



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe

Focus on Wipro
September 2023



Background of the research

- Despite the global macroeconomic conditions resulting in increasing cost pressures and Return on Investment (RoI) scrutiny, enterprise demand for digital workplace services remains high. The recent technological advances and digital transformations have led to the third wave of value-based transformation, where enterprises recognize value realization, productivity, and cost optimization to be critical to tackle and survive the slowdown. At the same time, industry-specific workplace accelerators, AI-backed solutions, and product-centric operations are gaining traction among enterprises
- In the European digital workplace market, enterprises are prioritizing Employee Experience (EX), a mix of global and local service delivery, and higher cultural alignment while also dealing with higher region-specific nuances, increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes
- The digital workplace service providers are focusing on strengthening their geographically contextualized and industry-specific capabilities to assist enterprises in their digital workplace engagements. Additionally, providers are seeking to enhance their consulting and advisory capabilities in an effort to position themselves as strategic partners to their enterprise customers
- In this research, we present an assessment and detailed profiles of 22 digital workplace services providers featured on the digital workplace services PEAK Matrix® – Europe

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace services providers, client reference checks, and ongoing analysis of the digital workplace services market.

The full report includes the profiles of the following 22 leading service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe](#):

- **Leaders:** Accenture, Atos, Capgemini, HCLTech, TCS, and Wipro
- **Major Contenders:** Cognizant, Computacenter, DXC Technology, Fujitsu, Infosys, Kyndryl, LTIMindtree, NTT DATA, Orange Business, Stefanini, Tech Mahindra, and Unisys
- **Aspirants:** Coforge, Microland, UST, and Zensar

Scope of this report



Geography
Europe



Providers
22 leading digital
workplace service
providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® – Europe characteristics

Leaders

Accenture, Atos, Capgemini, HCLTech, 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, display coherent vision, and continue to invest in technology and services capability development (internal Intellectual property (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 employees along with making headway into disruptive themes such as generative AI to optimize their operational efforts and workflows in client's environments
- 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, DXC Technology, Fujitsu, Infosys, Kyndryl, LTIMindtree, NTT DATA, Orange Business, 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

Coforge, Microland, UST, and Zensar

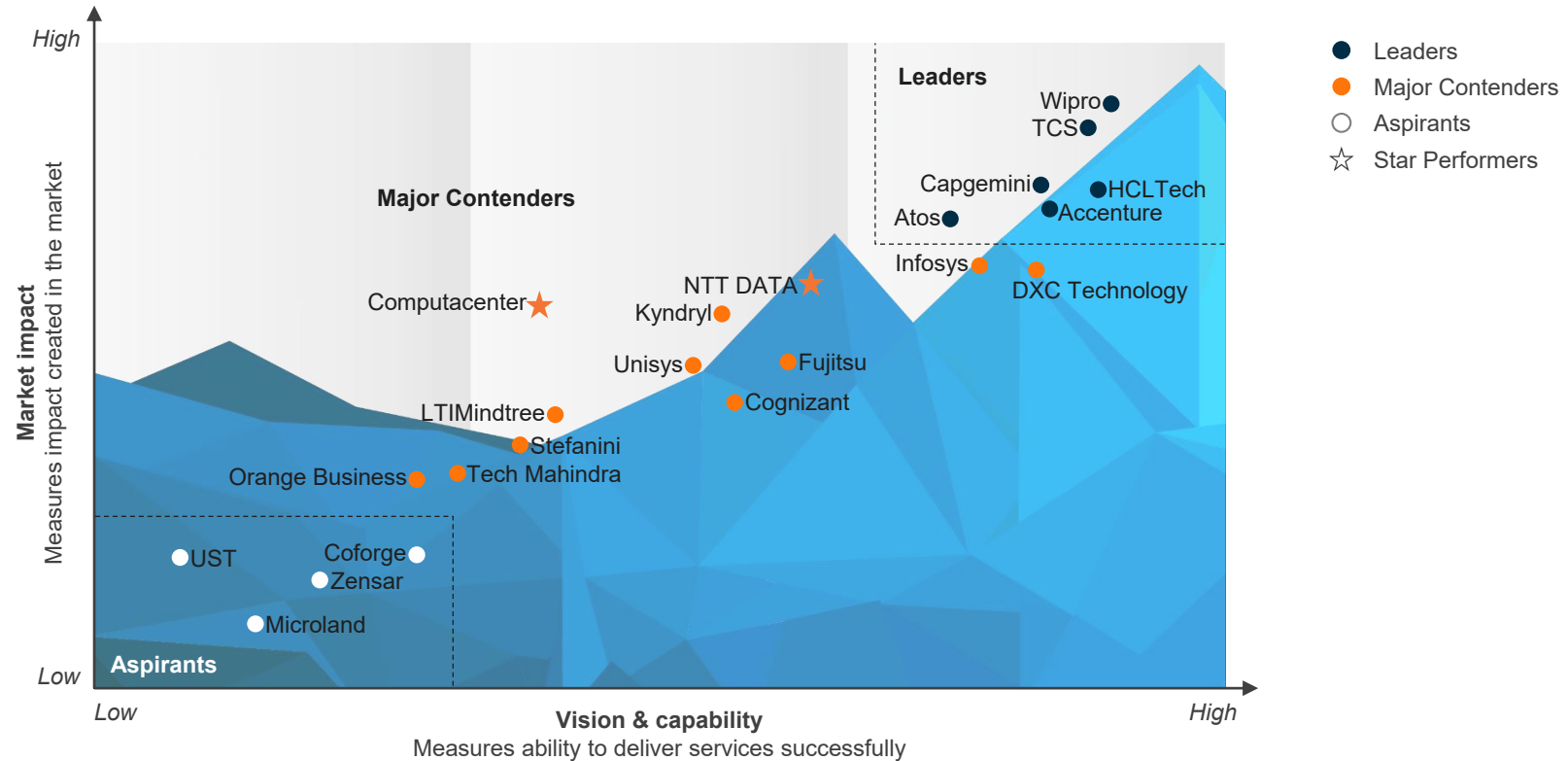
- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their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

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe | Wipro is positioned as a Leader



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe^{1,2,3,4}



1 Assessments for Fujitsu, Orange Business, Tech Mahindra, and UST excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
 2 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
 4 We have not considered LTIMindtree for Star Performer title since erstwhile Mindtree participated as a separate entity in the 2022 refresh of the assessment

Source: Everest Group (2023)

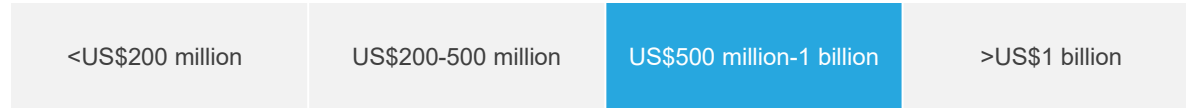
Wipro profile – Europe (page 1 of 5)

Overview

Digital workplace services vision

Wipro's vision for digital workplace is to facilitate a workplace environment that is driven by innovation through Wipro's proprietary Live Workspace™, which empowers enterprises to stay ahead of the transformation wave. Wipro aims to achieve holistic digital excellence with ambient intelligence, digitally augmented workforce, sustainable tech for future workplaces, streamlined operations, and advanced work hubs through infrastructure modernization to provide clients with a convergence of emerging technologies, comprehensive data mesh, human-centric designing, and sustainable innovation.

Digital workplace services revenue (2022)



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

Adoption by region

UK & Ireland	High (>20%)	Nordics	High (>20%)	DACH	High (>20%)
Benelux	Medium (10-20%)	France and Southern Europe	Medium (10-20%)	Eastern Europe	Low (<10%)
Others	Low (<10%)				

Adoption by industry

BFSI	High (>20%)	Energy and utilities	Medium (10-20%)	Electronics, hi-tech, and technology	Medium (10-20%)
Healthcare and life sciences	High (>20%)	Manufacturing	High (>20%)	Public sector	Low (<10%)
Retail and CPG	Medium (10-20%)	Telecom, media, and entertainment	Low (<10%)	Travel and transport	Low (<10%)

Adoption by service segments

Asset management	Low (<10%)	Deskside support	Medium (10-20%)	Desktop management and virtualization	High (>20%)
Infrastructure applications	Low (<10%)	Mobility/BYOD solutions	Medium (10-20%)	Service desk	Medium (10-20%)
Smart workplace	Low (<10%)	Unified Communication and Collaboration (UCC)	Medium (10-20%)	Workplace security	Medium (10-20%)

Adoption by buyer group

Small (annual revenue <US\$1 billion)	Low (<10%)	Midsize (annual revenue US\$1-5 billion)	Medium (10-20%)	Large (annual revenue >US\$5 billion)	High (>20%)
---------------------------------------	------------	--	-----------------	---------------------------------------	-------------

Source: Everest Group (2023)

Wipro profile – Europe (page 2 of 5)

Solutions

NOT EXHAUSTIVE

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
ExperienceNXT	An analytics-backed, AIOps-powered solution for experience monitoring and management for predictive support while enabling employee engagement
myConfab	A comprehensive communication and collaboration suite of solutions to promote intentional and contextual collaboration and ensure a resilient hybrid workplace
OneDesk	A comprehensive enterprise service management platform for multi-disciplinary service desk services
Realview	An intelligent visual support solution to transform field service experience with a digital suite of tools powered by enterprise augmented reality and AI
Liva	An intelligent virtual assistant and first point of contact for all employees, which includes both IT and non-IT issues
myHubstyle	An employee profiling and persona definition solution with a dynamic persona management capability to deliver hyper-personalized workspaces
Modern Management Services	An analytics-powered orchestration solution to automate complex workplace processes and maintain an evergreen IT
Digital Field Services	Uberized field services to a pandemic resistant delivery network along with enablers such as Digi lockers, IT vending machines, TechBars, and virtual kiosks for employee self-service
Virtual Walk in powered by TruRemote	A digital support solution to deliver near-zero remote resolution of IT issues including out-of-band management capability
Virtuadesk	Wipro's IP-based, packaged workplace transformation solution, which combines industry-leading cloud and hyper-converged infrastructure technologies for a smooth employee experience
myUnifiedMobility	Integrated enterprise mobility management services including unified endpoint management, mobile content management, mobile application management, mobile user experience management, and mobility expense management
GenAI Foundry	AI into the flow of work through LLMs integrated with Live Workspace, IPs and business solution accelerators and by leveraging strategic partnerships with industry-leading players
Green Operations Suite	Comprehensive suite of green IT solutions to drive sustainability in the digital workplace
Secure360	Intelligent solution that simplifies and modernizes endpoint security management with a Zero-trust unified platform powered by AI/ML, advanced analytics, and automation
WaaS360	All-inclusive persona-mapped Device-as-a-Service (DaaS) offered in flexible pricing models

Other solutions include verticalized workplace solutions – Modern Work for Retail, Modern Work for BFSI, Modern Work for Manufacturing, Modern Work for Healthcare, Smart i-Connect, IoTNXT, Consulting Model, ExperienceNXT for digital adoption, Windows 11 as a service, wiMigrate, and Viva.

Wipro profile – Europe (page 3 of 5)

Partnerships

NOT EXHAUSTIVE

Partnerships (representative list)

Partner name	Details
Microsoft	Wipro leverages Microsoft’s stack of offerings and is aligned with Microsoft’s digital transformation for all Windows OS, Office, collaboration, and productivity solutions; Partners since 2001, Wipro and Microsoft have a 360-degree partnership
Apple	Leverage its partnership with Apple for DaaS capabilities
Google	Leverages its partnership with Google for collaboration and productivity solutions
Intel	Leverages its partnership with Intel for secure device management
Happy Signals	Leverages its partnership with Happy Signals for employee experience measurement
Moveworks	Leverages its partnership with Moveworks for a conversational AI experience
Avaamo	Leverages its partnership with Avaamo for a chatbot experience
ServiceNow	Leverages ServiceNow’s Now platform to accelerate IT transformation and cross-functional collaboration for a better employee and customer engagement experience
Lakeside Systrack	Leverages Lakeside Systrack’s platform for employee experience measurement
Zscaler	Leverages Zscaler to provide endpoint security
Nexthink	Leverages Nexthink’s real-time end-user analytics platform for targeted employee engagement, benchmarking, and proactive improvement
Virbela	Leverages Virbela for immersive metaverse workplace
CareAR	Leverages CareAR’s AR/VR field support platform
GoTo	Leverages GoTo for remote field support and communication solutions
Juriba	Leverages Juriba for Evergreen IT and co-creates solutions
Walkme	Leverages this partnership for enterprise-wide digital adoption and to increase employee productivity
Other digital workplace partnerships include Qualtrics, 1E, CoreView , Flexera, Sakon, HP, Dell, Citrix, Avaya, Zinier, Lenovo, VOSS, Prognosis, VMware, Innoserve, Getronics, CompuCom, Hemmersbach, Barona, Daisy, ESP, British Telecom, Nectar, Vayusphere, and Aternity	

Wipro profile – Europe (page 4 of 5)

Investments and recent activities

NOT EXHAUSTIVE

Investments (representative list)

Investment name

Details

Innovation and investments

- Invested in setting up and launching the Experience Studio in Munich, Germany
- Invested in elevating use cases and demonstrations with strategic partners in Kodathi Experience Studio, Bangalore, India
- Invested in building the GenAI Foundry in Coimbatore, India, as a Prompt Engineering Hub
- Invested in building next-generation digital workspace-centric solutions for Microsoft CoE in Power Apps, Copilot, ChatGPT, and automation
- Invested in training resources for GenAI, Microsoft, Google, Intel, AWS, and Citrix

Acquisitions

- Acquired Rizing for consulting and HCM capabilities with proven expertise in accelerating organizations along their digital journeys
- Acquired LineCraft for AI-powered data fabric for manufacturing customers and improved operational efficiency in real-time
- Acquired CAS Group for workplace connectivity capabilities and differentiated value with niche telecom retail solutions

Wipro profile – Europe (page 5 of 5)

Everest Group assessment – Leader

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

- Wipro is leveraging its workplace-specific product and platform expertise to further strengthen its position as a strategic partner of choice for end-to-end workplace transformation
- Wipro has a strong and extensive partner ecosystem that spans both traditional and future-oriented technologies. It has multiple awards and conferred partnership status from large technology giants such as Microsoft, Dell, and Intel as well as niche providers such as GoTo
- Enterprises from the BFSI, life sciences, retail, and manufacturing segments seeking verticalized workplace offerings would benefit from Wipro’s LiVE Workspace which has solutions tailored to industry-aligned use cases
- European enterprises seeking sustainable workplace solutions would find relevance in Wipro’s green IT suite comprising solutions such as smart printing, device lifecycle management, and green Key Performance Indicators (KPIs)
- It has invested in setting up a new experience center in Germany which will serve as a hub for fostering co-creation with enterprises, acting as an incubation space
- Clients have highlighted its aggressive pricing and flexibility to adapt to their needs as key strengths

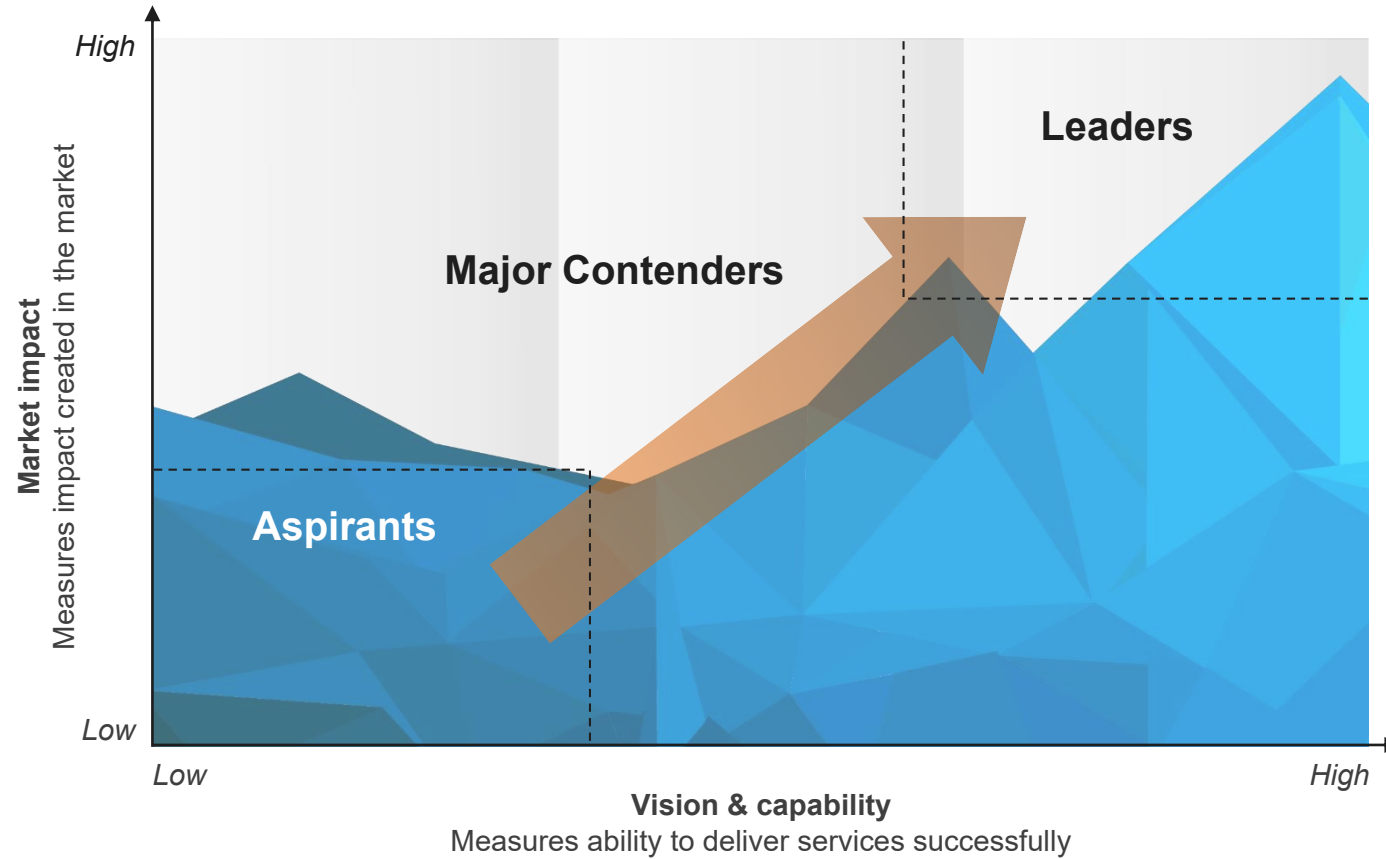
Limitations

- Despite creating new IP/offerings and investments, most of the investments have seen limited client traction with a lot of clients calling out the IP less relevant in most of the cases
- Wipro’s emphasis on large deals may not align well with the needs and preferences of small and midsize enterprises
- It has a limited resource presence in Eastern Europe, which makes it a less attractive choice for enterprises within these regions
- Enterprises operating in the telecom, media and entertainment, public sector, and travel and transport industries should conduct a thorough assessment of Wipro’s capabilities and the influence it holds within their specific verticals
- 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, to maintain service quality

Appendix

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

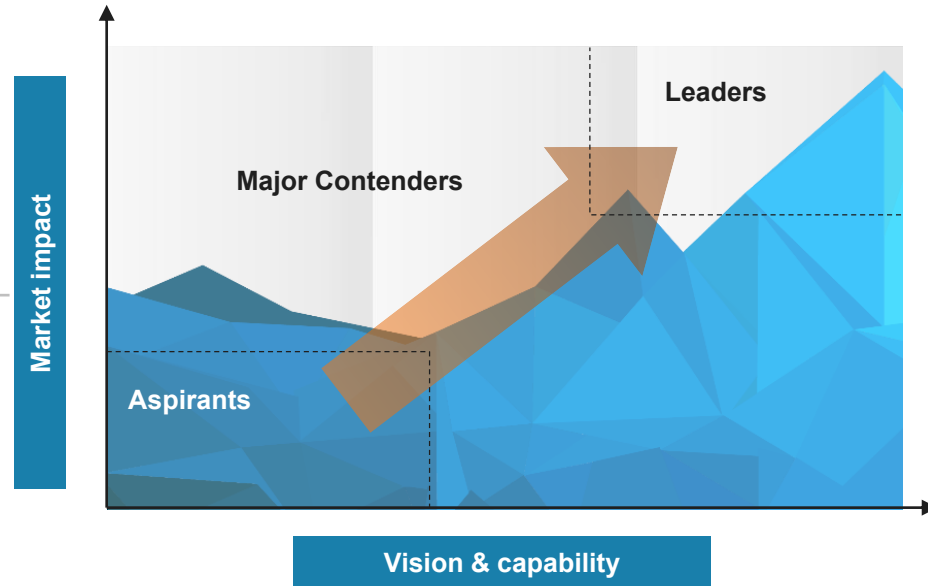
Everest Group PEAK Matrix



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



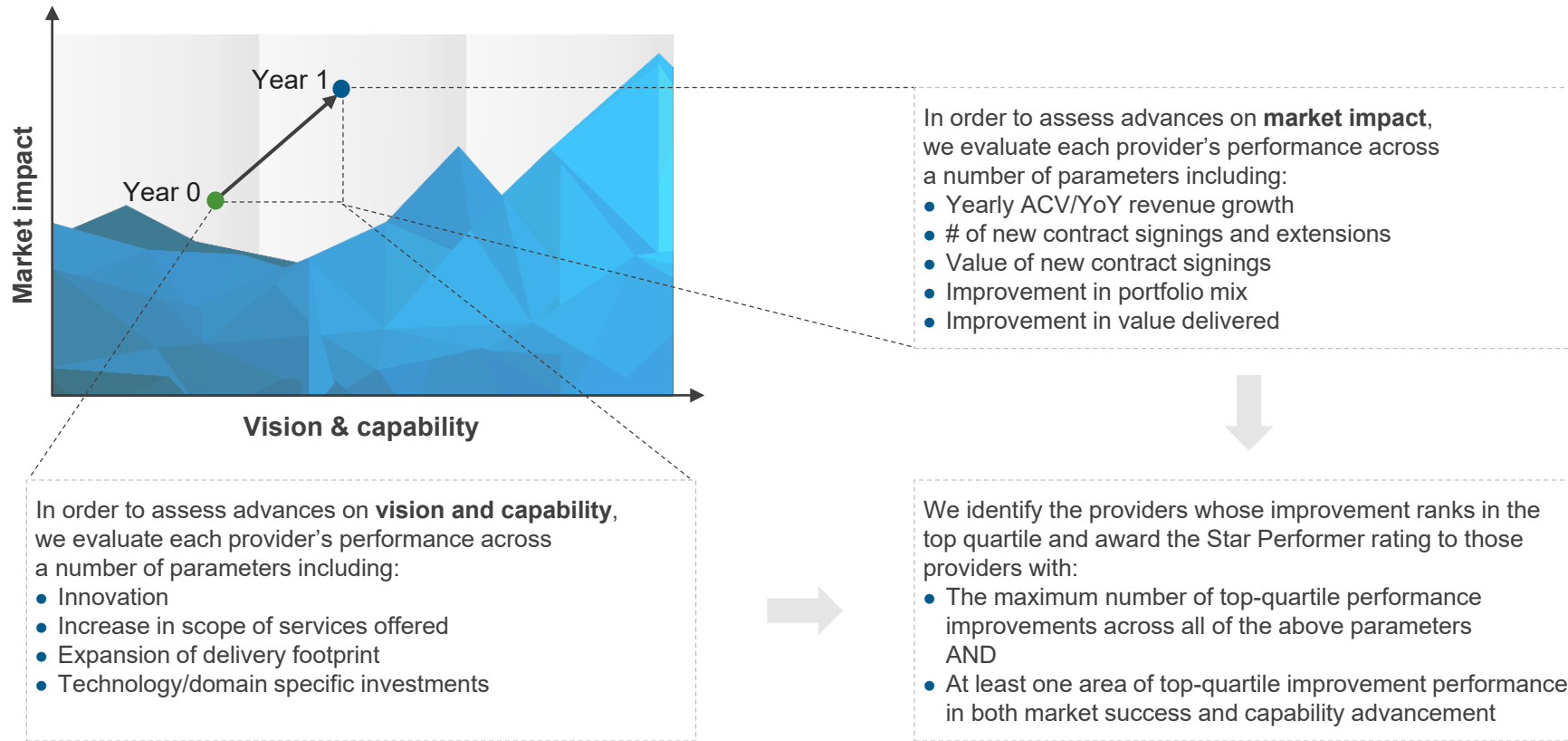
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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



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[®]

With you on the journey

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

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

NOTICE AND DISCLAIMERS

IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.