



# Everest Group Mainframe Services PEAK Matrix® Assessment 2024

Focus on Wipro

April 2024



# Introduction

Mainframe systems continue to be critical components of enterprise IT. They are still considered a strong choice for enterprises needing large processing capacities for high-volume transactions and will continue to form the back-bone of many medium-to-large enterprises in 2024 as well. However, as the pace of digital transformation mandates picks up, most enterprises are evaluating their mainframe systems for better optimization and compatibility with modern platforms and applications. Limitations around availability of skilled resources and rising costs are also influencing enterprise decisions in this regard. Enterprises are at crossroads with regards to their mainframes and are increasingly looking at ways to optimize, enhance, and modernize their mainframe workloads. Moreover, rise of Mainframe-as-a-service (MFaaS), AI and generative AI, rehosting offerings by technology providers and hyperscalers, and cloud-native technologies have given a boost to enterprise mainframe optimization and modernization initiatives.

In this research, we present an assessment and detailed profiles of 17 mainframe service providers featured on the [Mainframe Services PEAK Matrix® Assessment 2024](#). Each provider profile offers a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2024, interactions with leading mainframe services providers, client reference checks, and an ongoing analysis of the mainframe services market.

**The full report includes the profiles of the following 17 leading mainframe services providers featured on the Mainframe Services PEAK Matrix:**

- **Leaders:** DXC Technology, Ensono, Kyndryl, HCLTech, TCS, and Wipro
- **Major Contenders:** Accenture, Capgemini, Cognizant, Fujitsu, Infosys, LTIMindtree, Tech Mahindra, and UST
- **Aspirants:** Mphasis, T-Systems, and Unisys

## Scope of this report

**Geography:** Global

**Industry:** 17

**Services:** Mainframe services

# Mainframe services PEAK Matrix® characteristics

## Leaders

DXC Technology, Ensono, HCLTech, Kyndryl, TCS, and Wipro

- Leaders continues to showcase high expertise for end-to-end mainframe service engagements with credible suite of IPs and solutions backed by robust delivery capabilities and skilled talent pool
- These providers have a balanced vision for mainframe services and focus on building innovative and tailored solutions for clients that deliver quick business outcomes and support them in their mainframe optimization and modernization journey
- They are also making strategic investments in expanding their partner ecosystem with prominent technology vendors, niche providers, and start-ups to co-create solutions and engage in joint GTM activities to further augment their service delivery

## Major Contenders

Accenture, Capgemini, Cognizant, Fujitsu, Infosys, LTIMindtree, Tech Mahindra, and UST

- While these providers are augmenting their broader mainframe capabilities with targeted investments in talent development, delivery capabilities, and partnership ecosystem, their end-to-end mainframe services capabilities continue to have some visible gaps
- These providers have built meaningful capabilities to deliver mainframe services, however, their service portfolios and delivery capabilities are not as balanced as those of Leaders which reflects in the scale of market success achieved by these providers (vis-a-vis Leaders)
- These providers are making targeted investments in mainframe talent, delivery frameworks, internal IP, and partnerships to fix capability gaps – making them strong contenders to Leaders in mainframe services

## Aspirants

Mphasis, T-Systems, and Unisys

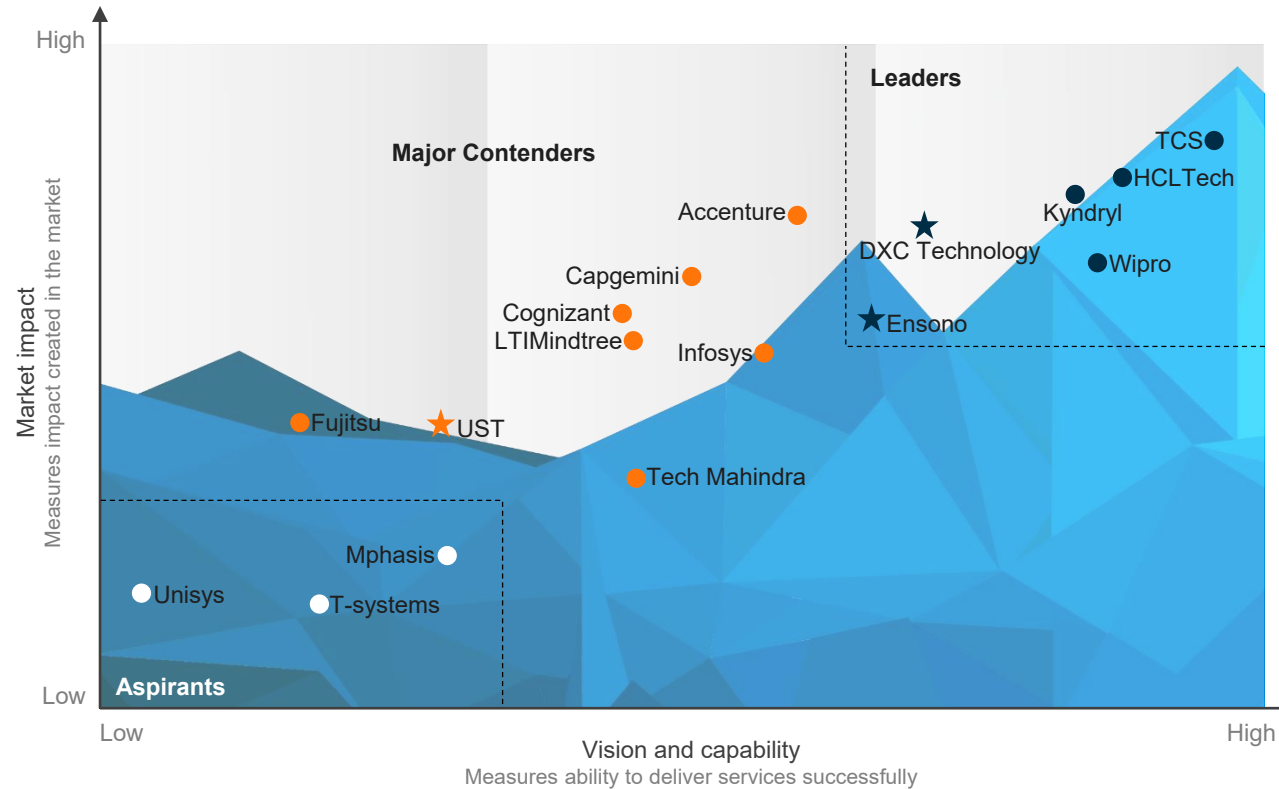
- Mainframe services capabilities of Aspirants show more gaps in the scope of mainframe services, maturity of internal IP, and coverage across industry verticals or geographies
- These providers are however expanding broader mainframe capabilities through investments in IP portfolios, niche platforms, and service and technology partnerships – keeping them poised to be significant challengers in the space

# Everest Group PEAK Matrix®

## Mainframe Services PEAK Matrix® Assessment 2024 | Wipro is positioned as a Leader

### Everest Group Mainframe Services PEAK Matrix® Assessment 2024<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> Assessments for Accenture, Capgemini, Cognizant, Infosys, and Unisys excludes system integrator inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these system integrators, system integrator public disclosures, and Everest Group's interaction with buyers  
Source: Everest Group (2024)

# Wipro profile (page 1 of 6)

## Overview

### Vision for mainframe services

Wipro aspires to be recognized by its clients as the go-to partner for mainframe simplification and modernization. It is guided by the key principles of implementing a de-risked strategy for mainframe simplification and modernization. It works toward delivering end-to-end solutions and leveraging IPs that harness cutting-edge technologies such as generative AI. It also leverages deep domain experience and showcases a track record of successful delivery and references in executing large-scale, intricate legacy modernizations.

### Overall mainframe services revenue (YTD 2023)

<US\$1 million	US\$1-10 million	US\$10-100 million	<b>&gt;US\$100 million</b>
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### Number of active clients for mainframe services

<20	20-50	50-100	<b>&gt;100</b>
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● Low (<10%)   ● Medium (10-20%)   ● High (>20%)

### Adoption by buyer group

- Small (annual client revenue <US\$1 billion)
- Midsize (annual client revenue US\$1-5 billion)
- Large (annual client revenue >US\$5 billion)

### Adoption by industry

- BFSI
- Healthcare and life sciences
- Public sector
- Energy and utilities
- Electronics, hi-tech, and technology
- Retail and CPG
- Manufacturing
- Telecom, media, and entertainment
- Others

### Adoption by geography

- North America
- Asia Pacific
- Rest of the World
- United Kingdom
- Middle East and Africa
- Europe
- Latin America

### Adoption by service segments

- Consulting
- Enhance/Optimize
- Transform/Modernize
- Manage/Run

# Wipro profile (page 2 of 6)

## Case studies

[NOT EXHAUSTIVE]

### CASE STUDY 1

End-to-end mainframe services and mainframe rehosting

#### Client

A leading US-based financial services company

#### Business challenge

The client sought maintenance and enhancement of its mainframe applications while reducing IT operational expenditure. Due to regulatory compliance, the client needed to ring-fence mainframe functionality for one of its regional operations in Indonesia in an accelerated manner without impacting operations

#### Solution

Wipro was already managing the mainframe applications and further proposed an end-to-end solution to isolate the required functionality from its large monolithic mainframe application to the Micro Focus mainframe emulator on a distributed architecture. The team worked closely with the customer and Micro Focus to find solutions for all the functions not supported on the enterprise server product. It migrated the batch from the TWS scheduler to Control M, migrated data from Db2 on z/OS to Db2 LUW, and restored file transfer and MQ integrations.

#### Impact

- Achieved a reduced project execution timeline of 18 months
- Reduced mainframe MIPS (Millions of Instructions Per Second) consumption by 2000 MIPS annually
- Fulfilled the regulatory mandate within the allotted time with negligible impact on operations

### CASE STUDY 2

Modernized legacy system to drive efficiency and innovation

#### Client

A multinational manufacturer of automobiles, two-wheelers, and power equipment

#### Business challenge

The client sought to modernize its global production control mainframe system, aiming to transition from COBOL to an agile language. It wanted to reduce mainframe run costs, streamline operations, and improve user productivity and experience on a monolithic web application running on 19 instances.

#### Solution

To address the challenges, Wipro offloaded a high MIPS-consuming batch process from its mainframe to a distributed environment by leveraging a partner tool. It also performed automated conversion from COBOL to Java Spring batch. The migration team leveraged Wipro's ModerniZ – PAN Analyzer, Wipro UI Builder, and data comparator for automation and efficiency. Test automation and DevOps were implemented to accelerate the delivery.

#### Impact

- Achieved 30% savings in infrastructure costs and license costs
- Streamlined applications by converting them from monolith to microservices
- Reduced the build time and speed of delivery

# Wipro profile (page 3 of 6)

## Solutions

[NOT EXHAUSTIVE]

Key Proprietary solutions (IPs/frameworks/accelerators/tools, etc. developed internally to deliver Mainframe services) (representative list)

Solutions	Details
ModerniZ	It is an integrated platform that simplifies the customer experience, serving as a marketplace for over 20 Wipro mainframe modernization tools and external ISV solutions. It offers features including documentation, reverse engineering, data migration, and code conversion. Its recent enhancements include the Monolith Decomposer, utilizing ML and gen AI for the conversion of mainframe code to microservices, and AI-Pedia, featuring a gen AI-powered Ask AI Anything chatbot for extracting intelligence from legacy code.
Wipro legacy modernization powered by Azure OpenAI	It is a partner tool that enables clients to convert base SAS from mainframe to open source.
Wipro ai360	This is an AI-first innovation ecosystem that builds on Wipro's decade-long AI investments, with the goal of incorporating AI into every platform, tool, and solution utilized internally and provided to clients. It leverages AI to modernize legacy processes and applications on the mainframe.
Wipro cloud studio	This is a one-stop marketplace for clients to enable and accelerate mainframe migration and the surrounding ecosystem's journey to the cloud, leveraging an automated and industrialized methodology.
Wipro Holmes	This is an AI and automation platform that enables maintenance, migration, quality assurance, and automation of mainframe services.

# Wipro profile (page 4 of 6)

## Partnerships

[NOT EXHAUSTIVE]

Partnerships (representative list)

Partners	Details
IBM	Partnered for in-place modernization, product rationalization, cloud integration, and establishing transformation roadmaps for clients with a significant mainframe footprint
Amazon Web Services (AWS)	Partnered to provide AWS architecture consulting, a mainframe modernization platform for rehost (Micro Focus), and refactor (Blu Age)
Microsoft Azure	Partnered to provide cloud architectural advice and funding incentives for mainframe-to-cloud transformation and data center exit
Google Cloud Platform (GCP)	Partnered to provide cloud architectural advice and funding incentives for mainframe-to-cloud transformation and data center exit; dual run enables clients to run workloads on both the mainframe and Google Cloud
Oracle Cloud Infrastructure (OCI)	Partnered to provide cloud architectural advice and funding incentives for mainframe-to-cloud transformation and data center exit; it works closely with Wipro to implement Oracle Tuxedo rehosts
Micro Focus (Rocket/OpenText)	Partnered for rehosting options, quick data center exit, and lifting and shifting applications from legacy platform to a new cloud-based platform, on-premise x86 servers, or on-premise private clouds
CAST	Partnered to enable clients with large-scale mainframe transformation/modernization projects with external interface integrations for application discovery and portfolio optimization
vFunction	Partnered to enable clients to breakdown monolith applications into microservices
CloudFrame	Partnered to automate the modernization of mainframe COBOL to Java



# Wipro profile (page 5 of 6)

## Investments and recent activities



[NOT EXHAUSTIVE]

Investments (representative list)

Investments	Details
Acquisition	Acquired Capco, to enhance ModerniZ, Wipro's mainframe modernization platform with AI-Pedia and Monolith Decomposer
Training	<ul style="list-style-type: none"> <li>• Trained 140 resources on AWS Blu Age mainframe modernization service</li> <li>• Trained 117 resources in Micro Focus Cobol</li> <li>• Trained resources on IBM Mainframe DevOps</li> <li>• Trained resources on CloudFrame</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>• Set up legacy migration and modernization lab that combined the capabilities of Wipro, AWS, and Micro Focus (OpenText) technology; equipped with COBOL rehosting platform from Micro Focus (OpenText) and DevOps tools from OpenText and AWS</li> <li>• Invested in AI tools and accelerators to enhance and automate creation of retro-documentation and transform COBOL to Java based microservices. These include: <ul style="list-style-type: none"> <li>– AI-Pedia: use case-driven knowledge portal with a "Ask-AI Anything" feature, powered by Gen-AI. It enables users to extract insightful answers from legacy code without the need for extensive browsing through technical reports</li> <li>– Monolith Decomposer: uses pattern recognition, clustering techniques, and Gen-AI to learn and generate blueprints of portable microservices from mainframe monolithic applications</li> </ul> </li> </ul>










# Wipro profile (page 6 of 6)

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

- Wipro has a robust end-to-end mainframe solution approach attributed to its consulting-led mainframe offering that integrates infrastructure, application, data, security, and AI capabilities
- Enterprises can benefit from Wipro's platform-led modernization solutions that incorporates automation, AI, and generative AI-augmented accelerators to facilitate complex workload migration and transformation
- It prioritizes mainframe simplification and in-place enhancements to optimize clients' existing mainframe ecosystem
- Enterprises seeking complex mainframe migration can benefit from Wipro's consultative framework, offering a business, process, and IT-focused roadmap for transformation
- Wipro leverages a comprehensive partnership ecosystem across hyperscalers, technology vendors, and ISVs to optimize mainframe systems and drive modernization initiatives

### Limitations

- Non-BFSI enterprises seeking mainframe services should conduct thorough due diligence before engaging with Wipro, considering its limited clientele in these domains
- Enterprises seeking an innovative commercial model for mainframe services may need to align with Wipro given its predominant focus on fixed pricing and T&M pricing models for clients
- Wipro lags a robust mainframe-specific talent development and knowledge management strategy
- Wipro lacks robust proof points around a single pane of glass management for a mainframe-integrated hybrid ecosystem

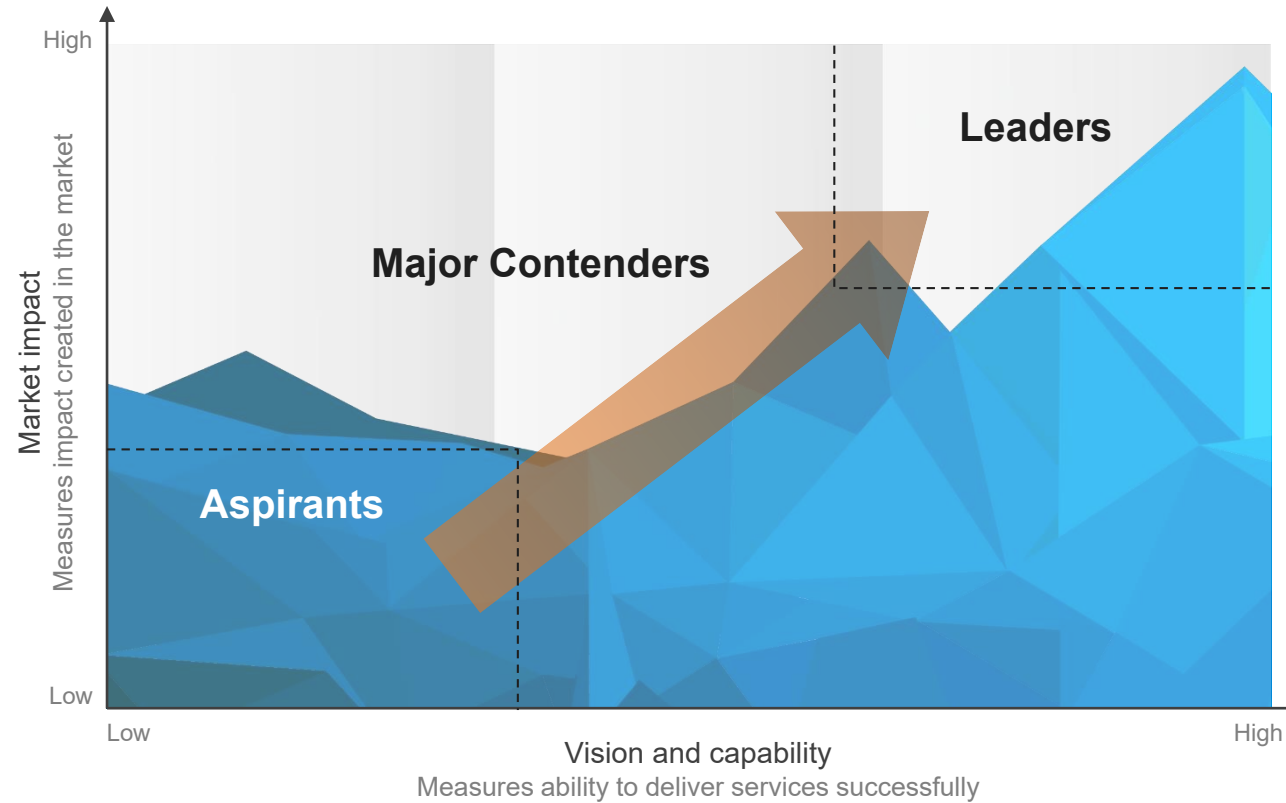
# Appendix

PEAK Matrix framework

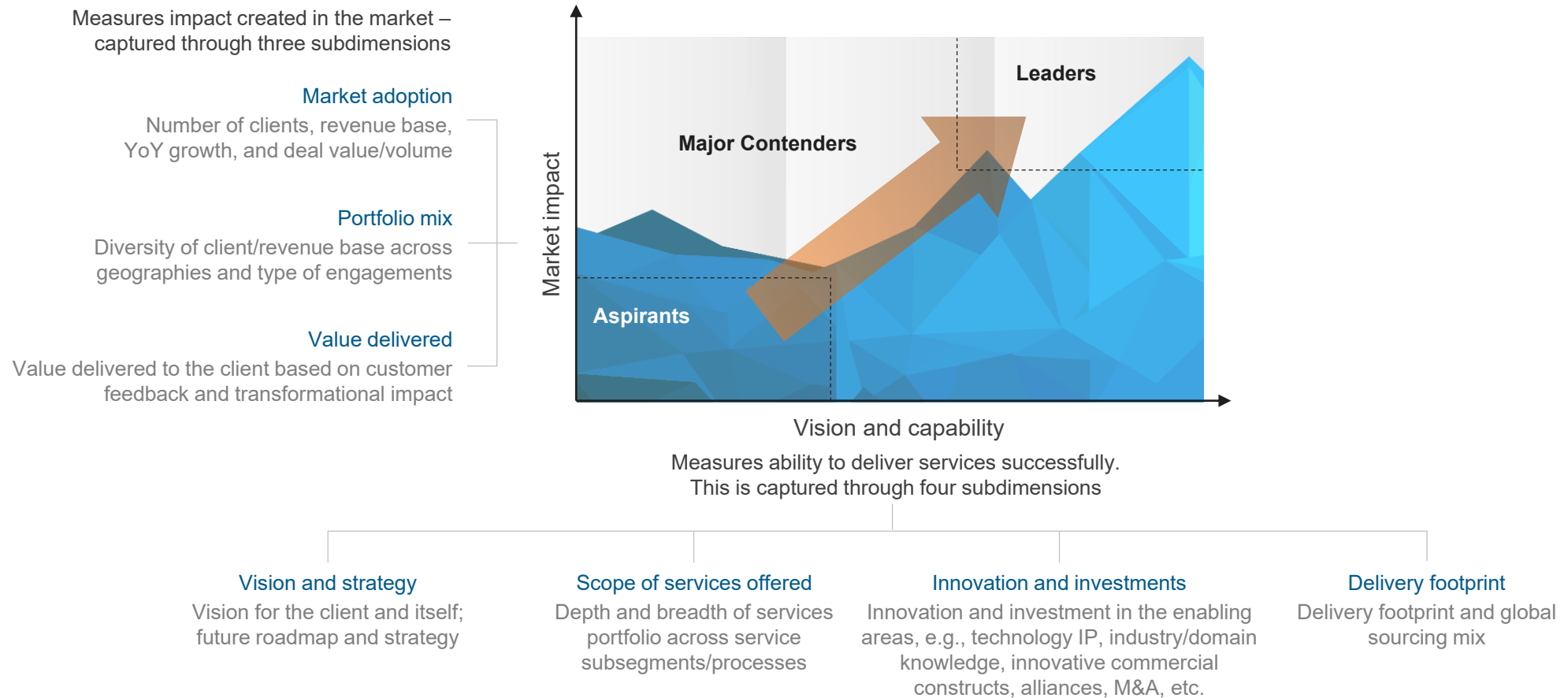
FAQs

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

Everest Group PEAK Matrix



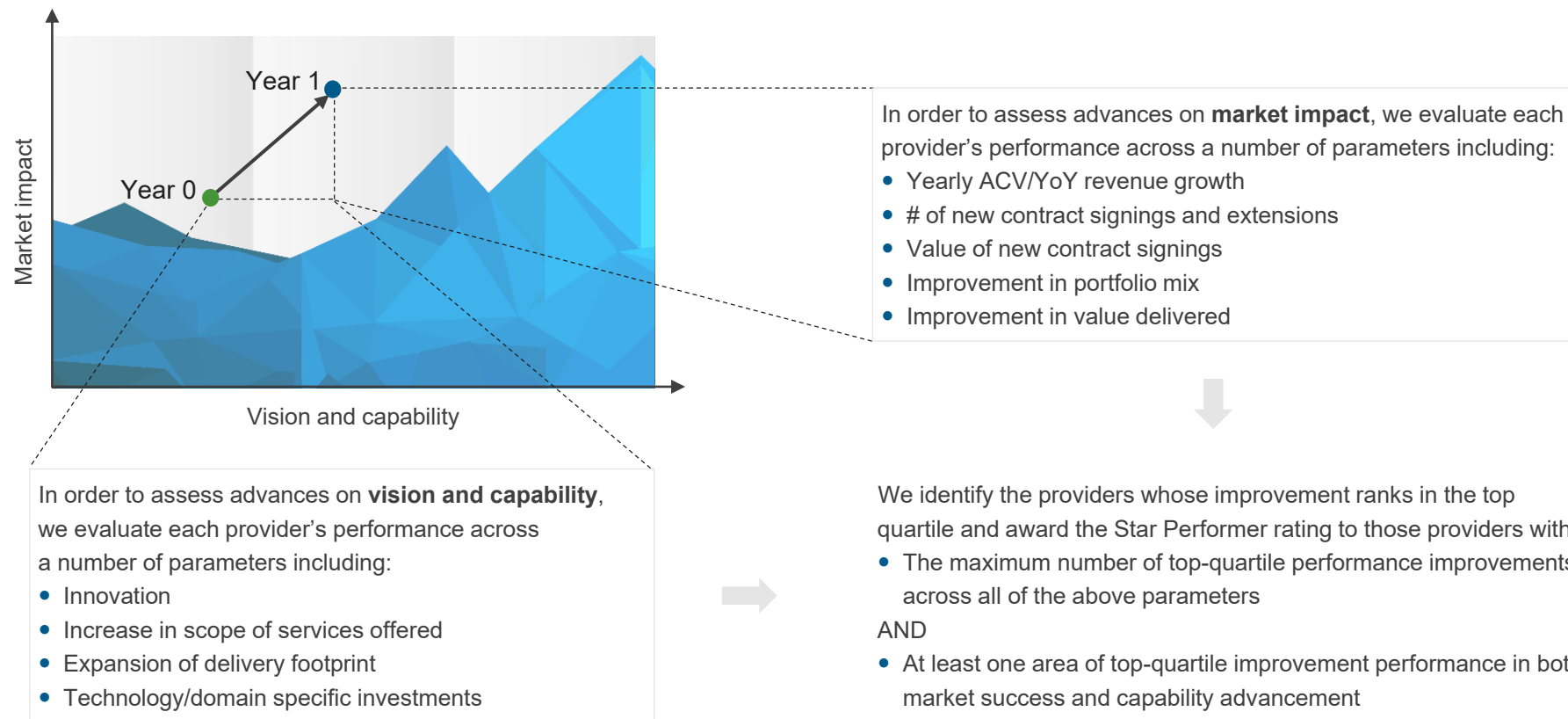
# Services PEAK Matrix® evaluation dimensions



# 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



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.

## FAQs

**Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?**

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

**Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?**

**A:** No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

**Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?**

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

**Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

**A:** Enterprise participants receive summary of key findings from the PEAK Matrix assessment

- For providers
  - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
  - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

**Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?**

**A:** Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

**Q: Does the PEAK Matrix evaluation criteria change over a period of time?**

**A:** PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

# Stay connected

Dallas (Headquarters)  
info@everestgrp.com  
+1-214-451-3000

Bangalore  
india@everestgrp.com  
+91-80-61463500

Delhi  
india@everestgrp.com  
+91-124-496-1000

London  
unitedkingdom@everestgrp.com  
+44-207-129-1318

Toronto  
canada@everestgrp.com  
+1-214-451-3000

Website  
everestgrp.com

Blog  
everestgrp.com/blog

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