



Everest Group Cloud Services PEAK Matrix® Assessment 2023 – North America

Focus on Wipro
October 2023



Introduction

Cloud adoption has reached a stage of maturity where organizations are now leveraging cloud services for increasing operational efficiency, enabling business innovation, and accelerating organizational growth. However, existing economic headwinds have prompted enterprises to scrutinize their cloud modernization spend and intensify their focus on cloud operations. Hybrid and multi-cloud strategies are being adopted to enhance reliability and utilize the best-of-the-breed offerings across cloud providers. At the same time, industry-specific cloud offerings, AI-backed cloud solutions, cloud sustainability, and product-centric operations are gaining traction. In the North American market, organizations are prioritizing business value outcomes and value creation throughout their cloud adoption journey, encompassing cloud consulting, infrastructure design/build, modernization, private cloud hosting, cloud operations, and cloud security services. Service Providers (SPs) are focusing on strengthening their horizontal- and vertical-focused partnerships with technology and platform providers to aid enterprises in their cloud adoption engagements.

In this research, we present an assessment and detailed profiles of 32 cloud SPs featured on [Cloud Services PEAK Matrix® Assessment 2023 – North America](#). The assessment is based on Everest Group’s annual RFI process for calendar year 2023, interactions with leading cloud SPs, client reference checks, and an ongoing analysis of the cloud services market.

The full report includes the profiles of the following 32 leading providers featured on the cloud services PEAK Matrix – North America:

- **Leaders:** Accenture, Capgemini, Deloitte, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Brillio, Cognizant, DXC Technology, EPAM, Genpact, GFT, Hitachi Vantara, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, Movate, NTT DATA, PwC, Tech Mahindra, Unisys, UST, and Virtusa
- **Aspirants:** Aspire Systems, HTC Global Services, Jade Global, Marlabs, Sonata Software, and Stefanini

Scope of this report



Geography
North America



Providers
32 cloud SPs



Services
Cloud services

Cloud Services PEAK Matrix® – North America characteristics

Leaders

Accenture, Capgemini, Deloitte, HCLTech, Infosys, TCS, and Wipro

- Leaders continue to showcase expertise in end-to-end integrated cloud transformation engagements with credible suite of IPs and solutions including industry cloud solutions and AI-enabled offerings
- They are making strategic investments in expanding partner ecosystem with prominent technology vendors, niche providers, and start-ups to co-create solutions and engage in joint GTM activities
- These providers are providing value-focused transformation approach, demonstrating strong complex workload transformation capabilities, and making headway into disruptive themes such as Generative AI to optimize their operational efforts and accelerate enterprises' cloud journey

Major Contenders

Brillio, Cognizant, DXC Technology, EPAM, Genpact, GFT, Hitachi Vantara, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, Movate, NTT DATA, PwC, Tech Mahindra, Unisys, UST, and Virtusa

- While these providers are augmenting their broader cloud capabilities with targeted investments in talent development, delivery capabilities, and partnership ecosystem, their end-to-end integrated cloud transformation capabilities have some visible gaps
- These providers are maintaining their market impact in terms of YoY growth and value delivered to clients while increasing investments in the development of horizontal and vertical cloud offerings

Aspirants

Aspire Systems, HTC Global Services, Jade Global, Marlabs, Sonata Software, and Stefanini

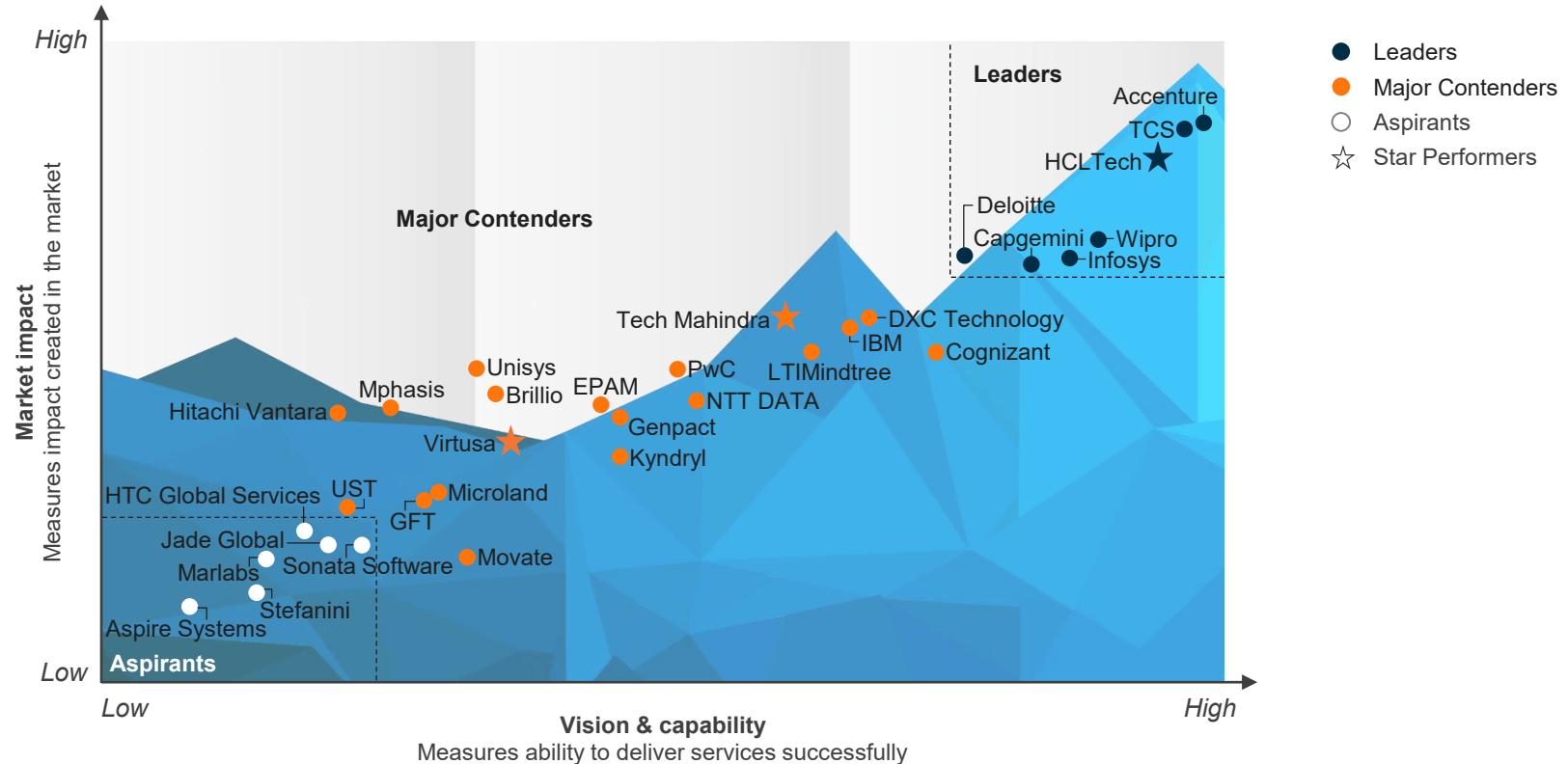
- Aspirants are approaching the market with a higher focus on certain segments of cloud services rather than a balanced portfolio, limited vertical focus, and restricted delivery footprint
- However, these providers are gradually increasing investments in assets including blueprints, accelerators, and solutions, service and technology partnerships, and expanding scope of their service offerings to contend in the mature cloud services market

Everest Group PEAK Matrix®

Cloud Services PEAK Matrix® Assessment 2023 – North America | Wipro is positioned as a Leader



Everest Group Cloud Services PEAK Matrix® Assessment 2023 – North America^{1,2,3}



1 Assessments for Cognizant, Deloitte, and IBM excludes 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 interaction with buyers
 2 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 based on capabilities after the split into IBM and Kyndryl
 Source: Everest Group (2023)

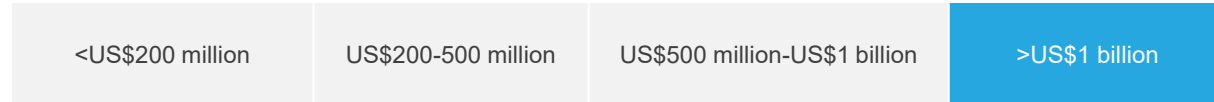
Wipro profile – North America (page 1 of 6)

Overview

Cloud services vision

Wipro envisions a future where businesses fully embrace the potential of cloud computing for their digital transformation endeavors. As a strategic partner, it guides clients in adopting cloud technologies and leveraging their advantages to foster business growth and enhance agility. Wipro Full Stride Cloud brings entire suite of cloud capabilities under a fully integrated, full stack offering.

Overall cloud services revenue (2022)

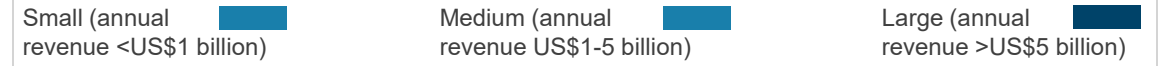


Scope of coverage

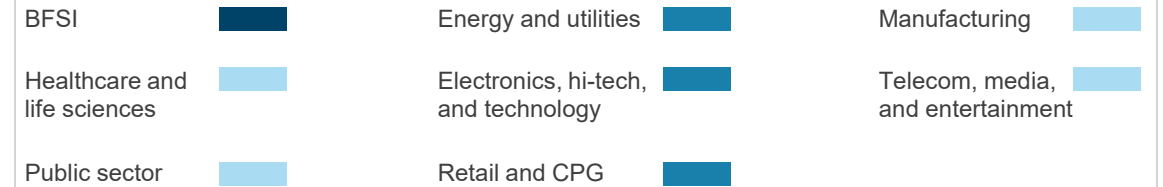
Consulting services	Infrastructure design/build services	Cloud modernization services
Private cloud hosting	Cloud operations	Cloud security

Low (<10%) Medium (10-20%) High (>20%)

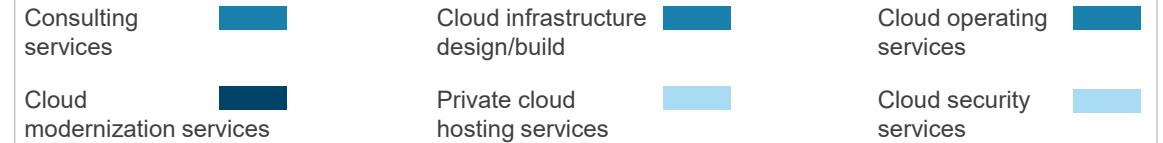
Adoption by buyer group



Adoption by industry



Adoption by service segments



Adoption by geography



Wipro profile – North America (page 2 of 6)

Case studies

Case study 1

Optimized asset performance management for APM solution

Client: British Petroleum

Business challenge

The oil and gas leader recognized an opportunity to reduce maintenance spending and OPEX costs by modernizing, standardizing and optimizing its advanced asset performance management (APM) solution. The company's existing APM spanned 10+ business units, with assistance from a central reliability and integrity team. Upgrading the system for asset reliability and integrity across its refining and petrochemical businesses would enable bp to improve performance, simplify and standardize workflows, and improve the user interface.

Solution

- Modernized the legacy APM solution by upgrading it to a web-based platform on AWS cloud
- Leveraged a DevOps model, automation, cloud-native services, and continuous integration/continuous delivery (CI/CD)
- Standardized the business workflow for integrity and reliability modules within the APM solution

Impact

- Improved performance by offering 80% faster calculations and analysis through risk-based inspection/thickness monitoring
- 30% reduction in IT infrastructure costs

Case study 2

Modernization of applications to Azure Cloud

Client: an investment banking and financial services firm

Business challenge

The client was looking at migrating 70 applications to Azure Cloud; however, the process posed several challenges including ambiguity in pilot objectives, acceptance criteria, process and procedures. Moreover, the applications ranged from custom built to COTS products across different technologies like Java, .NET, Spring, AngularJS, React, JSF, Oracle, SQL Server, Postgres. Also, there were pre-existing security vulnerabilities in the applications.

Solution

- Designed target architecture of the applications using the principles of automation, CI/CD pipelines and performance:
- Comprehensive discovery and assessment application, landing zone, security and costs
- Re-platformed applications and migrated to Azure cloud
- Migrated web-based applications to Azure Webapps and PCF using accelerators such as DevNXT and AMT
- Leveraged Azure Native services such as Azure File Storage, Azure AD, Azure Key Vault, Azure Log Analytics, and Monitor

Impact

- Cost savings due to the right sizing of infrastructure for applications and faster access to infrastructure
- Improved agility in application deployment cycle
- Improved security posture of applications with the use of static code analysis and by implementing stringent security group and network ACLs

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Solutions

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

Solutions	Details
Wipro Cloud Studio	This is a suite of in-house and third-party tools to cater to enterprises' end-to-end requirements across cloud services, including advisory, modernization, and operations
Wipro Data Intelligence Suite (WDIS)	It enables enterprises to transition their ecosystems to cloud with AI-/ML-infused accelerators with ready-to-deploy modules, enabling end-to-end automation of the cloud migration and modernization journey spanning leading cloud platforms such as Microsoft Azure, Google Cloud, and AWS
Cloud Applications Risk Governance (CARG)	This solution offers a structured approach for application risk assessment and recommends the base security controls needed to protect an application hosted on a cloud platform based on various parameters including regulations and compliance considerations
Security Management Center (SMC)	<ul style="list-style-type: none"> • This solution has an integrated approach combining predictive, preventive, and proactive activities based on automation and analytics, which ensures a 360-degree business-oriented view of security operations • It eliminates vulnerabilities, increases ROI on the security infrastructure, and facilitates decision-making at every level of the organizational hierarchy
SAP Cloud Migration Framework (MigMan)	<ul style="list-style-type: none"> • This framework helps in the assessment of the SAP landscape and creates a transformation roadmap keeping in view the latest SAP developments • It anticipates risks with a possible mitigation plan, provides downtime estimates, enables auto code remediation using Wipro's proprietary MigMan framework, and develops various transformation options such as rehost, replatform, and rearchitect
QuMiC	It is a tool for the migration of configuration tasks and on-premises data for rapid cloud implementations from cloud to cloud (different environment or same environment with different country and BUs and ERP to cloud)
DevNXT	This platform helps enterprises to build applications faster and democratizes engineering by bringing assets and capabilities together, allowing enterprises to conceive and launch disruptive solutions with just a few clicks
Cloud Management Center (CMC)	CMC is an integrated suite of cloud-based applications built to develop, deploy, and measure Salesforce environments. This is built to ensure high quality, provide best outcomes by measuring benchmarks on progress, reduce complexity, and drive adoption
BoundaryLess Enterprise	It is a reimagined cloud management platform built to deliver the next-generation intelligence enterprise.
Data Discovery Platform (DDP)	It is an end-to-end analytics, cognitive, and performance management solution. It is used to improve productivity and profitability of businesses using scattered disparate data.

Wipro profile – North America (page 4 of 6)

Partnerships

Partnerships (representative list)	
Partners	Details
Microsoft	<ul style="list-style-type: none"> • A gold competency partner with all six advanced certifications; it supports it with Azure-certified resources, specializations, and competencies • 2022 Azure Analytics Partner of the Year winner, 2022 Microsoft Power BI Partner of the Year winner, and 2022 Microsoft Compliance Partner of the Year winner
AWS	<ul style="list-style-type: none"> • A premier tier and MSP partner supported with AWS-certified resources, 11 competencies, and industry solutions • Launch partner for Amazon Security Data Lake, AWS Skills Guild, and Wipro Data Intelligence Suite
Google	A premier partner and certified MSP with specializations including application development, infrastructure, cloud migration, security, DC modernization, and data analytics.
IBM	Strategic partnership for co-developing solutions to address client challenges in areas such as cognitive computing, analytics, cloud and infrastructure, mainframe, and security.
Oracle	Partnership spans over 15 years, helping customers transform their businesses by leveraging the power of the cloud.
SAP	Partnered to offer cutting edge and innovative solutions to its customers through multiple joint co-innovation programs with SAP.
Red Hat	A premier partner driving end-to-end application to infrastructure engagements at scale, covering the entire Red Hat product stack.
Palo Alto	Partnered to deliver managed security and network transformation solutions such as Secure Access Service Edge (SASE), cloud security, and next-generation Security Operations Center (SOC) solutions based on Zero Trust principles for global enterprises.
Salesforce	A Summit Salesforce partner that brings deep capabilities spanning core clouds, industry clouds, cloud specializations, advisory, AI, and IP.
LambdaTest	Partnered for carrying out omnichannel assurance across real devices and browsers for functionality, usability, and visual test types.
Nutanix	Partnered to deliver invisible infrastructure for next-generation enterprise computing, elevating IT to focus on the applications and services that power their business.
Databricks	Being a preferred partner, Wipro has access to the all-services-enabled Databricks environment across Azure, AWS, and GCP. It is also listed among the top 10 partners of Databricks on parameters such as training and certifications.
Informatica	A premier Informatica partner offering industry-specific cloud data management solutions for gaining data visibility, improving data quality, and accelerating decision-making.
Snowflake	Partnered to focus on data mesh and data lake.
Others	Partnership with VMware Tanzu, Keysight Technologies – Eggplant, Micro Focus, Functionize, HeadSpin, and SeaLights.

Wipro profile – North America (page 5 of 6)










Investments and recent activities

Investments (representative list)	
Investments	Details
Acquisition	<ul style="list-style-type: none"> • Rizing – a leading SAP strategic partner; the acquisition aims to expand Wipro’s capabilities in oil and gas, utilities, manufacturing, and consumer industries • Edgile – a transformational cybersecurity consulting provider that focuses on risk and compliance, information and cloud security, and digital identity. The acquisition aims to strengthen Wipro’s cybersecurity services capabilities
CoEs	Invested in CoEs to develop solutions and capabilities covering hybrid cloud, Software Defined Everything (SDx), VirtuaDesk™ (VDI), and partner collaboration
Learning initiatives	<ul style="list-style-type: none"> • Utilized to enhance teams’ abilities and expertise in cloud technologies, platforms, and services; this initiative features various learning paths across all the major hyperscalers – AWS, GCP, and Microsoft Azure • The learnings are leveraged through online courses, instructor-led-trainings, and practical exercises to foster a comprehensive understanding of cloud-based solutions
Investments through WiproVentures	<ul style="list-style-type: none"> • Securonix for threat detection and response in a hybrid cloud and data-driven enterprise • vFunction, a platform for developers and architects that intelligently and automatically transforms monolithic Java applications into microservices
Infrastructure-as-Code (IaC) testing framework	It enables clients on the cloud to ensure seamlessness and reliability for AWS, Azure, and GCP with test IaC strategy.

Wipro profile – North America (page 6 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 offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Enterprises can benefit from Wipro’s hybrid cloud capabilities, highlighted through its ServiceNXT Cloud Operations Center (COC) platform, as well as its robust partnership ecosystem including providers such as RedHat, Nutanix, and Micro Focus
- They can rely on Wipro for engagements pertaining to data on cloud transformation due to its data-led transformation assets such as Wipro FullStride Data Intelligence Suite, Data Discovery Platform (DDP), and Semantic Data Hub
- Enterprises looking to engage in cloud cost optimization would benefit from Wipro’s solution approach and accelerators in partnership with niche FinOps providers such as Matilda Cloud, CloudHedge, and Harness
- The acquisition of Eximius Design and Wipro’s Intelliassure platform has bolstered its capabilities in supporting enterprises in edge computing and AI/ML- and IoT-based cloud solutions
- Wipro will be a right fit for enterprises seeking strong capabilities and proof points for SAP cloud migration due to its SAP Cloud Migration Framework and acquisition of Rizing

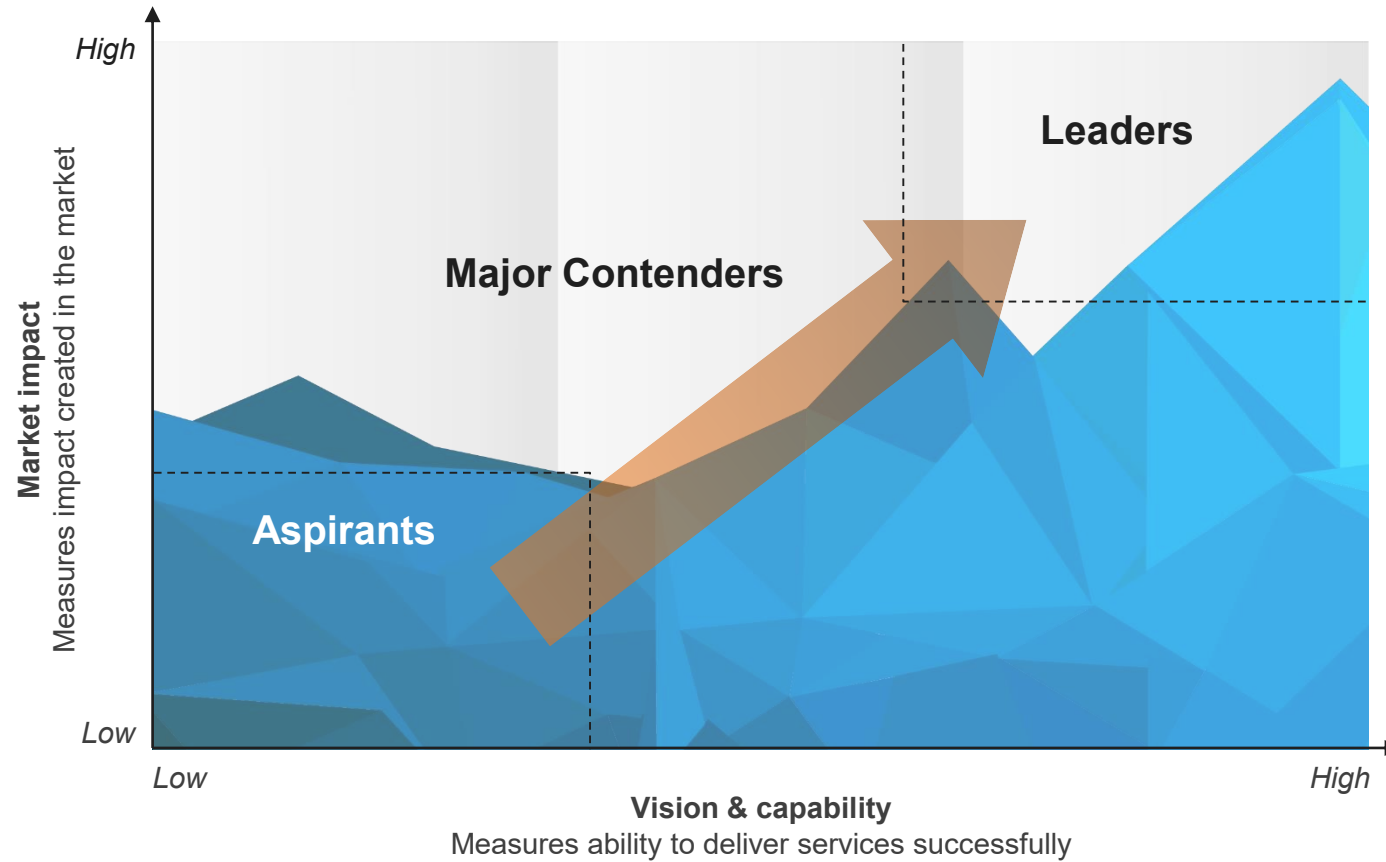
Limitations

- Wipro might not be a right fit for enterprises seeking delivery talent in close geographical proximity, as it lags peers in onshore and nearshore delivery presence
- Enterprises should conduct due diligence before engaging with Wipro for large-scale cloud operate-focused engagements as it lags peers in market mindshare
- Those with cloud sustainability requirements need to be careful while engaging with Wipro as its investments in this area are in the nascent stage
- Some clients have highlighted talent management and budget planning as key areas of concern for Wipro during cloud engagements

Appendix

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

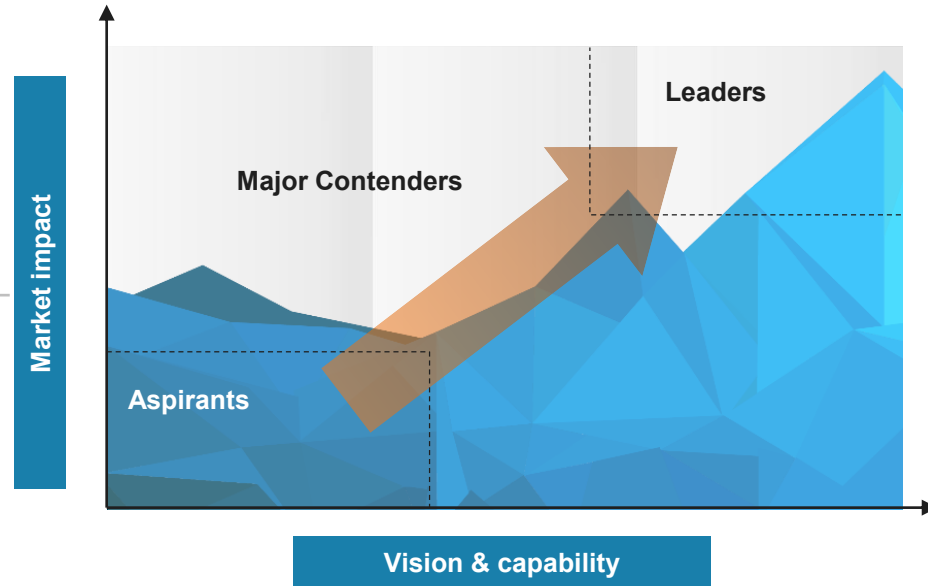
Everest Group PEAK Matrix



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



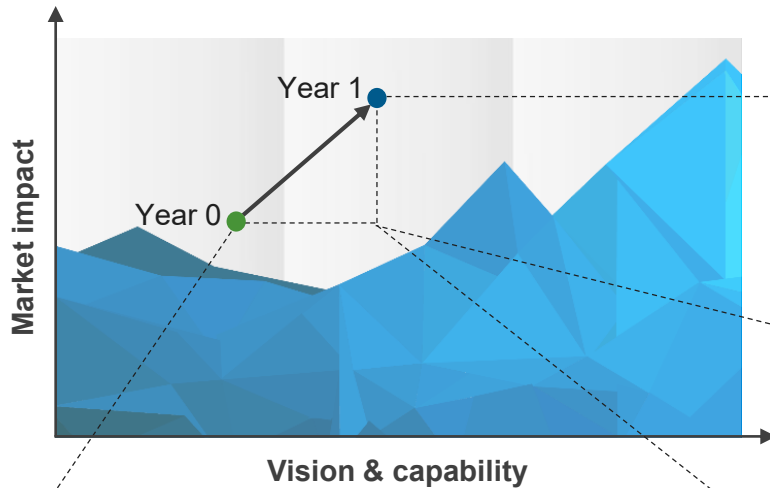
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 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 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 providers whose improvement ranks in the top quartile and award the Star Performer rating to those 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 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 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 is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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

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