



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America

Focus on Infosys
December 2023



Background of the research

- With the ongoing changes in the workplace, various trends have driven transformations. The upcoming years are poised to be remarkable for the digital workplace, marked by the third wave of value-centric transformation. This phase will see enterprises adopting a fully digital future of work, prioritizing improved employee experience, value realization, productivity, cost efficiency, and workplace cohesion. Realizing this goal would require collaboration with suitable Service Providers (SPs)
- In North America, existing economic headwinds such as increasing inflation, banking crisis, a steep rise in interest rates, and intense competition for talent have prompted enterprises to scrutinize their spend and intensify their focus on business value outcomes and value creation throughout their workplace transformation journey. At the same time, there is a growing interest in industry-specific workplace solutions, AI-driven innovations, and product-oriented approaches. SPs are focusing on strengthening their capabilities to aid enterprises in their workplace engagements
- In this research, we present an assessment of 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – North America

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

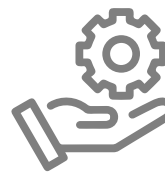
The full report includes the profiles of the following 26 leading digital workplace providers featured on [Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America](#):

- **Leaders:** Cognizant, HCLTech, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

Scope of this report



Geography
North America



Providers
26 leading digital
workplace service
providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® – North America characteristics

Leaders

Cognizant, HCLTech, 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 service cost optimization

Major Contenders

Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, 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

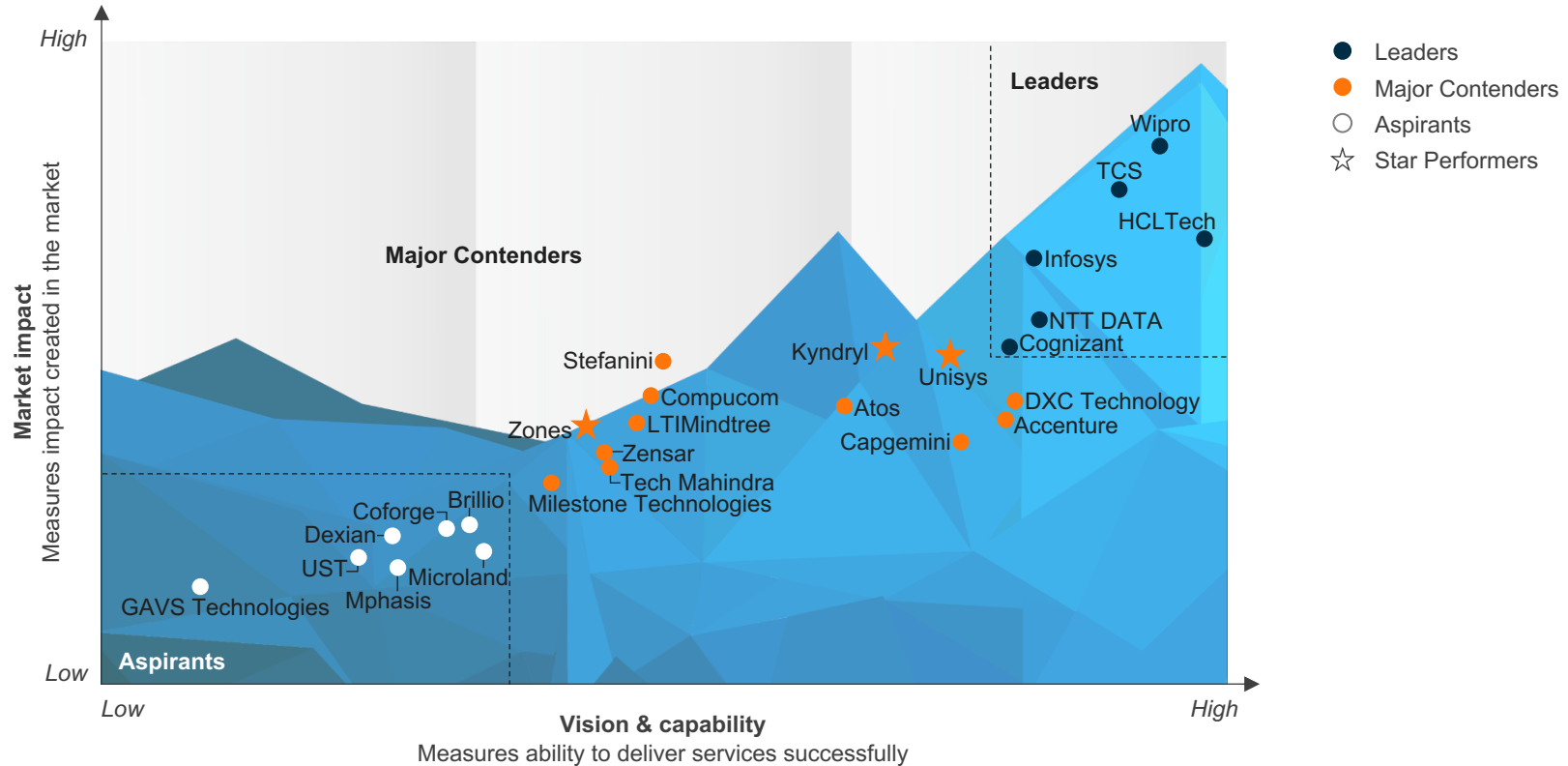
Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

- 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 Services PEAK Matrix® Assessment 2023 – North America | Infosys is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America^{1,2,3,4}



1 Assessments for Tech Mahindra and UST 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 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
 4 We have not considered LTIMindtree for Star Performer title since erstwhile Mindtree participated as a separate entity in the 2022 refresh of the assessment
 Source: Everest Group (2023)

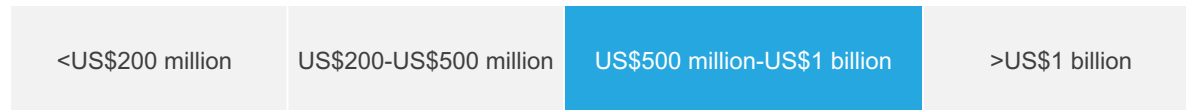
Infosys profile (page 1 of 5)

Overview

Digital workplace services vision

Infosys' digital workplace services portfolio focuses 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 proactive analytics and insights, shift from the traditional Service Level Agreements (SLAs) to Experience Level Agreements (XLA/BLA), and provide an automation-first secure mobility experience anytime, anywhere, and on any device.

Digital workplace services revenue (2022)

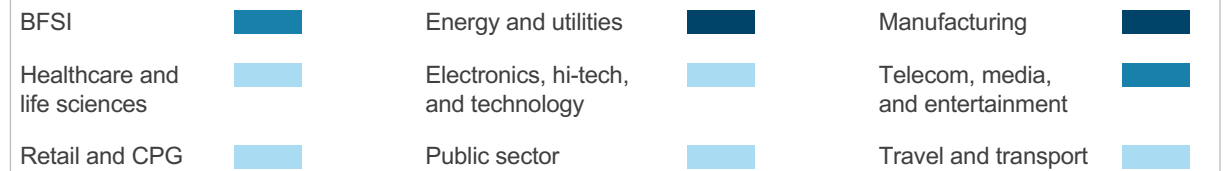


Low (<10%) Medium (10-20%) High (>20%)

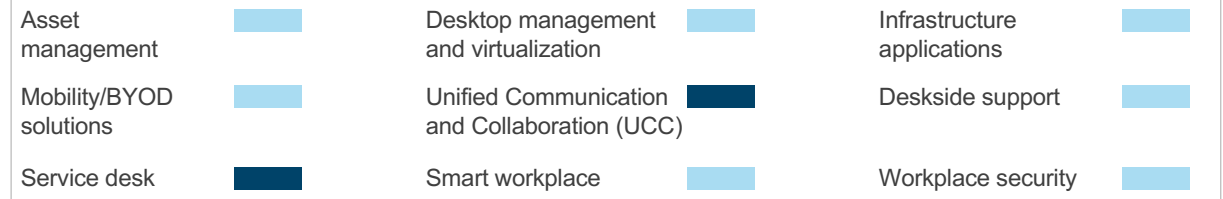
Adoption by region



Adoption by industry



Adoption by service segments



Adoption by buyer group



Source: Everest Group (2023)

Infosys profile (page 2 of 5)

Solutions

Proprietary solutions/IP/products (representative list)

Solution name	Details
Enhanced survivability and improved call notification	This solution offers a reliable mechanism to deliver calls and notifications to healthcare workers so that they can effectively respond to life and death situations, in a secure UCaaS environment.
Infosys Topaz	This solution provides AI-first set of services, solutions, and platforms using generative AI technology. It helps create value from innovations, pervasive efficiencies, and connected ecosystems. Infosys claims the solution currently offers approximately 12,000+ AI use cases, 150+ pre-trained AI models, and 10+ AI platforms steered.
XtractEdge - Document AI and commercial insurance	<ul style="list-style-type: none"> This solution enables clients to gain insights from documents: legal contracts, commercial insurance papers, SOPs, images, handwritten notes, PDFs, e-mails, or any other documents It leverages this tool to unlock insights from myriad unstructured data and gain measurable business value It empowers commercial insurers to improve underwriter productivity and response time by offering a complete view of the right information across the new business and underwriting life cycle
Infosys Orbit (Employee Experience Platform)	This solution acts as a human-centric digital employee experience platform offering fully customizable design system, built-in hyper-personalization tools, 100+ ready to go EX modules and accelerators, 25+ universal service blueprints, an extensive prototype library, API library to integrate with all major employee back-end platforms, and applications to empower every employee and amplify their potential at work every day. It enables a connected and hyper-productive workforce regardless of where, how, and when they choose to work.
Managed Protection Detection Response (MPDR) services	This solution offers pre-engineered packaged and integrated managed protection detection and response services to elevate the customer security posture that includes the Cyber Next platform and other managed security services such as Cyber Watch, Cyber Intel, Cyber Hunt, Cyber Scan, Cyber Central, Cyber Gaze, and managed Endpoint Detection and Response (EDR).
Infosys Cortex (applicable across industries)	This solution aims to bring transformation in the service desk operations as a one-stop shop for all requirements. It is a comprehensive, modular, micro-services based LEGO platform that integrates Infosys IP and leverages partner and technology provider ecosystem to uniquely cater to the needs of service desk operations.
Infosys Digital Operations Management (IDOM) (applicable across industries)	The solution is a cloud-based, modular, and digital ecosystem to help track, maintain, manage, and enhance end-to-end operations management. It offers next-generation command center view for delivering operations excellence through effective agent/analyst life cycle management through the four core modules of user management portal, knowledge management, performance management, and quality management.
Infosys Workplace Suite	<ul style="list-style-type: none"> This solution offers reduced threats with automated configuration monitoring and drift resolution, streamlines M365 tenant change and release management, provides resilience by safeguarding M365 tenant configuration from unintentional changes, and elevates experience by enabling a single pane view of all M365 administrative configurations The solution offers a digital assistant with capabilities of AI-enabled hyper-personalization, intelligent search, and smart notification

Other digital workplace solutions include Infosys Wingspan, Finacle Mobile Teller, ESM Café, and Infosys Intelligent Workplace Platform Solutions.

Infosys profile (page 3 of 5)

Partnerships

Partnerships (representative list)

Partner name	Details
Microsoft	<ul style="list-style-type: none"> • Leverages this partnership to help enterprise customers with all their end-to-end Microsoft products life cycle management needs • Offers managed cloud services and solutions such as Microsoft endpoint administration and Azure cloud services • Recognized as the Microsoft security solution partner for Identity and Access Management (IDAM) specialization, threat protection specialization, and Microsoft security 20/20 award in the category of MSSP/TDR disruptor
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 • Enabling asset management and 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 aims to provide support services through analysis, planning, deployment, and management of the print fleet
Dell	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 to navigate digital transformation and adopt a cloud-first strategy
RICOH	Leverages this partnership for: <ul style="list-style-type: none"> • Global dispatch and depot services partner • End-user device life cycle management
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
Other technology partners include Apple, CrowdStrike, GO TO, Cisco, Tenable, and Palo Alto	

Infosys profile (page 4 of 5)

Investments and recent activities










Investments (representative list)

Investment name	Details
Innovation and investments	<ul style="list-style-type: none"> • Technology innovation centers: invested in the Arizona technology innovation center, employing 1,000 Arizonans and focusing on autonomous technologies, Internet of Things (IoT), full-stack engineering, data science, and cybersecurity • Cyber defense center and innovation center: invested in cyber defense centers and seven innovation centers while expanding delivery from US hub locations to capture International Traffic in Arms (ITAR) demands and grow in the US public sector • Energy innovation center: invested in the energy innovation center in Houston and other upcoming industry-specific innovation centers • Expansion of service desks: invested in the expansion of its Brazil and Mexico service desks while also investing in setting up a new center in the Caribbean • Private 5G network-as-a-service: built the capability to provide end-to-end, private 5G Network-as-a-Service (NaaS) • Hubs and proximity centers: invested in 6 hubs and 21 proximity centers in the US, expanding its presence by growing in Canada (Calgary) as well as a nearshore capability in Mexico, Brazil, and LATAM regions
Investments / Skill development	<ul style="list-style-type: none"> • Digital learning center: using learnings and best practices from Infosys' global education center in Mysore; the training programs at the Indianapolis education and immersive digital learning center combine classroom-based and immersive, real-world learning focused on key competencies, such as user experience, cloud, big data, and core technology and computer science skills • Digital reskilling initiatives – US: expanded hiring from community colleges through digital reskilling initiatives (Infosys Springboard – Digital Academy and Pathfinders)

Infosys 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 continues to have a robust approach to workplace business and has been investing significantly through a proactive sales approach, expanding its talent pool, and developing innovative solution accelerators
- Infosys' user experience (UX)-centric approach to delivering workplace solutions bolstered through offerings such as Infosys Orbit is resonating well with enterprises
- Enterprises seeking user-centric solutions would find Infosys' increased focus toward front-line workers, augmented through offerings such as Wingspan, attractive
- Its focus toward building localized market understanding by strengthening both onshore and nearshore capabilities would benefit enterprises seeking strong delivery capabilities across NA
- Enterprises looking to invest in generative AI domain will find Infosys' Topaz services attractive, which have the advantage of 12,000+ AI use cases, 150+ pre-trained AI models, and 10+ AI platforms
- Some clients highlighted Infosys' flexibility to address requests and technical capabilities of the resources as its key strengths

Limitations

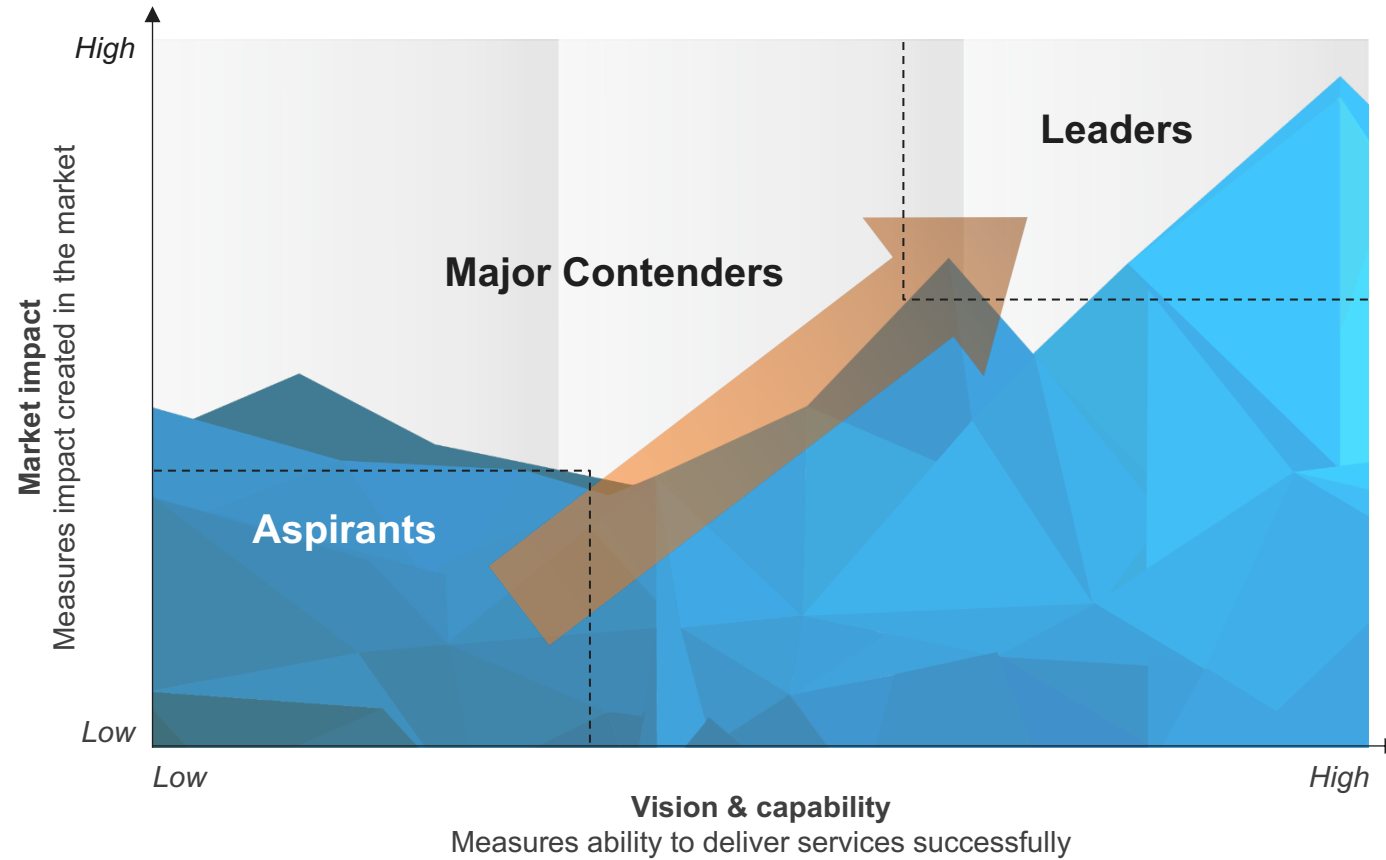
- Enterprises looking to engage for segments such as mobility/BYOD, asset management, and workplace security should carefully evaluate Infosys' capabilities
- Infosys is not considered as a thought leader and strategic partner for workplace services. It needs to further invest in building mindshare
- Given the focus on profitability and margin, Infosys' ability to use asset-leveraged deals for growth is constrained
- Enterprises can expect limited maturity and a number of credible proof points from its solution portfolio, given most of its IP are still evolving
- Small and midsize enterprises should run further due diligence owing to Infosys' greater focus and proof points for large enterprises
- Clients have highlighted a lack of proactiveness in the identification of issues that could be addressed through automation as a key improvement area
- Some clients have expressed displeasure over the lack of technical expertise in the resources

Appendix

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



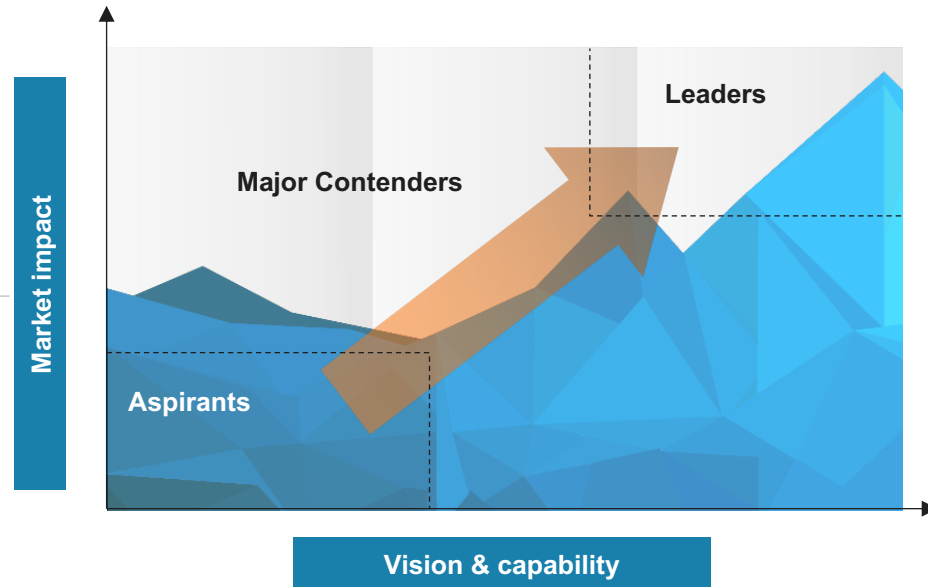
Everest Group PEAK Matrix



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.



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.

Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

NOTICE AND DISCLAIMERS

IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.