Higher Education Digital Services 2025 RadarView™

Empowering the future of higher education industry through digital enablement

July 2025

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About the Higher Education Digital Services 2025 RadarView

1. Service providers are leveraging emerging technologies to enhance student recruitment, retention, and engagement while improving institutional efficiency. They are helping institutions modernize core systems through cloud-native platforms and AI-driven tools. Additionally, providers are also using IoT, cybersecurity, AI, and analytics to optimize resources, build cyber resilience, improve student services, and drive sustainable growth.

2. Avasant evaluated 28 service providers using a rigorous methodology across the key dimensions of practice maturity, investments and innovation, and partner ecosystem in the higher education space. Through our analysis, we recognized 14 providers that brought the most value to the market over the past 12 months.

3. The *Higher Education Digital Services 2025 RadarView* aims to provide an in-depth capability assessment of the leading service providers offering services to the higher education sector. Based on our methodology, we have categorized the service providers into four broad segments: leaders, innovators, disruptors, and challengers.

4. To enable decision-making for enterprises, Avasant has provided an overview of the major service providers in the industry. This includes details of their practice size, key IP assets/solutions, partnerships, sample clients, subindustries focus, and case studies. This is supported by an analyst's take on the providers across the three key dimensions defined in the second point above.

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Executive summary

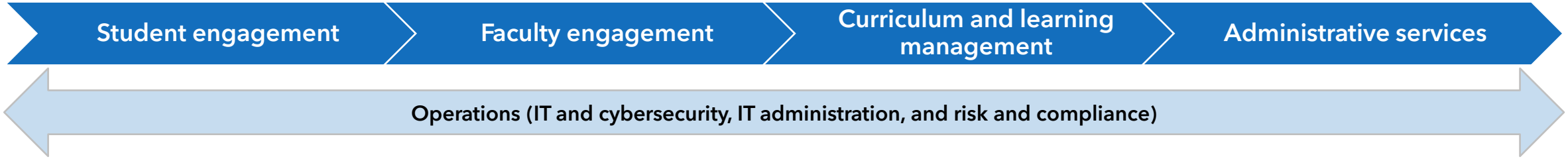
Scope: Higher education

The report focuses on digital services delivered to those commercial businesses licensed to provide the following higher education coverages:

Type of coverage	Description	Enterprise illustrative examples
Physical/on-campus institutions	Public and private colleges and universities, business and medical schools, military academies, vocational colleges, and for-profit institutions deliver most of their curriculum through in-person interaction.	Massachusetts Institute of Technology; Harvard Medical School; Stanford; University of Cambridge; University of Oxford
Virtual/distance learning institutions	Organizations (whether accredited as universities or not) that deliver most of their curriculum through online channels. They support and educate students through on-demand content, self-assessment modules, personalized training, live sessions, and support/advice from experts. Pure one-way content publishers, such as Wiley and YouTube, are not considered in this study.	coursera; edX; THINKIFIC; Udemy; SKILLSHARE

Digital services definition: Digital services accelerate the digital transformation using emerging technologies, such as AI (including agentic AI and generative AI) and analytics, blockchain, cloud, cybersecurity, intelligent automation, AR/VR/XR, and IoT across the higher education value chain. The services help address key challenges in the industry, including improving recruitment, streamlining operations, and enhancing the learning experience. Service provider offerings assessed in this study are advisory and consulting, proof-of-concept development, build and test, implementation, system integration, and development and maintenance.

We will assess service providers' offerings across the following value chain components:



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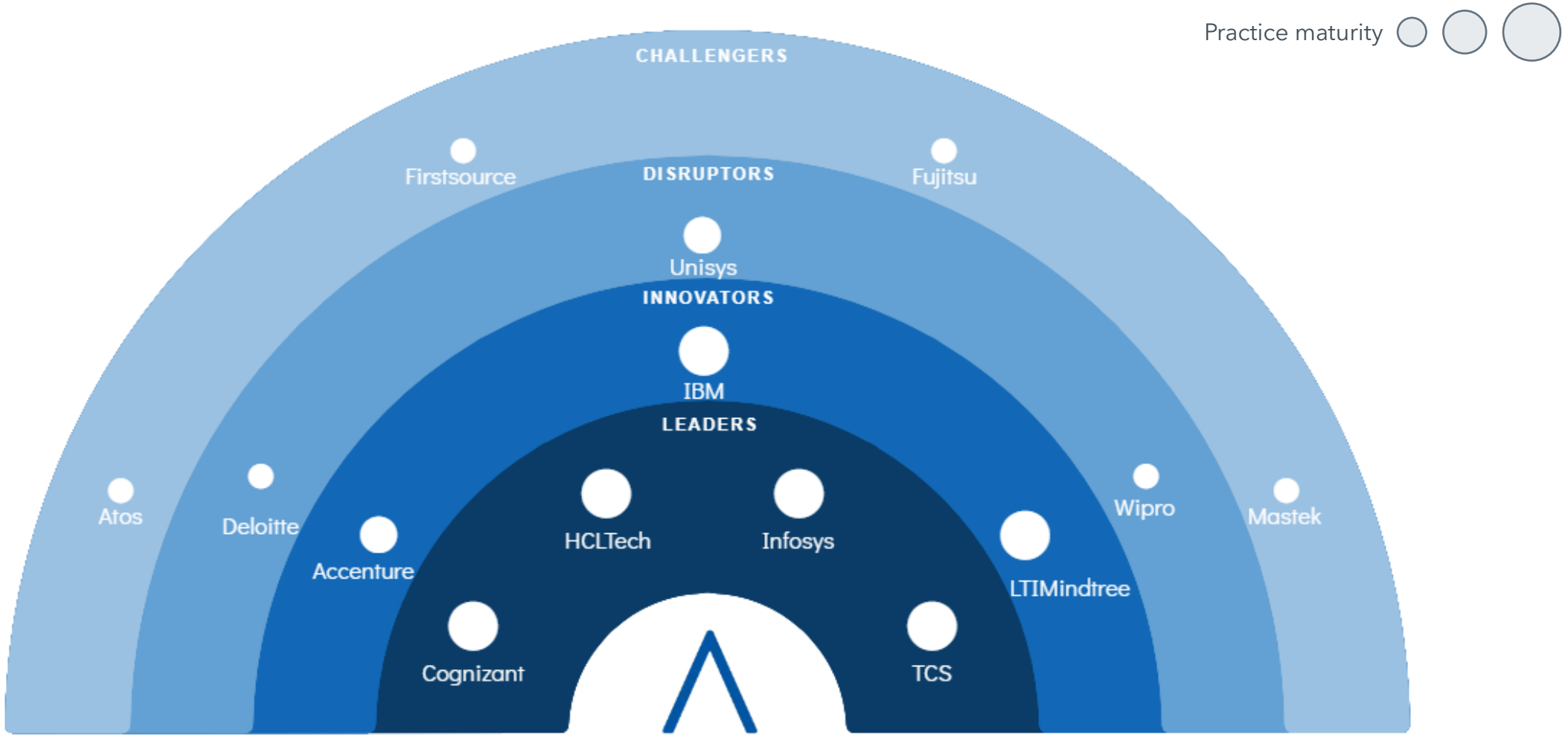
Executive summary

Key drivers	Enterprise response
Increased revenue pressures and competition are forcing higher education institutions to transform digitally for sustained growth	Amid growing pressures around financial sustainability and intensifying competition, higher education institutions are strategically embedding digital technologies such as AI and analytics across both academic and operational functions to drive value through digitization. The initiatives include personalized outreach and marketing, virtual assistants for admission and aid management, and student retention analytics.
Higher education institutions are augmenting cyber resilience amid a surge in cyber threats due to increased digitization	Higher education institutions are enhancing their cybersecurity postures as growing digital assets and rising threats increasingly disrupt operations. In the past 12 months, over 91% of higher education institutions in the UK faced cyberattacks—a trend mirrored globally. To combat this, they are strengthening authentication, adopting cybersecurity frameworks, and improving detection and response services.
The demand for scalability and interconnected systems is making the modernization of higher education systems essential	As scalability and interoperability become critical, higher education institutions are prioritizing the modernization of legacy systems. They are adopting cloud-native, integrated platforms, such as student information systems, to build connected digital ecosystems that unify academic, administrative, and student services, enable real-time data exchange, improve operational agility, and support collaboration.
Evolving expectations are pushing higher education institutions to deliver newer learning experiences and enhance student engagement	With hybrid and remote learning programs picking up and rising student expectations for curated content, higher education firms are adapting the learning and student engagement delivery models by leveraging digital technologies, including analytics, AI, AR/VR/XR, to deliver services such as tailored content delivery, individual learning paths, and personalized feedback.
Sustainability goals and the need for improved resource utilization are driving green campus initiatives	A heightened emphasis on achieving sustainability and climate objectives, along with the need to reduce energy consumption, is driving higher education institutions to utilize digital technologies such as IoT and analytics. These technologies help optimize resource usage, digitize monitoring processes, streamline reporting, lower carbon emissions, and create smart campuses.

Source: Avasant Research; The Department for Science, Innovation and Technology (DSIT), UK

Avasant recognizes 14 top-tier service providers supporting the higher education industry in digital transformation



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Demand-side trends

Revenue pressures have accelerated digital adoption to boost enrollment and retention in higher education

To address financial strain and increasing competition, higher education institutions are utilizing AI-driven CRMs, chatbots, and analytics to enhance enrollment, target untapped opportunities, improve admission outcomes, and boost retention rates.

Olivet Nazarene University

Unlocking new opportunities

Olivet Nazarene University (ONU) unified its recruitment process into Ellucian CRM Recruit and launched ONU Plus, a recruitment solution, to reach and enroll online students from different geographies.

Penn State

Enhancing admission experience

In 2024, Penn State University launched LionChat, an AI-powered chatbot that answers common admissions and enrollment questions to modernize engagement and boost admissions.

Georgia Northwestern Technical College

Accelerating enrollment

Georgia Northwestern Technical College utilized TargetX, a robust CRM platform, and digitized marketing to enable automated personalized and targeted outreach and tracking to boost enrollment.

Utah State University

Supporting student retention

In November 2024, Utah State University utilized Salesforce Education Cloud to deliver an AI-enabled CRM platform to enable student retention by delivering personalized support.

Source: Avasant Research

Higher education institutes are strengthening cyber resilience to counter rising threats as digital assets continue to grow in the sector

To manage cyber threats, higher education institutions are embedding zero-trust architectures, deploying AI-driven threat detection, and enhancing response capabilities. They are also leveraging dedicated CoEs and cross-sector partnerships to build resilient cyber defense ecosystems.

91%
of higher education institutes in the UK experienced a cyberattack in 2024

Recent cyberattacks

In February 2025, Northern Caribbean University experienced a cyberattack that disrupted access to its student financial databases and key university systems. The incident prompted a multi-agency response, including the involvement of the Jamaica Cyber Incident Response Team.

In June 2025, Columbia University experienced a cybersecurity incident caused by an unauthorized network intrusion. During this incident, data was unlawfully accessed and stolen from part of its IT infrastructure. The university continues to assess the scope and severity of the data breach.

In January 2025, the University of Notre Dame Australia reported a cyber incident involving unauthorized access to its systems and personal data. The university has since notified affected individuals and has been working with the Australian Taxation Office to enforce protective measures.

Cybersecurity initiatives across the higher education industry

SMU Singapore Management University

AI-enabled threat detection for academic data

In 2024, Singapore Management University integrated Microsoft Copilot for Security into its zero-trust framework, automating threat detection and accelerating incident response to safeguard critical research and personal data.

Curtin University

Threat response modernization through platform integrations

Curtin University advanced its cybersecurity posture by integrating Trustwave's Managed Detection and Response with Microsoft Sentinel and Defender to enable continuous threat monitoring and faster incident response.

University of Wolverhampton

Co-innovation to build cyber resilience

In May 2025, the University of Wolverhampton established the Centre for Cyber Resilience and Artificial Intelligence to mitigate the surge in cyber threats through collaboration with government, academia, and other industries.

uni.lu Université du Luxembourg

Teaming up to bolster cyber talent and capabilities

In February 2025, the University of Luxembourg and Google set up a CoE to strengthen cybersecurity and AI research. Google also funded the hands-on cyber training for the university students to improve cyber resilience.

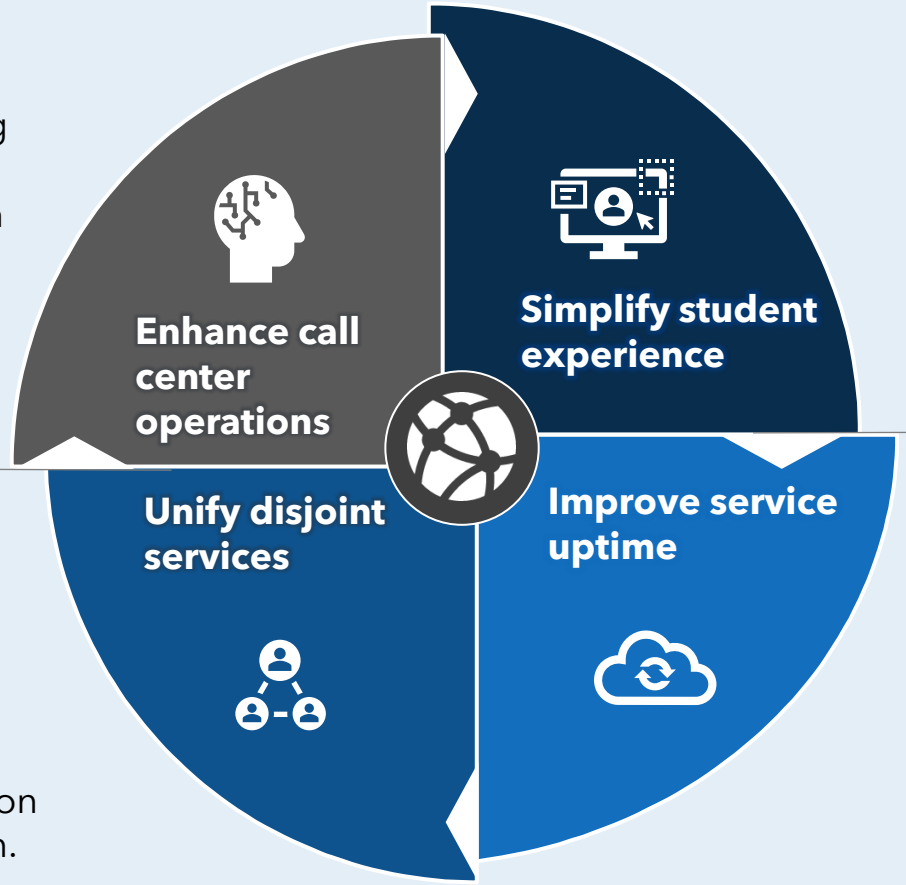
Source: Avasant Research; The Department for Science, Innovation and Technology (DSIT), UK

Delivering operational scalability and connected digital ecosystems is now imperative for higher education institutions

Higher education institutions are adopting cloud-native student systems, AI-enabled support tools, and unified cloud platforms to modernize legacy systems. These technologies are enabling institutes to have scalable operations, seamless data flow, and integrated academic and administrative services.

DALLAS COLLEGE

Dallas College modernized its call center with AWS using Amazon Connect, AI chatbots, and Amazon Kendra to streamline operations and enhance student communication efficiency.



In 2024, the University of Mississippi selected Ellucian's Banner student information system to modernize operations and deliver a unified, scalable SaaS platform to enhance academic operations.

THE UNIVERSITY of MISSISSIPPI

UofA UNIVERSITY OF ARKANSAS SYSTEM

The University of Arkansas System deployed Workday Student across its 14 campuses to unify disparate academic, financial, and HR data on a single cloud platform.

The University of Venda modernized its IT infrastructure by migrating 18 systems to Microsoft Azure, improving service availability and enhancing operational security.

University of Venda
Creating Future Leaders

Source: Avasant Research

Driven by evolving student expectations, the higher education industry is turning to digital technologies to provide personalized experiences

With the integration of AI in learning being a key trend in the industry, higher education institutions are leveraging the technology, along with analytics and AR/VR, to create hyperpersonalized student experiences, including tailored learning journeys and customized course curation.

Gen AI for personalized services

In 2024, Arizona State University integrated ChatGPT Edu to provide a personalized learning experience across various use cases, including scholarly writing and role-based conversations.

AI assistant for curated courses

In April 2025, Nagaland University in India developed an AI-driven flexible learning system that provides students with customized course content and improves their performance.

Chatbot for query resolution

Macquarie University worked with Microsoft to create Virtual Peer, an AI-powered chatbot that allows students to address custom queries and promote self-paced learning.

Advanced AI for immersive learning

In September 2024, Coursera integrated advanced AI in its Coursera Coach offering to provide immersive learning activities and recommend a personalized learning journey to students.

AR/VR for immersive experience

In 2024, Southern Utah University launched its AR/VR innovation classroom to enhance the student learning experience by providing interactive content and facilitating the exploration of complex subjects such as anatomy and molecular design.

Source: Avasant Research

Sustainability focus and efficiency requirements are accelerating green transformation in higher education

To meet sustainability targets and optimize energy use, higher education institutions are adopting digital tools such as IoT, AI, and real-time analytics. Universities are embedding these tech-driven systems to reduce emissions, monitor resource use, and achieve climate goals.

Institut Teknologi Sepuluh Nopember, an Indonesian institute, implemented real-time digital energy systems to control and minimize energy consumption. It also integrated IoT into its transportation systems to optimize routes, thereby reducing resource use.

In June 2025, Georgetown American University, a Guyana-based institute, worked with Visium Technologies, a digital technology company, to build an IoT and AI-enabled smart campus to meet the institute's sustainability goals and contribute to UN Sustainable Development Goals.

Lincoln University in New Zealand partnered with Siemens to implement cloud-based intelligent valves. These valves feature real-time energy tracking in the university's research facilities and use smart building technology to optimize energy efficiency and sustainability.

In July 2025, Mississippi State University collaborated with Cenergistic, an energy solutions provider, to initiate a campus-wide energy program that employs intelligent systems to analyze occupancy and space utilization in real-time and make automated adjustments to optimize energy consumption.

In July 2025, the University of Newcastle in Australia implemented a range of water-saving initiatives, including the installation of Hunter Hydrawise smart irrigation controllers. These controllers enable live weather integration and leak detection, significantly reducing water consumption.

Source: Avasant Research

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Cognizant profile

Cognizant: RadarView profile

cognizant

Practice maturity ★★★★★

Investments & innovation ★★★★

Partner ecosystem ★★★★★

Leverages over two decades of experience in the industry and a robust AI practice to drive digital transformation for higher education customers.

Practice overview

- Practice size: 8,000+
- Active clients: N/A
- Delivery highlights: Has presence across more than 35 countries

>USD 250M	>40%
Revenue from higher education, FY 2024	Digital revenue share from higher education

Industry-specific solutions/offerings

Flowsource™	An AI-enabled platform that assists higher education clients across the software development life cycle
Cognizant® Skygrade™	A cloud-based platform to optimize hybrid and multi-cloud environments for higher education firms
SCARF*	An offering that helps with student data centralization and distribution across various systems
Cognizant Neuro® Business Processes	An automation platform that leverages AI to streamline business processes for higher education clients

Sample clients

- A global education firm
- A private research university in Illinois
- A private university in Connecticut
- A Utah-based university
- An Australian university
- An EdTech company
- An Ivy League University
- Brigham Young University
- Murdoch University
- University of Newcastle

Partnerships/alliances

aws	Developed joint offerings to help higher education clients modernize and scale business operations
Google Cloud	Partnered to deliver infrastructure and data modernization for higher education customers
Microsoft	Utilized its platforms to deliver smart campus solutions, hybrid learning experiences, and student engagement services
salesforce	Leveraged its platforms to assist with student enrollment and curriculum optimization services
workday.	Used its Workday Student platform to optimize the student life cycle for higher education companies
Informatica	Partnered to deliver data management services to higher education clients

Value chain coverage

- Student engagement
- Faculty engagement
- Curriculum and learning management
- Administrative services
- Operations

Darker color indicates higher industry concentration:

*SCARF: Student Connector for Academic Records and Foundation

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Cognizant: RadarView profile

Case studies

Client	Capability	Summary	Business impact
A Utah-based university	• AI • Analytics • Cloud	• The customer aimed to modernize its ERP infrastructure to accommodate future business requirements, such as upgrading its student information system (SIS). • Cognizant implemented an AI-enabled Workday ERP solution for the client to modernize its processes, including human capital management and finance. It also supported the customer with curriculum development and SIS readiness.	• Enhanced operational efficiency • Improved student experience
A global education firm	• Analytics • Cloud	• The client sought to upgrade its legacy commerce solution to assist the end customers better. • Cognizant utilized the Salesforce B2B Commerce solution to unify operations across external and internal websites. Additionally, the solution was integrated with the client's CRM platform to streamline operations.	• Enhanced user experience • Improved operational efficiency
An EdTech company	• AI • Intelligent automation	• The customer wanted to modernize its business processes and drive innovation to meet growing demand. • Cognizant implemented a suite of AI-enabled solutions using Azure OpenAI to streamline operations, including faster prototyping and enhanced personalization. It also deployed GPT-powered bots for personalized student support, content summarization, and HR automation.	• Achieved 80% efficiency in HR processes • Enabled 300% faster development of AI bots
THE UNIVERSITY OF NEWCASTLE AUSTRALIA	• AR/VR	• The client sought to create an immersive solution to help students prepare for real-world emergency scenarios. • Cognizant developed a VR-based neonatal care simulation replicating a real-life delivery room scenario. The solution also included a HoloLens-powered AR tool with interactive human anatomy to support an advanced understanding.	• Enhanced student learning experience • Improved operations

Cognizant: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Cognizant utilizes a robust employee base and has over 500 digital implementations in the education space, catering to universities across geographies, including the US, UK, Asia Pacific, and Australia. It leverages its in-house offerings, such as Neuro AI and global system integration capabilities, to address client requirements across the student life cycle and higher education value chain.
- Cognizant is leveraging a comprehensive suite of digital technologies, including generative AI, AR/VR, cloud-based ERP systems, and CRM platforms, to deliver transformative services across the higher education value chain. These technologies have enabled higher education clients to provide personalized student engagement through AI-powered bots, immersive learning via VR simulations, streamlined digital commerce experiences, and delivered hands-on ERP training integrated into academic curricula.
- Cognizant has deployed use cases for generative AI (Gen AI) aimed at higher education clients, including enhancing student engagement and academic support through tools such as content summarization assistants and automated learning alignment solutions.

Investments and innovation ★★★★

- Cognizant is utilizing its technology-focused acquisitions to enhance digital services for clients in higher education. In 2024, the company acquired Thirdera, a multinational consultancy specializing in ServiceNow, to strengthen its ServiceNow practice. This acquisition enabled Cognizant to provide ServiceNow-based professional services and digital capabilities, including Gen AI, to higher education clients.
- Cognizant is enhancing its training capabilities to meet the needs of higher education clients. A new center has been opened in Halifax, Canada, to develop talent across various technologies, including AWS for cloud services, to support higher education customers' digital transformation.
- It continues to invest heavily in AI by developing a Gen AI Center of Excellence and driving AI-enabled offerings and use cases such as virtual teaching assistance.

Partner ecosystem ★★★★★

- The company utilizes its long-standing partnerships with hyperscalers to develop solutions and facilitate cloud-based transformations for higher education clients. It has established over 40 frameworks and accelerators in collaboration with Microsoft, specifically for these clients. Additionally, it has partnered with AWS to deliver joint offerings in data analytics, AI, and cloud-based migration, helping higher education customers achieve their business objectives.
- It offers dedicated services to higher education clients to implement platforms and solutions from global technology providers. It implements Workday ERP and Student solutions across institutions, supports Salesforce Education Cloud and CRM deployments, and has formed a ServiceNow Business Group to deliver AI-powered automation.

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Appendix:
About RadarView

Higher Education Digital Services 2025 RadarView assesses service providers across three critical dimensions

Practice maturity	• This dimension evaluates the type, market acceptance, and quality of offerings in the higher education space. It also assesses the strength of the overall practice with respect to its size, certified employees, embedded expertise in emerging technologies, and value chain coverage. • The width and depth of the client base, practice revenues, the use of proprietary/outsourced tools and platforms, and future strategy are important factors that contribute to this dimension.
Investments and innovation	• This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model, and how these align with the industry's future direction. • The overall strategic investments, both organic and inorganic, in capability and growth, technology development, and human capital development, along with the innovations that the service provider develops, are critical aspects of this dimension.
Partner ecosystem	• This dimension assesses the nature of the provider's partnerships and ecosystem engagements. It evaluates the partnerships' objective (codevelopment or co-innovation) and the provider's engagement with technology solutions or product providers, startup communities, and domain associations. • The kind of joint development programs around offerings, go-to-market approaches, the overall depth of partnerships, and their leverage to deliver superior value to clients are important aspects of this dimension.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures	Publicly available information from sources such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected through the service provider capability decks and structured briefings from April 2025 to June 2025

Of the 28 service providers assessed, the following are the final 14 featured in the Higher Education Digital Services 2025 RadarView:

accenture, Atos, cognizant, Deloitte., firstsource, FUJITSU, HCLTech, IBM, Infosys, LTIMindtree, Mastek (Trust. Value. Velocity), TCS TATA CONSULTANCY SERVICES, unisys, wipro

Note: Assessments for Accenture, Atos, Deloitte, Fujitsu, IBM, and Wipro were conducted based on public disclosures and market interactions only.

Reading the RadarView

Avasant has recognized service providers in four classifications:

Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, investments and innovation, and partner ecosystem) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.

Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.

Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.

Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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