



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

Focus on Capgemini
September 2024



Introduction

Aftermath a period of substantial growth, the digital workplace market has witnessed a period of slowdown largely in turn to the prevalent global macroeconomic conditions which has accelerated the cycle of realization among enterprises who are now striving toward realization of their prior investments. However, the upcoming years are poised to witness a resurgence in enterprise investment trends. Notably, this resurgence will be marked by a heightened emphasis on a strategic combination of cost optimization and transformative initiatives. At the forefront of this paradigm shift stands the integration of generative Artificial Intelligence (gen AI), signifying a pivotal force driving change within the organizational landscape.

In the European digital workplace market, while there has been an increased focus on cost optimization, improving Employee Experience (EX) remains the top priority, with added focus on maintaining an ideal mix of global and local service delivery to deal with the cultural nuances. While also dealing with increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes

Digital workplace service providers are focusing on strengthening their geographical capabilities while offering enterprises industry-specific and persona-specific solutions that follow a security-by-default approach and ESG compliance. Additionally, providers are enhancing their consulting and advisory capabilities to position themselves as strategic partners to their enterprise customers.

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

The full report includes the profiles of the following 23 leading digital workplace providers featured on Digital Workplace Services PEAK Matrix – Europe:

- **Leaders:** Accenture, Capgemini, DXC Technology, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys
- **Aspirants:** Microland, Mphasis, UST, and Zensar

Scope of this report

Geography: Global

Industry: 23 leading digital workplace service providers

Services: Digital Workplace services

Digital workplace services PEAK Matrix® characteristics

Leaders

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

- Leaders continue to showcase high expertise and experience in delivering end-to-end workplace engagements, while maintaining client satisfaction through their balanced portfolio, coherent vision, and robust suite of agnostic and contextualized IP and solutions, supported by skilled talent and strong delivery capabilities
- Further these providers have been able to effectively leverage next-generation themes such as copilot and generative AI, backed by their expansive partnerships with technology vendors, niche providers, and start-ups to co-create solutions and engage in joint Go-to-market (GTM) in this space to deliver quick business outcomes to enterprises
- However, despite this, Leaders face tough competition from Major Contenders in both retaining and winning new deals and must continue to enhance their capabilities to offer clients unique benefits

Major Contenders

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

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

Aspirants

Microland, Mphasis, UST, and Zensar

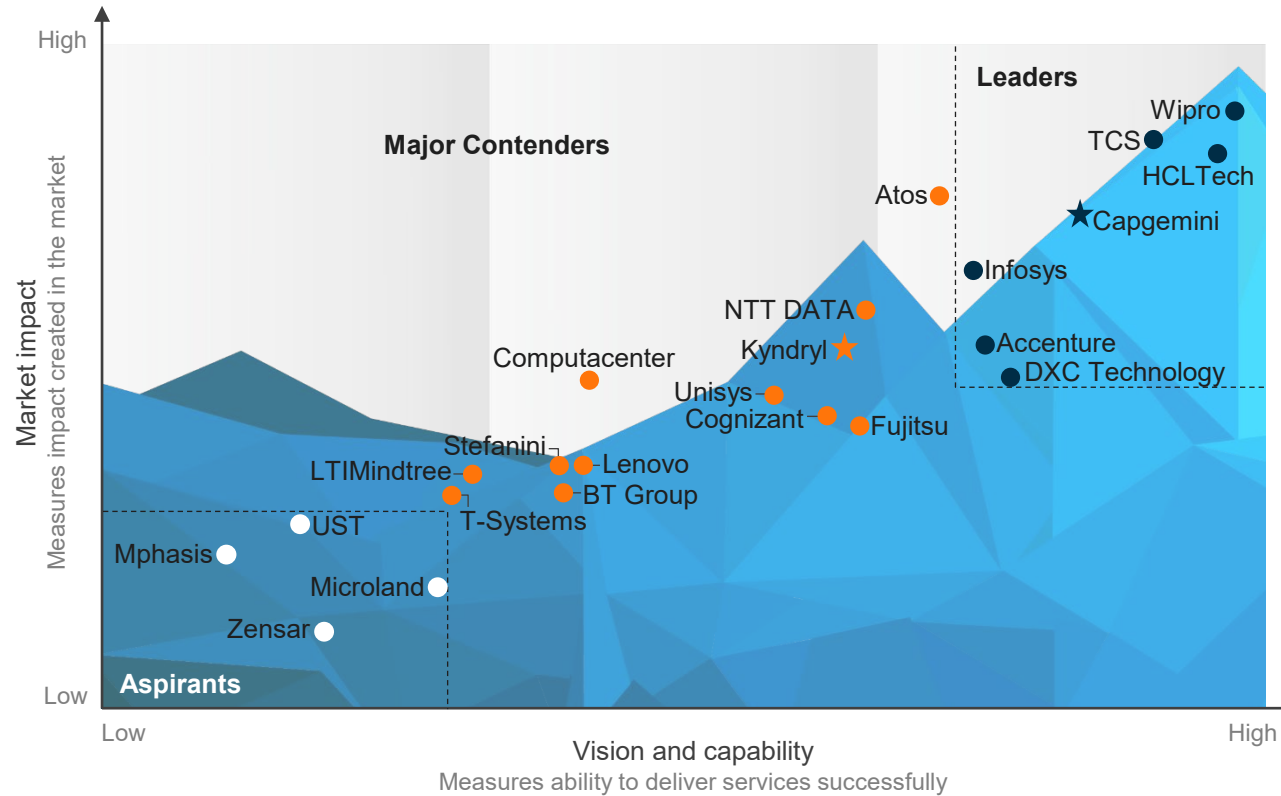
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership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

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe | Capgemini is positioned as a Leader and a Star Performer

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

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Accenture, Microland, and Zensar excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2024)

Capgemini profile (page 1 of 5)

Overview

Digital workplace services vision

Capgemini's strategic vision focuses on providing human-centric services. It anticipates that communal innovation and individual productivity will serve as future market differentiators, supported by inclusive and sustainable business practices. Its vision for the future of work is one in which AI enables organizations to achieve new levels of productivity, adaptability, and innovation, resulting in a workplace where human and machine intelligence work together to achieve enhanced performance.

Digital workplace services revenue (CY 2023)

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

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

By industry

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

By buyer size

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

By IT services segment

- Asset management
- Deskside support
- Enterprise mobility
- Desktop management and virtualization
- IT service management
- UCC
- Service desk
- Smart workplace
- Gen AI in the workplace

By geography

- UK and Ireland
- Nordics
- DACH
- Benelux
- France and Southern Europe
- Eastern Europe

Capgemini profile (page 2 of 5)

Solutions

Proprietary solutions for digital workplace services

Solution name	Details
Enterprise Automation Fabric (EAF)	<ul style="list-style-type: none"> This solution is a platform that combines Capgemini's intelligent automation platform – ADMnext, the enabling platform for its applications, Cloud Infrastructure Services (CIS), and Digital Operations Platform (DOP) into a single platform, allowing Capgemini to become the preferred partner for all client multi-tower deliveries It is a common automation framework for implementing policy, security, deployment, and operations as code
Smart meeting spaces	<ul style="list-style-type: none"> This solution is used to assist clients in transforming facilities into smart conference rooms and huddle spaces that deliver hybrid collaborative experiences for employees Its features and capabilities include ideal audio/video quality, a one-click join function, simple screen sharing, digital whiteboards, the option to auto-join meetings, smart lighting, and applications and panels for reserving and canceling rooms
WEX hub application	This solution is a platform that provides mobile and web applications for employees and delivers a unified digital workplace experience by virtue of integration to its Workplace Experience hub (WEX hub) platform and workspace IoT components.
Amelia (CHIP)	This solution is used to enable chatbots / voice bots and provide a zero-touch experience, which has been augmented with AIOps capabilities. It includes voice interaction with chatbot capability on the Interactive Voice Response (IVR) to improve accessibility and total automation.
Ask Adam	This solution is an extended augmented reality-based remote help system designed specifically for frontline workers. It is applicable to all sectors involving the frontline staff.
CapGPT	This solution is the internal personal bid writing partner, educated on Capgemini data and built using gen AI technology, to assist and collate assets to write bids swiftly and effectively.
People experience platform	This solution is powered by Microsoft VIVA and allows clients to work in a hybrid environment. It promotes meaningful connections by allowing clients' employees to easily discover relevant communications, communities, and tools, and ensures that the right news and information is delivered to the right employees.
Sustainable offices	This solution uses IoT sensors and smart design to connect the hybrid workforce and track sustainability parameters.

Capgemini profile (page 3 of 5)

Recent investments

Digital workplace services investments

Investment name/theme	Details
Investments	<ul style="list-style-type: none"><li data-bbox="504 454 2443 525">• Invested in the expansion of the proprietary employee experience index with HR-related metrics, as well as the inclusion of sustainability and adoption metrics embedded in the end-to-end experience management approach and scaling up the experience management office<li data-bbox="504 532 2443 596">• Invested in the implementation of an innovation workshop approach to fully leverage living labs facilities and assist clients in driving the innovation and transformation agenda on an ongoing basis<li data-bbox="504 604 2443 668">• Invested in the verticalization of its service offerings for a variety of industrial use cases, and focuses on some of the growing demand trends in workplace services across industries<li data-bbox="504 675 2443 739">• Invested in the establishment of an innovation lab in Krakow, Poland, which is completely immersive, allowing it to display digital workplace services in a specific sector or vertical environment<li data-bbox="504 746 2443 782">• Invested in a global delivery center in Egypt to increase its talent pool and expedite its automation aspirations and capabilities with the view of expanding it for support services<li data-bbox="504 789 2443 853">• Invested extensively in making its current services and products more sustainable with simultaneous investments in new services and products that use technologies such as chatbots, metaverse, and mobility services to assist clients in minimizing their carbon footprint

Capgemini profile (page 4 of 5)

Partnerships










Digital workplace services partnerships

Partner name	Details
Lakeside	Leverages this partnership to modernize the experiences and services offered to its end-user computing clients and prospects; it uses Lakeside Systrack to collect sentiment and operational data from various data sources, which aids in the definition of eXperience Level Indicators (XLIs) for engagements
NexThink	Leverages this partnership to collect sentiment and operational data from various data sources, which aids in the definition of XLIs for engagements
Amelia	Leverages this partnership to develop CHIP, an innovative AI-based virtual assistant, for optimizing its infrastructure operations using AI and ML; it is built on Amelia and includes a knowledge bot, a cognitive bot, and an action bot
NSC	Leverages this partnership to provide desk-side support, break/fix services, and system relocation/replacement, as well as personalized, hands-on support and assistance with special events
Excis	Leverages this partnership to provide field onsite assistance
Hemmersbach	Leverages this partnership for field onsite support services
Citrix	Leverages this partnership to modernize the experiences and services offered to end-user computing clients and prospects
Microsoft	Leverages this partnership (of over 25 years) with the goal of providing superior business value to its clients; Capgemini collaborates with Microsoft to modernize the experiences and services provided to end-user computing clients and prospects

Capgemini profile (page 5 of 5)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Enterprises seeking an experience-centric partner focused on transformation will find Capgemini attractive, given its strong focus on delivering total experience, further backed by its aggressive pushing of outcome-led deals
- Capgemini’s recent investment roadmap for enhancing its workplace capabilities underscores its commitment toward strengthening its presence in this space
- With Atos engaged in sales talks, Capgemini is increasingly seen as the preferred provider for European enterprises looking to move away from Atos, seeking a European alternative
- Capgemini takes a consulting-led transformation approach to workplace services, and has been able to successfully expand its consulting client base
- European enterprises will benefit from Capgemini’s strong focus on ESG, characterized by its ESG-embedded solutioning approach and solutions such as Sustainable IT and Eco-label

Limitations

- While Capgemini stands out as the preferred choice for enterprises seeking a European service provider. Its solutioning aggression and GTM shows gaps compared to more mature Indian-heritage providers, and seems to lose preference in cases where clients do not prioritize a European provider
- Despite having offerings across workplace segments, Capgemini currently lacks traction and enterprise mindshare for its workplace-focused IP and accelerators
- Small enterprises with legacy IT estate should do further due diligence on Capgemini, given its skewed focus to work on large transformative engagements
- Enterprises from healthcare and life sciences, travel and transport, and media and entertainment, should do further due diligence on Capgemini due to its limited presence in these verticals
- Clients seeking an aggressive pricing strategy might not find Capgemini suitable, considering it is perceived as a premium-priced provider compared to peers

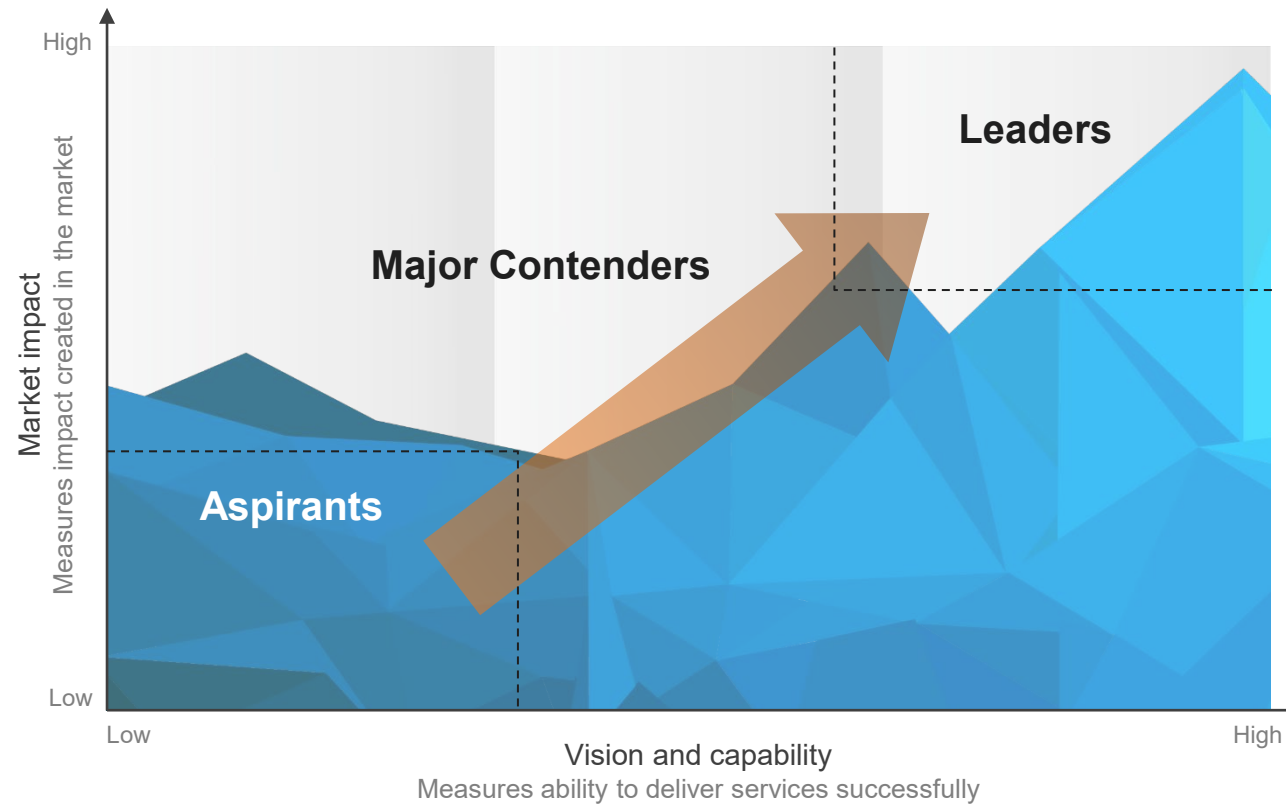
Appendix

PEAK Matrix® framework

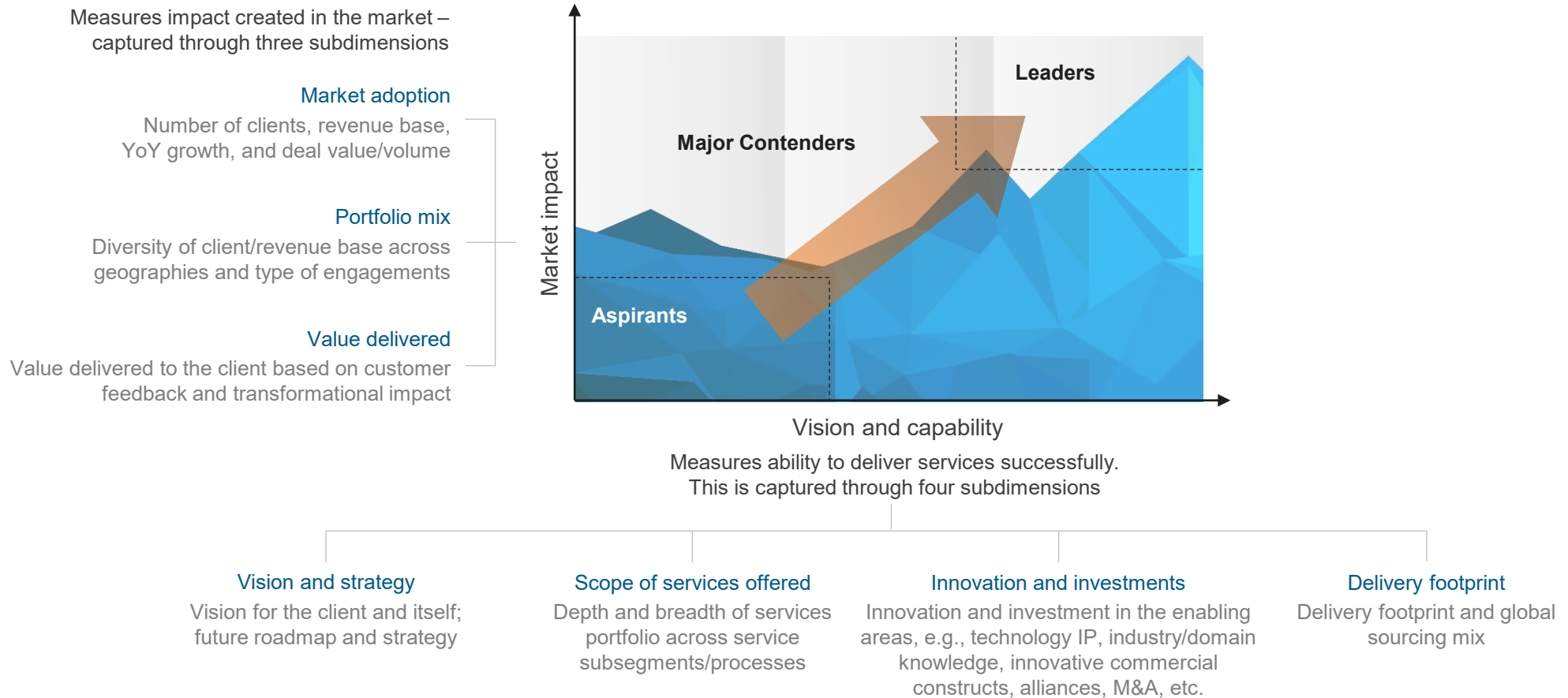
FAQs

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

Everest Group PEAK Matrix



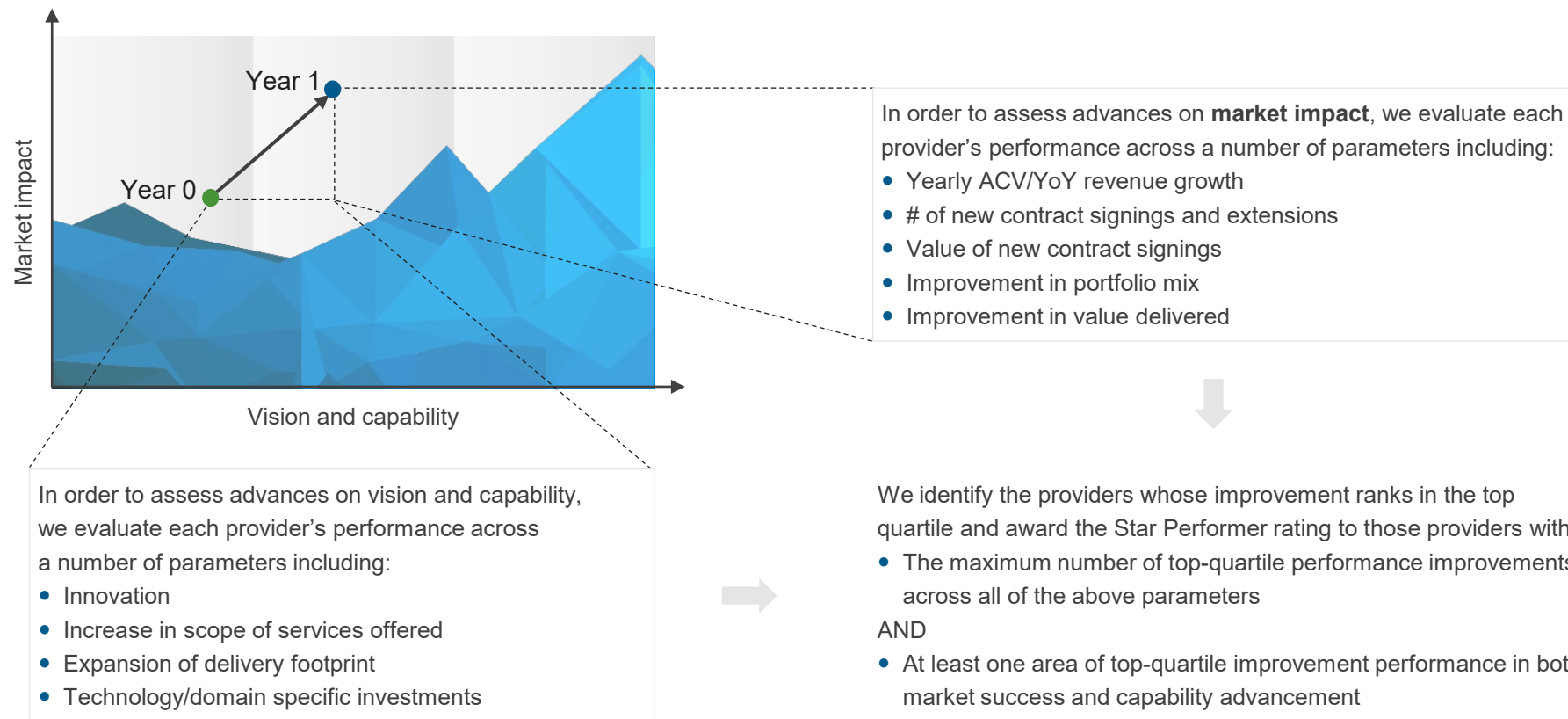
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer 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 Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

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

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

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

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

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

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

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

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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