



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2025 – Global

Focus on TCS
September 2025



Introduction

The digital workplace market is experiencing a demand stabilization phase, as macroeconomic uncertainty has moderated overall growth with the underlying dynamics revealing a nuanced picture with diverse regional priorities. North America continues to anchor global market share, driven by emerging mid-market demand and sustained interest in next-gen technologies, whereas Europe's focus remains in sustainability and regulatory compliance. Meanwhile APAC has showcased strong growth potential with underlying Global Capability Center (GCC) wave. The overall stabilization phase of digital workplace services industry signals strategic recalibration with enterprises becoming discerning in prioritizing spend and targeting impactful use cases.

With the resurgence of the productivity era, there is a growing emphasis on evaluating transformation investments through the lens of productivity gains. Focus is increasingly shifting toward demonstrating value and tangible outcomes through evolving constructs like Objectives and Key Results (OKRs) and outcome-driven pricing models.

Service providers are doubling down on industry- and persona-specific digital workplace offerings, backed by product-led operating models and a consulting-led strategic approach. While providers are rushing to implement agentic AI-led solutions, few are prioritizing the critical supporting processes needed to truly enable the technology.

The full report includes the profiles of the following 29 leading digital workplace providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2025 – Global](#):

- **Leaders:** Atos, Capgemini, Cognizant, HCLTech, Infosys, Kyndryl, NTT DATA, TCS, and Wipro
- **Major Contenders:** Avanade, Compucom, Computacenter, DXC Technology, Fujitsu, HP, Lenovo, LTIMindtree, Microland, Milestone Technologies, Mphasis, Persistent Systems, Stefanini, Sutherland Global, and Unisys
- **Aspirants:** Bell Techlogix, Birlasoft, Dexian, UST, and Zensar

Scope of this report

Geography: Global

Industry: 29 leading digital workplace service providers

Services: Digital workplace services

Scope of the evaluation (page 1 of 2)

[NOT EXHAUSTIVE]

Consulting/Assessment services

Strategy, roadmap formulation, feasibility, and readiness assessments, compliance assessment and evaluation, and TCO/ROI analysis

Design and implementation

Design, migration, post-migration, consolidation, integration, change management, and validation

Management and monitoring services

End-to-end management and support, monitoring, governance, and other operations/services

Workplace experience management, workplace security, digital adoption, service management, analytics, ESG, and automation

Digital workplace services

Service desk

End-to-end incident/request management, omnichannel contact services, multilingual support, self-healing/self-help solutions, AIOps, ticket workflow management, intelligent swarming, real-time translation, agent assist solutions, remote access management, AI agents, and conversational AI

Deskside/Client-site support services

Install, Move, Add, Change (IMAC) solutions and services, VIP support, tech cafe (genius bars), remote support, digital lockers, ITVM/kiosks, AR-/VR-based smart field support, smart-hands support, physical AI, digital twin, field-service management platforms, and site-support services for end-user devices

Unified Communication and Collaboration (UCC)

Productivity suites (M365, Google Workspace), UCC Copilots (M365 Copilot, Gemini), Copilot Studio extensions, telephony, messaging and meeting services, directory services, UCaaS, MRaaS, CCaaS, VoIP, intranet, intelligent knowledge management, and workplace content and collaboration services (including immersive collaborations such as avatars and AR/VR/MR for collaboration)

Desktop management and virtualization

Virtual desktop management:

VDI deployment, implementation, patch and image management, and Cloud PC management

Operating System (OS) and application management:

packaging, imaging, distribution, patching, on-demand provisioning, and zero-touch deployment / modern provisioning

Workspace-as-a-Service:

Includes various as-a-service workplace models such as Desktop-as-a-Service (DaaS), VDI-as-a-Service (VDIaaS), PC-as-a-Service (PCaaS), and Experience-as-a-Service (EXPaaS)

Scope of the evaluation (page 2 of 2)

[NOT EXHAUSTIVE]

Consulting/Assessment services	Design and implementation	Management and monitoring services
Strategy, roadmap formulation, feasibility, and readiness assessments, compliance assessment and evaluation, and TCO/RoI analysis	Design, migration, post-migration, consolidation, integration, change management, and validation	End-to-end management and support, monitoring, governance, and other operations/services

Workplace experience management, workplace security, digital adoption, service management, analytics, ESG, and automation

Digital workplace services

Asset management (H/w and S/w)	Enterprise mobility	Smart workplace	Gen AI in the workplace
Management of IT assets (forecasting, discovery, procurement, deployment, and disposal of endpoint devices such as desktops, AI PCs, tablets, and workplace apps), financial reporting, license management, asset discovery, stock management, follow-me print services, Just-in-time procurement (JIT), smart refresh, and circular economy	Unified Endpoint Management (UEM) including Enterprise Mobility Management (EMM), Mobile Device Management (MDM), Mobile Application Management (MAM), Mobile Identity Management (MIM), BYOD, and Identify and Access Management (IAM)	IoT-based smart office, hot desking, wayfinding, visitor management, connected devices, HVAC solutions, facilities and energy management, and smart wearables	Stand-alone gen AI, AI PC solutions, and agentic AI deals (e.g., M365 Copilot or customized gen AI pilots) will be categorized under gen AI in the workplace, while bundled engagements such as M365 Copilot with Team will fall under UCC, and AI agents for service desk ticket reduction will fall under service desk

Digital workplace services PEAK Matrix® characteristics

Leaders

Atos, Capgemini, Cognizant, HCLTech, Infosys, Kyndryl, NTT DATA, TCS, and Wipro

- Leaders consistently demonstrate strong expertise and a proven track record in delivering end-to-end workplace engagements, while sustaining high client satisfaction through a well-balanced portfolio, clear strategic vision, and a robust set of agnostic and context-aware IP and solutions, supported by skilled talent and mature delivery capabilities
- Additionally, these providers have effectively capitalized on next-generation themes such as agentic AI and OKRs, leveraging comprehensive partnerships with technology vendors, niche specialists, and start-ups to co-develop solutions and drive joint go-to-market efforts that enable rapid business value for enterprises
- Nevertheless, Leaders continue to face intense competition from Major Contenders in both retaining and winning deals, and must further strengthen their capabilities to deliver distinct value to clients

Major Contenders

Avanade, Compucom, Computacenter, DXC Technology, Fujitsu, HP, Lenovo, LTIMindtree, Microland, Milestone Technologies, Mphasis, Persistent Systems, Stefanini, Sutherland Global, 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

Bell Techlogix, Birlasoft, Dexian, UST, and Zensar

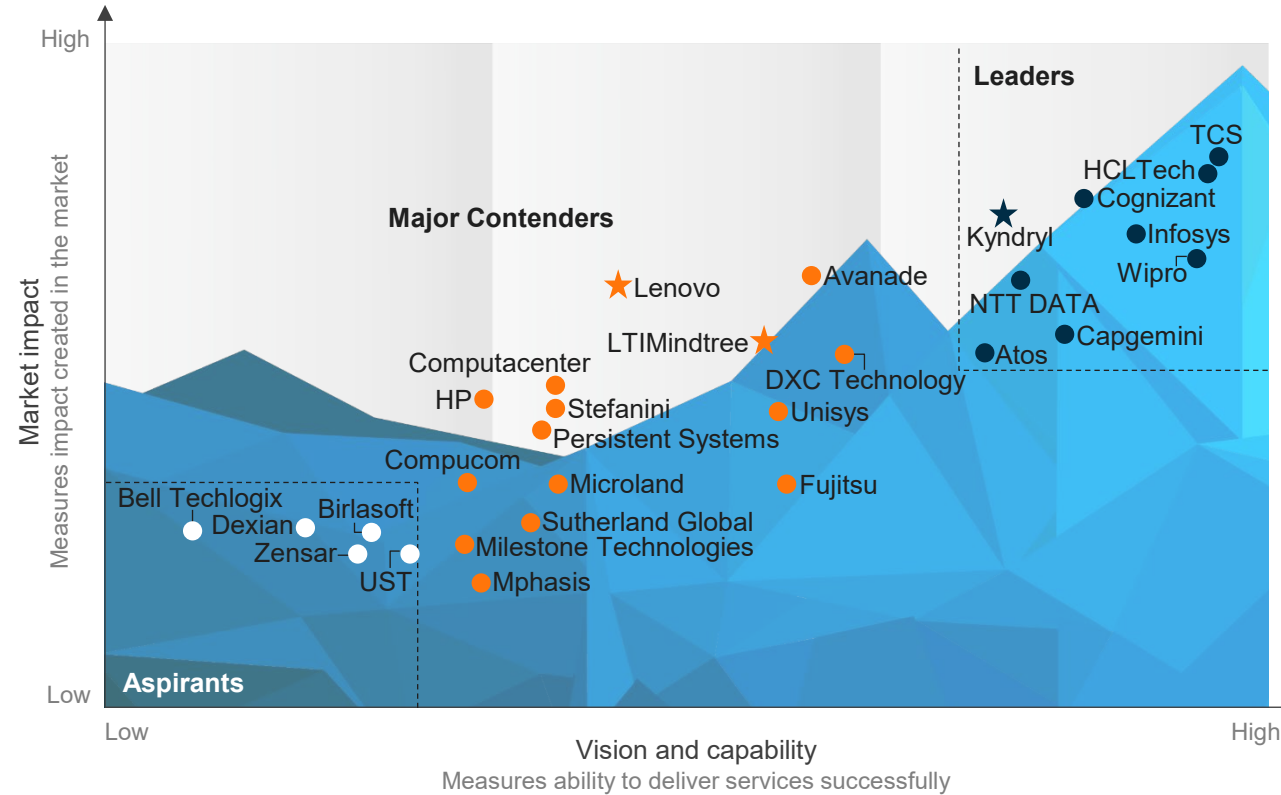
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership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

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2025 – Global | TCS is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2025 – Global¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Computacenter, DXC Technology, and Fujitsu 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 (2025)

TCS

Everest Group assessment – Leader

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 pursuing business outcome-aligned transformation benefit from TCS' product-led operating model, powered by IP solutions such as Cognix and Flex, which integrates AI, automation, and analytics into scalable and modular delivery constructs
- Enterprises exploring AI-led workplace transformation will find value in TCS' extensive talent pool and applied AI use cases, including service desk automation, agentic AI bots, voice AI, and contextual copilots tailored to enterprise operations
- Enterprises seeking vertical-specific contextualization will benefit from TCS' centralized CoE model, which enables cross-vertical knowledge transfer and domain-specific delivery through accelerators and vertical-specific dashboards
- Clients have praised TCS' ability to offer innovative pricing constructs and maintain highly competitive pricing in the contract
- TCS is recognized for its collaborative solutioning mindset, with clients appreciating its proactive approach to co-creation and clear communication

Limitations

- TCS lags in demonstrating consistent thought leadership and showcasing successful deployments in frontier areas such as agentic AI, immersive experience hubs, and autonomous workplace orchestration, positioning its innovation perception behind peers
- TCS could benefit from adding greater nuance to its regional GTM strategy by enhancing localization of offerings and refining messaging to better align with specific market needs
- SMBs may find limited alignment with TCS, given its strong focus on large enterprises and its orientation toward complex, large-scale transformation programs
- Clients expect a more proactive approach to innovation, noting limited examples where TCS has led with transformative workplace strategies or next-gen solutioning
- Some clients have emphasized that TCS needs to evolve from being a delivery-centric provider to a more strategic and consultative transformation partner

Market trends

Market size and growth

The digital workplace market stood at US\$104 billion in 2024, with an expected CAGR of 4-6%.

North America continues to account for the largest share, accounting for 45-47%, followed by Europe making up 27-29% of the market, and APAC comprising 12-14%.

Despite ongoing macroeconomic uncertainty, the digital workplace market has demonstrated strong resilience, undergoing a demand stabilization phase as enterprises prioritize high-impact initiatives.

Key drivers for digital workplace services

Productivity influenced deals	As enterprises remain cost-conscious and focused on extracting maximum value, the shift toward productivity-centric transformations has gained momentum further accelerated by value realization objectives in focus.
Confluence of other IT towers	Enterprises are increasingly pursuing multi-tower deals, where digital workplace service towers are acting as an anchor in deals bundled with other IT domains to achieve unified digital experiences across touchpoints.
Emergence of Global Capability Centers (GCCs)	GCCs have become a major investment focus this year, especially in the APAC region, with enterprises leveraging them to scale operations. GCCs today are key decision-makers, driving outsourcing to providers.

Opportunities and challenges

Consulting and advisory services	As enterprises grapple with identifying truly high-value next-gen use cases and face challenges in on-ground adoption, providers have a clear opportunity to lead with consulting-driven engagements that offer strategic guidance.
Outcome-driven delivery models	As enterprises struggle with realizing tangible value, they are embracing OKRs and innovative metrics that effectively capture business impact, offering providers an opportunity to align delivery with measurable outcomes.
Industry- and persona-specific solutions	Enterprises are prioritizing digital workplace offerings tailored to their industry context and user personas, creating an opportunity for providers to differentiate through specialized solutions that address unique needs and persona-driven experiences.

Provider landscape analysis

Market share analysis of the providers^{1,2}

2024; percentage of overall market of US\$104 billion



¹ Providers are listed alphabetically within each range

² Assessments for Computacenter, DXC Technology, and Fujitsu exclude service provider inputs and are not included in this page

Provider^{1,2} market share by YoY growth

2023-24; increase in percentage of revenue



Key buyer considerations

Key sourcing criteria

High



Transformation expertise

Extensive understanding of the client ecosystem, the ability to prescribe effective solutions, proven experience in AI deployment, and deep partnerships with leading technology vendors



Commercial innovation and flexibility

Offering innovative and flexible pricing constructs, tying commercials to actual value realization, and keeping contracts reasonably priced



Talent management

Providing skilled resources, particularly trained in next-gen technology such as AI and capable of navigating human-AI augmented scenarios, while effectively managing attrition to ensure delivery continuity



Strategic partnership

Proactively identifying improvement areas and recommending tailored, innovative, value-added solutions and services, beyond the immediate ask



Client engagement and relationship building

Responsiveness, flexibility, and proactive engagement, combined with regular facetime with senior leadership and the ability to influence key stakeholder decisions

Priority

Low

Summary analysis

Enterprises are making more calculated sourcing decisions for digital workplace services amid macroeconomic pressures, prioritizing end-to-end transformation and AI-driven value realization, alongside commercial flexibility through innovative, value-linked pricing models with skilled talent. There is growing demand for providers with deep AI expertise, not just in deployment but in ensuring value realization through outcome-driven models.

Additionally, vendor consolidation is gaining traction, as enterprises seek streamlined delivery and integrated support across functions.

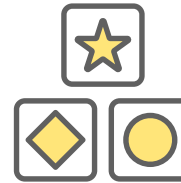
Key takeaways for buyers

As workplace transformation evolves, enterprises should focus on providers that can differentiate themselves by developing customized solutions, adopting distinctive strategic approaches, and offering holistic agentic AI-led innovation.



Shifts in provider capabilities

Enterprises prioritize service providers that lay emphasis on building a strategic partnership by deeply understanding enterprise ecosystems and offering customized solutions co-created with clients while demonstrating a vendor-agnostic approach.



Differentiation across provider types

Enterprises prioritize different providers based on their varied strategic approaches such as leading through industry-specific offerings, IP-driven platforms, consulting expertise, niche workplace segments, or outcome- and product-led delivery models.



Key innovations

As service providers focus on accelerating the implementation of agentic AI-led autonomous solutions enterprises are concerned with reimagining processes to unlock the optimal potential of Agentic AI.

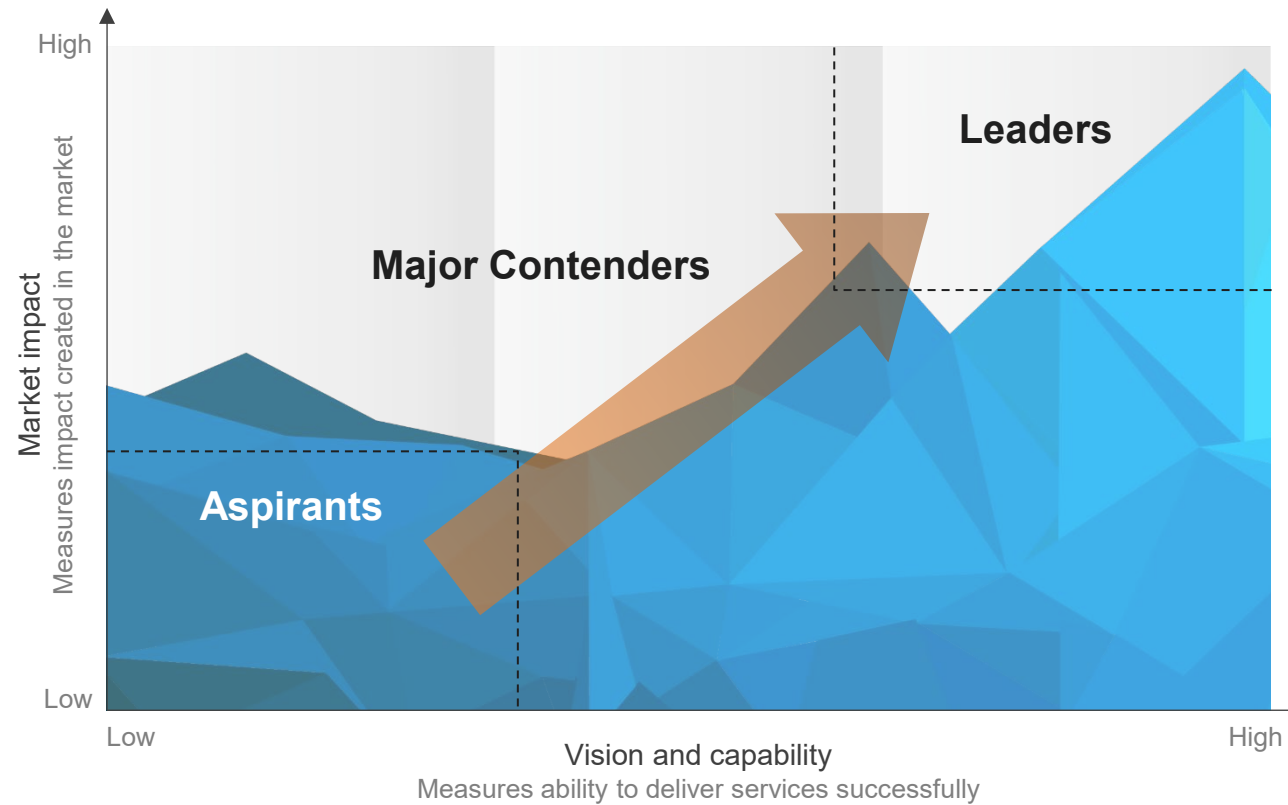
Appendix

PEAK Matrix® framework

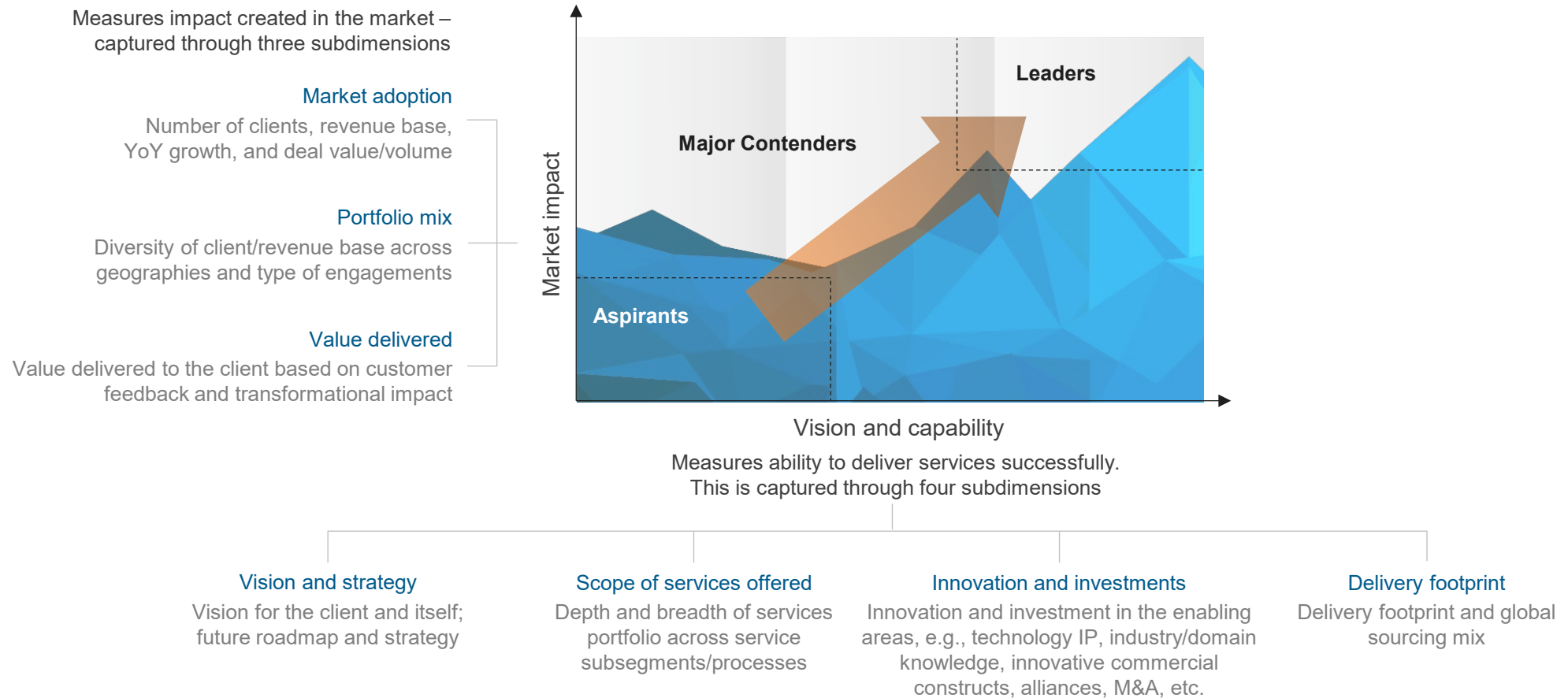
FAQs

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

Everest Group PEAK Matrix



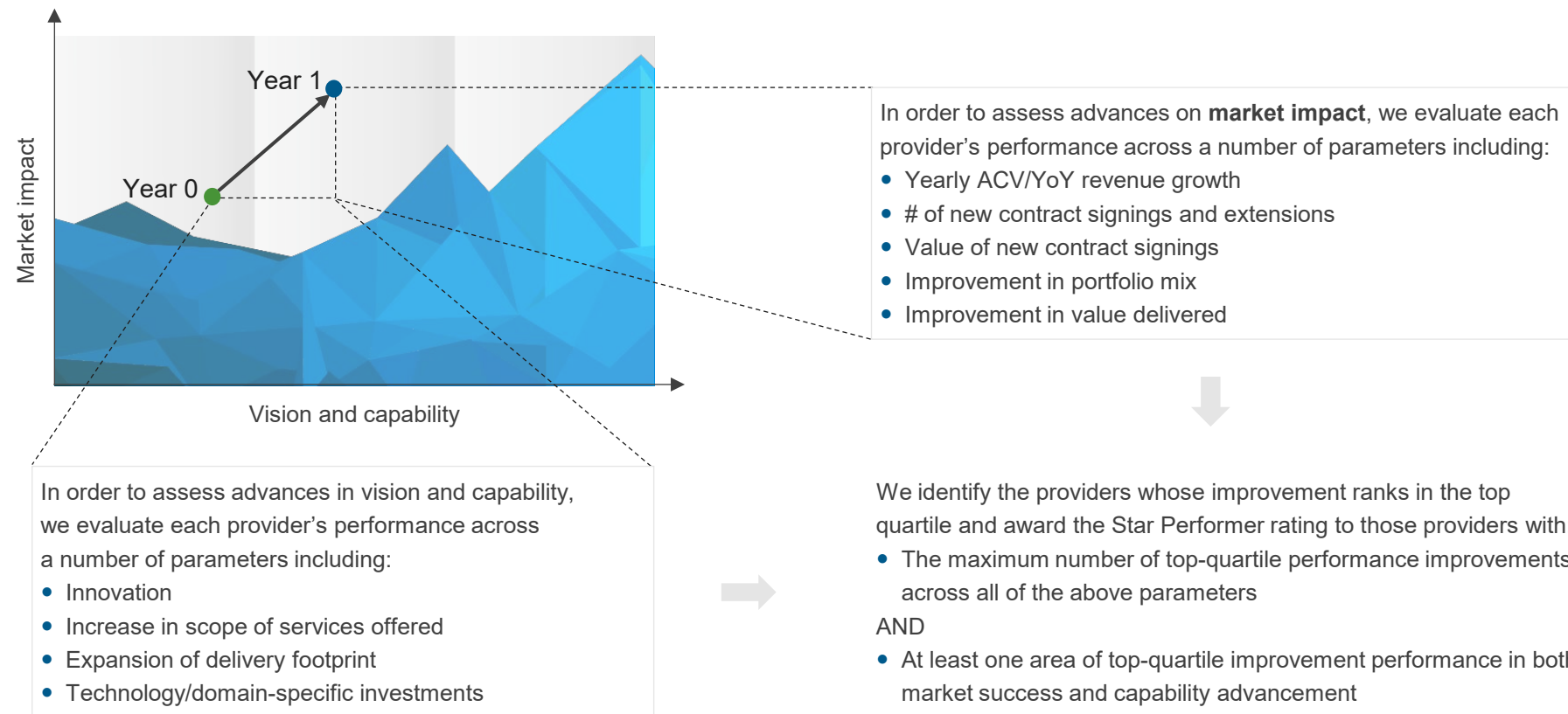
Services PEAK Matrix® evaluation dimensions



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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