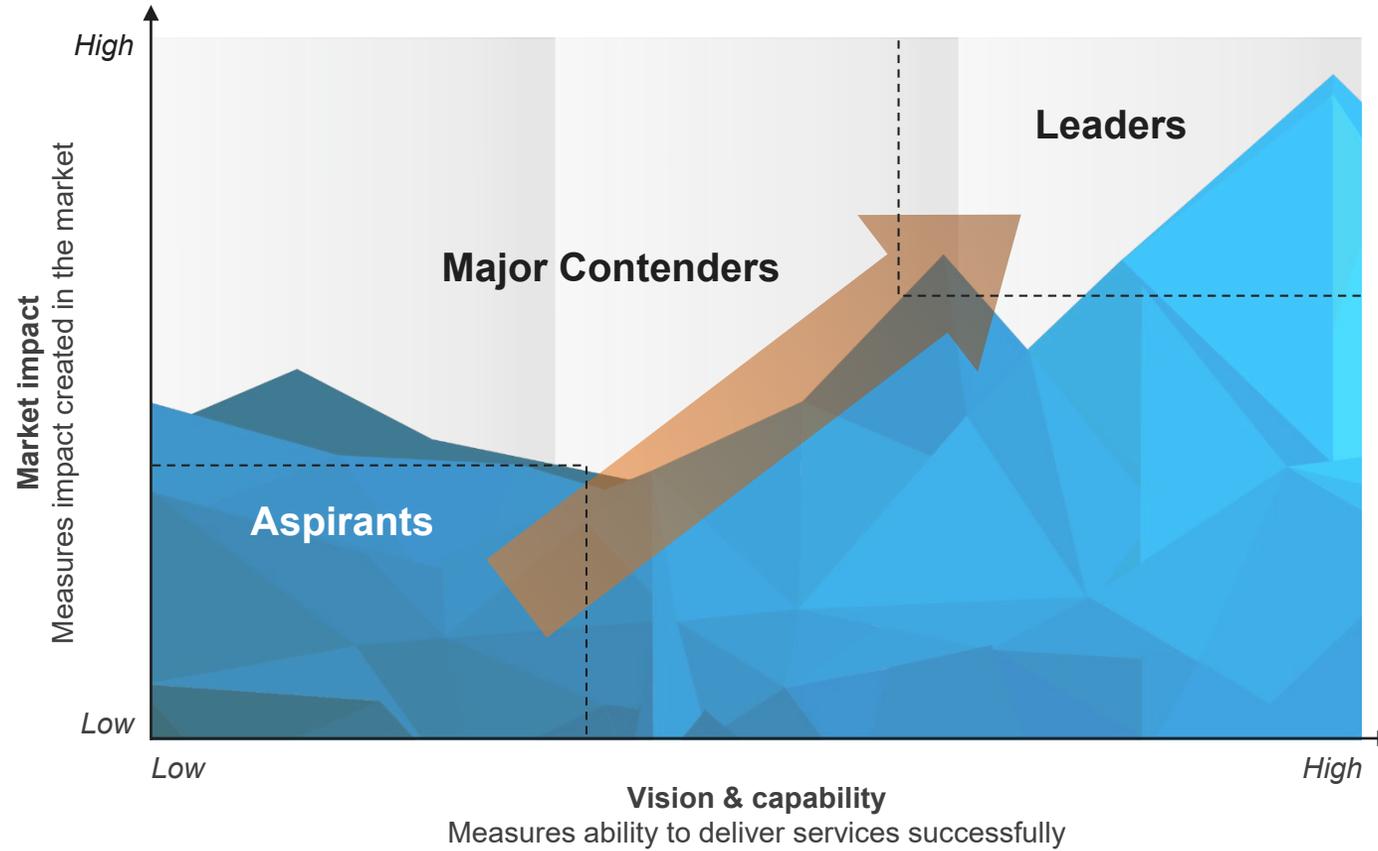
Skill development / investments	<ul style="list-style-type: none"> ● Launched the Infosys Springboard learning program in the US: this integrated digital skills program includes three lifelong learning offerings: Educating the Future, Upskilling Today, and Reskilling for Tomorrow – meeting all learners where they are on their digital journey, irrespective of the background or educational development ● Expanded its talent pool for the Americas regions: this was done by growing its Canada operations as well as nearshore capability in Mexico, Brazil, and the LATAM regions ● Technology Excellence Group: invested in an excellence center where it hired and trained its resources on technology ● Automation tools: trained 300+ resources on various automation & Digital Experience Management (DEX) tools such as Nanoheal, SysTrack, and Nexthink ● Experience Consulting: developed experience-driven consulting that focuses on bringing together new business experience, employee productivity, and wellness ● Microsoft Power Platform & TEAMS: scaled its capability and certified talents on MS Power Platform and MS TEAMS to 2000+ talents ● Digital Learning Platform – LEX/WingSpan: continued investments in its digital learning platform for digital reskilling of internal talents and within communities in the region we that it operates in to improve productivity and learning on the go ● Learning Branch: an AI platform for conducting pre-hire assessments and training for new/existing engagements
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Innovation and investments	<ul style="list-style-type: none"> ● Metaverse and other emerging themes related to investments: <ul style="list-style-type: none"> – Developed 100+ use cases – Published multiple thought leadership articles – Talent acquisition and upskilling to boost the competency ● GTM with Microsoft and Google for Workplace security solutions: <ul style="list-style-type: none"> – Alignment with Microsoft and Google for enhancing the digital workplace security offerings – Setting up of CoEs for corresponding DWS labs – Training and certification of talents - 100+ certified associates ● Employee Experience Platform – Orbit: invested in building a best-in-class employee experience platform to improve employee experience, productivity, and well-being ● Virtual Desktop CoE: investment to build dedicated teams comprising of product SMEs for design, solution validation, Issue resolution & enablement to deliver Desktop-as-a-Service (DaaS) on the cloud ● Speechlo: invested in Speechlo which records voiceovers / IVR messages including foreign languages ● Launched a Cyber Defense Center and seven innovation centers in the Americas ● Launched an Energy Innovation Center in Houston and other upcoming industry-specific innovation centers ● Partnered with a start-up ecosystem through IIN for driving disruptive and innovative solutions ● Invested in scaling its experience design capability with WongDoody ● Invested in research and analysis programs to leverage assisted technology frameworks ● Investments planned for scaling local capabilities on Workplace Automation, AI, workplace analytics, and other self-heal solutions
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Appendix

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

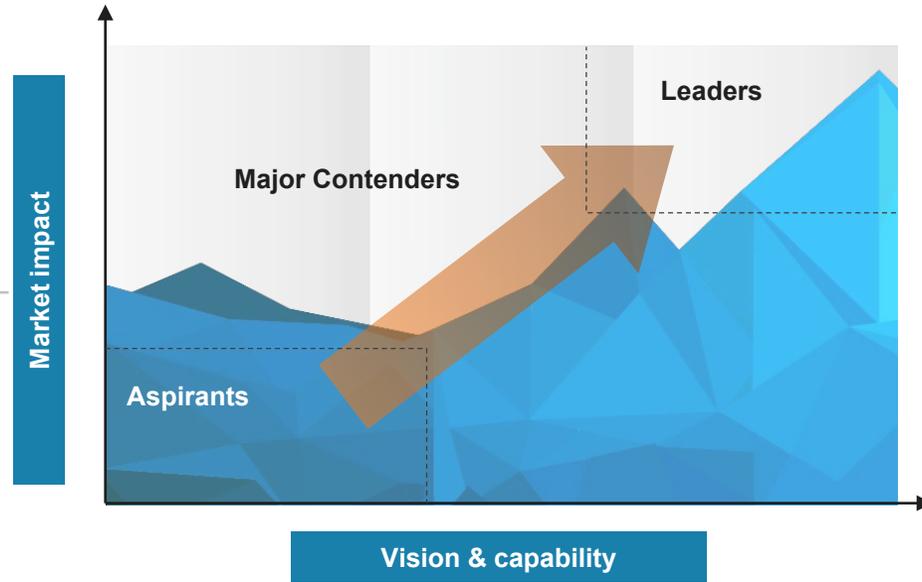
Everest Group PEAK Matrix



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



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 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.



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