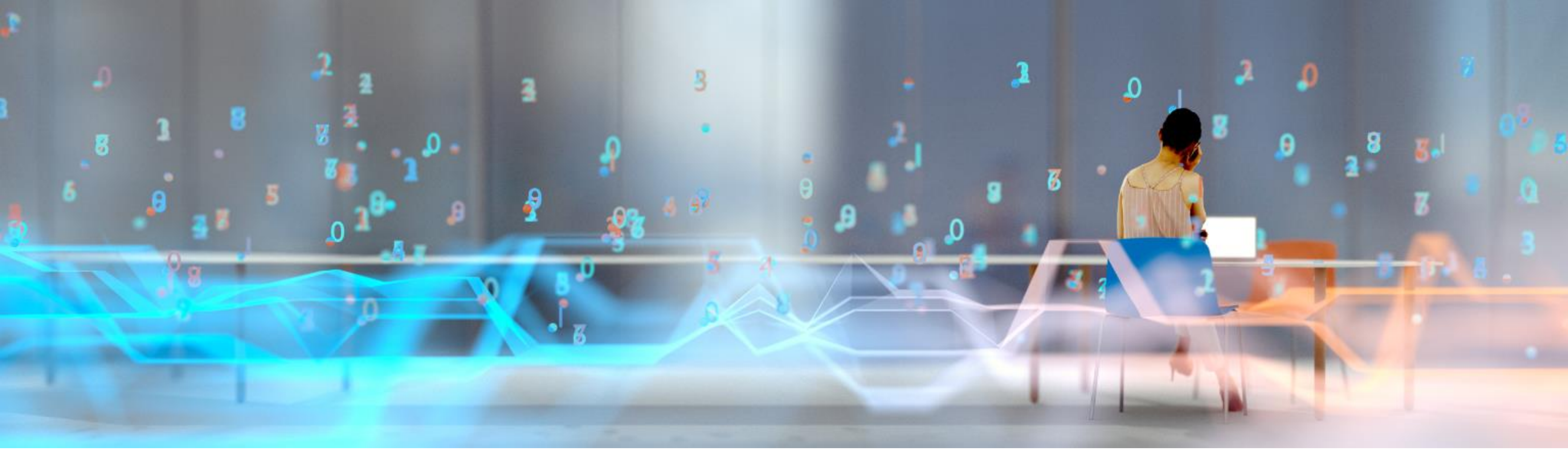

Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America

August 2026

PEAK MATRIX®

Digital Workplace

Everest Group®

Our research offerings

This report is included in the following research program(s):

Digital Workplace

- Advanced SciTech
- Agentic and Process Automation
- Amazon Web Services (AWS)
- Application Services
- Artificial Intelligence (AI)
- Asset and Wealth Management
- Banking and Financial Services Information Technology
- Banking and Financial Services Intelligent Operations
- Catalyst™
- Clinical Development Technology
- Cloud and Infrastructure Services
- Contingent Staffing
- Contingent Workforce Management
- Contract Research Organization Services
- Customer Experience Management Services
- CX Excellence
- CXM Technology
- Cybersecurity
- Cybersecurity Technology
- Data and Analytics (D&A)
- Digital Adoption Platforms (DAP)
- Digital Workplace
- Employer of Record (EOR)
- Engineering Research and Development
- Enterprise Platform Services
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- Finance and Accounting
- Financial Crime and Compliance
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- GBS and GCC
- Google Cloud
- Healthcare Information Technology
- Healthcare Payer Intelligent Operations
- Healthcare Provider Intelligent Operations
- HealthTech
- Human Resources
- Insurance Information Technology
- Insurance Intelligent Operations
- Insurance Technology (InsurTech)
- Insurance Third-Party Administration (TPA) Services
- Intelligent Document Processing (IDP)
- Lending and Mortgages
- Life Sciences Commercial
- Life Sciences Information Technology
- Life Sciences Intelligent Operations
- Locations Insider™
- Marketing and Sales Services and Technology
- Microsoft Azure
- Microsoft Business Application Services
- Modern Application Development (MAD)
- Multi-country Payroll
- Outsourcing Excellence
- Payment Integrity Solutions
- Price Genius – AMS Solution and Pricing Tool
- Pricing Analytics as-a-Service
- Process Intelligence
- Procurement and Supply Chain
- ProcureTech
- R&D and Innovation Excellence
- Recruitment
- Retail and CPG
- Retirement Technologies
- Rewards and Recognition
- Sales Services and Technology
- SAP Services
- Software Engineering
- Supply Chain Management (SCM) Services
- Sustainability Technology and Services
- Talent Genius™
- Trust and Safety
- Value and Quality Assurance (VQA)

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- Contract assessment
- Peer analysis
- Market intelligence
- Tracking: providers, locations, risk, technologies
- Locations: costs, skills, sustainability, portfolios

Contents

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Contents

Introduction and overview

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01 Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02 Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests

04 Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

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Proprietary contractual database of over 4000 digital workplace contracts (updated annually)

Year-round tracking of 150+ digital workplace providers

Large repository of existing research in digital workplace services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

This report is based on key sources of proprietary information

- Proprietary contract-based database, which tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including provider, contract type, TCV and ACV, provider FTEs, start and end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary provider database, which tracks the following elements of each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by line of business
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed
- Provider briefings
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
  - Drivers of and challenges to adopting services
  - Assessment of provider performance
  - Emerging priorities
  - Lessons learned and best practices

Providers assessed[1]

Altimetrik, anunta, Atos, Bell Techlogix, birlasoft, Capgemini, cognizant, Dell Technologies, HCLTech, HTC Global Services, infinite, Infosys, ITC Infotech, kyndryl, Lenovo, LTM, Microland, milestone technologies, Mphasis, nexustek, NTT Data, Persistent, Pomeroy, randstad digital, TCS, Tech Mahindra, unisys, UST, wipro

1 Assessments for Dell Technologies and Tech Mahindra 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
The source of all content is Everest Group unless otherwise specified
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will be presented only in an aggregated fashion

Introduction

The Digital Workplace Services (DWS) market has entered a phase of steady expansion, shaped by accelerated AI adoption, cross-tower convergence, and a renewed focus on enterprise-wide value realization. Enterprises increasingly view the workplace as the epicenter of broader IT ecosystem transformation, enabling AI across applications, infrastructure, service management, and employee workflows. At the same time, they are becoming more deliberate about AI investments, moving away from siloed deployments toward coordinated enterprise-wide programs focused on business value.

In North America, ongoing geopolitical uncertainties are prompting enterprises to scrutinize IT spending more closely, increasing demand for capabilities such as AI FinOps that can improve cost visibility, governance, and value tracking. At the same time, enterprises are balancing cost discipline with AI innovation and a renewed experience focus. This is fueling demand for experience-centric workplace transformation, persona-led services, and outcome-oriented operating models.

In response, workplace providers are evolving beyond just support automation platforms to build cross-tower AI capabilities, such as orchestration platforms, AI agent libraries, and end-to-end experience journey simulation engines. Emerging delivery models such as Forward Deployed Engineers (FDEs) are being introduced to streamline and contextualize enterprise data, redesign workflows, re-engineer business processes, and support organizational adoption. Providers are also strengthening AI advisory and consulting capabilities to help enterprises assess AI readiness, develop prioritized roadmaps, establish governance, and accelerate AI at scale while ensuring measurable business-level outcomes.

This report includes the profiles of the following 29 leading digital workplace providers featured on the Digital Workplace Services (DWS) PEAK Matrix – North America:

- **Leaders:** Capgemini, Cognizant, HCLTech, Infosys, Kyndryl, NTT DATA, TCS, Unisys, and Wipro
- **Major Contenders:** Atos, Birlasoft, HTC Global Services, Infinite Computer Solutions, ITC Infotech, Lenovo, LTM, Microland, Milestone Technologies, Mphasis, NexusTek, Persistent Systems, Pomeroy, Tech Mahindra, and UST
- **Aspirants:** Altimetrik, Anunta, Bell Techlogix, Dell Technologies, and Randstad Digital

Scope of this report

Geography: North America

Industry: 29 leading digital workplace service providers

Services: digital workplace services

Scope of the evaluation (page 1 of 2)

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

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DWS

Service desk

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

Deskside/Field support services

Install, Move, Add, Change (IMAC) solutions and services, VIP support, tech cafes (genius bars), remote support, digital lockers / IT Vending Machine(ITVM), digital 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, Zoom Workplace, and Google Workspace), telephony, messaging and meeting services, directory services, Unified Communication-as-a-Service (UCaaS), Meeting Room-as-a-Service (MRaaS), Contact Center-as-a-Service (CCaaS), Voice over Internet Protocol (VoIP), intranet, intelligent knowledge management, and workplace content and collaboration services (including immersive collaboration such as avatars and AR/VR/MR)

Desktop management and virtualization

Virtual desktop and application management:
VDI 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, and AI PC solutions

Workspace-as-a-Service (WaaS):
Includes various as-a-service workplace models such as Device-as-a-Service (DaaS) and VDI-as-a-Service (VDIaaS)

Scope of the evaluation (page 2 of 2)

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

DWS

Asset management (hardware and software)

Management of IT assets (forecasting, discovery, procurement, deployment, refurbishment, and disposal of endpoint devices such as desktops, AI PCs, tablets, and workplace applications), financial reporting, license management, compliance monitoring, stock management, follow-me print services, Just-in-time (JIT) procurement, 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),Remote Monitoring and Management (RMM,) Bring Your Own Device (BYOD), Identity and Access Management (IAM) and management of rugged devices

Smart workplace

IoT-based smart office and space management, hot desking, wayfinding, visitor management, connected devices, Heating, Ventilation, and Air Conditioning (HVAC) solutions, digital signage, facilities and energy management, and smart wearables

Cross-cutting digital workplace service elements

AI agent libraries, agent-to-agent orchestration frameworks, AI work platforms (Claude Cowork and Amazon Quick), AIOps, Experience-as-a-Service (EXPaaS), trust, governance, and risk management, cross-tower observability and analytics layers, AI FinOps, cross-functional automation workflows, AI model tuning and management, low-code/no-code agent development platforms, sustainability, digital adoption, workplace security, and service management

Market trends

Market size and growth

- The digital workplace market stood at US$108 billion in 2025, with an expected CAGR of 4-6%
- North America continues to account for the largest share, accounting for 45-47%
- Despite ongoing geopolitical uncertainty, the North American market is undergoing a demand stabilization phase as enterprises prioritize AI-led high-impact initiatives

Key drivers for digital workplace services in North America

Experience-led transformation	North American enterprises are demonstrating a renewed focus on Employee Experience (EX), driving demand for persona-led workplace transformation, proactive experience management, and stronger Experience Level Agreements (XLA) commitments while balancing productivity and EX objectives.
Workplace as the anchor for enterprise-wide transformation	Enterprises are pursuing integrated transformation across workplace, infrastructure, applications, cybersecurity, and service management, positioning digital workplace services as an orchestration layer within the broader IT ecosystem.
Emergence of AI work platforms	Growing enterprise interest in AI work platforms is creating demand for platforms that can autonomously interpret requests, execute workplace tasks, and orchestrate workflows across enterprise systems, applications, and data environments.

Opportunities and challenges

AI FinOps	As enterprises seek greater visibility into the cost and business impact of AI investments, AI FinOps is becoming critical to strengthening consumption governance, tracking value realization, and optimizing investments.
AI advisory and implementation consulting	As enterprises increasingly seek strategic guidance to deploy AI at scale, demand for AI advisory is growing. Providers are now responding through FDEs that bridge strategy and execution by contextualizing enterprise data, re-engineering workflows, and driving AI adoption.
Business-aligned workplace delivery	As enterprises demand measurable value from workplace transformation, providers can differentiate through outcome-based commercial models supported by business-aligned Objectives and Key Results (OKRs), Business-level Agreements (BLAs), and XLAs.

Provider landscape analysis

Market share analysis of the providers[1,2]

2025; percentage of the overall North American market of US$48-50 billion

Provider[1,2] market share by YoY growth

2024-25; increase in percentage of revenue

1 Providers are listed alphabetically within each range

2 Assessments for Dell and Tech Mahindra exclude service provider inputs and are not included in this page

Key buyer considerations

Key sourcing criteria

High

Priority

Low

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 providers

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-generation 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

Summary analysis

Enterprises are positioning digital workplace services at the center of broader IT transformation, with sourcing decisions increasingly shaped by productivity-enabled, experience-led transformation, cross-tower convergence, commercial innovation, and the emergence of AI work platforms.

Demand is rising for providers that can deploy autonomous AI platforms, integrate them across enterprise systems, and translate adoption into measurable value.

Key takeaways for buyers

As AI-powered workplace transformation accelerates, enterprises should prioritize service providers that can contextualize AI for their business, orchestrate enterprise-wide workflows, and demonstrate measurable business-level value realization through differentiated capabilities, delivery models, and innovation

Shifts in provider capabilities

Enterprises prioritize providers that move beyond technology deployment to understand business context, customize solutions, orchestrate workflows, redesign processes, and engineer experience journeys to deliver measurable outcomes.

Differentiation across provider types

Providers carve out differentiated strategic approaches such as subscription-based service-as-a-software platforms, cross-tower experience management, AI advisory and consulting instruments, and innovative contracting and delivery models.

Key innovations

Service provider innovations are increasingly centered on contextualization, with capabilities such as vertical- and enterprise-specific Small Language Models (SLMs), cross-domain agent-to-agent orchestration, and FDE-led delivery models.

Digital Workplace Services (DWS) PEAK Matrix® characteristics

Summary of key messages

PEAK Matrix framework

Everest Group PEAK Matrix for digital workplace services

Characteristics of Leaders, Major Contenders, and Aspirants

Provider capability summary dashboard

Enterprise feedback summary

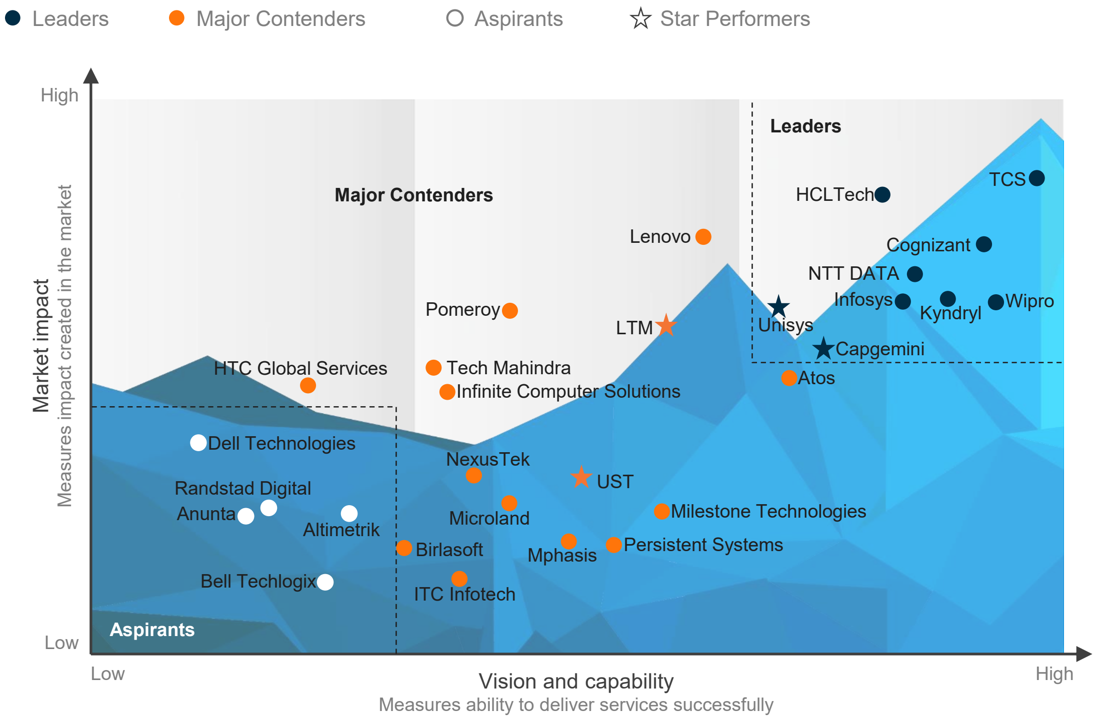
Summary of key messages

Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America

Everest Group classified 29 digital workplace Service Providers (SPs) on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants

- The PEAK Matrix is a framework to assess the market impact and vision and capability of service providers
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 29 SPs evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Capgemini, Cognizant, HCLTech, Infosys, Kyndryl, NTT DATA, TCS, Unisys, and Wipro
  - **Major Contenders:** Atos, Birlasoft, HTC Global Services, Infinite Computer Solutions, ITC Infotech, Lenovo, LTM, Microland, Milestone Technologies, Mphasis, NexusTek, Persistent Systems, Pomeroy, Tech Mahindra, and UST
  - **Aspirants:** Altimetrik, Anunta, Bell Techlogix, Dell Technologies, and Randstad Digital
- Based on Year-on-Year (YoY) movement of different service providers on the PEAK Matrix®, Everest Group identified four service providers as the **2026 Digital Workplace Services (DWS) market Star Performers in North America** – Capgemini, Unisys, UST, and LTM

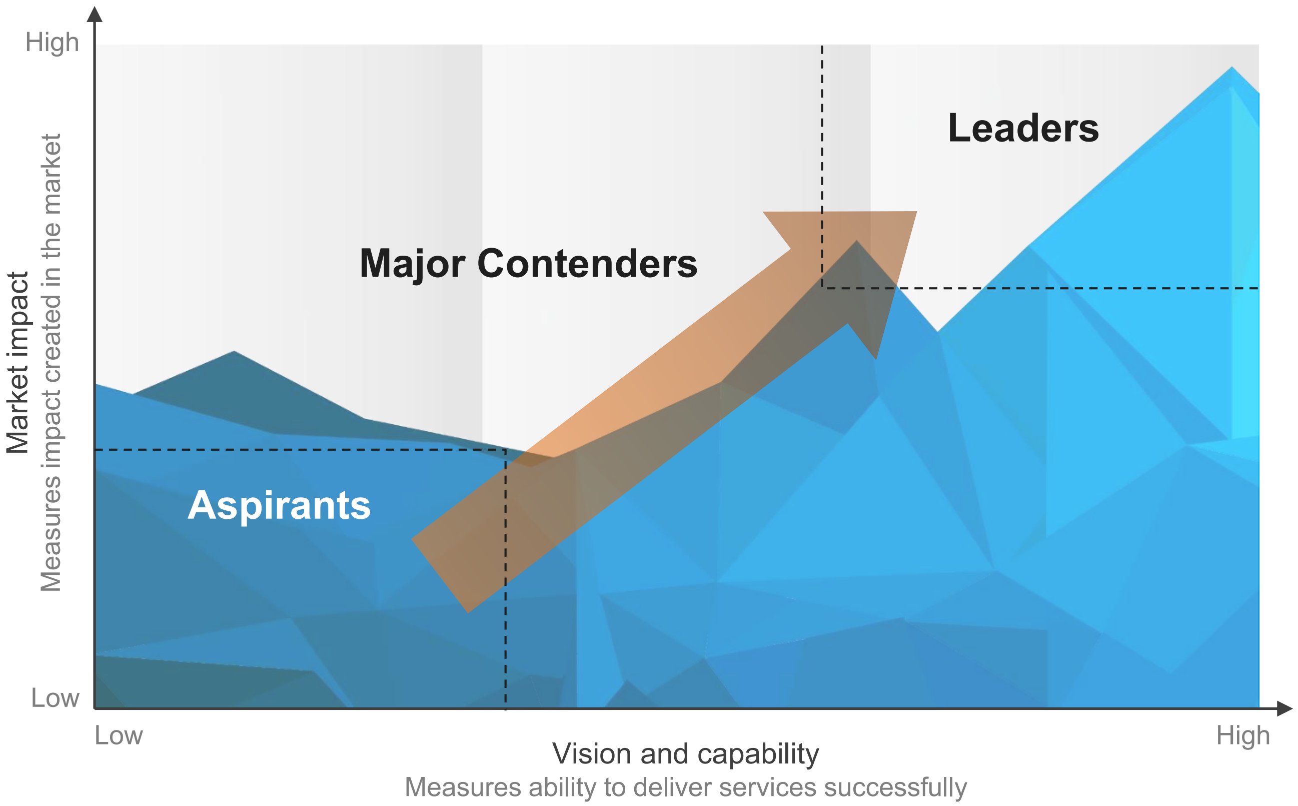
Everest Group Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America[1]



1 Assessments for Dell Technologies and Tech Mahindra 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 (2026)

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

Everest Group PEAK Matrix



Please click Everest Group PEAK Matrix® for more information

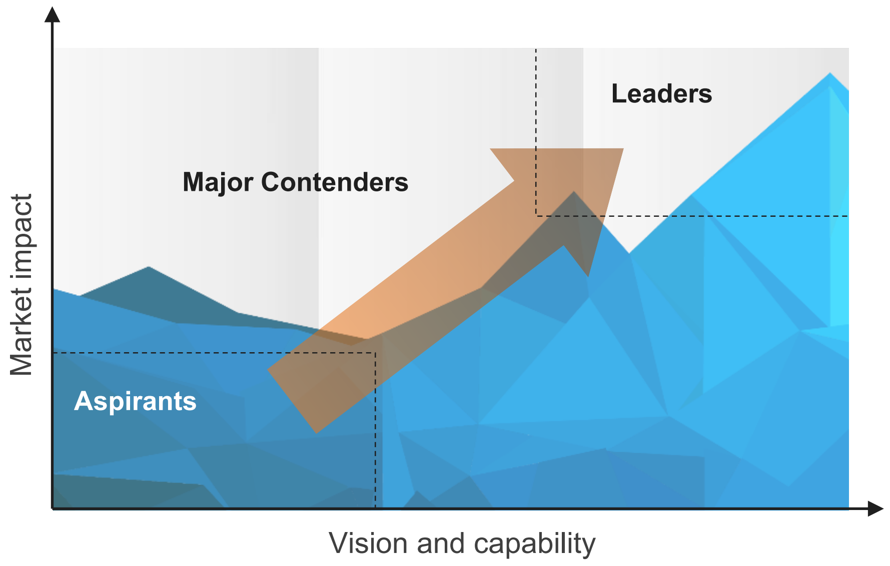
Services PEAK Matrix® evaluation dimensions

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

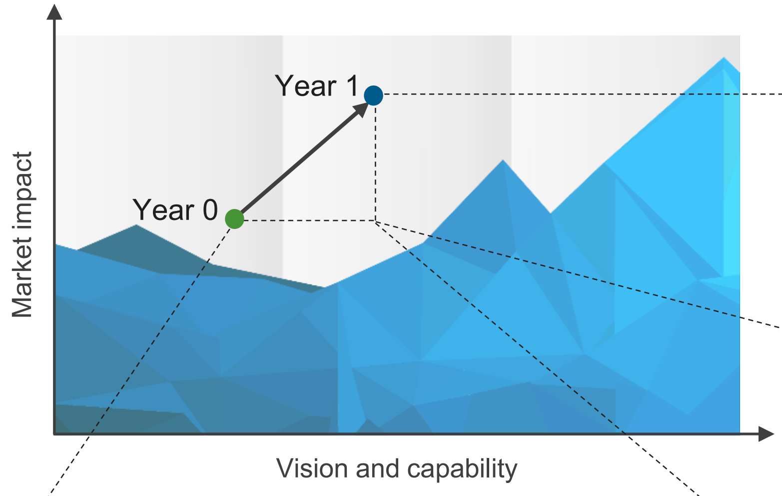
Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

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



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances in **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain-specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

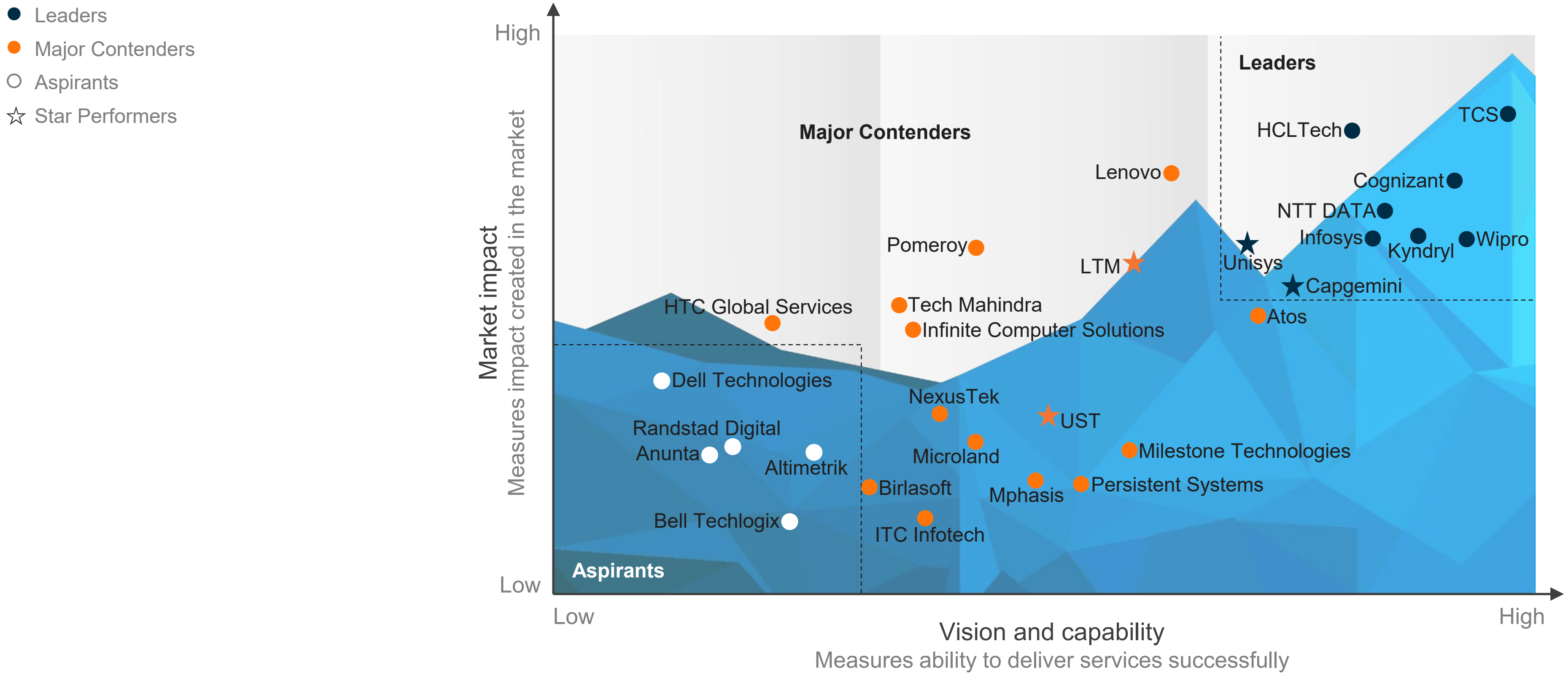
- The maximum number of top-quartile performance improvements across all of the above parameters
  AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

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.

Everest Group PEAK Matrix®

Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America

Everest Group Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America[1]



1 Assessments for Dell Technologies and Tech Mahindra 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 (2026)

Digital workplace services (DWS) PEAK Matrix® characteristics

Leaders

Capgemini, Cognizant, HCLTech, Infosys, Kyndryl, NTT DATA, TCS, Unisys, 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 orchestration, FDE deployments, and OKRs enablement, 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

Atos, Birlasoft, HTC Global Services, Infinite Computer Solutions, ITC Infotech, Lenovo, LTM, Microland, Milestone Technologies, Mphasis, NexusTek, Persistent Systems, Pomeroy, Tech Mahindra, and UST

- 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, including mid-market-specific and platform-centric offerings, and leveraged their relatively limited talent debt to capture AI-led revenue opportunities across workplace segments, their portfolios and delivery capabilities remain less balanced than those of Leaders, as 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

Altimetrik, Anunta, Bell Techlogix, Dell Technologies, and Randstad Digital

- 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 partnerships to strengthen and help generate major workplace revenue and improve market positioni

Everest Group has identified four providers as Star Performers in 2026

Digital workplace services Star Performers	Distinguishing features of market impact in 2026	Distinguishing features of capability advances in 2026	Change in PEAK Matrix® positioning for digital workplace services
Capgemini	• Strong YoY growth in digital workplace services revenue • Well-balanced industry mix with strong presence across Banking, Financial Services and Insurance (BFSI) and manufacturing	• Strong consulting-led focus spanning strategy, design, and change management • Robust experience-centric solutions focused on identifying silent suffering to improve outcomes	Moved from **Major Contenders** to **Leaders**
LTM	• Sustained growth in digital workplace services business • High revenue per FTE demonstrating strong delivery efficiency	• Strong AI-first BlueVerse offering for intelligent resolutions, orchestration, and agentic AI • Balanced portfolio with a strong focus on service desk and field services	Strengthened its **Major Contenders** positioning
Unisys	• Strength in regulated industries, including BFSI and the public sector • Strong enterprise resonance via effective value delivery in key engagements	• Differentiated field services capabilities and a strong focus on frontline worker enablement • Comprehensive smart workplace capabilities through its MTR Dashboard offering, enhancing experiences across environments	Moved from **Major Contenders** to **Leaders**
UST	• Balanced presence across enterprise buyer segments • Strong YoY growth in digital workplace services revenue	• Diversified portfolio across key workplace service segments • Revamped workplace strategy centered on AI-first support and service delivery through UST NEURA Works offering	Moved from **Aspirants** to **Major Contenders**

Summary dashboard | market impact and vision and capability assessment of providers for digital workplace services 2026 (page 1 of 4)

Leaders

Measure of capability: Low High

	Market impact				Vision and capability				
Provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Capgemini									
Cognizant									
HCLTech									
Infosys									
Kyndryl									
NTT DATA									
TCS									
Unisys									
Wipro									

Summary dashboard | market impact and vision and capability assessment of providers for digital workplace services 2026 (page 2 of 4)

Major Contenders

Measure of capability: Low High

Provider	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
Atos									
Birlasoft									
HTC Global Services									
Infinite Computer Solutions									
ITC Infotech									
Lenovo									
LTM									
Microland									
Milestone Technologies									

Summary dashboard | market impact and vision and capability assessment of providers for digital workplace services 2026 (page 3 of 4)

Major Contenders

Measure of capability: Low High

	Market impact				Vision and capability				
Provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Mphasis									
NexusTek									
Persistent Systems									
Pomeroy									
Tech Mahindra									
UST									

Summary dashboard | market impact and vision and capability assessment of providers for digital workplace services 2026 (page 4 of 4)

Aspirants

Measure of capability: Low High

Provider	Market impact: Market adoption	Market impact: Portfolio mix	Market impact: Value delivered	Market impact: Overall	Vision and capability: Vision and strategy	Vision and capability: Scope of services offered	Vision and capability: Innovation and investments	Vision and capability: Delivery footprint	Vision and capability: Overall
Altimetrik									
Anunta									
Bell Techlogix									
Dell Technologies									
Randstad Digital									

Enterprise sourcing considerations

Leaders

- Capgemini
- Cognizant
- HCLTech
- Infosys
- Kyndryl
- NTT DATA
- TCS
- Unisys
- Wipro

Capgemini

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 consulting-led workplace transformation will benefit from Capgemini's strategy, design, and change capabilities, supported by multiple innovation sprints that help clients identify, prototype, and scale transformation opportunities
- Enterprises operating within the Microsoft ecosystem will benefit from Capgemini's deep Microsoft 365 and Copilot expertise, reinforced by its designation as a Microsoft Agent 365 launch partner and investments in industry-specific AI agents
- Enterprises seeking experience-led operations will value Capgemini's Experience Management Office (XMO) and Experience Navigator capabilities, which combine Digital Employee Experience (DEX), sentiment, service data, and XLAs to identify silent suffering and link remediation to employee outcomes
- Enterprises with complex and distributed operations will benefit from Capgemini's industry-specific capabilities across frontline support, retail operations, manufacturing, life sciences, and regulated environments
- Clients have appreciated Capgemini's strong technical expertise, deep understanding of their accounts, digital environments, and development processes

Limitations

- Enterprises should evaluate Capgemini's evolving WNS integration, as there is limited clarity on how Intelligent Operations, PRiSM, XMO, and cross-functional employee services will combine into a cohesive workplace proposition
- Enterprises seeking near-zero on site support should assess Capgemini's maturity carefully, as its AI-led field services and physical AI capabilities remain nascent compared with its established service desk offerings
- Enterprises seeking outcome-based commercial models may find Capgemini less relevant, given its greater reliance on output-based pricing metrics
- Clients seeking a modular approach to transformation expressed the need for greater agility in Capgemini's delivery approach, particularly in mid-market or highly iterative engagements

Cognizant

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 seeking a strong technology partnership ecosystem will benefit from Cognizant's build, co-build, and buy model with hyperscalers, major platform vendors, and niche specialists
- Enterprises will benefit from Cognizant's buyer-segment-specific solutioning, which supports both modular adoption for small and midsize enterprises and integrated end-to-end transformation programs for large clients
- Enterprises seeking closer alignment between workplace services and business objectives will benefit from Cognizant's use of Business-level Agreements (BLAs), persona-aligned XLAs, and outcome-based commercial constructs
- Enterprises seeking immersive field support and knowledge enablement will value Cognizant's augmented reality and digital twin capabilities
- Clients highlight Cognizant's deep knowledge and understanding of their business as one of its key strengths

Limitations

- Enterprises should carefully evaluate Cognizant's long-term workplace vision, as its strategic direction has evolved less distinctly than that of leading peers despite strong recent growth
- Enterprises should remain mindful of Cognizant's ongoing talent restructuring, as organizational changes may create near-term risks to delivery continuity, resource stability, and execution consistency
- Enterprises seeking localized delivery may find Cognizant less suitable, given its skewed focus on maintaining an offshore delivery model
- Some clients have highlighted gaps in Cognizant's change management capabilities, citing service disruptions during transition phases

HCLTech

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 seeking cross-enterprise transformation will value HCLTech's focus on aligning workplace services with objectives of IT, HR, finance, operations, and other domains
- Enterprises evaluating AI-ready endpoint modernization may find value in HCLTech's FlexSpace and AI PC capabilities
- Enterprises seeking commercial flexibility will benefit from HCLTech's dynamic pricing, open-book constructs, and outcome-based scenarios, which enable contracts to adapt as business requirements evolve
- Enterprises seeking ecosystem-led transformation will benefit from HCLTech's structured technology partnership model and dedicated partner cohorts across major and niche workplace platforms
- Clients have appreciated HCLTech for its ability to provide a flexible and scalable services model that adapts quickly to changing business and staffing needs

Limitations

- While HCLTech has strong offerings and capabilities across digital workplace segments, it needs to refine its messaging to craft a cohesive narrative that aligns with enterprise concerns and objectives
- Although HCLTech has recently developed dedicated workplace offerings for mid-market enterprises, it has limited relevant proof points and needs to further strengthen its mindshare within this segment
- Enterprises seeking mature AI value measurement should conduct further due diligence, as buyer feedback indicates limited end-to-end visibility into AI performance, reporting, and value realization
- Some clients have highlighted gaps in the domain expertise of HCLTech's resources, along with significant talent management disruptions that have affected their operations

Infosys

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 seeking AI-native workplace transformation will benefit from Infosys' platform-led strategy, powered by Infosys Topaz Fabric and Cortex, which combine agentic AI, automation, and AI solutions to modernize workplace operations
- Infosys' investments in AI-first talent strategy, supported by Forward Deployed Engineers (FDEs) and structured reskilling programs, strengthen its ability to support enterprises pursuing AI-first transformations
- Infosys' strong focus on workplace security, anchored in AI-powered cyber resilience, zero trust principles, and platform-enabled security services, will benefit enterprises strengthening secure workplace operations
- Infosys' broad workplace partner ecosystem, spanning strategic technology vendors and niche innovators across domains such as AI, sustainability, and smart workplaces, will appeal to enterprises seeking best-of-breed capabilities
- Infosys is valued for its accountable delivery approach, characterized by clear communication, responsiveness, and a strong sense of ownership

Limitations

- While Infosys has strong workplace capabilities, enterprises may find its value proposition comparatively less clearly articulated, making it more difficult to assess its differentiation relative to other leading providers
- Enterprises evaluating AI PC adoption may find Infosys' AI PC strategy comparatively less mature, particularly across bundled on-device AI use cases, AI PC-focused partnerships, and co-innovation initiatives, than those of leading providers
- Infosys' workplace portfolio is primarily geared toward large enterprises, which may make it comparatively less aligned with the transformation needs of Small and Medium-sized Businesses (SMBs)
- Some clients have highlighted opportunities for Infosys to think beyond standard approaches by proactively presenting innovative solutions and emerging workplace features

Kyndryl

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

- European enterprises pursuing experience-led workplace transformation will appreciate Kyndryl Bridge, which combines unified observability, AI-driven insights, and experience analytics to proactively optimize workplace operations
- Enterprises seeking next-generation transformation will appreciate Kyndryl's digital twin for the workplace, which creates a virtual representation of workplace operations to predict, prevent, and proactively remediate technology disruptions
- Kyndryl concierge services will appeal to enterprises seeking premium workplace support through AI-powered remote assistance, preventive issue resolution, and personalized employee engagement
- Healthcare enterprises will benefit from Kyndryl's clinical experience leader offering, which embeds clinical expertise into service delivery to better align workplace transformation with caregiver workflows and patient outcomes
- Clients have highlighted Kyndryl's service delivery capabilities, particularly its responsive support, effective communication, and timely resolution of incidents and service requests

Limitations

- Recent company-specific headwinds, such as financial and governance-related challenges, may warrant additional evaluation of Kyndryl before long-term partnership considerations
- Enterprises seeking workplace transformation driven by broader business outcomes may find Kyndryl's approach comparatively more focused on XLAs than metrics such as Objectives and Key Results (OKRs) and BLAs
- Mid-market enterprises may find Kyndryl's workplace focus and value proposition comparatively more oriented toward large-scale enterprises than organizations seeking simplified workplace transformation
- Some clients have indicated that Kyndryl could improve the speed and agility at which innovative ideas and transformation initiatives are translated from ideation to production

NTT DATA

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 AI-enabled support transformation will benefit from NTT DATA's Workplace Smart AI Agent suite, including Swarming.ai, Quality.ai, and Knowledge.ai, supported by proof points in automated resolution and first-contact resolution
- Enterprises in regulated sectors will benefit from its industry-aligned solutions for healthcare, public sector, BFSI, and manufacturing, offering strong contextualization
- Enterprises with distributed operations will benefit from NTT DATA's field services portfolio, including Digital Dispatch, Field Services Cockpit, smart lockers, and virtual tech bars
- Enterprises seeking persona-led DaaS will benefit from NTT DATA's Workplace Lifecycle Hub and Digital Brain, which analyze device estates and recommend life cycle and automation actions more comprehensively than many peers
- Clients have appreciated NTT DATA's customer-centric culture and reliability in crises, which strengthen its employee-facing service delivery

Limitations

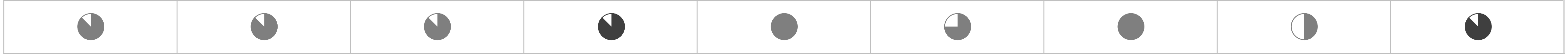
- Enterprises seeking a differentiated long-term workplace vision should consider that NTT DATA's Total Workplace Experience narrative is becoming less distinctive as several leading peers have adopted comparable experience-led propositions
- Mid-market enterprises should consider whether NTT DATA's solutioning and operating model are appropriately right-sized, as its strongest credentials and investments remain oriented toward large and complex organizations
- Enterprises may need to evaluate the consistency of NTT DATA's innovation-led engagement, as client feedback indicates that proactive value-added solutioning has not always been sustained beyond the initial transformation phase
- Some clients have indicated that NTT DATA has limited strong technical leaders, which can create dependence on a small number of individuals for complex transformations

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 will benefit from TCS' customer-zero journeys across Microsoft Copilot and Google Gemini, which use large-scale internal deployments to strengthen its AI adoption, governance, and implementation capabilities relative to most peers
- TCS is well positioned to support consulting-led workplace transformation for AI-native solutions through DWS advisory with credible proof points for the same
- Enterprises seeking an experience-led delivery construct will benefit from TCS' product-aligned pod model and Experience Elevation Center, which connect business objectives, agile backlogs, and focus on contextual XLAs
- Its workplace service approach includes a structured progression from foundational excellence to an intelligence fabric and experience engine enabling telemetry, knowledge, automation, and AI to translate into measurable workplace outcomes
- Clients appreciate TCS' understanding of enterprise challenges, stable account leadership, and the ability to deploy relevant talent for workplace transformation

Limitations

- TCS' positioning in some mature accounts remains weighted toward people provisioning and operational execution, requiring a stronger demonstration of proactive, agent-led, and AI-first transformation
- Enterprises seeking comprehensive DaaS capabilities may find TCS' hardware lifecycle ownership, financing, and circular device propositions less differentiated than those of some other Leaders
- TCS needs to further strengthen its strategic positioning by bringing more proactive transformation ideas beyond day-to-day service delivery
- Clients have cited constraints in TCS' talent mobility across IT towers, with internal organizational hierarchies occasionally limiting agility in integrated transformation programs

Unisys

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 will benefit from Unisys' smart workplace capabilities that leverage its proprietary MTR Dashboard to improve the availability, health, and user experience of meeting rooms and broader workplace environments
- European enterprises seeking experience-led workplace transformation will benefit from Unisys' XLA 3.0 framework, which combines elements such as persona-based insights, workplace analytics, and business outcome measurement
- Mid-market enterprises seeking alternatives to large-scale technology vendors will find value in Unisys' broad ecosystem, including partnerships with technology providers such as Freshworks and EasyVista, delivering fit-for-purpose solutions
- Enterprises will benefit from Unisys' mature field services capabilities, which extend beyond traditional on site support to include differentiated offerings such as the VIP Tech Button, AR-assisted technicians, and liquid cooling for data centers
- Clients have appreciated Unisys' client engagement approach, citing strong client intimacy, transparency, and commitment as key strengths

Limitations

- Enterprises operating in manufacturing, energy and utilities, and healthcare industries may find Unisys' presence and proof points in these sectors comparatively limited
- While Unisys has invested in certain differentiated offerings, its capabilities across next-generation themes such as agentic AI platforms and cross-tower orchestration remain comparatively less mature than those of leading providers
- Enterprises seeking comprehensive capabilities across workplace segments may find Unisys' portfolio comparatively less mature in certain segments such as asset management, Unified Communications and Collaboration (UCC), and enterprise mobility
- Some clients have highlighted opportunities for Unisys to better balance client-specific customization with standardized IT service management best practices during transformation engagements

Wipro

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 will appreciate Wipro's investments in proprietary AI platforms such as WEGA and WINGS, which enable enterprises to leverage its reusable AI agents, solutions, and pre-built enterprise AI workflows to solve for their unique use cases
- Enterprises seeking converged cross-domain workplace transformation will benefit from Wipro's strategy, which extends beyond workplace by integrating applications, network, cyber resiliency, data, AI, and experience design into a unified operating model
- Enterprises in the BFSI sector will benefit from Wipro's longstanding industry expertise and delivery capabilities, supported by investments in its GIFT City Hub to deliver secure, compliant, and AI-enabled workplace transformation
- Enterprises looking to operationalize AI PCs will benefit from Wipro's strategic partnership with Intel, supported by investments in on-device AI capabilities and use case development
- Clients have highlighted Wipro's strong technical capabilities across VDI, End-user Computing (EUC), and desktop management as key differentiators

Limitations

- Wipro's workplace consulting narrative could be further improved through elements such as structured consulting accelerators, maturity assessment frameworks, and AI roadmap and adoption advisory
- While Wipro has demonstrated proof points across multiple industries, its workplace value proposition could benefit from more differentiated industry-specific solutions tailored to individual vertical requirements
- While Wipro has invested in implementing XLAs, it can further strengthen its outcome articulation by developing innovative Objectives and Key Results (OKRs) and Business-level Agreement (BLA) metrics
- Some clients have highlighted opportunities for Wipro to improve talent continuity and reduce resource transitions across long-term managed workplace engagements

Enterprise sourcing considerations

Major Contenders

- Atos
- Birlasoft
- HTC Global Services
- Infinite Computer Solutions
- ITC Infotech
- Lenovo
- LTM
- Microland
- Milestone Technologies
- Mphasis
- NexusTek
- Persistent Systems
- Pomeroy
- Tech Mahindra
- UST

Atos

Everest Group assessment – Major Contender

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

- Atos' strategic pivot toward an AI-led, consulting-first model, supported by a pragmatic zero-service-desk vision, agentic resolution capabilities, and contextualized transformation advisory, positions it strongly in the market for AI-first digital workplace services
- Atos' outcome-oriented model, which combines services and technology budgets through constructs such as the Sovereign Agentic Studio and its AI FinOps partnership with Pay-i, strengthens its credibility in linking agentic AI adoption to measurable value
- Enterprises will benefit from Atos' experience in supporting complex, regulated organizations across healthcare, public sector, and telecommunications
- Enterprises will benefit from Atos' experience-led governance, with XLAs contractually committed in a large number of its North American engagements and a portion of contract value linked to experience outcomes
- Atos' robust partnerships with ServiceNow, Google, and Microsoft strengthen its North American workplace transformation capabilities

Limitations

- Enterprises requiring extensive local delivery should evaluate Atos' onshore and nearshore capacity, which is less extensive than the North American footprints of larger global and regional peers
- Enterprises should consider that Atos' workplace services' market adoption in North America remains concentrated in service desk, deskside support, and desktop management, with limited scale in collaboration, enterprise mobility, and asset management services
- While Atos is strong across core workplace segments such as service desk, its capabilities such as self-service and real-time language translation remain less differentiated than leading peers, and it is still strengthening its partners for the same
- Enterprises seeking differentiated frontline and industry solutions should evaluate the maturity of Atos' verticalized offerings and use cases, as sector-specific capabilities are less prominent than those of leading peers

Birlasoft

Everest Group assessment – Major Contender

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 support across IT, HR, finance, and other business functions will benefit from Birlasoft's Sigma GenEx offering, which orchestrates workflows across platforms such as ServiceNow, Workday, BambooHR, Okta, and Microsoft 365
- Enterprises seeking robust migration capabilities will find value in Birlasoft's O'Migrate framework, which supports M365 tenant-to-tenant and cross-platform migrations
- Enterprises seeking personalized AI enablement will value Birlasoft's user-centric approach across business KPIs, knowledge readiness, user intent, technology architecture, and value measurement
- North American enterprises will benefit from Birlasoft's strong expertise in the manufacturing and energy and utilities industries, supported by solid market adoption and relevant proof points in these sectors

Limitations

- Enterprises seeking mature experience-linked commercials should evaluate Birlasoft carefully, as contractual commitment to XLAs in workplace engagements is relatively limited and fixed-price models dominate its engagements
- Enterprises seeking a mature and customizable experience management offering may find limited value, as Birlasoft's Sigma DEX solution is relatively behind the curve compared to other leading solutions developed by peers
- Enterprises operating extensively in Canada and Mexico may need to assess Birlasoft's regional depth, given its limited local delivery footprint in these regions
- Enterprises seeking smart workplace and asset management services may find fewer relevant capabilities and proof points from Birlasoft

HTC Global Services

Everest Group assessment – Major Contender

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 infrastructure and workplace transformation will benefit from HTC Global Services' unified leadership across digital workplace and cloud infrastructure services, enabling better coordination and integrated service delivery
- Small and midsize enterprises seeking focused and iterative workplace engagements will value HTC Global Services, given its strong focus and proof points in this segment
- Enterprises operating in the healthcare and life sciences vertical will benefit from its clinical service desk capabilities, including 24x7 clinician support and automation-led Electronic Medical Record (EMR) provisioning
- Clients have appreciated HTC Global Services for its technical expertise with robust responsiveness and support coverage

Limitations

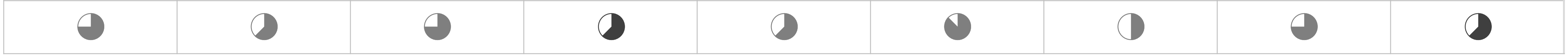
- Enterprises seeking support across a broad technology ecosystem may find HTC Global Services less relevant, given its stronger emphasis on Microsoft-led workplace modernization
- Enterprises seeking a consultancy-led workplace transformation partner may find limited value in engaging with HTC Global Services, given its skewed focus on managed services
- Enterprises seeking innovative pricing constructs may find HTC Global Services less suitable, given its skewed focus on traditional pricing models
- Some clients have highlighted opportunities for HTC Global Services to take a more proactive approach in bringing forward innovative ideas and recommendations that drive business outcomes

Infinite Computer Solutions

Everest Group assessment – Major Contender

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 early financial outcomes will benefit from Infinite Computer Solutions' outcome-based commercial approach, which commits to upfront savings and shares the benefits of automation from the outset of engagements
- Enterprises operating in the healthcare and life sciences vertical will find value in partnering with Infinite Computer Solutions, given its strong presence and relevant proof points in this industry
- Enterprises undertaking supplier transitions will benefit from its strong focus and expertise on rebadging and retaining incumbent employees, which can reduce knowledge loss and improve delivery continuity
- Clients value Infinite Computer Solutions’ commitment to service quality, flexibility, transparent communication, and detailed transition planning

Limitations

- Enterprises seeking a broad workplace technology ecosystem may find Infinite Computer Solutions less differentiated, given its partnerships are concentrated among a limited set of major technology vendors
- Enterprises seeking enterprise-scale agentic AI capabilities should conduct further due diligence, as its capabilities remain less mature than those of peers
- Enterprises seeking innovative pricing constructs in their workplace engagement may find limited value from Infinite Computer Solutions, given its skewed focus on traditional pricing models
- Clients have highlighted improvement opportunities in helpdesk agents’ communication capabilities, particularly in areas such as multilingual support and accent neutralization

ITC Infotech

Everest Group assessment – Major Contender

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 continuous workplace modernization will value ITC Infotech's three-year rolling technology roadmap, which supports structured innovation and periodic capability refresh
- Small and midsize enterprises seeking a workplace transformation partner will find value in ITC Infotech, given its strong focus and relevant proof points in this segment
- Enterprises seeking flexible commercial alignment will benefit from ITC Infotech's joint innovation funds and reward-based commitments, which help share transformation risk and encourage measurable value creation
- Enterprises aiming to modernize their service desk and deskside support will find benefit in ITC Infotech's strong expertise and relevant proof points across these service segments

Limitations

- While ITC Infotech has developed compelling workplace capabilities, it needs to invest further in enterprise mindshare and market awareness to strengthen adoption
- Enterprises seeking on site support beyond the US may find ITC Infotech less relevant, given its limited delivery coverage across Canada and Mexico
- Enterprises operating in public sector, electronics, hi-tech, and technology may not find ITC Infotech relevant, given its limited presence and proof points in these verticals
- Enterprises seeking a long-term strategic workplace partner should conduct further due diligence, as ITC Infotech's comparatively lower renewal rate indicates less established experience in long-term engagements

Lenovo

Everest Group assessment – Major Contender

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 experience-centric workplace transformation will benefit from Lenovo's xIQ platform, which combines persona-level intelligence, AI-driven recommendations, and experience orchestration to enable hyper-personalized experiences
- North American enterprises in the retail industry will benefit from Lenovo's differentiated retail-specific solutions and an expanding portfolio of engagements in sectors such as sports, quick-service restaurants, and consumer products
- Enterprises pursuing persona-led AI PC adoption will find value in Lenovo's AI PC portfolio, which combines purpose-built devices with persona-led use case identification and deployment capabilities
- Clients have highlighted Lenovo's responsive support model and consistent turnaround times as key strengths of its service delivery

Limitations

- While Lenovo is expanding its workplace portfolio with a few flagship offerings, it continues to trail leading providers in certain forward-looking themes such as agentic AI platforms and cross-tower orchestration
- Enterprises in North America with significant onshore workplace support requirements may find Lenovo's local delivery footprint comparatively less extensive than those of leading providers
- While Lenovo is focused on establishing strong partnerships with strategic technology vendors, its ecosystem breadth across niche workplace technology vendors remains comparatively less mature
- Some clients have indicated that Lenovo could further streamline its device refresh process to improve operational efficiency during technology lifecycle transitions

LTM

Everest Group assessment – Major Contender 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 AI-enabled support will find value in LTM's BlueVerse AI offering, which combines intelligent issue resolution, workflow orchestration, and agentic AI capabilities to improve employee and engineer productivity
- Enterprises will appreciate LTM's flexible and innovative commercial approach, which includes gainshare and tiered pricing models to support enterprise AI transformation initiatives
- Forward-looking enterprises seeking AI-first workplace transformation will value LTM's AI 1000 Forward Deployed Engineers (FDEs) model, which supports the adoption, deployment, and scaling of agentic AI platforms in the workplace
- Clients have highlighted LTM's technical expertise, with dedicated specialists in on site support services and service desk operations

Limitations

- Enterprises seeking industry-specific workplace transformation may find LTM less differentiated than peers, given its limited contextualization of solutions around sector-specific requirements
- Enterprises seeking experience-centric workplace transformation supported by mature experience management capabilities and persona-led experience frameworks may find LTM's capabilities comparatively less mature
- Enterprises seeking enterprise mobility and asset management support may find LTM less suitable, given its limited capabilities and client proof points in these segments
- Some clients have indicated that LTM could strengthen its strategic partnership by proactively introducing innovative solutions and continuous improvement recommendations

Microland

Everest Group assessment – Major Contender

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

- Mid-market enterprises seeking a consolidated workplace platform will find value in Microland's Intelligeni offering, which brings together workplace observability, automation, AI, and operational insights within a unified layer
- European enterprises will appreciate Microland's experience operator vision, which moves beyond traditional services to focus on experience optimization, operational outcomes, and continuous service improvement
- Enterprises seeking established service desk capabilities will benefit from Microland's operational maturity in this segment, supported by its SDI World Class Service Desk accreditation
- Clients have highlighted Microland's commercial competitiveness as a key strength, citing its ability to deliver cost-effective services while maintaining quality and value

Limitations

- Enterprises seeking workplace transformation aligned to industry-specific needs may find Microland's workplace portfolio comparatively less tailored across verticals
- While Microland continues to strengthen its workplace portfolio, its capabilities across emerging workplace themes such as agentic AI orchestration and unified experience layers remain comparatively less mature than those of leading providers
- While Microland has introduced outcome-oriented commercial constructs, its implementation across workplace engagements remains limited, while being skewed toward traditional fixed-price models
- North American enterprises seeking in-country workplace service delivery beyond the US may find Microland's regional presence and footprint comparatively less established

Milestone Technologies

Everest Group assessment – Major Contender

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 structured AI and automation advisory will benefit from Milestone Technologies' benchmarking framework, which evaluates service maturity and creates phased transformation roadmaps
- Enterprises will benefit from Milestone Technologies' talent transformation approach, which evolves traditional support roles into AI-augmented agents and workflow orchestrators through structured upskilling and reskilling
- Enterprises seeking support in service desk, deskside support, and asset management will benefit from its strong focus and relevant proof points across these service segments
- Clients value Milestone Technologies' proactive account management, responsiveness, and strategic engagement, supported by strong senior leadership access and collaboration in complex workplace environments

Limitations

- Enterprises seeking a mature employee experience strategy may find Milestone Technologies less differentiated than peers, given its limited articulation of persona-aligned journeys and experience models
- Enterprises outside electronics, hi-tech, telecom, media, and entertainment industries may find Milestone Technologies less suitable, given its limited expertise and proof points in other sectors
- Enterprises seeking support beyond the US may find Milestone Technologies less relevant, given its limited proof points across Canada and Mexico
- Enterprises seeking innovative commercial models may find Milestone Technologies less differentiated, as buyer feedback indicates that its pricing approach remains weighted toward traditional constructs

Mphasis

Everest Group assessment – Major Contender

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 structured automation advisory will benefit from Mphasis' proprietary TRG framework, which analyzes ticket data to identify automation and service improvement opportunities
- Enterprises seeking service desk automation will value Mphasis' UniXHub platform, which provides enterprise-wide visibility and workflow orchestration across IT, HR, and other business functions
- Enterprises seeking AI-enabled endpoint operations will benefit from Mphasis' Automated Endpoint Management (AEM) offering, which applies intelligence and automation to endpoint monitoring, remediation, and management
- Clients have appreciated Mphasis for its strong client management capabilities in workplace engagements

Limitations

- Enterprises operating in sectors other than BFSI should assess Mphasis' industry relevance carefully, given its stronger market focus and proof points in banking and financial services
- Enterprises seeking mature experience-led transformation may find limited differentiation across persona-based journeys, XLAs, and business-aligned employee experience outcomes
- Enterprises looking for innovative pricing constructs may not find Mphasis suitable, given its stronger reliance on traditional pricing models
- Some clients have expressed dissatisfaction with the overall customer experience, highlighting opportunities for more proactive communication and account engagement

NexusTek

Everest Group assessment – Major Contender

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 structured advisory will benefit from NexusTek's consultative approach, which proactively identifies technology gaps across the ecosystem and aligns priorities through a business-outcome-led roadmap
- Enterprises seeking converged infrastructure transformation across workplace, cloud, cybersecurity, and data will appreciate NexusTek's NexusOps platform, which leverages automation and AIOps to unify operations across these domains
- Small and midsize organizations with limited in-house IT capabilities will find value in NexusTek's virtual Chief Information Officer (CIO)-led engagement model, which provides vendor-neutral guidance to support organizations in navigating their transformation journey
- Clients have appreciated NexusTek's strategic partnership capabilities, particularly its flexible engagement approach and ability to align solutions with evolving requirements

Limitations

- NexusTek's workplace-specific offering portfolio remains comparatively less extensive than peers, particularly in supporting a broader range of workplace segments and technologies
- Enterprises pursuing large-scale workplace transformation programs may need to evaluate NexusTek's experience supporting complex enterprise environments
- While NexusTek has introduced flexible commercial constructs, its workplace engagements remain comparatively more concentrated around traditional fixed-price and time-and-material pricing models
- Some clients have highlighted opportunities for NexusTek to improve delivery consistency by reducing occasional delays during service execution

Persistent Systems

Everest Group assessment – Major Contender

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 engineering-first workplace transformation with tailored solutions will appreciate Persistent Systems’ practitioner-led delivery approach, reinforced by its digital engineering heritage
- Enterprises seeking Google Workspace-native modernization will benefit from Persistent Systems’ deep partnership with Google Cloud, supported by strong implementation, migration, and governance capabilities
- Enterprises seeking intelligent support operations will find value in Persistent Systems’ OpsP(AI)lot platform, which enables proactive operations through AIOps, intelligent automation, and data-driven insights
- Clients have appreciated Persistent Systems' strong technical expertise and execution capabilities, supported by its investments in talent development through Persistent Academy

Limitations

- Large enterprises seeking providers with extensive experience in transformation programs may find Persistent Systems' portfolio comparatively more concentrated among small and mid-market enterprises
- Enterprises seeking workplace transformation partners that lead with consulting and strategic advisory may find Persistent Systems' workplace portfolio comparatively more execution-oriented
- North American enterprises operating in the manufacturing and energy and utilities industries may find Persistent Systems' workplace-specific proof points comparatively limited
- Some clients have highlighted opportunities for Persistent Systems to take a more proactive approach in introducing more innovative ideas and value-added recommendations beyond operational delivery

Pomeroy

Everest Group assessment – Major Contender

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 on site support will benefit from Pomeroy's large North American field-services workforce, extensive location coverage, and strong deskside delivery heritage
- Enterprises with complex device estates will benefit from Pomeroy's strong asset lifecycle capabilities, supported by dedicated warehousing, logistics, deployment, refresh, and IT asset disposition facilities
- Enterprises seeking cross-functional workplace services may find value in Pomeroy's investments in the SmartServices portfolio, underpinned by its BanzAI platform, which aims to unify workflows across IT, HR, finance, legal, facilities, and customer service
- Clients value Pomeroy's strong talent management capabilities and its role as a strategic partner that proactively identifies areas for improvement

Limitations

- Enterprises seeking a mature AI-first workplace transformation should validate BanzAI carefully, as it is a recently developed offering with limited adoption proof points
- Enterprises operating in energy, utilities, telecom, and media and entertainment sectors should assess Pomeroy's industry relevance carefully, given its limited market adoption and proof points in these sectors
- Enterprises seeking experience-centric workplace transformation may find limited value in Pomeroy due to the relatively limited maturity of its capabilities in this area
- Clients have highlighted inconsistencies in Pomeroy's technical expertise, with resource skill levels varying across engagements and affecting service quality

Tech Mahindra

Everest Group assessment – Major Contender

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

- Tech Mahindra’s cohesive workplace narrative, delivered through its unified FLEX offering, will appeal to enterprises seeking end-to-end digital workplace enablement across their IT ecosystem
- Enterprises pursuing consulting-led workplace transformation will benefit from Tech Mahindra’s integrated sales, consulting, solutioning, and delivery model, enabling a more seamless transition from strategy to execution
- Enterprises seeking experience-led operations will benefit from Tech Mahindra’s FLEX eXM offering, which combines real-time telemetry, proactive experience management, and XLA-based governance
- Enterprises seeking on site and nearshore workplace support across North America will benefit from Tech Mahindra's extensive regional delivery footprint

Limitations

- Enterprises aiming to link workplace performance with broader business outcomes should conduct further due diligence on Tech Mahindra, as its flagship FLEX offering primarily emphasizes productivity and cost optimization over wider business results
- Mid-market enterprises seeking lightweight and rapidly deployable workplace solutions may find Tech Mahindra less agile, given its stronger orientation toward broad, enterprise-scale transformation and integrated service programs
- Enterprises should assess Tech Mahindra’s delivery governance carefully, as some clients have highlighted challenges in internal coordination and team management
- Some clients have also highlighted opportunities to improve pricing and commercial competitiveness, particularly in delivering effective cost optimization

UST

Everest Group assessment – Major Contender 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 pursuing vendor-native transformation across large tech vendors, such as Microsoft, AWS, Google Cloud, and ServiceNow, will appreciate UST's dedicated Chief Technology Officer (CTO)-led practices and strategic partnerships with these technology providers
- Enterprises pursuing AI-led workplace operations will find value in UST's NEURA Works platform, which brings together capabilities such as intelligent incident management, experience-first support, and automation
- Enterprises seeking flexible commercial engagements will appreciate UST's innovative pricing models and willingness to align commercial constructs with operational objectives
- Clients have highlighted UST's consistent service delivery and execution capabilities as key strengths across workplace engagements

Limitations

- Enterprises seeking workplace consulting-led transformation should conduct due diligence on UST, given its relatively stronger focus on execution-led workplace services than upstream consulting engagements
- North American enterprises operating in manufacturing and energy and utilities industries may find UST's experience and proof points comparatively limited across these verticals
- While UST has recently revamped its digital workplace portfolio, enterprises seeking well-established offerings may find its market-facing proof points comparatively limited
- Enterprises requiring large-scale workplace transformation programs may need to evaluate UST's market scale, relevant proof points, and experience in delivering complex transformation engagements

Enterprise sourcing considerations

Aspirants

- Altimetrik
- Anunta
- Bell Techlogix
- Dell Technologies
- Randstad Digital

Altimetrik

Everest Group assessment – Aspirant

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 requiring modern endpoint operations will benefit from Altimetrik's engineering-led capabilities, further strengthened by its recent acquisition of SLK Software, which expands its capabilities in AI, data, and digital engineering
- North American enterprises pursuing integrated operations will benefit from Altimetrik's unified observability and cyber resiliency capabilities across workplace, cloud, network, security, and applications
- Enterprises seeking support with workplace stabilization and modernization during carve-out journeys will find value in Altimetrik's strong experience in delivering these engagements
- Clients value Altimetrik's strong client management capability, particularly its responsiveness, flexibility, and willingness to scale support as priorities evolve

Limitations

- Enterprises seeking a workplace partner with a consulting-first mindset may find limited value in Altimetrik's capabilities, given its greater focus on implementation and managed services than on consulting-led engagements
- Enterprises seeking innovative commercial alignment should consider Altimetrik's strong reliance on fixed-price constructs, as its adoption of outcome-linked, consumption-based, and value-sharing models trails more commercially progressive peers
- Enterprises seeking support in asset management and smart workplace services should conduct due diligence on Altimetrik, given its relatively limited focus in these segments
- Clients have highlighted that Altimetrik needs to strengthen its talent management capabilities, as delivery maturity remains inconsistent across teams

Anunta

Everest Group assessment – Aspirant

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 desktop and virtual workspace modernization will find value in Anunta's deep specialization in Virtual Desktop Infrastructure (VDI)-related services and Desktop-as-a-Service (DaaS) offering
- Enterprises will value Anunta's platform-led operating model, with focus on unifying telemetry across IP systems through its AI Fabric to support multi-agent reasoning and automated operations
- Enterprises with complex virtual desktop estates will benefit from Anunta's platform-agnostic capabilities across Microsoft, AWS, Google Cloud, Omnissa, Citrix, Nutanix, and endpoint management platforms, reducing dependence on a single technology ecosystem
- Enterprises seeking a flexible device and virtualization management portfolio will find Anunta relevant, with offerings ranging from preconfigured packaged solutions to customized enterprise DaaS and plug-and-play virtualization capabilities

Limitations

- Enterprises seeking broad end-to-end digital workplace transformation may find Anunta less relevant, given its limited expertise and proof points beyond desktop management and virtualization and Unified Communication and Collaboration (UCC)
- Enterprises operating outside the US, such as Canada and Mexico, should evaluate Anunta's capabilities, given its concentration of delivery and market presence in the US
- Enterprises seeking consulting-led transformation may find Anunta less suitable, given its greater focus on managed services than advisory-led engagements
- While Anunta has developed promising proprietary IP, it currently has limited industry-specific proof points demonstrating differentiated business outcomes

Bell Techlogix

Everest Group assessment – Aspirant

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 undergoing mergers, acquisitions, and divestitures will benefit from Bell Techlogix's repeatable transition templates and workplace stabilization capabilities
- Enterprises would appreciate the executive engagement model of Bell Techlogix, which ensures strong C-suite and senior leadership involvement in all client engagements, from deal pursuit to delivery governance
- Enterprises seeking service desk and deskside support will find value in Bell Techlogix's strong expertise and client proof points across these service segments
- Clients have appreciated Bell Techlogix for providing resources with deep domain expertise and the ability to introduce innovative ideas to drive better outcomes

Limitations

- Enterprises seeking consulting-led workplace transformation may find Bell Techlogix less relevant, as its portfolio remains more focused on implementation, managed services, and operational support than on strategy-led advisory engagements
- Enterprises outside Bell Techlogix's core industries, including manufacturing, public sector, and energy and utilities, may need to evaluate the depth of its relevant transformation experience
- Enterprises seeking innovative commercial models may find Bell Techlogix's heavy reliance on traditional pricing constructs less attractive
- While Bell Techlogix has strengthened its AI-led offerings through the infiniti framework, enterprises should assess its maturity carefully, as clients indicate that its AI capabilities remain behind the curve

Dell Technologies

Everest Group assessment – Aspirant

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 end-to-end device lifecycle transformation will benefit from Dell Technologies' Lifecycle Hub Suite, which integrates planning, procurement, configuration, deployment, repair, refresh, and secure asset recovery at global scale
- Enterprises seeking consulting-led gen AI implementation will value Dell's dedicated strategy and roadmap services, supported by accelerator workshops that help identify use cases and define adoption pathways
- Enterprises seeking data optimization for workplace enablement will benefit from Dell's capabilities across data readiness, modernization, governance, and AI implementation
- Small and midsize enterprises will find benefit in partnering with Dell, given its strong focus and relevant adoption proof points in this segment

Limitations

- Although Dell has a strong hardware legacy, it still needs to build greater credibility and enterprise mindshare as an end-to-end workplace managed services provider
- While Dell has developed gen AI capabilities, enterprises seeking mature agentic workplace operations may find its portfolio more developed across infrastructure and advisory services than autonomous, cross-functional employee support
- Enterprises seeking a proprietary EX platform may find Dell less suitable than other peers with mature DEX orchestration, XMOs, and business-linked XLA capabilities
- Enterprises seeking a single provider across the complete workplace services spectrum may find Dell less suitable, given its more limited capabilities across UCC and smart workplace services

Randstad Digital

Everest Group assessment – Aspirant

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 cross-functional support will find value in engaging with Randstad Digital, given its strong focus in unifying services across IT, HR, finance, applications, and other business functions
- Enterprises across buyer segments will benefit from engaging with Randstad Digital, given its balanced focus and strong market adoption across enterprises of different sizes
- Enterprises seeking service desk and deskside support will find value in Randstad Digital, given its strong focus and relevant proof points in these service segments
- Clients value Randstad Digital's strong talent and client management capabilities, supported by transparent communication and low attrition-related disruption

Limitations

- Randstad Digital needs to sharpen its workplace narrative and articulate a forward-looking vision, particularly around next-generation themes such as autonomous operations and experience enablement
- Enterprises seeking innovative commercial models may find Randstad Digital less differentiated, given its stronger reliance on traditional pricing constructs
- Enterprises seeking support beyond the US should conduct further due diligence, given Randstad Digital's limited delivery presence and proof points across Canada and Mexico
- Enterprises operating in electronics, hi-tech, energy, utilities, and public sector may find Randstad Digital less relevant, given its limited focus and proof points in these verticals

Appendix

Glossary

Research calendar

Glossary of key terms used in this report

AI	Artificial Intelligence; the ability of machines to mimic human intelligence, such as visual perception, speech recognition, decision-making, and language translation
Agentic AI	Artificial intelligence systems that act autonomously to achieve specific goals through multi-step reasoning, planning, and interaction with external tools or environments
AR	Augmented Reality; a technology that superimposes a computer-generated image on a user's view of the real world, providing a composite view
DaaS	Desktop-as-a-Service; is a bundled pricing option for hardware and software in a pay-per-use model; this model also includes a third party hosting the virtual desktop infrastructure, wherein the Operating System (OS) runs inside virtual machines on servers present in the cloud provider’s data center
DEX	Digital Employee Experience; reflects how effectively people interact with their workplace digital tools
ESG	Environmental, Sustainable, and Governance; is an investment principle reflecting an organization’s environmental and social impact
EX	Employee Experience; overall experience and satisfaction of employees within an organization throughout their employment journey
GCC	Global Capability Center; company-owned hub that provides strategic, technology, and operational support to a multinational organization, leveraging global talent and innovation
Gen AI	Generative Artificial Intelligence; where AI is capable of generating texts, images, videos, or other data using generative models, often in response to prompts
IoT	Internet of Things; physical objects with sensors, processing ability, software, and other technologies that connect and exchange data with other devices and systems over the internet or other communications networks
KPIs	Key Performance Indicators; a quantifiable measure of performance over time for a specific objective
OKR	Objectives and Key Results (OKRs); goal-setting framework that aligns teams around measurable objectives and outcomes
RoI	Return on Investment; a financial metric that measures the profitability of an investment relative to its cost
SLA	Service Level Agreement; contract that defines the level of service expected by the end-user from a provider
TCO	Total Cost of Ownership (TCO); evaluates all costs associated with acquiring, operating, and maintaining a service during a specified time period
UCaaS	Unified Communications-as-a-Service; a cloud-based suite of communication and collaboration tools
UX	User Experience; how a user interacts with and experiences a product or service
VDI	Virtual Desktop Infrastructure; is a virtualization technology that hosts a desktop OS on a centralized server in a datacenter
XLA	Experience Level Agreement; framework that measures and manages the quality of service based on user experience

Research calendar

Digital Workplace

Published Current release Planned

Report title	Release date
IT Service Management (ITSM) and Service Integration and Management (SIAM) Services – Provider Compendium 2025	November 2025
Exploring the Modern in Microsoft Modern Work Services	November 2025
Tech Vendor Spotlight: State of AI in Integrated IT Management Platforms 2025	December 2025
Digital Workplace Services PEAK Matrix® Assessment 2026: Mid-market Enterprises	January 2026
Digital Workplace Services Voice of the Customer (VoC) 2026	February 2026
Digital Workplace Services for Mid-market Enterprises – Provider Compendium 2026	April 2026
Future of the Workplace: Architecting a Blended Workforce in Enterprises	April 2026
IT Service Management (ITSM) Platform PEAK Matrix® Assessment 2026	June 2026
IT Asset Management (ITAM) Platform PEAK Matrix® Assessment 2026	June 2026
IT Service Management (ITSM) and IT Asset Management (ITAM) Platform Provider Compendium 2026	July 2026
IT Service Management (ITSM) and Service Integration and Management (SIAM) State of the Market 2026	August 2026
Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026: North America	August 2026
Digital Workplace Services (DWS) PEAK Matrix® Assessment 2026 – Europe	Q3 2026
Digital Workplace Services Provider Compendium 2026	Q3 2026
Top 50™ Unified Endpoint Management (UEM) Technology Providers 2026	Q3 2026
IT Service Management (ITSM) Services PEAK Matrix® Assessment 2026 – Global	Q4 2026

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