



# Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe

Focus on Capgemini  
December 2023



## Background of the research

- Despite the global macroeconomic conditions resulting in increasing cost pressures and Return on Investment (RoI) scrutiny, enterprise demand for digital workplace services remains high. The recent technological advances and digital transformations have led to the third wave of value-based transformation, where enterprises recognize value realization, productivity, and cost optimization to be critical to tackle and survive the slowdown. At the same time, industry-specific workplace accelerators, AI-backed solutions, and product-centric operations are gaining traction among enterprises
- In the European digital workplace market, enterprises are prioritizing Employee Experience (EX), a mix of global and local service delivery, and higher cultural alignment while also dealing with higher region-specific nuances, increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes
- The digital workplace service providers are focusing on strengthening their geographically contextualized and industry-specific capabilities to assist enterprises in their digital workplace engagements. Additionally, providers are seeking to enhance their consulting and advisory capabilities in an effort to position themselves as strategic partners to their enterprise customers
- In this research, we present an assessment and detailed profiles of 22 digital workplace services providers featured on the digital workplace services PEAK Matrix® – Europe

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace services providers, client reference checks, and ongoing analysis of the digital workplace services market.

**The full report includes the profiles of the following 22 leading service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe](#):**

- **Leaders:** Accenture, Atos, Capgemini, HCLTech, TCS, and Wipro
- **Major Contenders:** Cognizant, Computacenter, DXC Technology, Fujitsu, Infosys, Kyndryl, LTIMindtree, NTT DATA, Orange Business, Stefanini, Tech Mahindra, and Unisys
- **Aspirants:** Coforge, Microland, UST, and Zensar

### Scope of this report



**Geography**  
Europe



**Providers**  
22 leading digital  
workplace service  
providers



**Services**  
Digital workplace  
services

## Digital workplace services PEAK Matrix® – Europe characteristics

### Leaders

Accenture, Atos, Capgemini, HCLTech, 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 Intellectual property (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 employees along with making headway into disruptive themes such as generative AI to optimize their operational efforts and workflows in client's environments
- 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

Cognizant, Computacenter, DXC Technology, Fujitsu, Infosys, Kyndryl, LTIMindtree, NTT DATA, Orange Business, Stefanini, Tech Mahindra, and Unisys

- 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

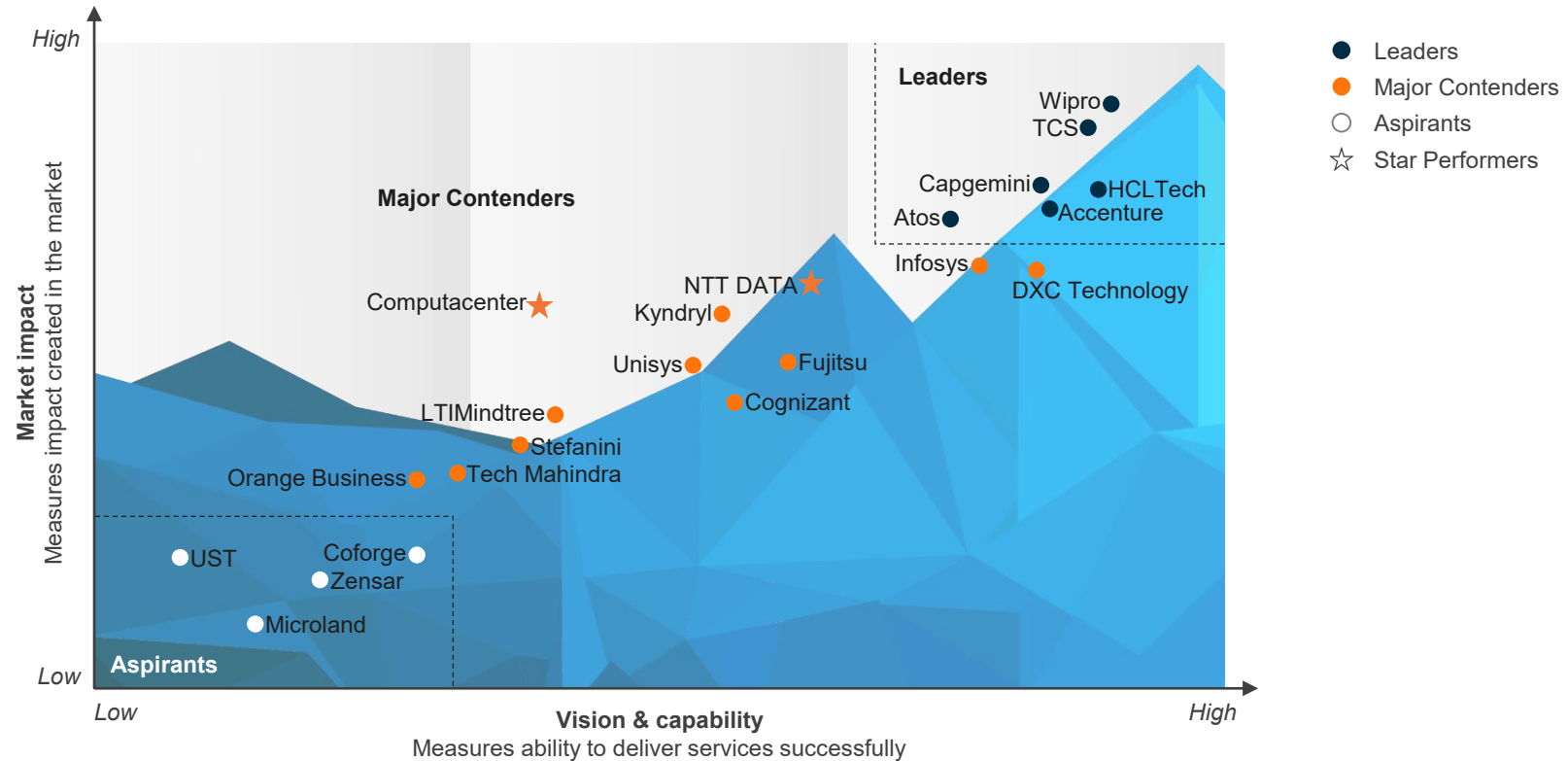
Coforge, Microland, UST, and Zensar

- 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 – Europe | Capgemini is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe<sup>1,2,3,4</sup>



1 Assessments for Fujitsu, Orange Business, 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)

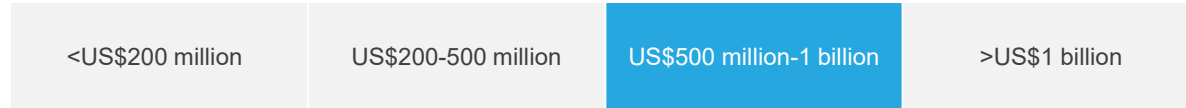
# Capgemini profile – Europe (page 1 of 5)

## Overview

### Digital workplace services vision

Capgemini's vision is to focus on empowering people and transforming the work experience by embracing the shift from traditional end-user offerings to human-centric value-add solutions, integrating their capabilities across the group and committing to measurable outcome and client value. Capgemini believes technology alone is no longer sufficient and the convergence between people services (HR) and traditional infrastructure (CIO) is greater than ever; thus, they have shifted their focus to meeting the new needs of all client business lines.

### Digital workplace services revenue (2022)

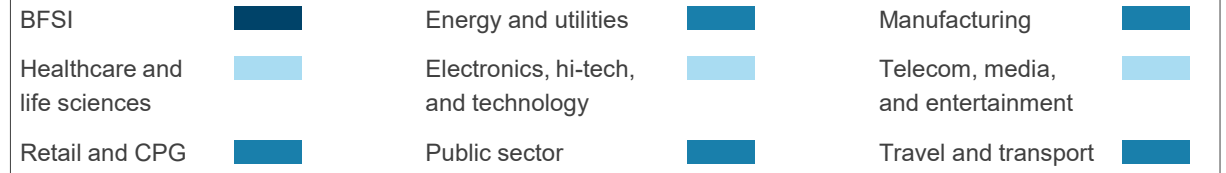


Low (<10%) Medium (10-20%) High (>20%)

### Adoption by region



### Adoption by industry



### Adoption by service segments



### Adoption by buyer group



Source: Everest Group (2023)

# Capgemini profile – Europe (page 2 of 5)

## Solutions

NOT EXHAUSTIVE

### Proprietary digital solutions (representative list)

Solution	Details
Ask Adam	This solution offers cross-industry extended AR-based remote assistance, especially for front-line workers.
Front-line worker solutions / medical trial service desk	This solution leverages MS Viva to offer cross-industry Microsoft front-line workers solution. It provides enhanced safety in work for manufacturing and life sciences clients, allowing them to simulate processes, onboard new people, and train employees on complex business processes within the safety of an immersive and extended reality environment.
Amelia (CHIP)	This solution offers chatbot / voice bot support and zero-touch experience, expanded with AIOps capabilities. It provides voice interaction with chatbot capability on the IVR to cater for accessibility and for increased overall automation. It helps in enhancing capabilities of their CHIP virtual assistant by leveraging latest capabilities in generative AI and LLM.
Enterprise Automation Fabric (EAF)	This solution merges Capgemini's intelligent automation platform, its enabling platform for their applications ADMnext offer, and their Cloud Infrastructure Services (CIS) Digital Operations Platform (DOP) into a single Capgemini platform to help the organization become the partner of choice for all client multi-tower deliveries. It is a common automation fabric used to implement policy, security, deployment, and operations as-a-code.
Employee Experience Index (Experience Management)	The solution utilizes data from service performance, KPIs, digital experience monitoring tools, network monitoring, and productivity suites to enhance employee productivity, well-being, work-life balance, quality of work (including remote work), and collaboration experience. It correlates with subjective personas to identify important areas for users and allows for ongoing employee experience management to improve performance.
Hybrid Work Configurator tool	This solution offers maturity assessment to create clear results in the evaluation of digital workplace to design the workplace of the future.
People Experience Platform	This solution is powered by Microsoft VIVA and helps clients to operate in a hybrid workplace.
WEX Hub Application	This solution provides mobile and web applications for employees and claims to deliver a truly unified digital workplace experience (resource booking, secure building access, maps and campus navigation, facility faults reporting, colleague finding, and check-in options).
Smart Meeting Spaces	This solution leverages the smart spaces practice, helping clients to transform spaces into smart conference rooms and huddle spaces that provide seamless inclusive hybrid collaboration experiences for employees.
Metaverse, AR/MR, and AR/VR Collaboration	This solution provides metaverse capability with AR and VR technologies to augment and improve collaboration and is also used for onboarding, collaboration, and learning and development (L&D) use cases.
Other digital workplace solutions include Carbon Calculator, Andy3D, Ecolabels, and Identity security by design in workplace services.	

# Capgemini profile – Europe (page 3 of 5)

## Partnerships

NOT EXHAUSTIVE

### Partnerships (representative list)

Partner name	Details
Lakeside	Leverages partnership with Lakeside to modernize experiences and services delivered to end-user computing clients and prospects
Nexthink	Leverages Nexthink’s technology to gather sentiment and operational data from multiple data sources that help in defining eXperience Level Indicators (XLIs) for engagements
Amelia	<ul style="list-style-type: none"> <li>Leverages partnership with Amelia to enable new AI capability that incorporates the latest generation of AI with ML</li> <li>CHIP, an intelligent AI VA for streamlining infrastructure operations through AL and ML, is based on Amelia and comprises a knowledge bot, a cognitive bot, and an action bot</li> </ul>
NSC	Leverages partnership with NSC for deskside support, break/fix services, moving/replacement of systems, distributed smart services / onsite-support service, personalized, hands-on support, and to support special events
Excis	Leverages partnership with Excis for field onsite support services
Citrix	Leverages partnership with Citrix to modernize experiences and services delivered to end-user computing clients and prospects
Microsoft	Leverages partnership with Microsoft to modernize experiences and services delivered to end-user computing clients and prospects
AWS	Leverages partnership to provide specific focus on hosting workplace platforms, data, as well as use of AWS connect for some customers
Google	Expanded partnership with Google cloud to launch the global generative AI Google Cloud CoE to accelerate client value
ServiceNow	<ul style="list-style-type: none"> <li>Leverages partnership with ServiceNow to provide GSI in 26 countries</li> <li>Enrolled in partner programs for consulting and implementation as well as reseller and service provider support</li> <li>Offers implementations and upgrades across all product lines</li> </ul>
Genesys	Leverages partnership with Genesys to provide: <ul style="list-style-type: none"> <li>New global telephony platform migration</li> <li>Transcription and sentiment for all calls</li> <li>Agent assist integration</li> <li>Cloud-based platform</li> </ul>

Other digital workplace partnerships include Hemmersbach, HPI, Signifi, Genesys, Happy Signals, Qualtrics, Lenovo, Dell, and VMware.

## Capgemini profile – Europe (page 4 of 5)

### Investments and recent activities

NOT EXHAUSTIVE

#### Investments (representative list)










Investment name	Details
Innovation and investments	<ul style="list-style-type: none"> <li>• TechPeople experience capability – invested in the Arizona technology innovation center, employing 1,000 Arizonans and focusing on autonomous technologies, IoT, full-stack engineering, data science, and cyber security</li> <li>• Sustainability investments – invested toward making existing services and products more sustainable</li> <li>• Invested in developing sector-specific solutions</li> <li>• Living Labs, both physical and virtual – invested in showcasing digital workplace services in specific sector / vertical context</li> <li>• Embedded varied new functionalities as part of experience management</li> <li>• Sustainable IT data platform – – invested in understanding the success of client’s sustainability initiatives</li> <li>• Ecolabeled operations – providing clients with an ecolabel for service desk and workplace that can be used in the context of a carbon accounting and reduction strategy</li> <li>• Sustainability awareness and adoption – helping enterprises to raise awareness on the corporate sustainability goals among their employees and educate them on how they can lower their carbon footprint by effective use of corporate IT resources</li> <li>• Sustainable devices – advising clients toward reducing the carbon impact of the entire life cycle of employee devices – from manufacture, to distribution, day-to-day usage, and retirement</li> </ul>
Delivery Center (Investment)	Added new delivery centers in Egypt and Mexico



# Capgemini profile – Europe (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

- Capgemini takes a consulting-led approach to workplace services and has increased its capabilities across the segments of workplace which resonates well with enterprises
- Enterprises looking for a partner with strong capabilities and focus on sustainability within the digital workplace can prefer Capgemini, owing to its mature capabilities such as dashboards to enable assessment, reporting, insights, and sustainability score cards
- Given Capgemini’s strong foothold in the European region, it continues to be a preferred provider for enterprises seeking a Europe-centric partner, with a substantial resource presence, especially in the Western European region. It has gained more prominence in the region with Atos going through a split
- It has forged strategic partnerships with prominent providers such as Microsoft, Amazon, and Google as well as with niche and interesting providers such as Aruba and Unity
- Enterprises will benefit from its strong focus on innovation and recent investments in Living Labs which helps Capgemini demonstrate its capabilities to potential and existing clients
- Clients have expressed their appreciation for Capgemini’s adaptability to a dynamic work environment

### Limitations

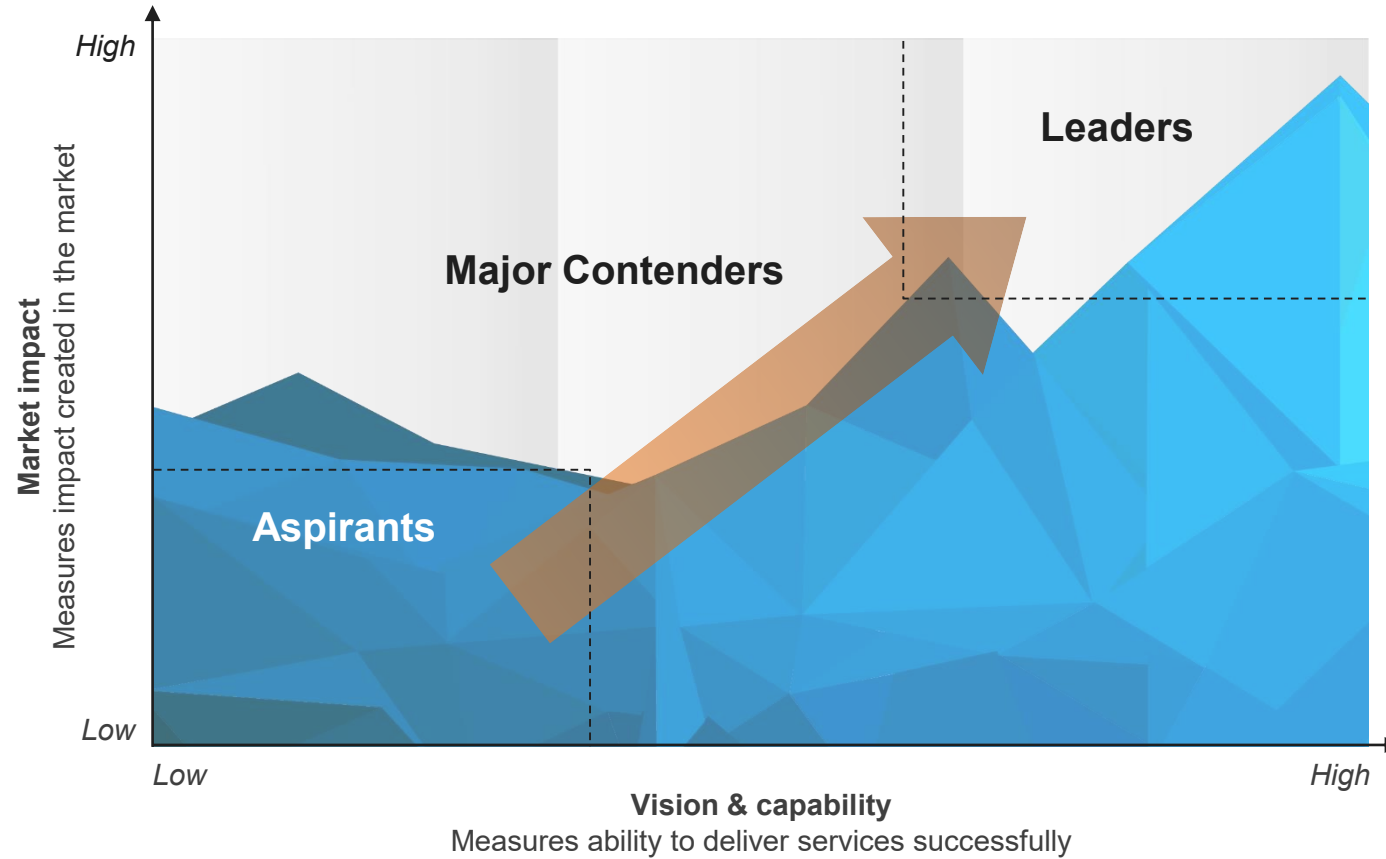
- Capgemini’s capability to provide end-to-end workplace services stack is still maturing, and hence it might not be the right partner for enterprises looking for a single provider
- Enterprises seeking mature and workplace-focused IP and accelerators will find Capgemini to be lagging peers due to its limited number of named offerings. Although Capgemini has increased its investment in internal IP and partner accelerators, these offerings lack maturity and proof points of implementation in a diverse and complex environment
- For enterprises seeking efficiency-focused transformations, Capgemini may not be the most suitable choice due to its limited maturity in automation and cost-focused levers
- Enterprises from travel and transport, electronics and hi-tech, and media and entertainment, need to be wary of Capgemini due to its limited presence in these verticals
- Enterprises looking for in-depth industry-specific workplace solutions need to assess Capgemini’s capabilities as it lags peers in terms of verticalized solutions, frameworks, and partnerships
- Clients have expressed displeasure over delays in service delivery, which impact business outcomes and employee experience

# Appendix

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



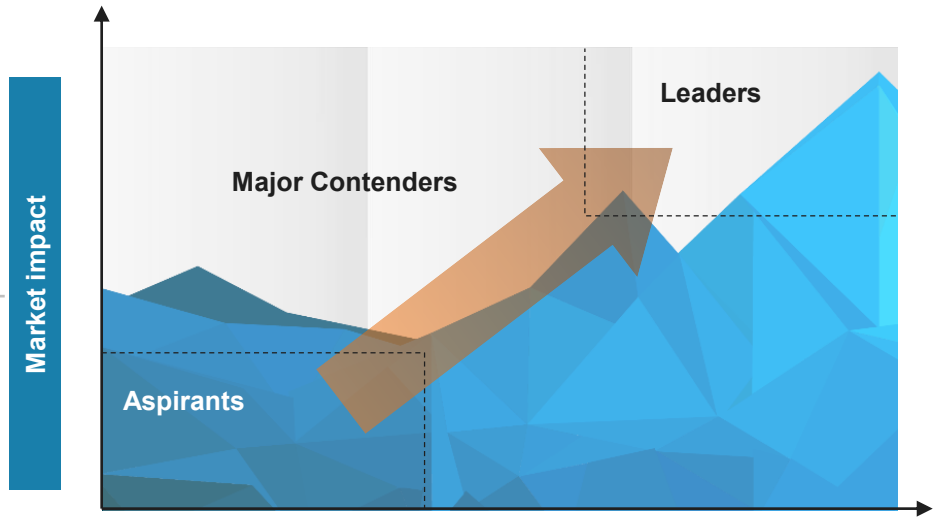
Everest Group PEAK Matrix



# 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



**Vision & capability**

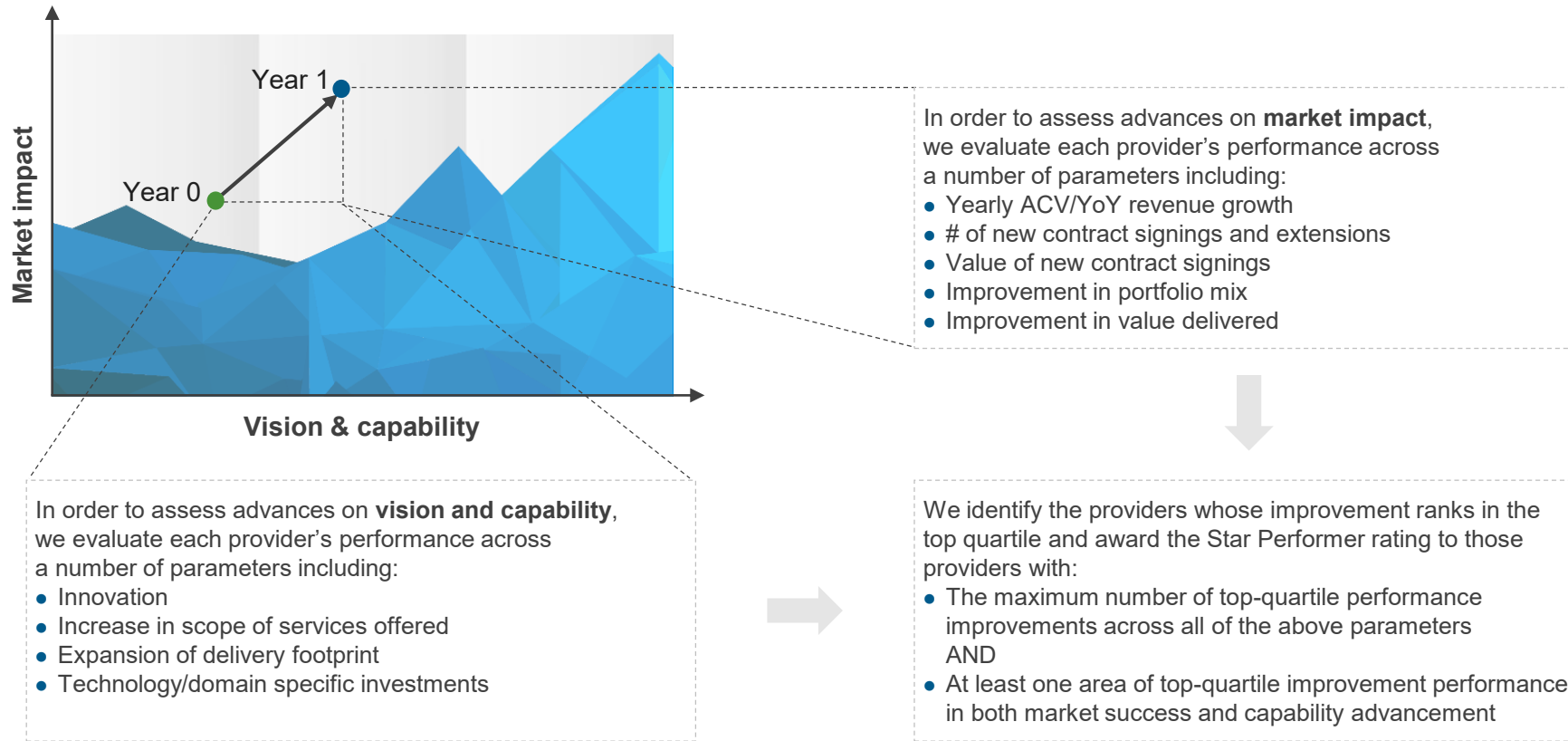
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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

# Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

## Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

# 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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