Everest Group®

Everest Group Cloud Services PEAK Matrix® Assessment 2023 – Europe

Focus on Wipro
October 2023

Everest Group PEAK MATRIX®

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 cloud 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 European market, the cloud adoption strategy is being defined based on regional nuances. There is an increasing demand for sovereign private and hybrid cloud-hosted infrastructure to support enterprises' business enablement and growth. Additionally, there is a continued momentum toward AI-enabled automation and SRE-enabled operations to better manage their multi-cloud environment. Service Providers (SPs) have increased investments in regional delivery centers and are focusing on strengthening their regional partnerships with technology vendors in the public and private cloud space to provide compliant and accelerated cloud transformation services.

In this research, we present an assessment and detailed profiles of 27 cloud SPs featured on Cloud Services PEAK Matrix® Assessment 2023 – Europe. 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 27 leading providers featured on the cloud services PEAK Matrix – Europe:

- **Leaders:** Accenture, Capgemini, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Cognizant, DXC Technology, Deloitte, EPAM, Fujitsu, GFT, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, NTT DATA, Orange Business, Sopra Steria, and Tech Mahindra
- **Aspirants:** Aspire Systems, Sonata Software, UST, Unisys, and Virtusa

Scope of this report

Geography
Europe

Providers
27 cloud SPs

Services
Cloud services

Cloud Services – Europe PEAK Matrix® characteristics

Leaders

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

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

Major Contenders

Atos, Cognizant, DXC Technology, Deloitte, EPAM, Fujitsu, GFT, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, NTT DATA, Orange Business, Sopra Steria, and Tech Mahindra

- While these providers are augmenting their broader cloud capabilities with targeted investments in talent development and partnership ecosystem, their end-to-end integrated cloud transformation capabilities and regional delivery 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, Sonata Software, UST, Unisys, and Virtusa

- 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 – Europe | Wipro is positioned as a Leader

Everest Group Cloud Services PEAK Matrix® Assessment 2023 – Europe[1,2,3,4]
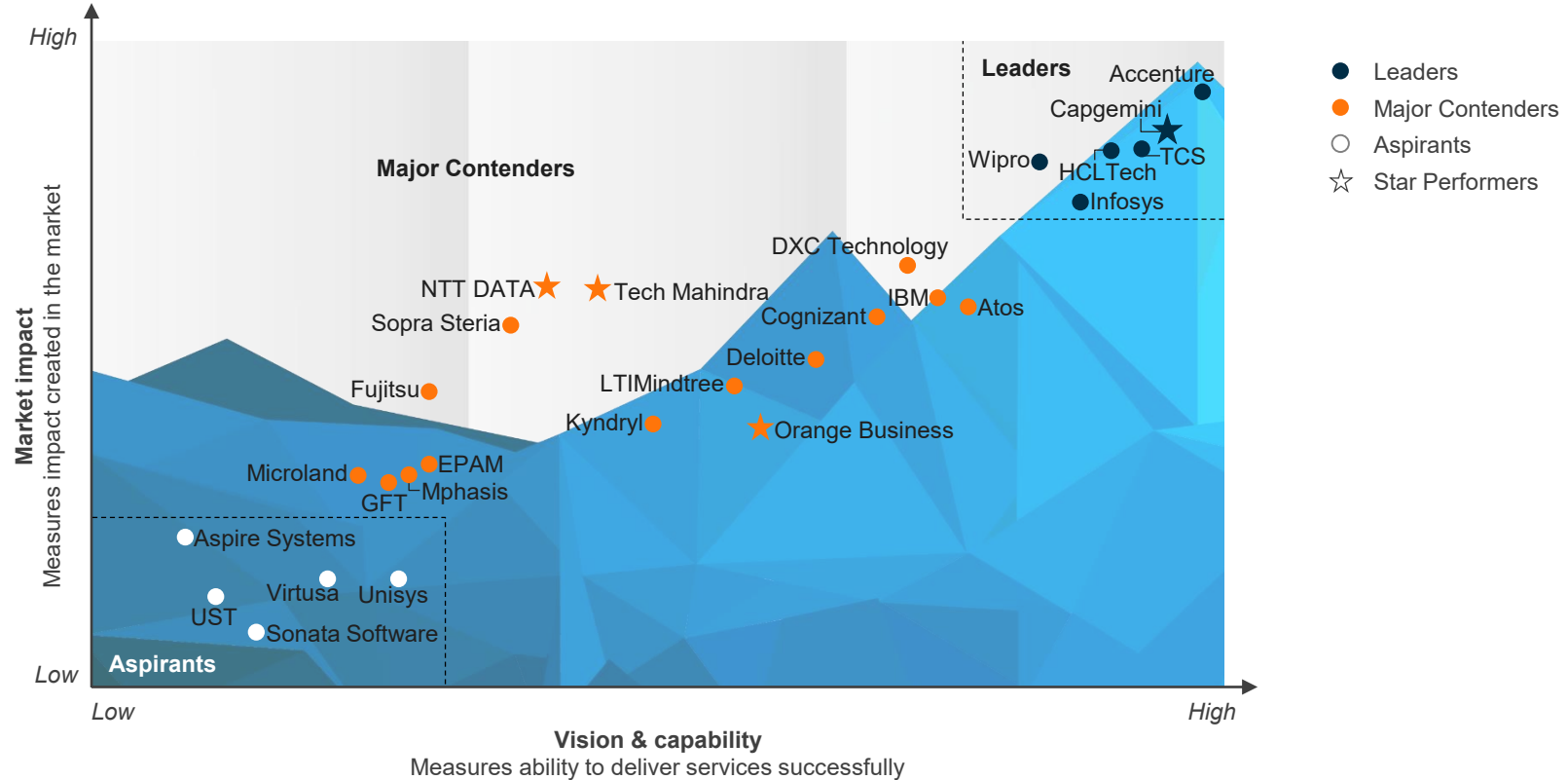
1   Assessments for Cognizant, Deloitte, Fujitsu, IBM, and Sopra Steria excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interaction with buyers
2   Analysis for Atos is based on capabilities before its split into Atos and Eviden
3   Analysis for IBM is based on capabilities after the split into IBM and Kyndryl
4   Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
Source: Everest Group (2023)

Wipro profile – Europe (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)

<US$200 million	US$200-500 million	US$500 million-US$1 billion	>US$1 billion
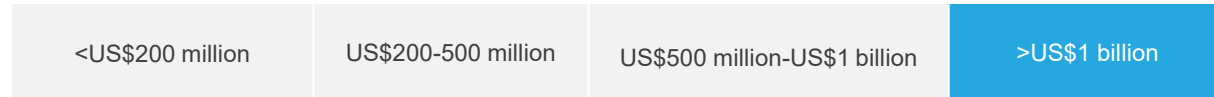
Scope of coverage

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

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

Adoption by industry

BFSI	High	Energy and utilities	Medium	Manufacturing	Low
Healthcare and life sciences	Low	Electronics, hi-tech, and technology	Medium	Telecom, media, and entertainment	Low
Public sector	Low	Retail and CPG	Medium		
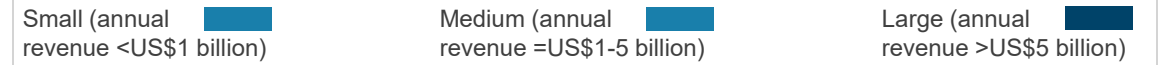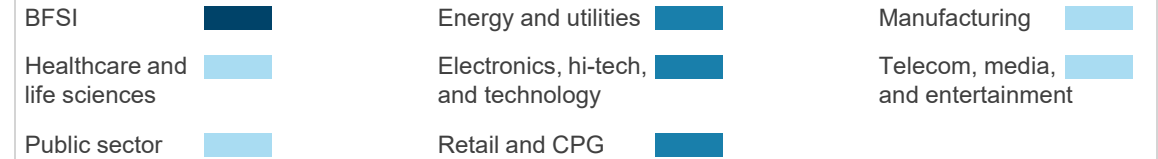
Adoption by service segments

Consulting services	Medium	Cloud infrastructure design/build	Medium	Cloud operating services	Medium
Cloud modernization services	High	Private cloud hosting services	Low	Cloud security services	Low

Adoption by geography

UK & Ireland	High	Nordics	Medium	DACH	Medium
Benelux	Low	France and Southern Europe	Low		
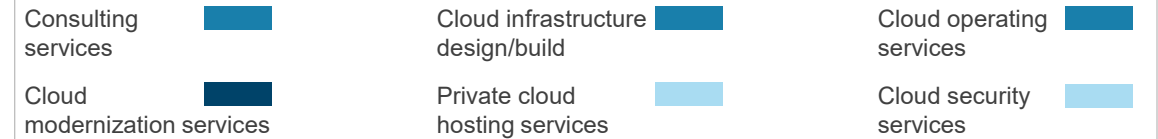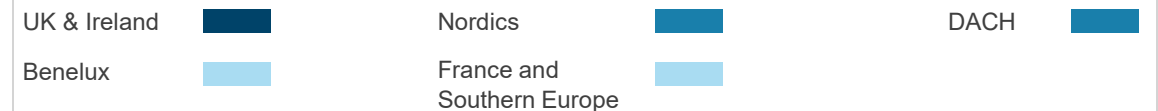
Wipro profile – Europe (page 2 of 6)
Case studies

Case study 1	Transformation of the IT infrastructure to AWS

Client: T-Mobile

Business challenge

The company was running its entire IT from servers hosted in Athens, Greece, and multiple Data Centers (DCs) in the Netherlands, including in cities such as The Hague, and Rotterdam. Multiple DCs and legacy platforms were expensive to maintain and did not allow for much automation or standardization. The old infrastructure was not compliant with the latest security requirements. The distributed, on-premise setup was not scalable, which limited T-Mobile's ability to scale operations as and when needed.

Solution

- Decommissioned the old infrastructure located in DCs across Athens and various parts of the Netherlands
- Transitioned around 65 applications to the AWS Cloud, each with an average of four environments: dev, agile, staging, and production
- Incorporated full-scale security, CI/CD, DevOps, and test automation
- Implemented complete vertical ownership (vertical sourcing) of the various applications and enabled DevOps where possible
- Wipro also leveraged AWS native security tools such as AWS WAF and AWS Security Groups to improve the security control and traffic filtering
- Used a container security solution from Aquasec to provide complete life cycle security and visibility for security risk management and compliance of AWS cloud-native applications

Impact

- Observed incremental revenue through personalized marketing
- Greater application observability increased the productivity and reduced issue resolution time
- Higher quality and more secure code delivery for production while keeping all environments in sync
- Reduced IT spend by 50%

Case study 2	Management of the IT infrastructure on Google Cloud

Client: a multinational investment bank in Switzerland

Business challenge

The client has a complex and decentralized IT landscape, which was running on multiple platforms. It wanted to simplify and streamline its IT landscape through cloud adoption. It was looking to go through a transformation program that could lead to better business benefits.

Solution

- Designed and built the GCVE Private cloud environment
- Enabled provisioning, operating, and maintaining Google Cloud infrastructure configuration, automation, Disaster Recovery (DR), backup, and recovery
- Facilitated scripting for automating repeatable tasks to reduce administrative toil, (provisioning, monitoring, backup, DR-sync, and image creation)
- Undertook administration and database management for PostgreSQL instances hosted on CloudSQL
- Strengthened the client's Google Cloud security by enabling Google Cloud Armor's DDOS and external protection on 10 Google native external load balancers
- Provided managed services for Cloud Armor DDOS service using the Infrastructure-as-Code (IaC) template built by Wipro

Impact

- Improved system resiliency by using reliable availability testing and reporting dashboards
- Reduced operating expense by the consolidation of App server platforms

Wipro profile – Europe (page 3 of 6)
Solutions

Proprietary solutions (IPs/frameworks/accelerators/tools, etc. developed internally to deliver cloud services) (representative list)	
Solutions	**Details**
Wipro Cloud Studio	• A strategic ecosystem integrator leveraging Wipro's platforms, IP, and talent, along with native and niche tools developed by hyperscalers and partners • It acts as an integrated workbench to easily plan, create, design, develop, and manage cloud projects with an automated and industrialized approach and multiple standard blueprints and industry solutions
Wipro Data Intelligence Suite (WDIS)	It enables enterprises to cloudify their ecosystems with AI-/ML-infused accelerators with ready-to-deploy modules, enabling end-to-end automation of the cloud migration and modernization journey, and 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 the cloud platform based on various parameters including regulations and compliance considerations.
Security Management Center (SMC)	• 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)	• 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 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 business units) and ERP to the 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 the 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 – Europe (page 4 of 6)
Partnerships

Partnerships (representative list)	
Partners	**Details**
Microsoft	• 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	• 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 – Europe (page 5 of 6)
Investments and recent activities

Investments (representative list)	
Investments	**Details**
CoEs	It invested in CoEs to develop solutions and capabilities covering hybrid cloud, Software Defined Everything (SDx), VirtuaDesk™ (VDI), and partner collaboration.
Learning initiatives	• 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	• 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
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 – Europe (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

- 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 the right fit for enterprises seeking strong capabilities and proof points for cloud security due its various offerings such as Wipro Cloud Platform Security and Smart Cloud Defense Service, augmented by its recent acquisition of Edgile

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

Limitations

- Wipro might not be the right fit for enterprises seeking delivery talent in close geographical proximity as it lags peers in onshore and nearshore delivery presence

- Enterprises looking to engage with an SI for requirements around sovereignty and sustainability might not find Wipro a good fit due to its limited capabilities and investments in these areas

- Those seeking delivery presence in France, Nordics, and the Benelux regions may not find Wipro a good fit as its geographical presence and market focus is centered mostly around the UK&I and DACH in Europe

- Some clients have highlighted that Wipro needs to strengthen its talent management and budget planning capabilities in cloud services engagements

Appendix

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

Everest Group PEAK Matrix
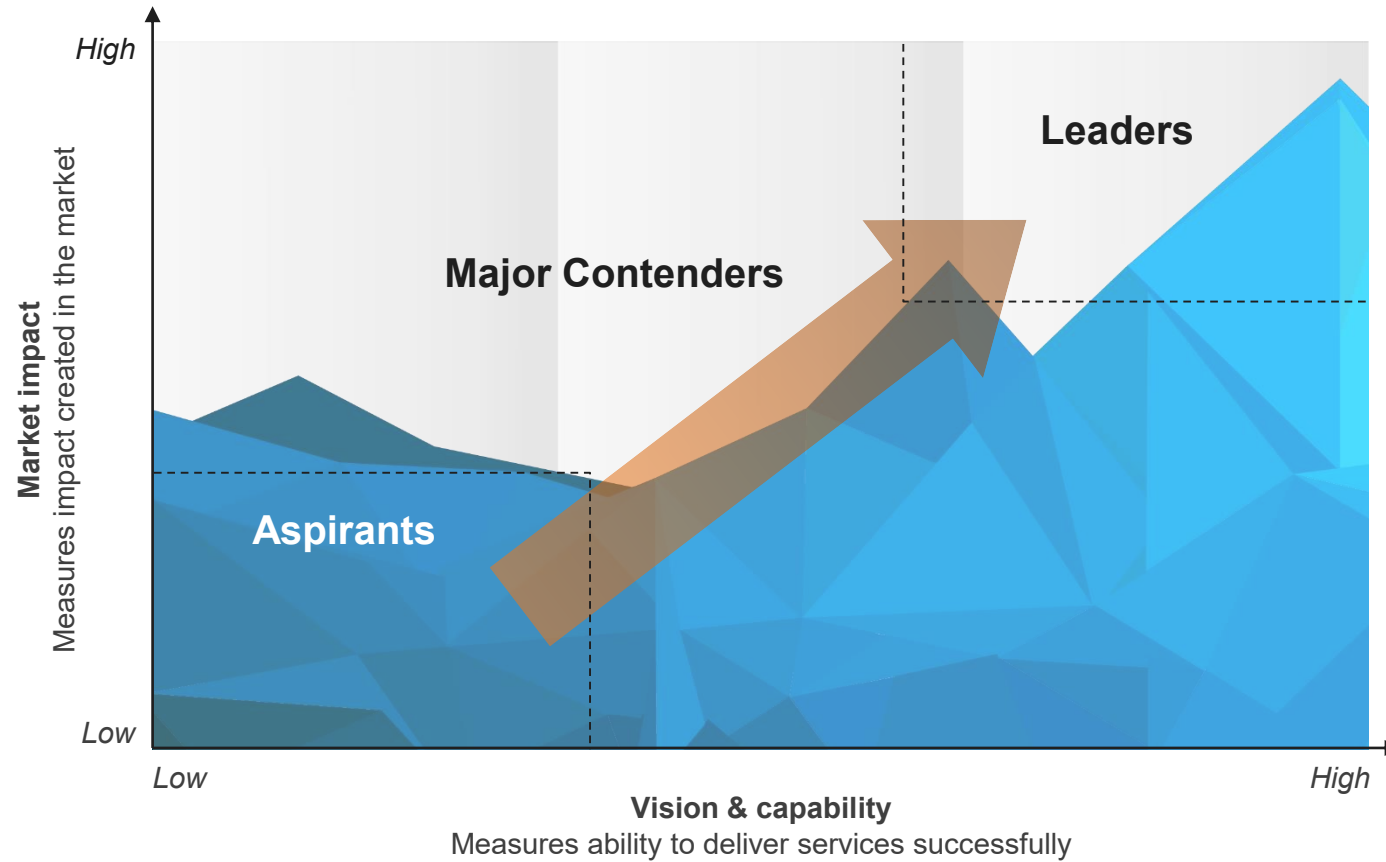
Services PEAK Matrix® evaluation dimensions

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

Market impact

Leaders

Major Contenders

Aspirants
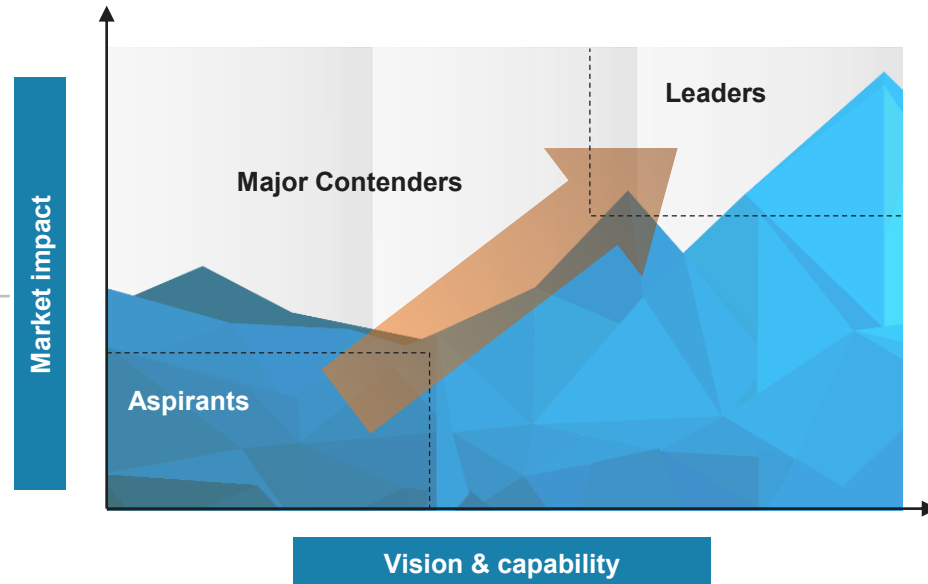
Vision & capability

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

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

Market impact (y-axis)

Year 1

Year 0

Vision & capability (x-axis)
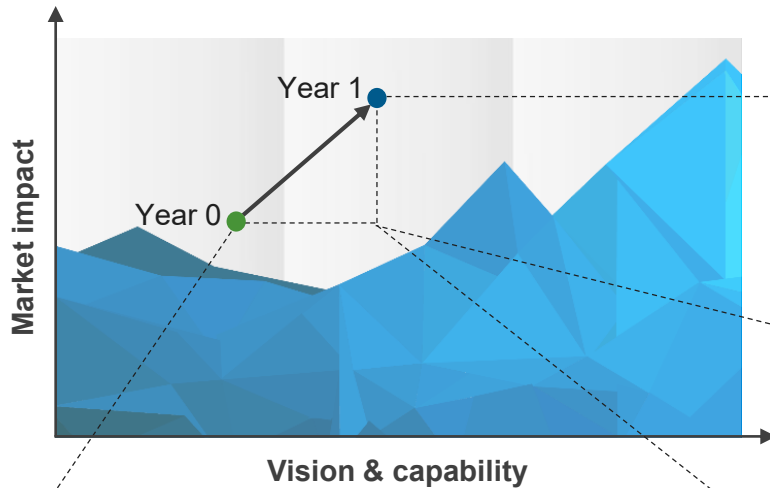
In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:
- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

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 in 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**.

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