Everest Group PEAK Matrix® for Digital Workplace Service Provider 2022 – Europe

Focus on Wipro
September 2022

Background of the research

- With enterprises focusing on digital transformation initiatives, the digital workplace services market recovered rapidly in 2021. It is expected to continue its strong growth trajectory in 2022 as enterprises attempt to drive maximum value in the hybrid work model, from their recent workplace investments done during the pandemic, through partnership with a right-fit service provider

- The digital workplace market in Europe has distinct characteristics such as significantly higher focus on employee experience and engagement compared to other geographies, preference for local service delivery model, high language variations within regions, focus on ESG-centric initiatives, strong need for cultural alignment, and high variance in region-specific demands

- In this research, we present an assessment of 22 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® Assessment 2022 – Europe.

The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2022, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the European region.

This report assessed the following 22 service providers on the digital workplace services PEAK Matrix :

- **Leaders:** Accenture, Atos, Capgemini, DXC Technology, HCL Technologies, TCS, and Wipro

- **Major Contenders:** Cognizant, Computacenter, Fujitsu, Getronics, Infosys, Kyndryl, NTT DATA, Orange Business Services, Stefanini, Tech Mahindra, and Unisys

- **Aspirants:** Microland, Mindtree, UST, and Zensar

Scope of this report

Geography
Europe

Service providers
22 leading digital workplace
service providers

Services
Digital workplace
services

Digital workplace services PEAK Matrix® (Europe) characteristics

Leaders:

Accenture, Atos, Capgemini, DXC Technology, HCL Technologies, TCS, and Wipro

- The digital workplace services Leaders have established a successful business, driven by years of capability building and experience across different workplace services segments
- These providers have a highly balanced portfolio, showcase coherent vision, and continue to invest in technology and services capability development (internal IP/tools, partnerships, acquisitions, etc.). They are also focused on talent empowerment, solution contextualization, and sales and marketing enablement
- 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
- That said, 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:

Cognizant, Computacenter, Fujitsu, Getronics, Infosys, Kyndryl, NTT DATA, Orange Business Services, Stefanini, Tech Mahindra, and Unisys

- The Major Contenders segment includes a mix of global and regional service providers
- These service providers 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 providers (vis-a-vis Leaders)
- However, these service providers are making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps. They also provide a competitive and innovative pricing structure to clients, thereby positioning themselves as strong challengers to the Leaders in this space
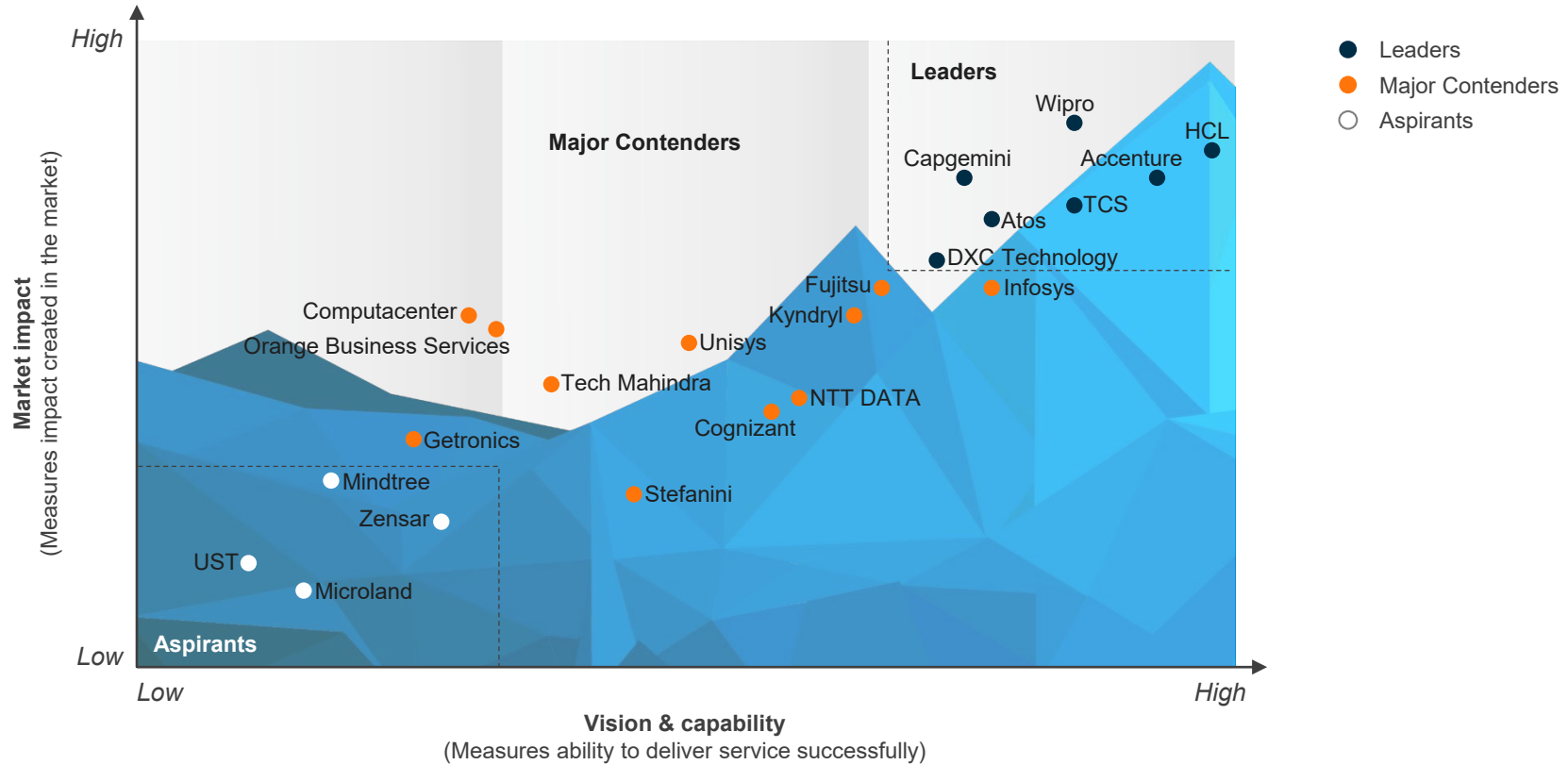
Aspirants:

Microland, Mindtree, UST, and Zensar

- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market

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

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – Europe[1]

Legend:
- ● Leaders
- ● Major Contenders
- ○ Aspirants

Axis labels:
- Vertical: **Market impact** (Measures impact created in the market) — Low to High
- Horizontal: **Vision & capability** (Measures ability to deliver service successfully) — Low to High

Quadrants: Leaders, Major Contenders, Aspirants

Plotted providers: Wipro, Capgemini, Accenture, HCL, TCS, Atos, DXC Technology, Infosys, Fujitsu, Kyndryl, Unisys, Tech Mahindra, NTT DATA, Cognizant, Getronics, Computacenter, Orange Business Services, Stefanini, Mindtree, Zensar, UST, Microland

1 Assessments for Capgemini, Computacenter, Fujitsu, Getronics, and Kyndryl exclude service provider inputs and are 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 (2022)

Wipro | digital workplace services profile – Europe (page 1 of 5)
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 and investments	Delivery footprint	Overall
●	◕	●	●	●	◔	●	◑	◕

Strengths

- Wipro has a strong focus on digital workplace services and continues to make investments and gain new logos. Clients are expected to benefit from its acquisitions, such as Capco and Edgile, to strengthen its consulting and cybersecurity capabilities

- It has a client-centric approach and has restructured its GTM strategy to enable regional alignment of its solutioning and sales strategies for providing better support to clients

- Enterprises looking for niche expertise can benefit from its partnerships with start-ups and niche technology vendors such as Avaamo and Moogsoft through Wipro Ventures

- It is investing in a new experience center in Germany, focused on employee engagement and virtual support, which will act as an incubation hub for co-creation for enterprises

- Enterprises from HLS and BFSI industries can benefit from Wipro's verticalized solutions, for example WiproiX for remote patient monitoring and its Mobility solution for insurance

- Clients have highlighted its pricing and flexibility to adapt to their needs as key strengths

Limitations

- Wipro lacks coherence in its vision and some elements of its pitch are disjointed, which can lead to an overwhelmed audience and a negative impact on potential clients

- Some clients have pointed out that Wipro's solutioning lacks contextualization to the European geography

- Some clients have highlighted that it needs to improve on onboarding the right talent for projects in a timely manner

- It needs to improve its mindshare among European enterprises as a strategic transformation partner through proactive workshops, account pursuits, and events

- It has limited resource presence in regions such as the Nordics and Benelux, which makes it a less attractive choice for enterprises within these regions

- Clients have expressed displeasure around its processes within device management, which could be more streamlined and automated

Wipro | digital workplace services profile – Europe (page 2 of 5)
Overview

Digital workplace services vision

Wipro's vision is to be the technology partner that digitally transforms workplaces into an employee-centric new work hub, and blurs lines between the physical, augmented, and digital world while delivering a harmonized employee experience. It focuses on enabling human-digital augmentation that drives business outcomes while prioritizing community, employee well-being, and experience.
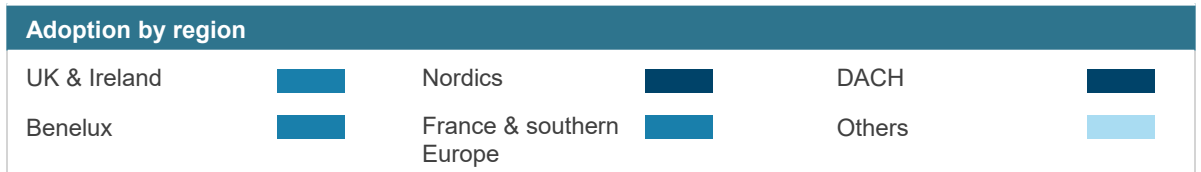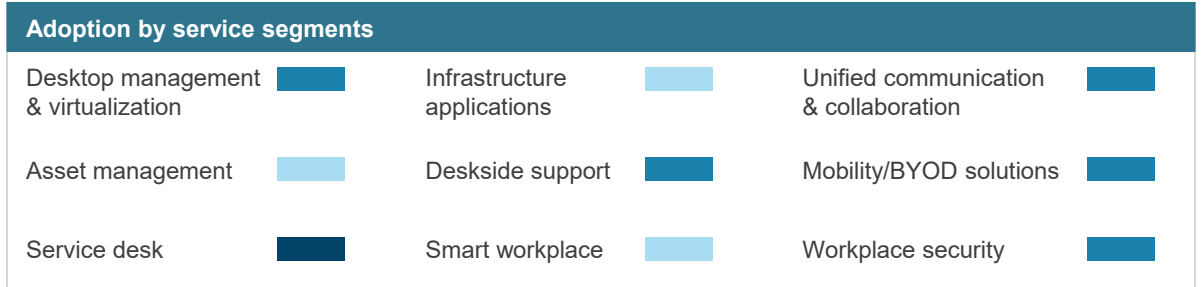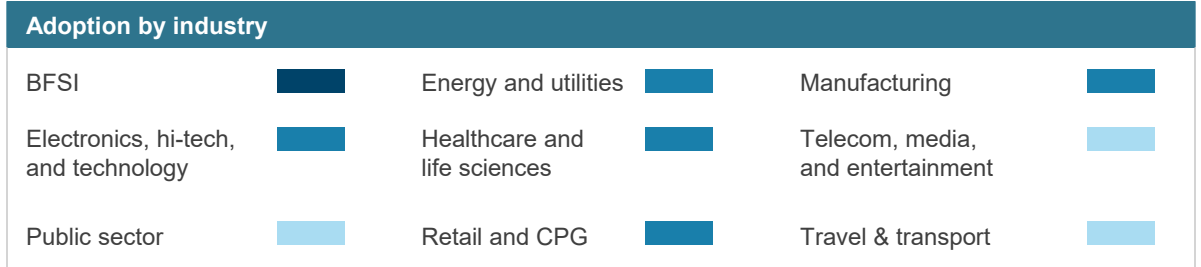
Digital workplace services revenue (2021)

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

Scope of coverage

- Number of users served through service desk support – ~3.2 million
- Number of service desk contacts managed – ~2.4 million
- Number of deskside/break/fix incidents managed – ~850,000
- Total number of end-user devices managed – ~1.8 million

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

Adoption by industry

BFSI	High	Energy and utilities	Medium	Manufacturing	Medium
Electronics, hi-tech, and technology	Medium	Healthcare and life sciences	Medium	Telecom, media, and entertainment	Low
Public sector	Low	Retail and CPG	Medium	Travel & transport	Low

Adoption by service segments

Desktop management & virtualization	Medium	Infrastructure applications	Low	Unified communication & collaboration	Medium
Asset management	Low	Deskside support	Medium	Mobility/BYOD solutions	Medium
Service desk	High	Smart workplace	Low	Workplace security	Medium

Adoption by buyer group

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

Adoption by region

| UK & Ireland | Medium | Nordics | High | DACH | High |
| Benelux | Medium | France & southern Europe | Medium | Others | Low |

Source: Everest Group (2022)

Wipro | digital workplace services profile – Europe (page 3 of 5)
Solutions

Proprietary digital solutions (representative list)	
Solution	**Details**
myUniHub	A unified integrated user enablement platform, which provides employees with a user interface coupled with 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	Integrated OTB solutions for digital front-office workers tailored for the post-COVID-19 landscape, such as 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, such as 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, such as contact center modernization, network modernization, and field services modernization
Workspace Consulting	An automated workplace consulting service that helps customers understand user profiles, technology, and process roadmaps
Enterprise Mobility Management	A solution that consolidates application platforms into a unified mobile-first and cloud-first platform. Wipro claims that there is a 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 enterprises
Modern Workplace Transformation	Helps customers migrate to modern workplace on Windows, Google, or Apple
Wipro IoTNxT™ platform	Enables the management of IoT and wearable devices in the workplace
Health COV-ER "Back to Workspace"	An intelligent and system-driven mobile application, which 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 – Europe (page 4 of 5)
Partnerships

Partnerships (representative list)	
Partner name	**Details**
Microsoft	Partners since 2001, Wipro and Microsoft have had 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 a mobile-first and cloud-first world
Apple	Leverages its partnership as a global managed services partner and also leverages Apple Financial Services, AppleCare, and Apple Professional Services
Citrix	Leverages Citrix's desktop virtualization and mobile device management services
Intel	Provides next-generation and smart field services with Intel Endpoint Management Assistant (EMA)
VMware	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	Leverages its partnership with Avaamo for integrated chat and voice assistant services
ServiceNow	Leverages ServiceNow's Now Platform to accelerate IT transformation and cross-functional collaboration for a better employee and customer engagement experience
1E	Leverages 1E's integrated solutions for software management
Flexera	Leverages Flexera's integrated solutions for optimizing IT assets and software management
Nexthink	Uses Nexthink's real-time, end-user analytics platform for targeted employee engagement, benchmarking, and proactive improvement
HP	Leverages HP's DaaS to optimize IT assets and resources
Dell	Leverages Dell's DaaS to optimize IT assets and resources
HP Aruba	Uses HP Aruba's solutions for providing smart workspaces
Tangoe	Leverages its partnership with Tangoe for enterprise mobility management
Lakeside SysTrack	Leverages the SysTrack platform for end-user analytics
Getronics, ESP, A&O etc.	Leverages its partnerships with these vendors for field services support to end-users, especially 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 – Europe (page 5 of 5)
## Investments and recent activities

Investments (representative list)	
Investment name	**Details**
Innovation and investments	• Invested in building next-generation and digital workspace-centric solutions for Microsoft CoE • Invested in design thinking-led experience centers across the globe to engage and co-innovate with customers • Invested in CoE for back-to-work initiatives to build a safe and productive environment for the customer's employees who are returning to work • Invested in an intelligent and cognitive process automation platform to focus on digital employee experience management
Investments / Skill development	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	• Acquired Encore Theme Technologies Private Limited to increase its competency in niche financial cloud and SaaS solutions • Acquired 4C to increase its competency in Salesforce solutions • Acquired Capco to increase its competency in digital solutions and consulting and technology services to financial institutions • Acquired Edgile to enhance its cybersecurity and strategic consulting capabilities

Appendix

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

Everest Group PEAK Matrix
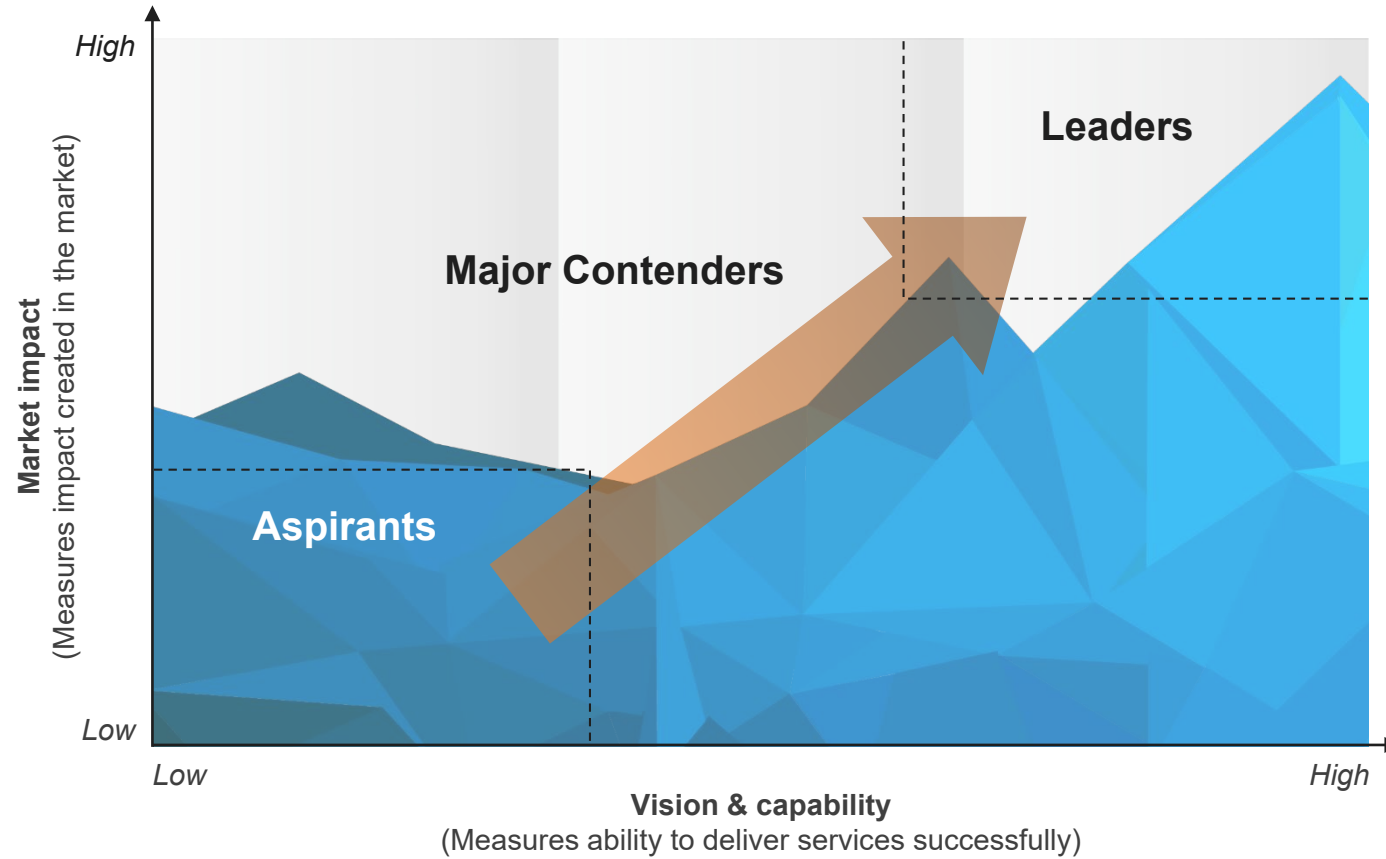
Services PEAK Matrix® evaluation dimensions

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
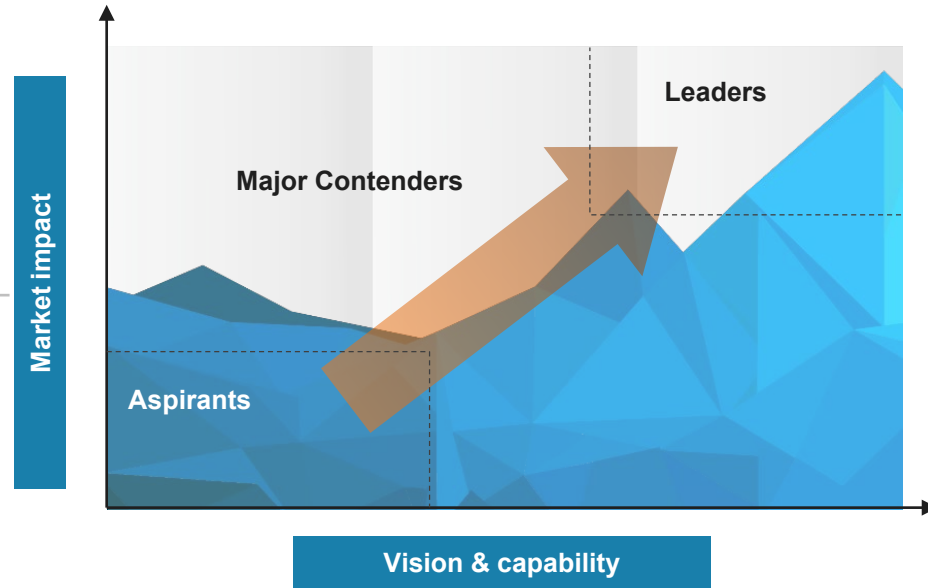
Measures ability to deliver services successfully. This is captured through four subdimensions

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

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?
A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
  - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
  - In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?
- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
  - Issue a press release declaring positioning; see our citation policies
  - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
  - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

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

Everest Group®

With you on the journey

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