Everest Group PEAK Matrix™ for IT Infrastructure Services Automation Service Providers

Focus on Wipro

July 2018

Introduction and scope

Everest Group recently released its report titled "IT Infrastructure Services Automation – Market Trends and Services PEAK Matrix™ Assessment 2018: Become AI Aware or Fall Behind" This report analyzes the evolving dynamics of the IT infrastructure services automation landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 20 service providers on the Everest Group PEAK Matrix™ for IT infrastructure services automation into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of IT infrastructure services automation service providers based on their absolute market success and delivery capability. Everest Group also identified 4 service providers as the "2018 IT Infrastructure Services Automation Market Star Performers" based on the strongest forward movement demonstrated on the PEAK Matrix year-on-year.

Based on the analysis, **Wipro emerged as a Leader**. This document focuses on Wipro's IT infrastructure services automation experience and capabilities and includes:
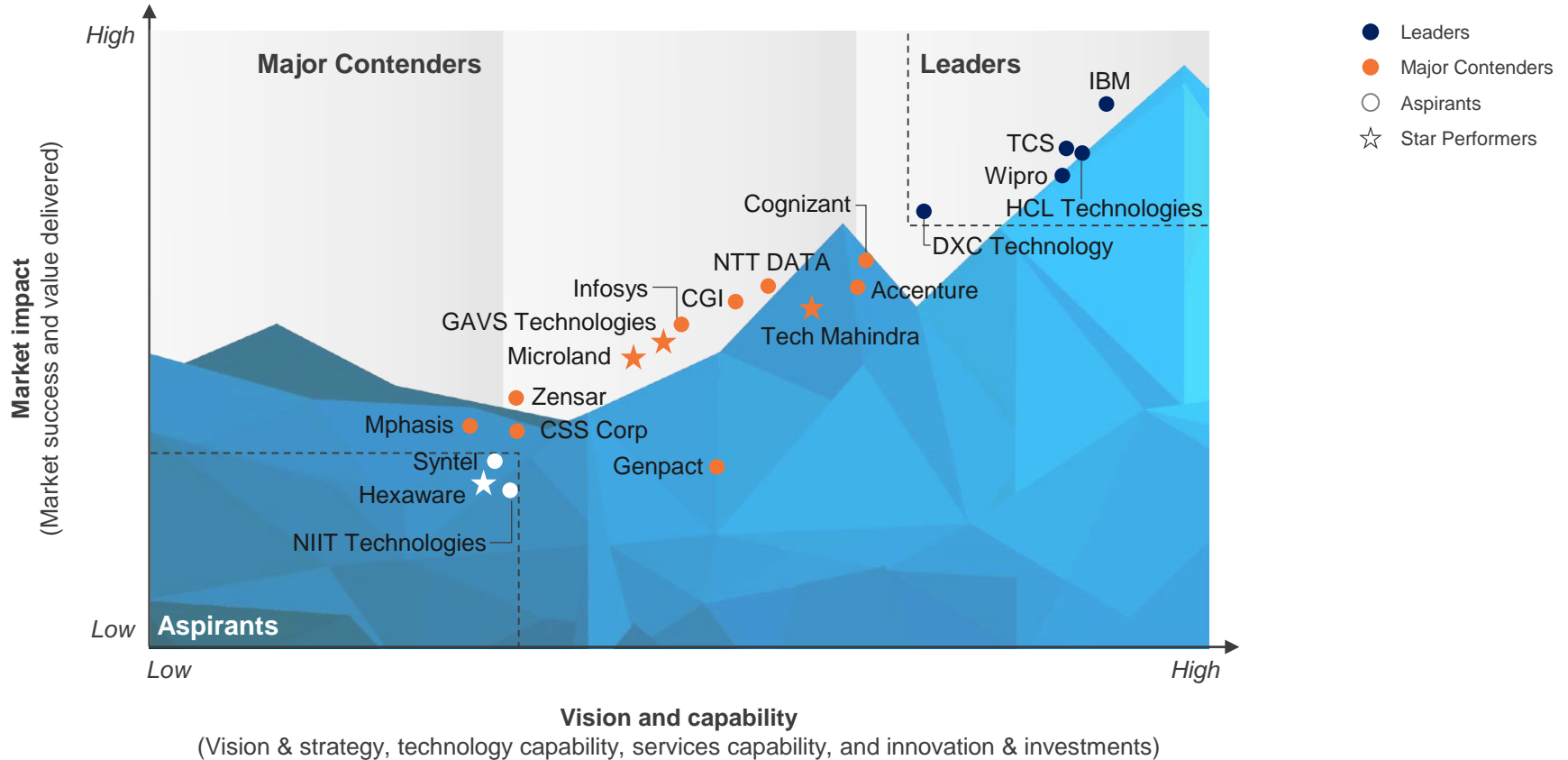
- Wipro's position on the infrastructure services automation PEAK Matrix
- Detailed IT infrastructure services automation profile of Wipro

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Source: Everest Group (2018) unless cited otherwise

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RESEARCH

Everest Group PEAK Matrix™

IT Infrastructure Services Automation – Market Trends and Services PEAK Matrix™ Assessment 2018: Become AI Aware or Fall Behind | Wipro positioned as Leader

Everest Group IT Infrastructure Services Automation – Market Trends and Services PEAK Matrix™ Assessment 2018: Become AI Aware or Fall Behind[1]

Legend:
- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

Chart axes:
- Y-axis: **Market impact** (Market success and value delivered) — from Low to High
- X-axis: **Vision and capability** (Vision & strategy, technology capability, services capability, and innovation & investments) — from Low to High

Quadrants: Major Contenders, Leaders, Aspirants

Plotted companies: IBM, TCS, Wipro, HCL Technologies, DXC Technology, Cognizant, NTT DATA, Accenture, Infosys, CGI, GAVS Technologies, Microland, Tech Mahindra, Zensar, Mphasis, CSS Corp, Genpact, Syntel, Hexaware, NIIT Technologies

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1 Assessment for CGI and Infosys excludes service provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers

Source: Everest Group (2018)

Wipro | IT infrastructure services automation profile
Overview

Wipro's vision involves helping its customers drive topline impact and improve their business agility and speed by delivering infrastructure as code through software-defined datacenters. Wipro's 3E approach of Educate, Engage, Empower ensures enterprise adoption of automation solutions in their clients' landscape. Wipro aims to bridge the gap between back-office and front-office through a broad range of offerings based on the Wipro HOLMES AI Platform and strategic partnerships through the automation ecosystem. Wipro's AI portfolio, based on their ETHICA design principles (Explainable, Transparent, Human-first, Interpretable, Common-sense, Auditable), encompasses themes such as zero-touch automation (leading to zero service desk and near-zero ops), self-help/self-heal, infrastructure security, workplace automation, and cloud.

Strengths

- Enhanced portfolio of automation frameworks and solutions within the Holmes platform, spanning a wide range of simple and complex use cases
- Meaningful investments in broadening the partnership network to augment its existing automation capabilities across the IT infrastructure services space

Areas of improvement

- Needs to approach clients with a better commercial construct where clients can envision commensurate benefits for their investments. Clients have cited cases where they did not go ahead after the POC stage due to concerns around ROI
- Room for improvement in articulating a clear adoption roadmap and ensuring smooth transition periods for clients

Proprietary solutions (representative list)

Solution	Details
HOLMES Chat	Conversational AI platform which integrates with messaging and chat channels (Skype, Spark, etc.) as well as with the enterprise IT systems (SAP, JDE, etc.)
Cloud lifecycle management automation	Provides fully automated end-to-end lifecycle services from discovery and assessment to migration, managed services, and optimization
Wipro HOLMES Orchestrator	A central point for all infrastructure orchestration, remediation, and management
Wipro HOLMES End Point Management	Solution focused on persona-based self-service to enable user to resolve issues themselves and to auto-fix issues on endpoint systems in real-time
HOLMES Infrastructure Suite (HIS)	A one-stop-shop automation solution primarily built for non-ticketed and compliance-related infra management activities

Partnerships (representative list)

Partner	Details
Arago	Strategic partnership for Arago's HIRO platform to hyper-automate existing and new client IT & business operation
Aptean	Focus area of the partnership involves end-user automation. Wipro leverages Aptean's end-point solution in its service desk and end-user support operations
Other technology partners include ServiceNow, BMC, Evolven, Nexthink, Splunk, etc.	

Recent activities (representative list)

| Development	Details
Open innovation	Partnerships with leading AI providers and niche startups (e.g. Arago and Demisto) to build use-cases and cross-skilled resources
Automation studio	Marketplace that provides a catalog of native and third-party services to accelerate the development of assets, providing metering, chargeback, and service governance

Source: Everest Group (2018)

Appendix

Everest Group PEAK Matrix™ is a proprietary framework for assessment of market impact and vision & capability
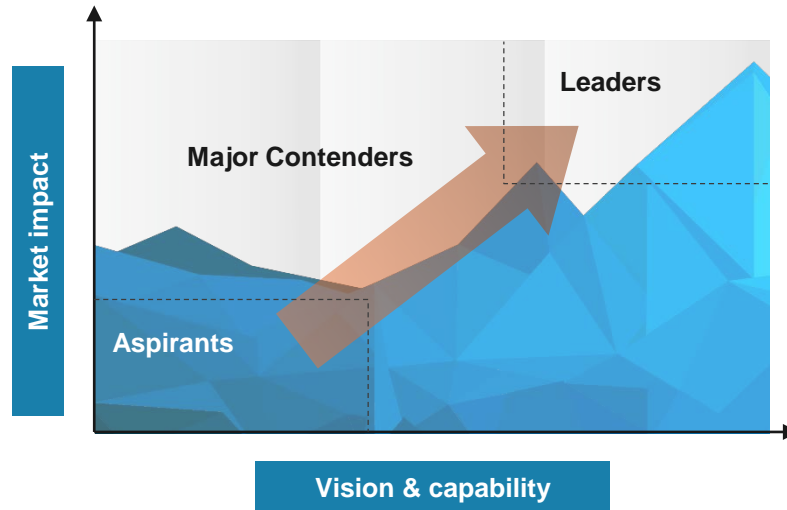
Everest Group PEAK Matrix
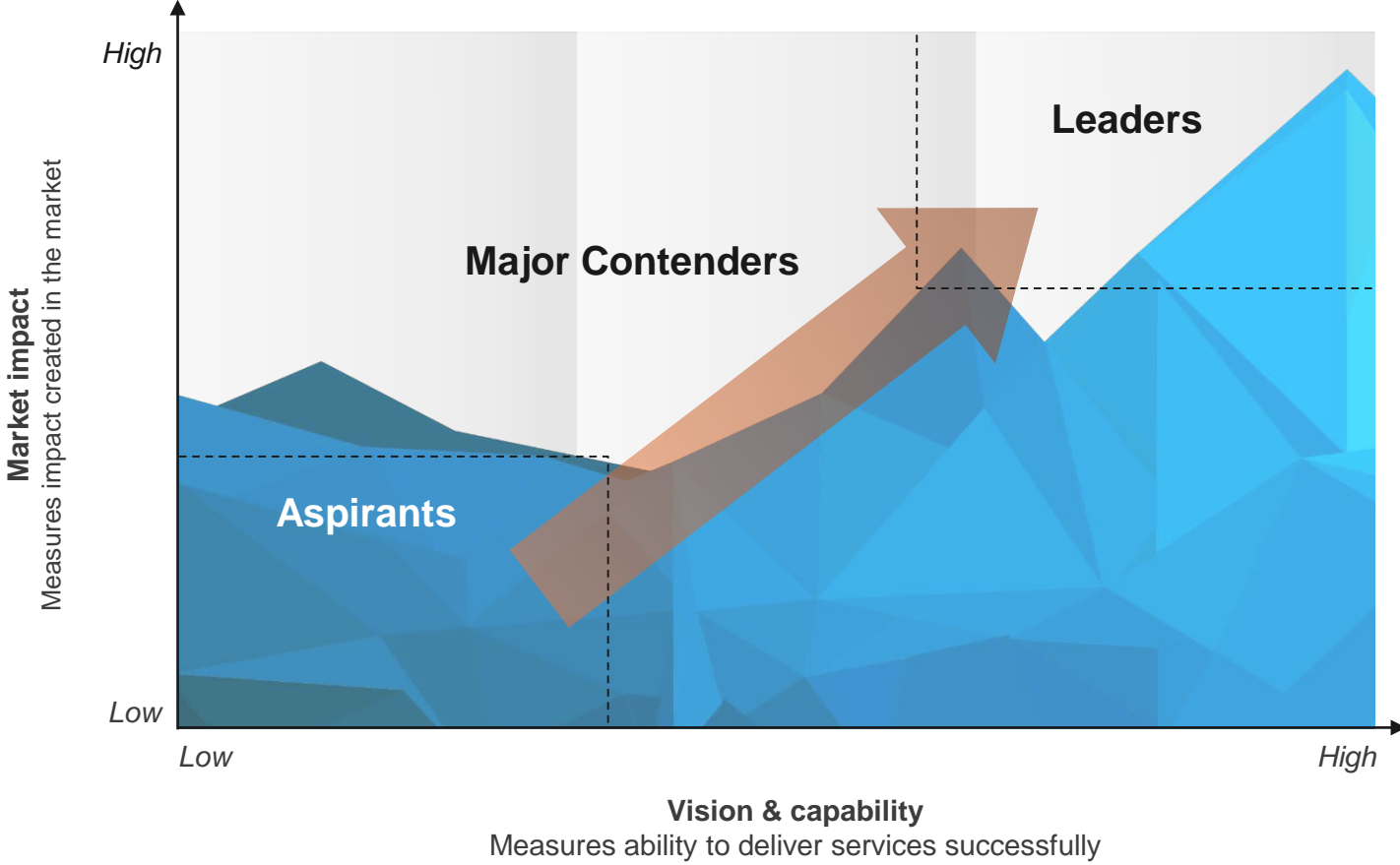
Services PEAK Matrix™ evaluation dimensions

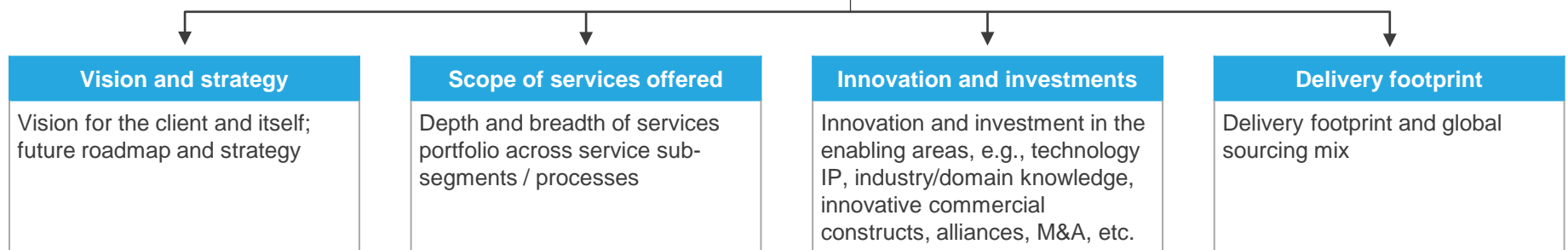Measures impact created in the market – captured through three subdimensions

Market adoption
No. of clients, revenue base, and YOY growth, deal value/volume

Portfolio mix
Diversity of client/revenue base across geos 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 sub-segments / 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
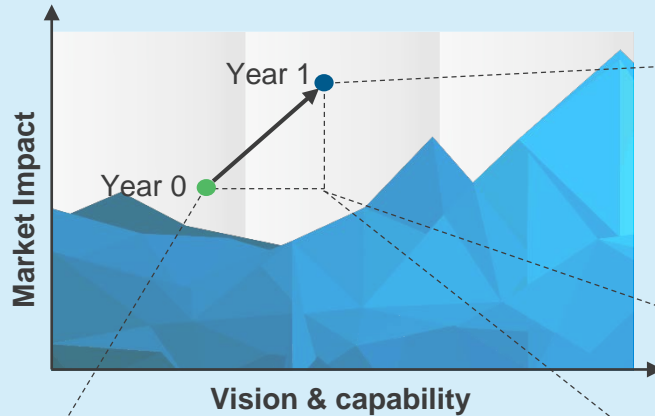
In order to assess advances on **market impact**, we evaluate each service provider's performance across a number of parameters including:
- Yearly ACV/YOY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value 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

Star Performers are identified by top quartile performance improvement on the X and Y axes for each segment

The Star Performers title relates to YOY performance for a given service provider 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

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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