Everest Group®

Everest Group PEAK Matrix® for Digital Workplace Service Providers 2022

Focus on Wipro
December 2021

Everest Group
PEAK MATRIX®

Background of the research

- The pandemic has been a catalyst for enterprises to recalibrate their perception of the workplace. Over 75% enterprises[1] are reviewing their current workplace model for more flexible options. Considering that the business case for workplace transformation is well established now, enterprises are now focused on conceptualizing the target state of their workplace environment and the journey required to achieve it

- The post-pandemic workplace is going to be a consequence of significant overhaul across tools, processes, talent requirements, security mechanism, and governance frameworks. This multi-year transformation journey will be underpinned by location-agnostic services and significant focus on employee experience and wellness

- In this research, we present an assessment of 26 digital workplace service providers featured on the digital workplace services PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over Q2 and Q3 2021, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace.

This report assessed the following 26 service providers on the digital workplace services PEAK Matrix:

- **Leaders:** Accenture, Atos, Cognizant, HCL Technologies, NTT DATA, TCS, and Wipro

- **Major Contenders:** Capgemini, CGI, Compucom, Computacenter, DXC Technology, Fujitsu, IBM/Kyndryl, Getronics, Infosys, Microland, Orange Business Services, Stefanini, Tech Mahindra, Unisys, and Zensar

- **Aspirants:** LTI, Milestone Technologies, Mphasis, and UST

Scope of this report:

Geography
Global

Service providers
26 leading digital workplace service providers

Services
Digital workplace services

1   Everest Group key enterprise issue survey 2021.

Characteristics of Leaders, Major Contenders, and Aspirants

Leaders:

Accenture, Atos, Cognizant, HCL Technologies, NTT DATA, TCS, and Wipro

- The digital workplace services Leaders have established a successful global business, driven by years of capability building and experience across different workplace services segments
- These players have a highly balanced portfolio, and continue to keep pace with the market dynamics through continued investments in technology and services capability development (internal IP/tools, partnerships, etc.)
- Leaders are highly proactive in taking their innovations and next-generation service offerings to clients to help them future-proof their workplace environments. In addition, they are increasingly focusing their services on enhancing the workplace experience for end-users
- However, the current Leaders face a stiff challenge from Major Contenders, in both new and rebid deal situations alike. Leaders need to continue focusing on building effective solutions that are well-balanced, and address the seemingly conflicting dual mandate from enterprises for enhanced user experience and services cost optimization

Major Contenders:

Capgemini, CGI, Compucom, Computacenter, DXC Technology, Fujitsu, IBM/Kyndryl, Getronics, Infosys, Microland, Orange Business Services, Stefanini, Tech Mahindra, Unisys, and Zensar

- The Major Contenders segment includes a mix of global and regional players
- These players have built meaningful capabilities to deliver workplace services (both management/run and transformation services); however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across workplace services segments or geographies or both) – this is also reflected in the scale of market success achieved by these players (vis-a-vis Leaders)
- However, all these players are making continued investments in developing internal IPs and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps, and thereby, positioning themselves as strong challengers for the Leaders in this space

Aspirants:

LTI, Milestone Technologies, Mphasis, and UST

- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such players
- Nevertheless, these companies are making investments to build broader capabilities to cater to buyers (through service and technology partnerships as well as internal IPs/tools)

Everest Group PEAK Matrix®
Digital Workplace Services PEAK Matrix® Assessment 2022 | Wipro positioned as Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022
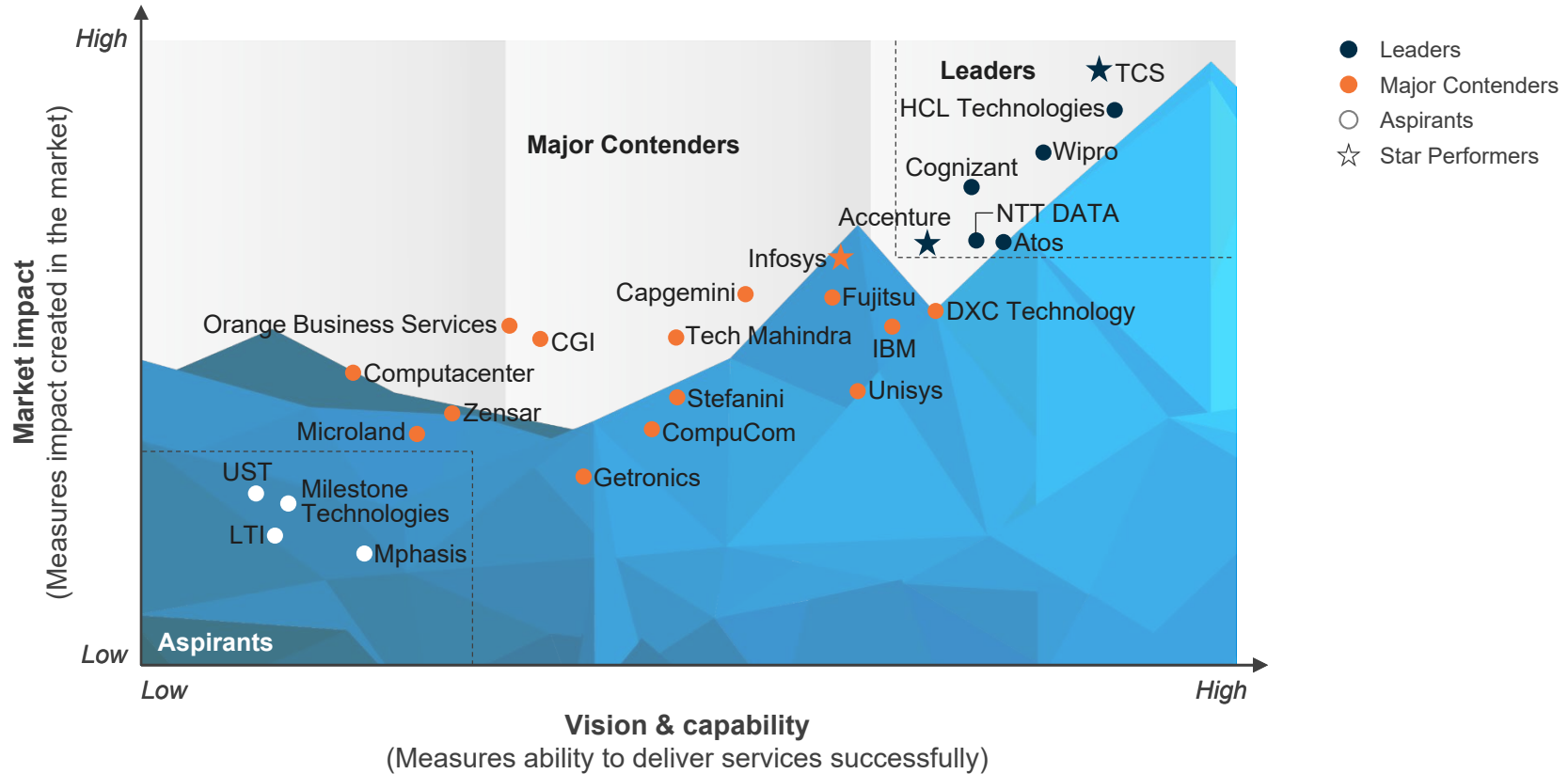
Note: Assessment for Capgemini, CGI, Computacenter, IBM/Kyndryl, LTI, Mphasis, and Unisys excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers.

Source: Everest Group (2021).

Wipro | digital workplace services profile (page 1 of 6)
Everest Group assessment – Leader

Measure of capability: ◔ Low ● High

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
◕	◕	●	◕	◕	◕	●	●	◕

Strengths

- Wipro offers a robust partner ecosystem, a strong set of IPs, and credible delivery proof points around complex workplace engagements

- Clients have highlighted Wipro's price competitiveness during new deals and renewals

- Wipro is expanding its presence in Europe, especially with focus on German market, by investing in new capability centers, dedicated SMUs (Strategic Market Unit), and hiring leadership talent

- It has curated a balanced set of horizontal and vertical offerings under its LiVE Workspace portfolio to cater to hybrid-workplace use-cases

- Wipro has a venture fund arm named Wipro Ventures that brings new-age technology such as AI/ML and IoT to clients. It has invested in various startups such as Avaamo , Altizon, and Vicarious

Limitations

- Despite being a strong player, clients have pointed out that Wipro needs to bring more innovation in their offerings, and it needs to think beyond the traditional workplace

- Wipro needs to evolve itself from being a decision-taker to someone who shapes the thinking for clients through innovation, challenging clients' assumptions, and bringing industry best practices

- Despite a significant improvement in execution capabilities in recent times, clients are still reeling under execution glitches of the past and remain cautious of Wipro's performance

- Continues to trail other India-based peers in growth and large deals; needs to invest more in sales and thought leadership efforts

- Some clients have highlighted that Wipro's bench strength is a challenge, owing to high attrition and COVID-19 related challenges

Wipro | digital workplace services profile (page 2 of 6)
Overview

Legend: ■ Low (<10%) ■ Medium (10-20%) ■ High (>20%)

Wipro Live Workspace's vision is to be the technology enabler that infuses an intelligent fabric in the hybrid digital workplace through innovation-led future of work, ensuring UX while fostering a culture of inclusiveness and democratization. It has continually focused on bridging the generational gap between enterprise IT and personal IT for the workplace for the past few years. In the year of pandemic, with hybrid work becoming the norm, it has expanded to provide a new-generation hybrid digital workspace, which focuses on providing a ubiquitous digital workspace to the employees. The workplace extends beyond the boundaries of office/home & technology domains while enhancing digital employee experience, driving employee engagement & productivity, and ensuring security.
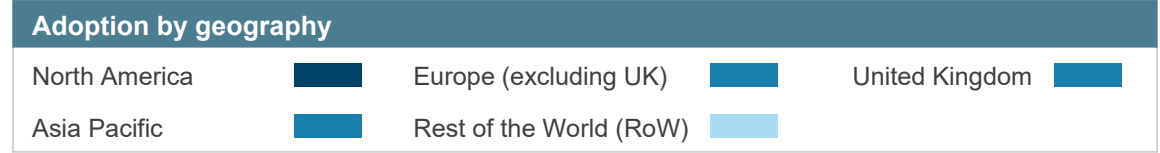
Workplace services revenue

<US$200 million	US$200-500 million	US$500 million-US$1 billion	>US$1 billion

Scope of coverage

- Number of FTEs deployed for workplace services – ~23,000
- Number of users served through service desk support – ~8.4 million
- Number of users served through desk-side support – ~3.6 million
- Number of end-user devices managed – ~4.3 million

Adoption by industry

BFSI	High	Energy and utilities	Medium	Technology	Medium
Healthcare and life sciences	Medium	Telecom, media, and entertainment	Low	Retail, distribution, and CPG	Medium
Public sector	Low	Manufacturing	Medium		

Adoption by service segments

Service desk	High	IoT in workplace	Low	Asset management	Low
Desk-side support	Medium	Unified Communications	Low	Workplace security	Low
Mobility / BYOD solutions	Medium	Workplace Automation	Low	Workplace-as-a-service	Low
Desktop management and virtualization	Medium	Infrastructure application	Low		

Adoption by buyer group

Small (annual revenue < US$1 billion)	Low	Medium (annual revenue = US$1-5 billion)	High	Large (annual revenue > US$5 billion)	High

Adoption by geography

North America	High	Europe (excluding UK)	Medium	United Kingdom	Medium
Asia Pacific	Medium	Rest of the World (RoW)	Low		

Wipro | digital workplace services profile (page 3 of 6)
Case studies

Case study 1	Revamped the workplace ecosystem and delivered personified services

Client: an American client in skin/hair care business, in the manufacturing and retail industry

Business challenges/requirements

- Traditional IT model with legacy engineering and field support; needed migration to a value-driven model
- Required improvement in automation and reduction in IT downtime across business-critical sites
- Needed a flexible partner that evolves as the client undertakes digital transformation
- Mismatch between employees' perception and provider's view of service performance

Solution

- Delivered user persona-led site support to uniquely cater to the needs of each persona
- Linked performance to outcomes with an experience-based service delivery model
- Provided persona-based multi-lingual service delivery, IT marketplace, and ServiceNow chatbot
- Enabled intelligent virtual assistant and machine learning-based ticket categorization
- Created a command center for proactive experience monitoring
- Provided robust engineering services focused on Mac/BYOD
- Deployed customer success managers with a highly available field team to proactively resolve problems

Impact

Wipro claims to have provided the following benefits to the client:

- Enabled 30% increase in the happiness index for users, matured to experience value metrics
- Supported a predictive model that reduced IT faults and eliminated downtimes
- About 25% incidents eliminated through PC analytics and bots; enabled 22% reduction in interaction costs and cost of service

Case study 2	Enabled automation and user experience-driven workplace transformation

Client: a pharmaceutical client in the healthcare and life sciences sector

Business challenges/requirements

- Consolidate on-site services for all sites globally, with lesser number of vendors for standardization
- Bring new digital channels to increase user productivity
- Enable transformation projects such as digital lockers, vending machines, and video kiosks
- Provide a new commercial model for service desk and desk-side services

Solution

As part of the engagement, Wipro implemented the following solutions:

- Implemented a modularized service offering with end-to-end management
- Shift left & eliminate : provided a prioritized, automated, and self-service resolution
- Digital hub: included functionalities such as integrated assistant & search, personalized feed, and micro-apps
- Persona-aligned delivery: redesigned services to provide contextualized support
- UX command center: provided service excellence with XLA/SLA, chatbots, RPA, and video kiosks
- Assisted digital: provided new ways of receiving support and simplifying tech
- Provided the ability to log tickets in the offline mode, with the tickets being fulfilled by the next morning

Impact

- Consolidated vendors across multiple sites into a single supplier for the standardization of services
- Wipro claims 92% increased resolution speed, 38% automated resolutions, 25% issues handled by chatbot, 30% improved UX, 95% improved CSAT, and reduced onboarding time to <4 hours
- Rationalized costs by having device stock levels as low as 15%
- Provided new ways of working for the COVID-19 / post-COVID-19 scenario and transparency in service cost

Wipro | digital workplace services profile (page 4 of 6)
Solutions

Proprietary digital solutions (representative list)	
Solution	**Details**
myUniHub	A unified integrated user enablement platform, to provide employees with a consumer-grade user interface coupled with industry leading solutions and an extensible Application Programming Interface (API) bridge to enhance employee experience and drive employee productivity.
ExperienceNXT	An analytics-backed, AIOps-powered solution for experience monitoring and management for predictive support.
myConfab	A comprehensive communication and collaboration solution that supports hybrid work, analytics-based change management, and uses application refactoring to drive change and provide modern meeting room experience.
Safe@Wipro	These are integrated Out-of-the-Box (OTB) solutions for digital front office workers tailored for the post-COVID-19 landscape, e.g., plant floor automation, retail store modernization, AR/VR workspaces, health, and compliance.
Remote@Wipro	An integrated and OTB solution for back-office workers for the post-COVID-19 scenario, e.g., workspace modernization, zero-touch change adoption, and remote employee engagement.
Support@Wipro	An integrated and OTB solution for digital support office workers tailored for the post-COVID-19 landscape, e.g., contact center modernization, network modernization, and field services modernization.
Workspace Consulting	An automated workplace consulting service to help customers understand user profiles, technology, and process roadmaps.
Enterprise Mobility Management	A solution that consolidates application platforms into a unified mobile-first cloud-first platform. Wipro claims that there is reduction in maintenance costs by 30%, by leveraging the solution.
Smart Campus	A service that drives smart campus with digital signages, indoor maps, virtual badges, and meeting room experiences.
Wipro HOLMES™ Avaamo chatbots	A multi-use case chatbot platform that enables digital enterprise.
Modern Workplace Transformation	The solution helps customers migrate to modern workplaces on Windows, Google, or Apple.
Wipro IoTNxT™ platform	A platform that enables the management of IoT and wearable devices in the workplace.
Health COV-ER "Back to Workspace"	An intelligent and system driven mobile application, that enables all 'Back to work' initiatives such as employee health assessment, social distancing, and smart workspaces.
Device-as-a-Service (DaaS)	An integrated DaaS offering with Original Equipment Manufacturer (OEMs) along with self-service for hardware break/fix issues.
Other digital workplace solutions include VirtuaDesk, Verticalized workplace solutions for HLS, Workplace Maturity Model, Digital Field Services, Digital Concierge, and Workplace-as-a-Service (WaaS) on Cloud (AWS and Azure).	

Wipro | digital workplace services profile (page 5 of 6)
Partnerships

Partnerships (representative list)		
Partner name	**Type of partnership**	**Details of the partnership**
Microsoft	Technology	Partners since 2001, Wipro and Microsoft have a 360-degree partnership. Wipro leverages Microsoft's stack of offerings including Dynamics 365, Office 365, Windows 10, Azure, etc., and is aligned with Microsoft's digital transformation for mobile-first cloud-first world.
Apple	Technology	Leverages its partnership as a global managed services partner and leverages Apple Financial Services, AppleCare, and Apple Professional Services.
Citrix	Technology	Leverages Citrix's desktop virtualization and mobile device management services.
Intel	Technology	Provides next-generation smart field services with Intel Endpoint Management Assistant (EMA).
VMware	Technology	Partnered with VMware and has built next-generation enterprise solution, i.e., LiVE Workspace and Wipro BoundaryLess DataCenter (BLDC) to drive digital transformation. Their joint solution also includes predictive and prescriptive analytics for managing application and infrastructure-related problems.
Avaamo	Technology	Leverages its partnership with Avaamo for integrated chat and voice assistant services.
Service Now	Technology	Leverages ServiceNow's Now platform to accelerate IT transformation and cross-functional collaboration for better employee and customer engagement experience.
1E	Technology	Leverages 1E's integrated solutions for software management.
Flexera	Technology	Leverages Flexera's integrated solutions for optimizing IT assets and software management.
Nexthink	Technology	Uses Nexthink's real-time, end-user analytics platform for targeted employee engagement, benchmarking, and proactive improvement.
HP	Technology	Leverages HP's DaaS to optimize IT assets and resources.
Dell	Technology	Leverages Dell's DaaS to optimize IT assets and resources.
HP Aruba	Technology	Uses HP Aruba's solutions for providing smart workspaces.
Tangoe	Technology	Leverages its partnership with Tangoe for enterprise mobility management.
Lakeside SysTrack	Technology	Leverages the SysTrack platform for end-user analytics.
Getronics, ESP, A&O etc.	Service	Leverages its partnerships with these vendors for field services support to end-user specifically for break/fix, IMACD, user onboarding, device refresh, etc.
Other digital workplace partnerships include Vayusphere, Ivanti, Zinier, BitTitan, Hemmersbach, Dropbox, and Compucom.		

Wipro | digital workplace services profile (page 6 of 6)
## Investments and recent activities

Investments and recent activities (representative list)	
Theme	**Details**
CoE	• **Microsoft CoE:** building next-generation digital workspace-centric solutions • **Experience centers:** design thinking-led 18 experience centers across the globe to engage and co-innovate with customers • **CoE for Back to Work initiatives:** building a safe and productive environment for customer's employees who are returning to work • **Intelligent and cognitive process automation:** building an intelligent platform focused on digital employee experience management • **DaaS:** building an integrated, enhanced, and end-to-end DaaS stack
Training and skills	Wipro claims that it trained resources for the following skills: • 275+ resources on the Microsoft M365 Suite • 100+ resources on AWS contact center solutions • 50+ resources on Intel EMA • 80+ resources on Citrix
Acquisitions	• **Encore Theme Technologies Private Limited:** increased its competency in niche financial cloud and SaaS solutions • **4C: i**ncreased its competency in Salesforce solutions • **Capco: i**ncreased its competency in digital solutions, and consulting and technology services to financial institutions

Appendix

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

Everest Group PEAK Matrix
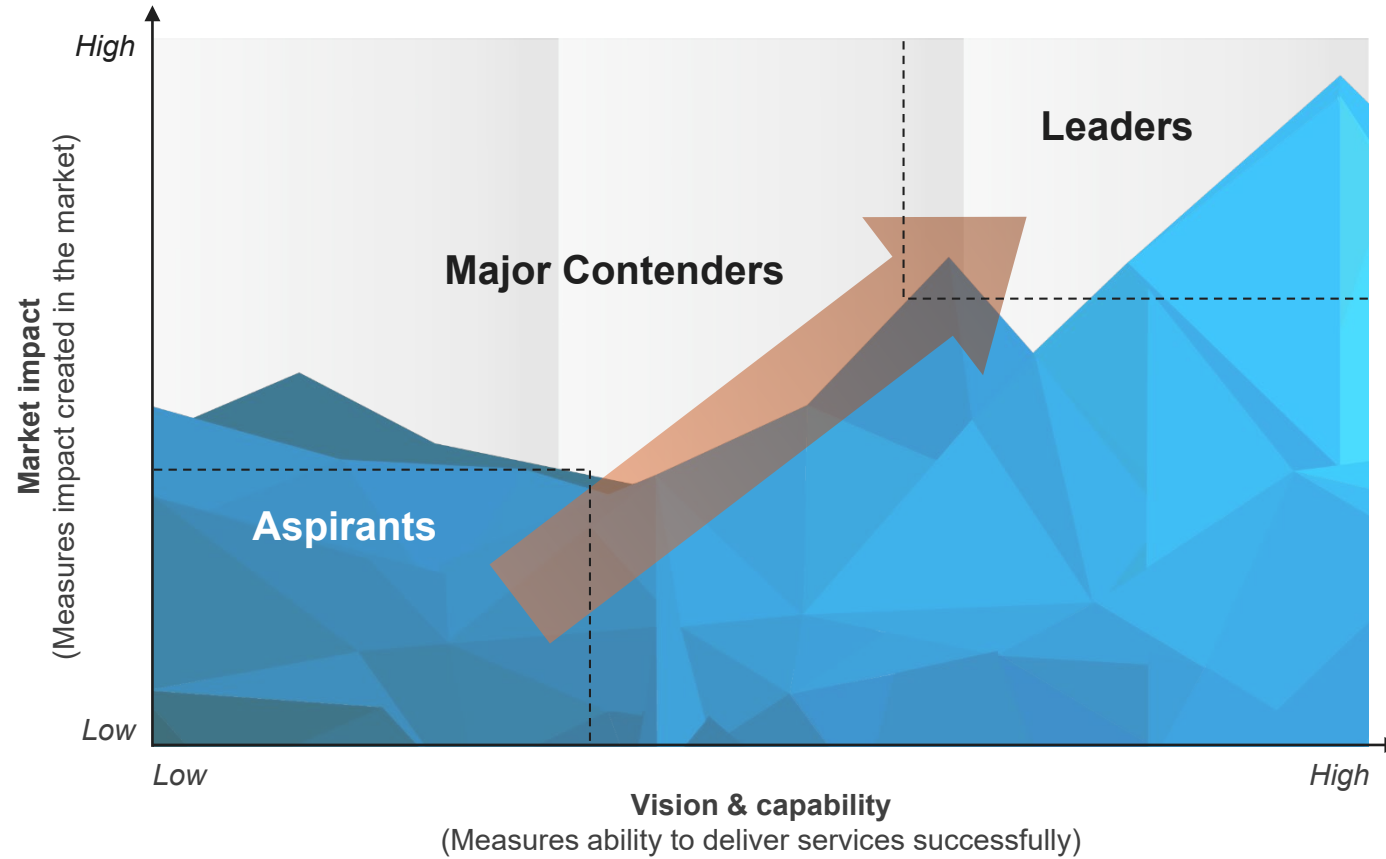
Services PEAK Matrix® evaluation dimensions

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

Market impact

Leaders

Major Contenders

Aspirants
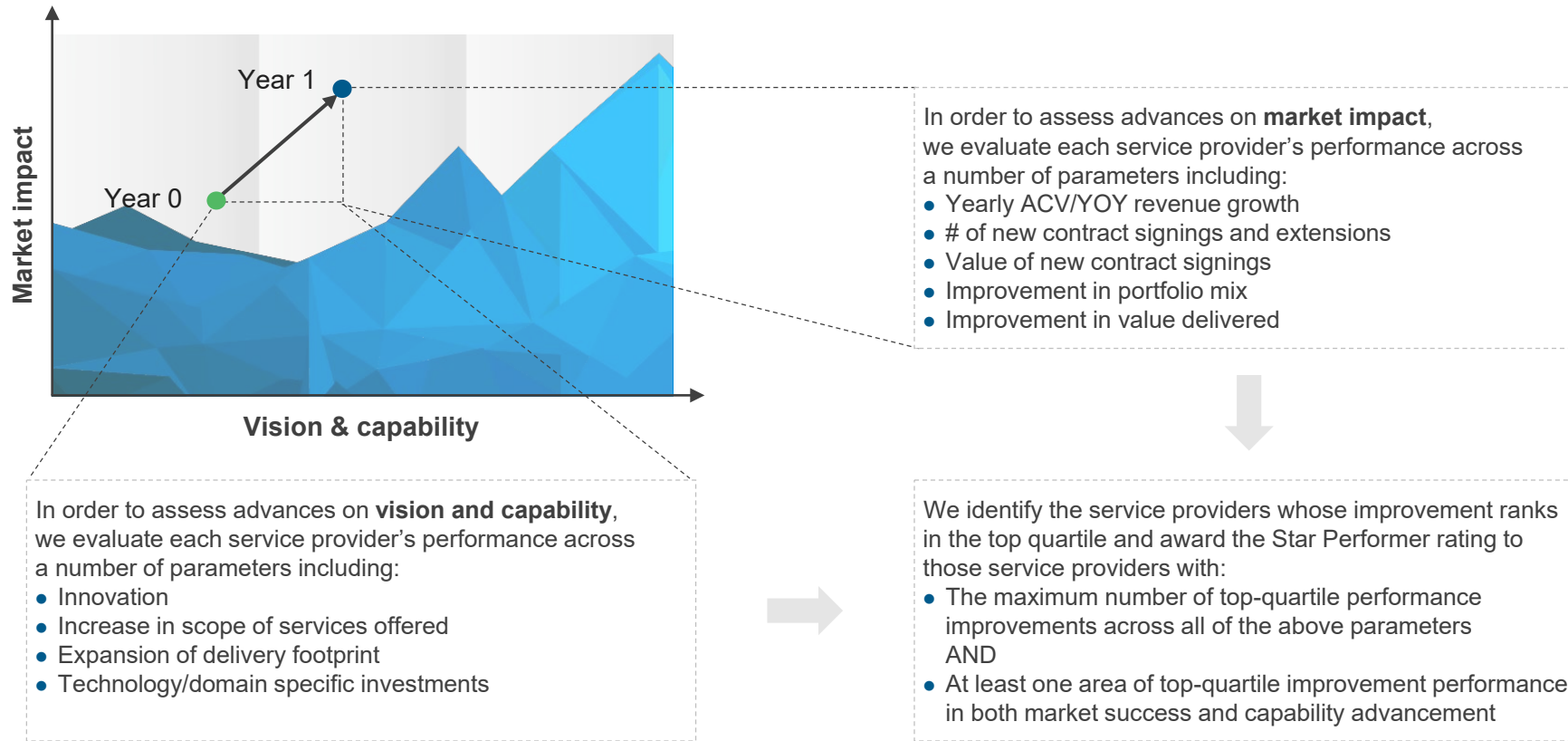
Vision & capability
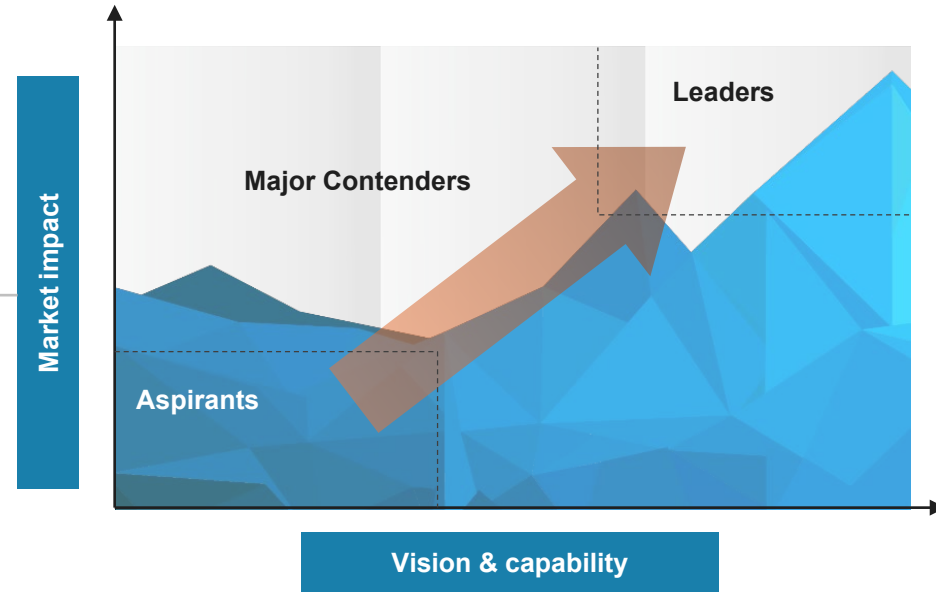
Measures ability to deliver services successfully. This is captured through four subdimensions

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 Performers 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 service 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 on **vision and capability**, we evaluate each service 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 service providers whose improvement ranks in the top quartile and award the Star Performer rating to those service 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 Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  – Issue a press release declaring their positioning. See citation policies
  – Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  – Quotes from Everest Group analysts could be disseminated to the media
  – Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

Everest Group®

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