Everest Group®

Everest Group PEAK Matrix for Cloud Service Provider 2022 – Europe

Focus on Wipro
December 2021

Everest Group
PEAK MATRIX®

Background of the research

The COVID-19 pandemic has accelerated the pace of digital transformation and increased the adoption of cloud among enterprises. Enterprises are no longer looking at cloud just from a cost saving perspective but are considering it as an area of investment that drives value for their businesses. Clients expect services beyond cloud with the aspects of customer experience-centric design, business-led transformation, and code-based infrastructure embedded in the overall transformation play. Cloud sustainability and data sovereignty are emerging as key decision-making criteria for European enterprises for partner selection.

Enterprises prefer service providers with comprehensive hybrid cloud solutions portfolio and delivery capabilities characterized by a strong regional presence in Europe. Enterprises are adopting a platform-based approach instead of a service-based approach to cloud offerings. Enterprises are eager to achieve accelerated value realization through an industry-specific cloud solution portfolio. Enterprises are looking for partners to aid them in their end-to-end cloud adoption journey across cloud consulting, infrastructure design/build, modernization, private cloud hosting, cloud operations, and cloud security services.

In this research, we present an assessment and detailed profiles of 28 IT service providers for their cloud services capabilities in the Europe region featured on the
Cloud Services PEAK Matrix® 2022 – Europe. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading cloud services providers, client reference checks, and an ongoing analysis of the cloud services market.

This report includes the profiles of the following 28 leading cloud service providers featured on the cloud services PEAK Matrix - Europe:

- **Leaders:** Accenture, Atos, Capgemini, DXC Technology, HCL Technologies, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Cloudreach, Cognizant, Deloitte, Ensono, Fujitsu, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Orange Business Services, Sopra Steria, and Tech Mahindra
- **Aspirants:** Coforge, Unisys, UST, Virtusa, and Zensar

Scope of this report:

Geography
Europe

Service providers
28

Services
Cloud Services

Cloud services PEAK Matrix® – Europe characteristics

Leaders:

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

Leaders have demonstrated extensive capabilities in delivering cloud services in Europe, backed by robust delivery organizations, capability expansion, and improvements in process maturities

- These players have a balanced vision for cloud services and a focus on building innovative, tailored solutions for clients that deliver business outcomes quickly while also maximizing value from their client's existing investments in the cloud
- They have a mature industry-specific offerings portfolio, full stack capabilities, IPs, and accelerators across a full spectrum of scope, strong hybrid and multi-cloud solutions, credible cloud sustainability and data sovereignty capabilities, investments in next-generation themes, a comprehensive partner ecosystem, and an expansion of regional delivery capabilities and local presence across Europe
- All Leaders have made investments in building extensive portfolios of platforms, tools, and accelerators through acquisitions and in-house capability expansion for innovation across the cloud services value chain

Major Contenders:

Cloudreach, Cognizant, Deloitte, Ensono, Fujitsu, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Orange Business Services, Sopra Steria, and Tech Mahindra

Major Contenders in the cloud services space include a mix of mostly large and mid-sized service integrators

- While these players have built meaningful capabilities to deliver cloud services, 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 players (vis-a-vis Leaders)
- These players are making targeted investments in cloud talent, delivery frameworks, internal IP, and partnerships to fix capability gaps – making them strong contenders as Leaders

Aspirants:

Coforge, Unisys, UST, Virtusa, and Zensar

Cloud services capabilities of Aspirants show more gaps in the balance of cloud services, maturity of internal IP, and coverage across industry verticals or geographies
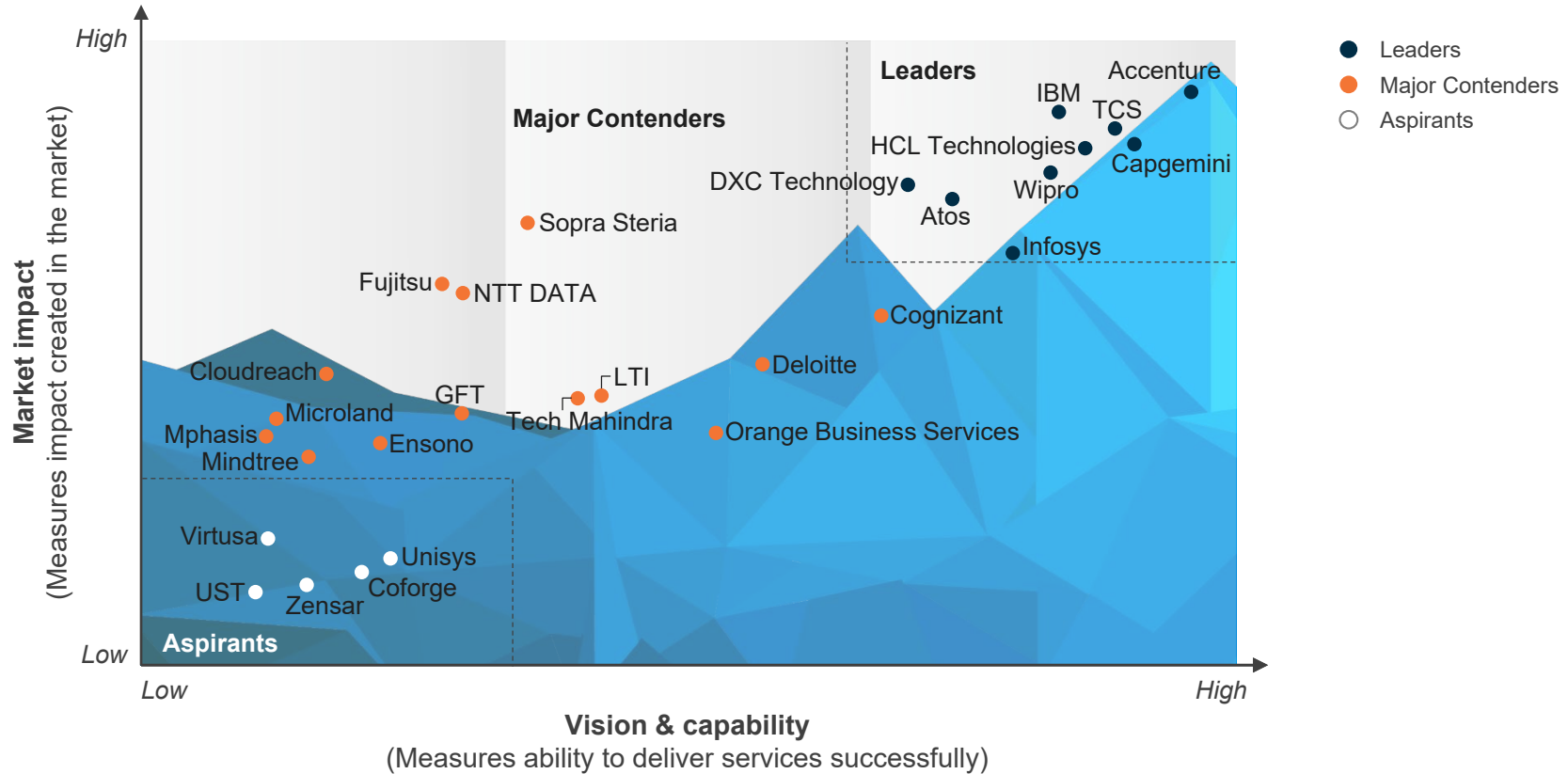
- These players are, however, expanding their broader cloud capabilities through investments in IP portfolios, niche platforms, and service and technology partnerships – keeping them poised to be major challengers in the space

Everest Group PEAK Matrix®
Cloud Services PEAK Matrix® Assessment 2022 – Europe | Wipro positioned as Leader

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

- Leaders
- Major Contenders
- Aspirants

Market impact (Measures impact created in the market)

Leaders

Accenture
IBM
TCS
HCL Technologies
Capgemini
DXC Technology
Wipro
Atos
Infosys

Major Contenders

Sopra Steria
Cognizant
Fujitsu
NTT DATA
Deloitte
Cloudreach
LTI
GFT
Microland
Tech Mahindra
Orange Business Services
Mphasis
Ensono
Mindtree

Virtusa
Unisys
UST
Coforge
Zensar

Aspirants

Low — High

Vision & capability (Measures ability to deliver services successfully)

1   Assessment for Atos and Deloitte 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 interaction with buyers.
Source: Everest Group (2021).

Wipro | cloud services profile – Europe (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 offered	Innovation and investments	Delivery footprint	Overall
◕	◕	●	◕	◕	◐	●	◒	◕

Strengths

- As part of the FullStride offering, Wipro has invested in providing integrated vendor-agnostic cloud services and developing a strong industry-specific portfolio of point solutions and platform solutions across multiple industries, and has demonstrated multiple proof points for the implementation of these solutions

- Wipro is a good fit for clients looking for a strong portfolio of next-generation demand themes such as IoT, edge computing, and blockchain on cloud. Its capabilities are supported by investments in partner ecosystems and co-innovation labs

- Wipro has been stepping up its acquisitions to grow its digital consulting capabilities in Belgium and worldwide, and an example of this is its recent acquisition of the consulting firm Capco

- Enterprise buyers have highlighted its collaborative approach, technical expertise, and solutioning flexibility as key strength areas

Limitations

- Enterprises looking for extensive onshore-nearshore presence in Europe will find Wipro lacking in comparison to other peers

- Clients seeking sustainability through cloud will find Wipro lacking in its value proposition as well as its investments in its sustainability-aligned solutions portfolio and specialized partner ecosystems in comparison to its peers

- While Wipro has made headway into Continental Europe, it lags peers in its client serving GTM capabilities in France, Southern Europe, and Nordics regions

- Clients have indicated that Wipro needs to improve its domain capabilities and talent management abilities
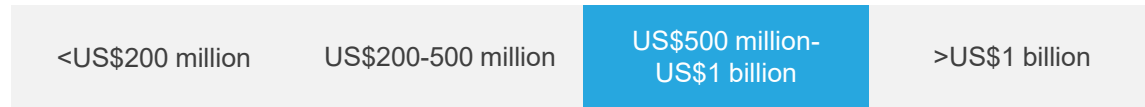
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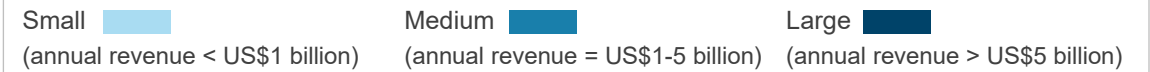# Wipro | cloud services profile – Europe (page 2 of 6)
Overview

Vision

Wipro envisions to be its clients' trusted partner while being an ecosystem integrator. It has committed to investing US$1 billion in cloud technologies, capabilities, acquisitions, people, and partnerships over the next three years.
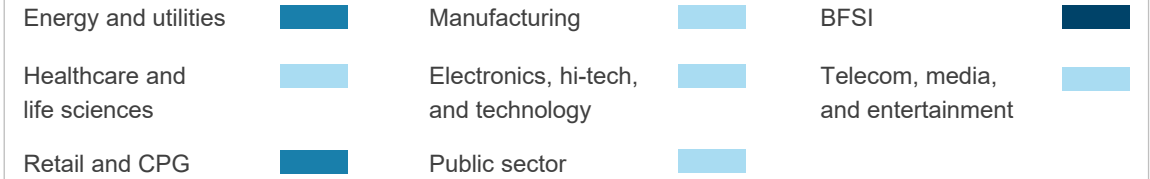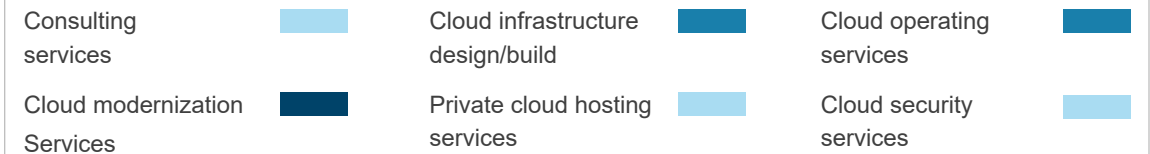
Cloud services revenue (2020)

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

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

Adoption by buyer group

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

Adoption by industry

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

Adoption by service segments

Consulting services		Cloud infrastructure design/build		Cloud operating services	
Cloud modernization Services		Private cloud hosting services		Cloud security services	

Adoption by country

UK & Ireland		France and Southern Europe		Nordics	
DACH		Benelux			
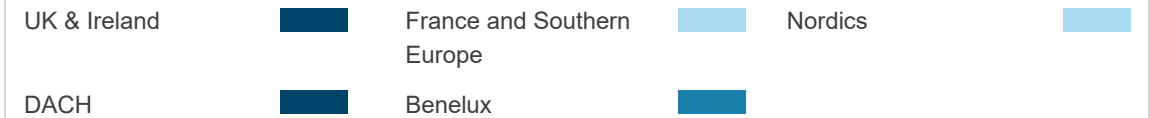
Wipro | cloud services profile – Europe (page 3 of 6)
Case studies

Case study 1	Enabled hybrid cloud services with Wipro's BoundaryLess Enterprise (BLE) services

Client: A leading equipment manufacturer in North America.

Business challenge

The client saw declining revenues owing to the rise of public cloud providers; so, it was looking to expand the service portfolio and enable hybrid cloud services for its customers.

Solution

Wipro proposed to deliver turnaround of hybrid cloud automation and management capability through reuse of the existing platform framework and accelerators, which could extend the customer's cloud footprint to 50,000 devices. The engagement was carried out in a quick timeline, involving detailed designs, workshops, and design-led thinking. This helped to put end-user at the center of the design and plug-in framework to deliver the platform in eight months as against a standard timeline of 24 months.

Impact

- Implemented 16 customer journey mappings
- Customized and integrated 550 blueprints and automation scripts
- Delivered over 80 use cases and completed over 50 complex integrations

Case study 2	Enhanced automation to reduce time-to-market

Client: A Global anatomical pathology solutions company.

Business challenge

The client had multiple business units, with separate IT teams, technology adoption, and mode of consumption, which were unable to cross-leverage investments. Large scale hybrid cloud operations led to complexity and poor service levels. There was a lack of innovation leading to delayed time-to-market and rise of shadow IT. The operating costs were high due to lack of visibility on asset consumption and there was a high volume of medium to high impact incidents.

Solution

Wipro proposed single pane of glass to offer catalog-based consumption model and enhanced automation to improve time to business. It established a standardized service governance across all the business units for seamless end-user experience and consolidated, managed, and delivered engineering, architecture, and project governance services under a single umbrella. Wipro established and funded an innovation council, delivered AI-enabled operations by rethinking tools architecture, and integrated SOC function, providing threat and vulnerability management and commitment to zero critical vulnerabilities.

Impact

- Service requests were automated and time to market was reduced from days to hours
- Achieved 100% automated documentation of network estate
- Reduced severity one incidents or P1s by 70% by implementing AI OPS
- Exited high-cost datacenters hosted IaaS solution and public cloud within 70% of the allocated time

Wipro | cloud services profile – Europe (page 4 of 6)
Solutions

Proprietary solutions (representative list)	
Solution name	**Details**
Cloud Studio	It helps customers assess, strategize, and accelerate cloud adoption through an industrial approach that includes 'lift and shift', replatform, and rfactor.
BoundaryLess Enterprise (BLE)	It is the reimagined cloud management platform built to deliver the next-generation intelligent enterprise.
CloudAssess	An automated assessment and analysis solution that gives a deep insight into IT environments for driving IT strategy.
Smart Containerization Platform	It is a platform that helps reuse the same Continuous Integration / Continuous Delivery (CI/CD) configuration, thereby reducing human intervention, time, and cost.
CloudTrust	A comprehensive life cycle framework that addresses security challenges for enterprises adopting cloud.
DevNXT	A productized service offering which automates the software release management process in a software delivery life cycle.
CNAP	A fully orchestrated cloud-native platform that is cloud-agnostic, built on native and managed kubernetes, and leverages open-source technologies and Wipro accelerators to provide both autonomy and speed to developers.
Data Discovery Platform (DDP)	It is an end-to-end analytics, cognitive, and performance management solution. It helps drive decisions to improve productivity and profitability of businesses using scattered disparate data from anywhere, anytime.

Wipro | cloud services profile – Europe (page 5 of 6)
Partnerships

Partnerships (representative list)	
Partner name	**Details**
Amazon Web Services	Wipro is a premier consulting partner of AWS. It has formed a Wipro AWS Business Group (WABG) in collaboration with AWS with the aim to fast-track customer journeys on AWS.
Microsoft Azure	Wipro has a 360-degree relationship with Microsoft and is one of Microsoft's top global SI partners. It is also an Azure Expert Managed Services Provider (MSP) partner.
Google Cloud Platform	A Premier Partner for GCP with over five cloud specializations and has strategic GTM alliance with GCP. GCP is also a partner of choice for SAP migration.
IBM	Wipro is an IBM Platinum Business Partner. They have a joint innovation center in IBM Novus Lounge. They harness the power of Wipro's industry leadership and IBM's technology leadership to generate brand loyalty and accelerate growth.
Oracle	Wipro and Oracle partnered to help customers transform their businesses by leveraging the power of cloud.
VMware Tanzu	A long-standing global SI partnership with VMware Tanzu, they work together on clients' digital transformation programs globally.
Red Hat	A premier partner of Red Hat; together, they run complete infrastructure to application engagements at scale for clients on the complete Red Hat product stack.
SAP	It is a global strategic services partner of SAP. Together, they strengthen industry-specific offerings through RISE with SAP.
Nutanix	Wipro and Nutanix partnered to deliver invisible infrastructure for next-generation enterprise computing, elevating IT to focus on the applications and services that power their business.

Wipro | cloud services profile – Europe (page 6 of 6)
## Investments and recent activities

Investments (representative list)	
Investment name	**Details**
Acquisitions	• Acquired CAPCO, a global management and technology consultancy firm, to give clients access to a partner who can deliver integrated, custom-made solutions to help fuel growth and achieve their transformation objectives • Acquired Encore Theme, a specialist in providing SaaS and Cloud solutions in financial services, to help strengthen its position as a dominant player across the globe implementing Finastra solutions • Acquired Eximius Design, an engineering services company. Eximius' offerings and solutions are being consolidated as a part of Wipro's EngineeringNXT framework, providing customers with a platform to innovate and engineer the next generation of products and platforms at scale • Acquired International TechneGroup Incorporated (ITI), a global digital engineering and manufacturing solutions company. ITI's offerings and solutions are consolidated as a part of Wipro's industrial and engineering services business and will function as a wholly owned US subsidiary of the company
Training	Wipro invests in training and skill development of its employees. Over 155,000 employees have been trained in digital skills as of financial year 2020.
Cloud experience centers	Wipro has launched experience centers to demonstrate emerging technologies, test proof of concepts, and give customers the opportunity to see the latest datacenter, enterprise, and cloud solutions in real-world, real-time scenarios. Some of these datacenters are AWS Launchpad, Google Innovation Arena, IBM Novus Lounge, and Silicon Valley Innovation Center.

Appendix

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

Everest Group PEAK Matrix®
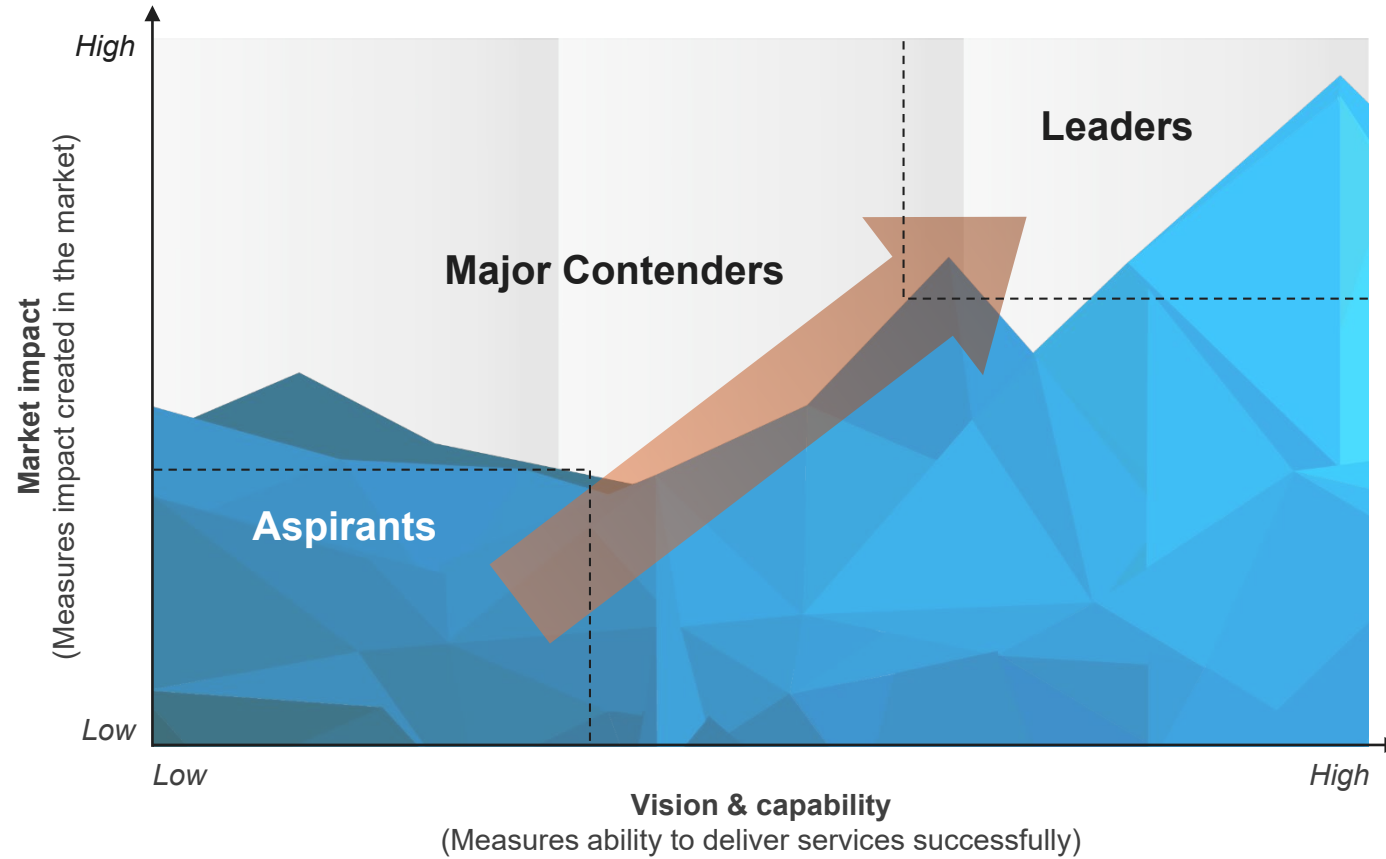
Services PEAK Matrix® evaluation dimensions

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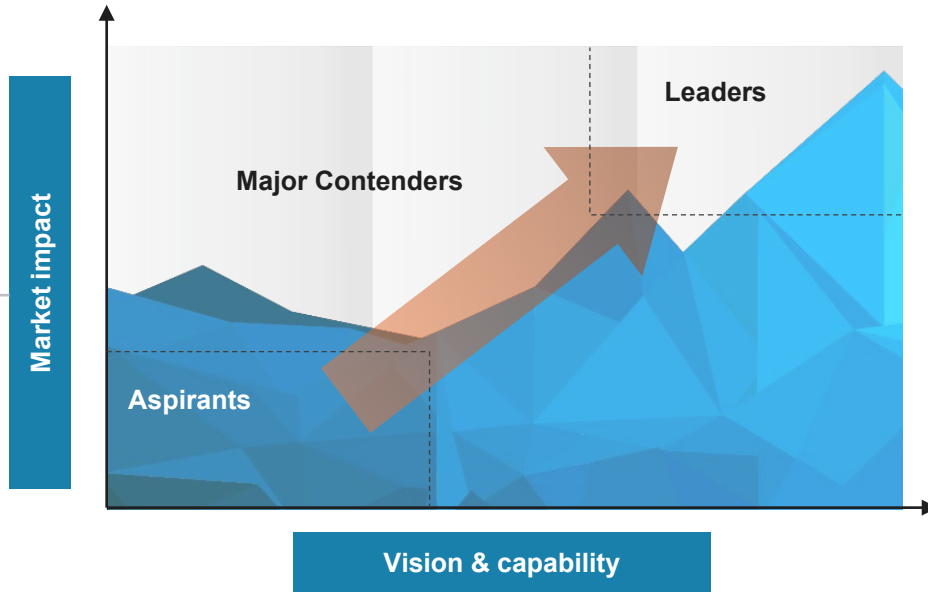
Measures ability to deliver services successfully.
This is captured through four subdimensions

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 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

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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
+1-647-557-3475