



# Everest Group Digital Workplace Services PEAK Matrix<sup>®</sup> Assessment 2025 – Global

Focus on NTT DATA  
December 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

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

### Asset management (H/w and S/w)

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

### Enterprise mobility

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)

### Smart workplace

IoT-based smart office, hot desking, wayfinding, visitor management, connected devices, HVAC solutions, facilities and energy management, and smart wearables

### Gen AI in the workplace

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

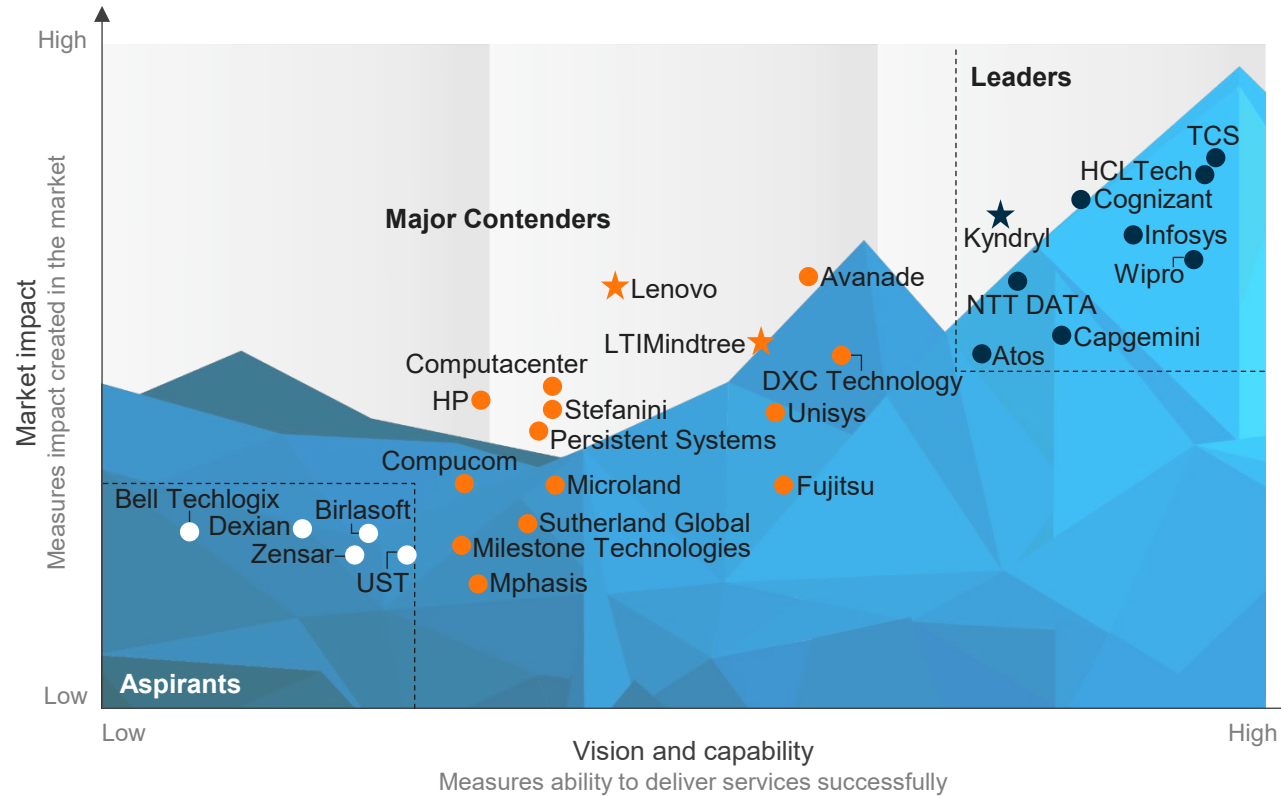
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership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

# Everest Group PEAK Matrix®

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

## Everest Group Digital Workplace Services PEAK Matrix® Assessment 2025 – Global<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> 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)










# NTT DATA

## Everest Group assessment – Leader

Measure of capability:  Low  High

### Market impact

### Vision and capability

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 convergence across workplace, IoT, datacenter, and network domains will find value in NTT DATA’s integrated end-to-end delivery capabilities
- Enterprises in regulated sectors such as BFSI, public services, and healthcare benefit from NTT DATA’s ability to align workplace transformation with compliance requirements, accessibility standards, and region-specific data governance
- Enterprises exploring next-gen workplace capabilities will find NTT DATA well-positioned, with offerings spanning across Microsoft Copilot enablement including Swarming, Prompt-as-a-Service, and its own gen AI LLM, Tsuzumi, for enterprise-grade AI adoption
- NTT DATA’s co-creation-led approach and advisory workshops, backed by regular executive engagement and governance cadences, provide value to enterprises
- Clients have highlighted NTT DATA’s pricing flexibility and competitiveness as its key strength areas

### Limitations

- Enterprises requiring strong in-region delivery in Europe may find NTT DATA less appealing, as it continues to trail peers in terms of local investment and delivery scale across key European markets
- While NTT DATA has made significant investments in experience management, it has limited relevant proof points, which may not appeal to enterprises seeking a mature service provider in this area
- Mid-market and SMB clients may find NTT DATA’s digital workplace value proposition and solutioning less tailored, given its skewed focus toward large enterprises
- Clients have raised concerns around delivery continuity, with some engagements reliant on single-resource ownership, creating risks when key personnel transition out
- Clients expect NTT DATA to be more proactive in innovation, as value-added solutioning and forward-looking strategies are not consistently delivered

# 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

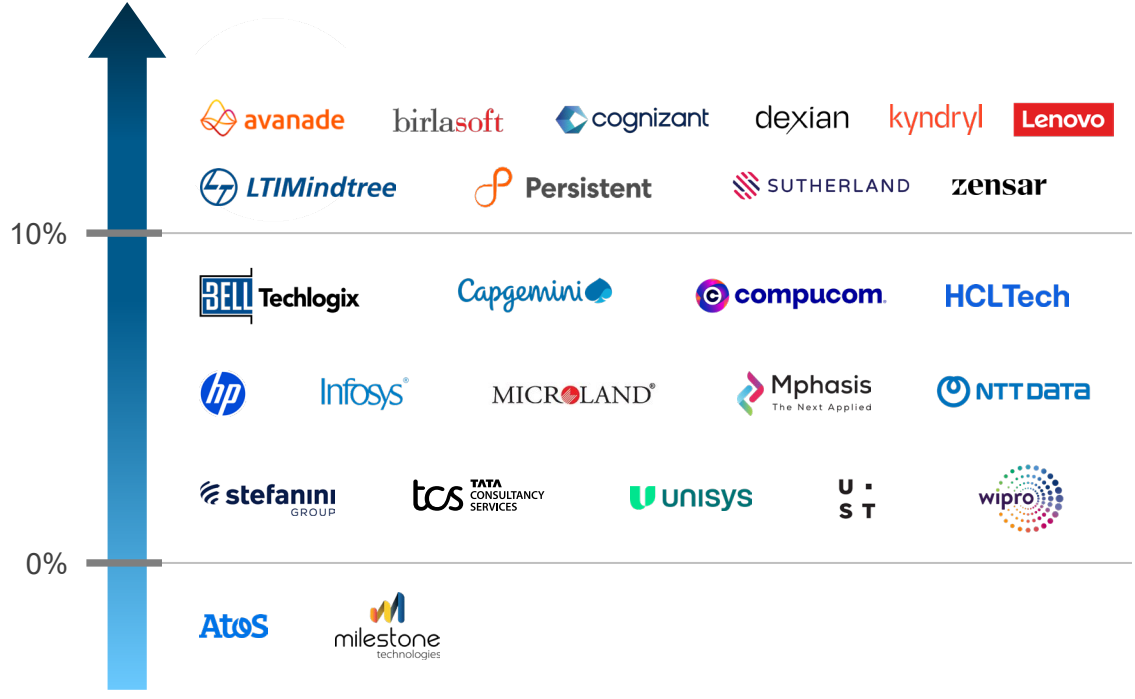
Consulting and advisory services	As enterprises grapple with identifying truly high-value next-gen use cases and face challenges in on-ground adoption, providers have a clear opportunity to lead with consulting-driven engagements that offer strategic guidance.
Outcome-driven delivery models	As enterprises 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<sup>1,2</sup>  
2024; percentage of overall market of US\$104 billion



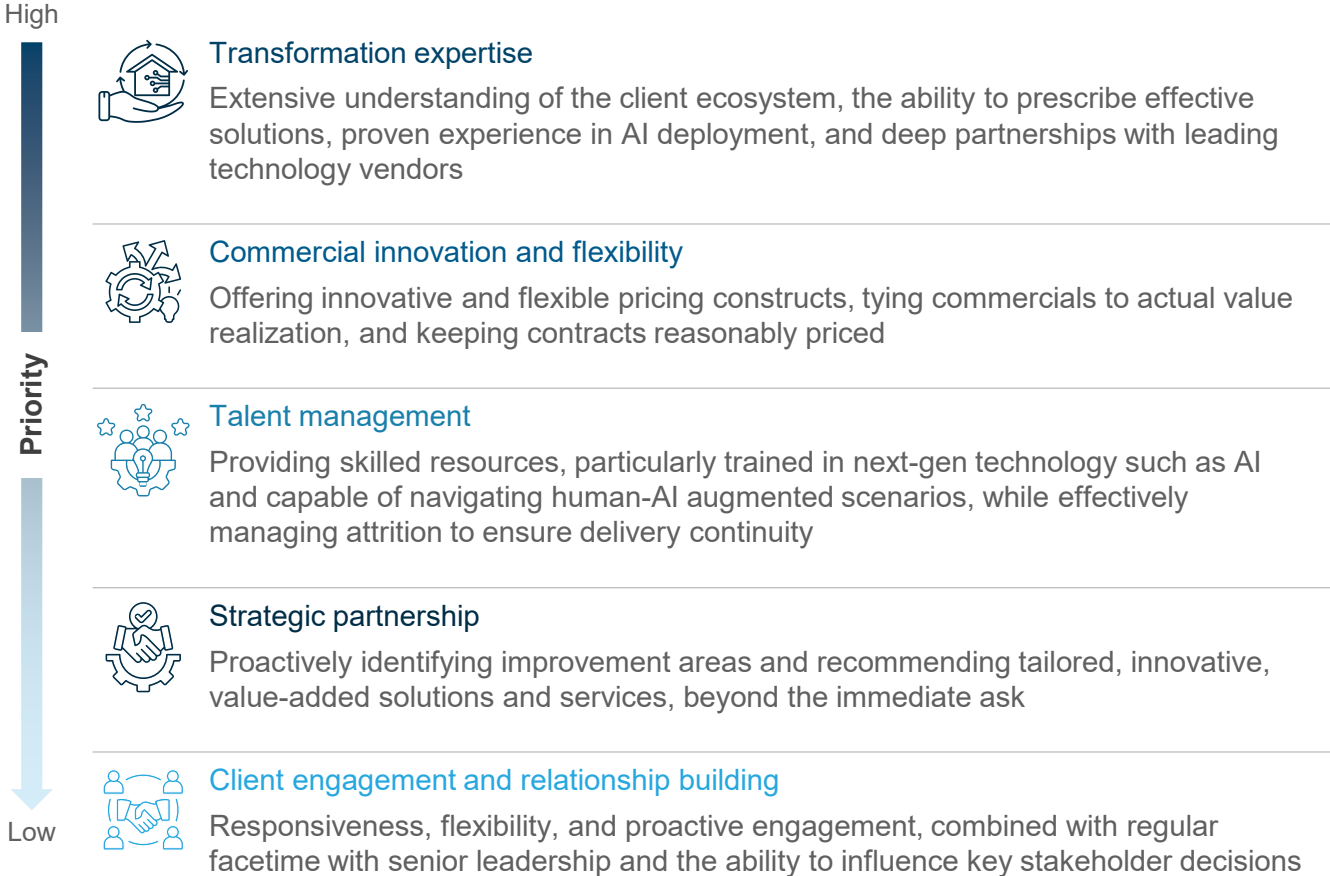
Provider<sup>1,2</sup> market share by YoY growth  
2023-24; increase in percentage of revenue



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

# Key buyer considerations

## Key sourcing criteria



## 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.

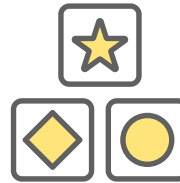
# Key takeaways for buyers

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.

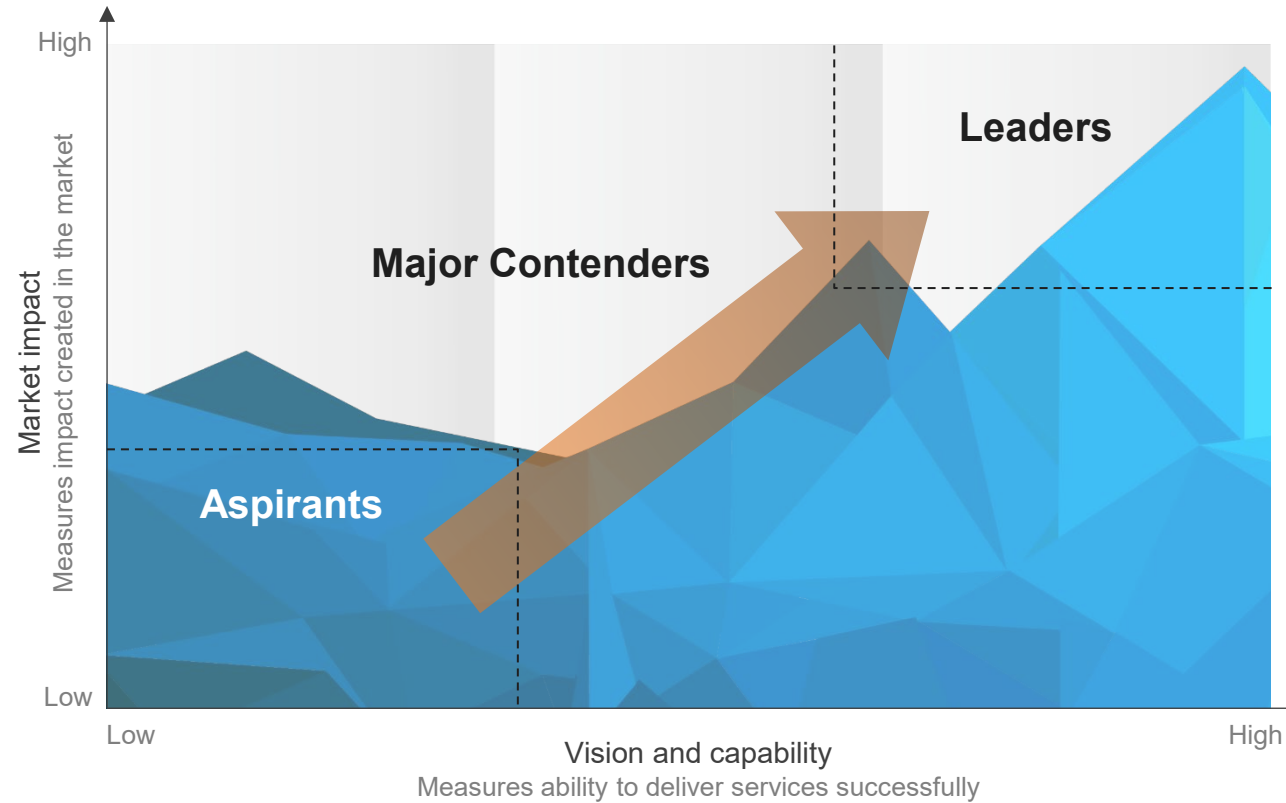
# Appendix

PEAK Matrix® framework

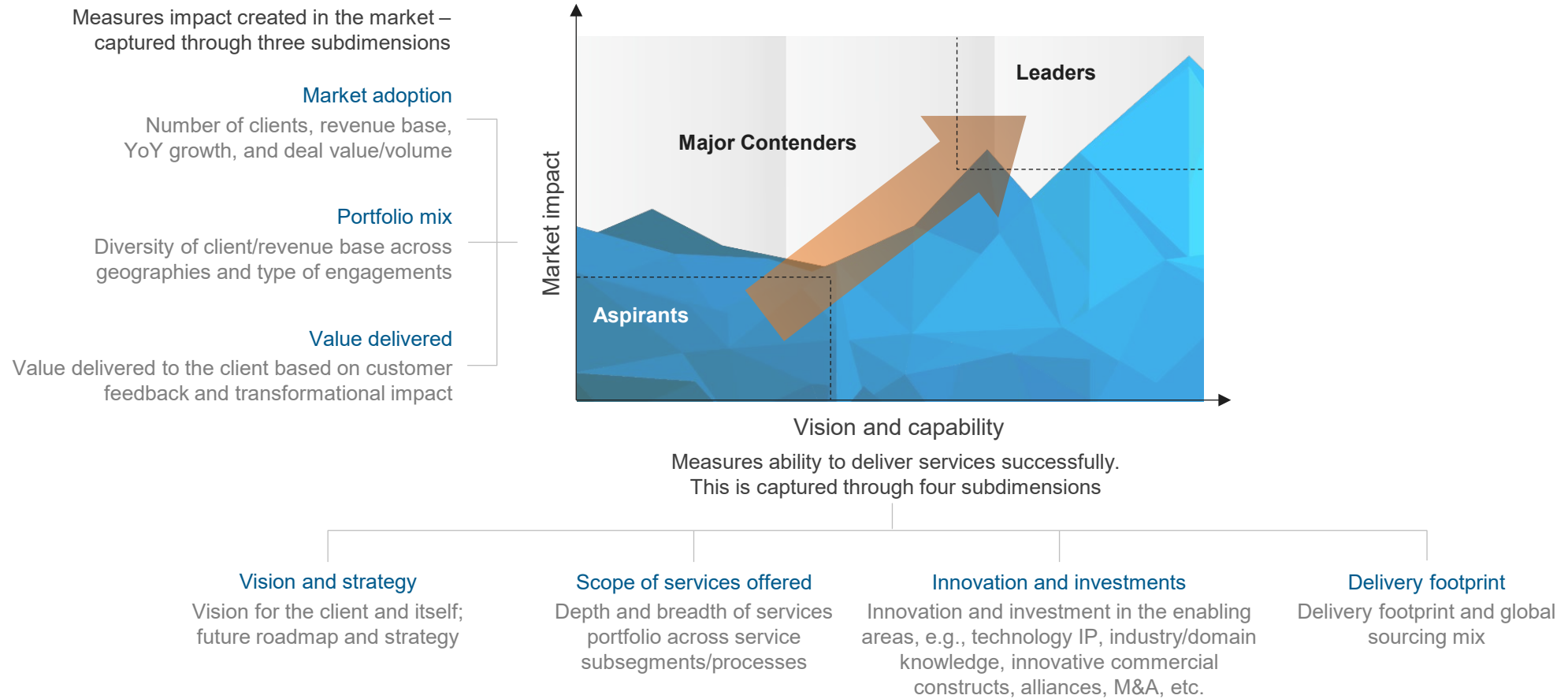
FAQs

# 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



## 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.

# 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

Website

everestgrp.com

Blog

everestgrp.com/blog

Follow us on



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](http://www.everestgrp.com).

## Notice and disclaimers

**Important information. Please read this notice carefully and in its entirety. By accessing Everest Group materials, products or services, you agree to Everest Group's Terms of Use.**

Everest Group's Terms of Use, available at [www.everestgrp.com/terms-of-use](http://www.everestgrp.com/terms-of-use), is hereby incorporated by reference as if fully reproduced herein. Parts of the Terms of Use are shown below for convenience only. Please refer to the link above for the full and official 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 Regulation Authority (FINRA), or any state or foreign (non-U.S.) 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 properties, assets, materials, products and/or services (including in relation to gen AI) of Everest Group are provided or made available for access on the basis such is for informational purposes only and provided "AS IS" without any warranty of any kind, whether express, implied, or otherwise, including warranties of completeness, accuracy, reliability, noninfringement, adequacy, merchantability or fitness for a particular purpose. All implied warranties are disclaimed to the extent permitted by law. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon such.

Everest Group is not a legal, tax, financial, or investment adviser, 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.

Everest Group materials, products and/or services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to Everest Group materials, products and/or services does not constitute any recommendation by Everest Group to (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 material, 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 collects data and information from sources it, in its sole discretion, considers reliable. Everest Group may have obtained data or information that appears in its materials, products and/or services from the parties mentioned therein, public sources, or third-party sources, including data and information related to financials, estimates, and/or forecasts. Everest Group is not a certified public accounting firm or an accredited auditor and has not audited financials. Everest Group assumes no responsibility for independently verifying such information.

Companies mentioned in Everest Group materials, 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.