

Everest Group PEAK Matrix[®] for Data & Analytics Service Providers 2020

Focus on Wipro
September 2020



Background and scope of the research

The ecosystem of D&A players has succeeded in educating the market on the supremacy of evidence-based decision-making over traditional gut-based and thumb rule-based approaches. Consequently, the debate today has upgraded to ROI of D&A investments and scalability of initiatives. While enterprises have seen D&A investments translate into improved business outcomes and customer and employee experience, organizations are still failing to achieve the full benefit owing to the adoption of D&A programs in pockets, lack of data skills across the enterprise, and inefficient/unoptimized data management practices. In this regard, service providers can help enterprises formulate a central vision for D&A, streamline investments, modernize the data landscape, and upskill enterprise users to achieve multiple outcomes through coherent and enterprise-wide data-driven decision-making.

In this context, we present an assessment and detailed profiles of 28 service providers featured on the D&A services PEAK Matrix® 2020. Each service provider profile provides a comprehensive picture of its services focus through a snapshot of its relative capabilities across assessment parameters, key strengths, and areas of improvement, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2019, interactions with leading D&A service providers, client reference checks, and ongoing analysis of the D&A services market (refer to slide 8 for key sources of information).

This report includes the profiles of the following 28 leading D&A service providers featured on the D&A PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro
- **Major Contenders:** Atos, Birlasoft, Coforge, DXC Technology, EY, HCL, Infosys, KPMG, LTI, Mphasis, NTT DATA, PwC, Stefanini, Tech Mahindra, and Virtusa
- **Aspirants:** Datamatics, Happiest Minds, Sonata Software, UST Global, and Zensar

Scope of this report:



Geography
Global



Service providers
28 leading D&A service providers



Services
D&A services

D&A services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro

- Leaders have displayed a vision focused on driving business outcomes through D&A services for their customers
- They made sustained strategic investments to bridge the portfolio gaps to achieve full services play
- They are at the forefront of innovation and driving change with thought leadership, partnerships, and internal investments in emerging themes such as AI-scaling, intelligent data management, data landscape modernization, democratization, and data literacy
- Leaders have invested heavily in building structured internal talent development programs to ensure the availability of skilled talent to solve complex problems. They also focus on the breadth of skills, enabling full services play by developing a range of certification programs that help them stay ahead as technology evolves
- Leaders have developed a range of integrated platforms along with industry- and use case-specific accelerators to cut down the trial and run phase to achieve faster outcomes
- Domain focus and willingness to share risk and returns through value-based pricing models have further differentiated them in stakeholder partnerships

Major Contenders:

Atos, Birlasoft, Coforge, DXC Technology, EY, HCL, Infosys, KPMG, LTI, Mphasis, NTT DATA, PwC, Stefanini, Tech Mahindra, and Virtusa

- Major Contenders have shown high confidence in their sweet spots within the D&A stack. They have a strong base of satisfied clientele within these areas
- Major Contenders have the vision to develop full services play and are investing in talent development programs, acquisitions, IP building, and a partnership ecosystem to enable the same
- They need to supplement their vision and investments with effective communication of success on transformative end-to-end D&A deals to enhance their market perception

Aspirants:

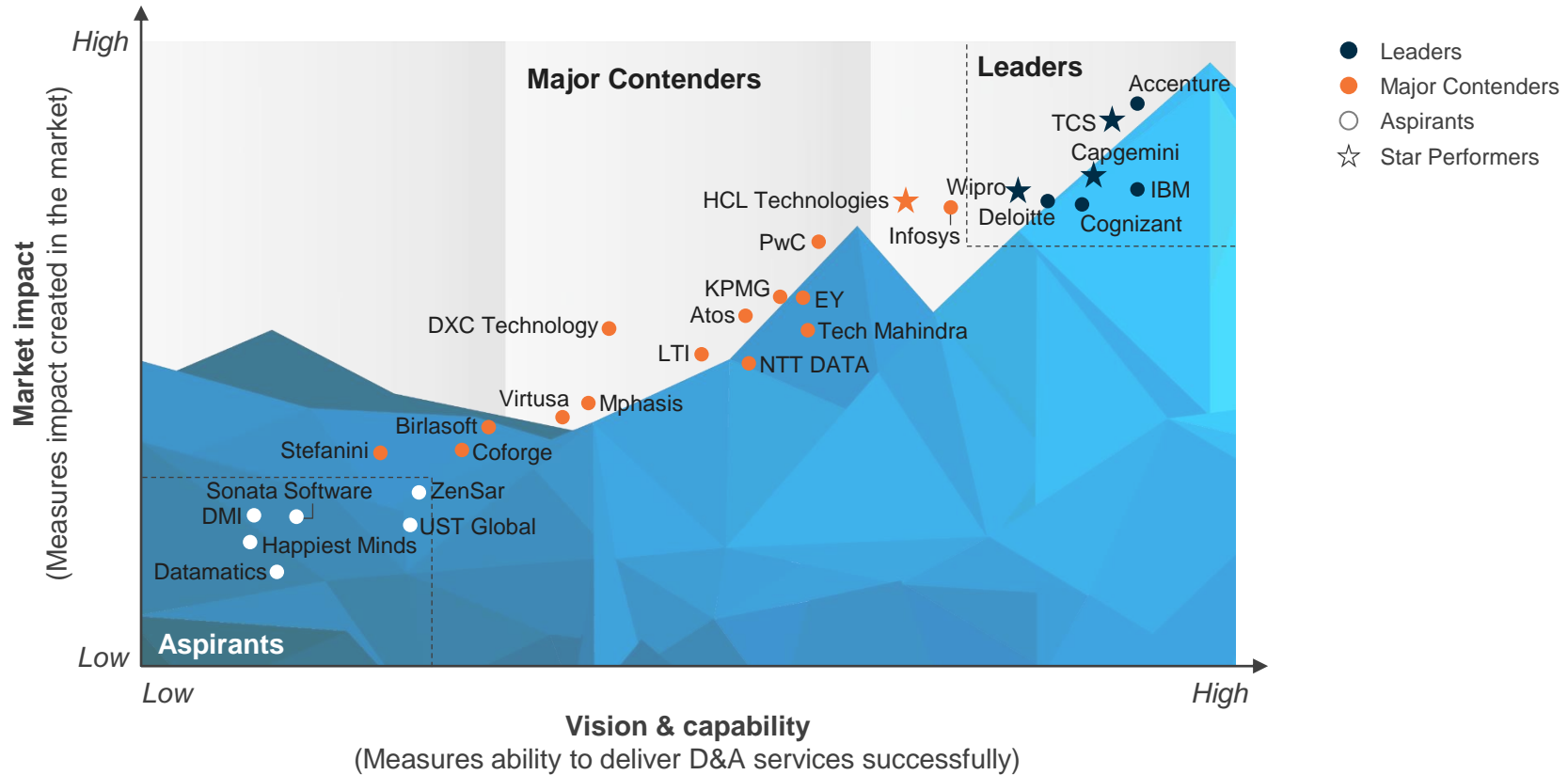
Datamatics, DMI, Happiest Minds, Sonata Software, UST Global, and Zensar

- They aim to focus on creating solutions beyond niche areas; most engagements are based on flagship tools and solutions. The majority of investments are also directed toward upgrading and improving the features of these flagship solutions

Everest Group PEAK Matrix®

Data and Analytics (D&A) Services PEAK Matrix® Assessment 2020 | Wipro features as a Leader and Star Performer

Everest Group Data and Analytics (D&A) Services PEAK Matrix® Assessment 2020



Note 1 PEAK Matrix specific to Data & Analytics services

Note 2 Assessment for Atos, Deloitte, DXC Technology, EY, Infosys, KPMG, NTT DATA, and PwC excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of service providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Wipro | D&A services profile (page 1 of 5)

Overview

Company overview

Wipro Ltd (Wipro) is a provider of IT, consulting, and BPO services. The company also offers Information, Communication, and Technology (ICT) solutions, environment-centric solutions, and energy management services. The company classifies its business operations into three reportable business segments – IT services, IT products, and ISRE. It has business presence across Asia Pacific, Europe, Middle East, Africa, and the Americas.

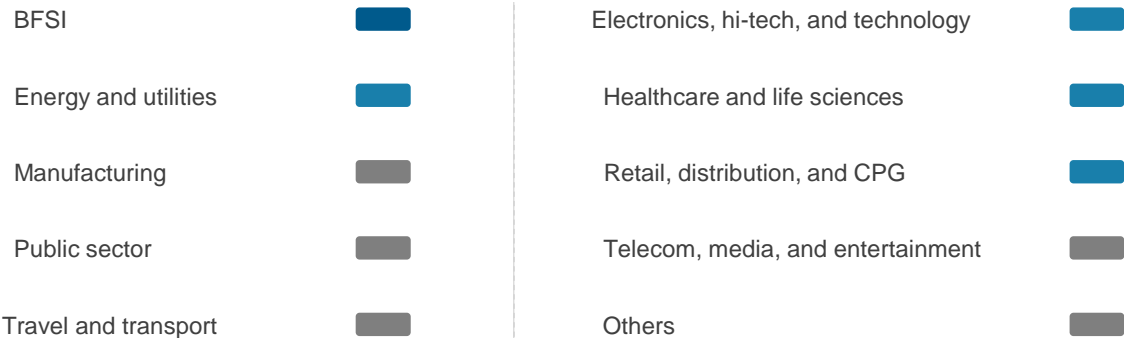
Key leaders: Thierry Delaporte (CEO); Bhanumurthy B M (COO); K R Sanjiv (CTO); Rajan Kohli (President and Global Head, Wipro digital & consulting); Jayant Prabhu (VP and Global Head, Data, Analytics & AI)

Headquarters: Bangalore, Karnataka, India

Website: www.wipro.com

Percentage of revenue by industry

■ High (>25%) ■ Medium (10-25%) ■ Low (<10%)



D&A practice fact sheet

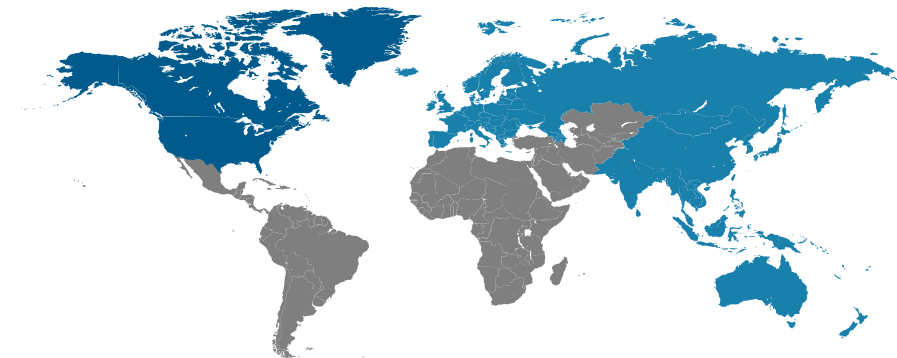
	2018	2019
D&A revenue (US\$ million)	1,655	1,972
D&A FTEs	19,821	23,458

D&A practice overview

- Wipro has a broad portfolio of D&A & AI offerings – with vertical-specific solutions and a strong partner ecosystem to deliver effective services across the D&A stack
- It has partnered with many niche technology start-ups and academic institutions to provide innovative D&A/AI solutions to customers and to strengthen its AI frameworks
- It focuses on infusing AI into business processes, to increase the adoption and outcomes in the customers' journey to become an Intelligent Enterprise (IE)
- **Buyer size:** The majority of deals are signed with large market clients with an annual revenue of >US\$5 billion

Percentage of revenue by geography

■ High (>25%) ■ Medium (10-25%) ■ Low (<10%)



Wipro | D&A services profile (page 2 of 5)

Key delivery locations



Note: Wipro has few other D&A delivery centers present across India, South America, North America, Africa. APAC, Europe, and the Middle East

Wipro | D&A services profile (page 3 of 5)

Solutions

D&A IP overview

- Wipro works toward ensuring operational efficiencies through an asset-based approach for its customers. Starting with an advisory focus, Wipro has a seven-step advisory framework that leverages its consulting assets such as Metro Map, Intelligent Enterprise Blueprints, and Change Management Framework
- Wipro uses its automation IP Wipro HOLMES to automate clients' business processes. It uses a collection of industry-focused and persona-based apps to deliver actionable insights using Data Discovery Platform (DDP)
- It provides analytics experimentation platform, Data Science Accelerator (DSA), to accelerate hypothesis development for organizations, and SNIPE for BI transformation to deliver contextual, actionable, and impactful insights
- To enable data transformation, it has a suite of IPs called Intelligent Data Engineering Accelerators (IDEA)-CDRS, IQNxt, NextGen DI, and SDH that provide concurrent, curated, and consolidated data. It also has industry-focused products and platforms such as NetOxygen, HPS, Looking Glass, Promax, AutoInsights, and Smart i-Connect to provide curated solutions for particular industries
- It is developing IPs around the latest technologies such as homomorphic encryption, 6G, neuromorphic computing, partisan speech, quantum-based mixed reality simulator, and blockchain

Proprietary IP/solutions/frameworks/accelerators/tools developed internally to deliver D&A services

Solution name	Solution type	Year launched	Details (include value proposition)
DDP	Platform	2017	It is a collection of apps that caters to business personas across five major themes (customer, finance, human resource, assets, and compliance) in various industries. Cognitive features of the platform include supervised/unsupervised Machine Learning (ML), Natural Language Processing (NLP), and chatbots capabilities for image, text, voice, and video analytics. It helps solve business challenges with speed, scale, and skills toward achieving a data-driven culture
IQNxt	Framework/accelerator	2016	An AI-infused service offering that can enable organizations to profile, cleanse, and manage information from various sources and move the organization up the information value chain. It enables business & IT subject matter experts to obtain data quality insights through configurable business rules
Wipro HOLMES	Platform	2015	An AI platform, Wipro HOLMES accelerates the digital journey of enterprises and enhances operational efficiency, effectiveness, and user experience across key business processes. It enables ease of consumption and governance through the marketplace

Key partnerships

ERP



Data integration, preparation, and governance



Cloud and Big Data



BI and visualization



Others



Wipro | D&A services profile (page 4 of 5)

Investments and market success

Other investments to enhance D&A services capabilities, e.g., setting up of new delivery centers / CoEs / innovation labs, trainings/certifications, etc.

Development	Details
Talent	Wipro develops its talent in data engineering and AI skills such as AI/ML, Python, Cloud, big data, and SQL through various upskill and cross-skill programs
CoE/labs	Development of analytics innovation hub, computer vision lab, advanced analytics lab, AI labs, digital pods, and automation lab
Acquisitions	<ul style="list-style-type: none"> In 2020, acquired Rational Interaction, a digital Customer Experience (CX) company with focus on Chief Marketing Officer (CMO) and marketing suite personas. It helped the company's clients to create an ecosystem of connected touchpoints across the customer journey and enable CMOs to scale for future In 2019, acquired International Techne Group Incorporated (ITI), a digital engineering, and manufacturing solutions company. ITI added to Wipro's core strengths in Industry 4.0 and allowed it to offer end-to-end solutions in digital engineering and manufacturing In 2018, acquired Syfte, an Australian design agency with human-centered design thinking and service design capabilities. It extended Wipro's ability to take a design-led approach to business and technology transformation
Investments	<ul style="list-style-type: none"> In 2020, invested in Yugabyte, an open source, distributed SQL database for global, internet-scale applications with low query latency, offering unique solutions for cloud native consumer-facing applications that need high performance, high availability, and geography distribution In 2019, invested in Incorta, a real-time analytics platform designed to aggregate large and complex business data. It eliminates the intermediate steps required to build a data warehouse










Recently announced D&A engagements (non-exhaustive)

Client	Year of signing	Geography	Engagement details
A Europe-based global financial services firm	Not disclosed	Europe	Helped the client upgrade its legacy solution and provided a single consolidated platform for anti-money laundering and trade surveillance across geographies – EMEA, Americas, and APAC. The implementation spanned business consulting, development, and maintenance support. This led to 15% reduction in time-to-market for each application/source system with reusable components and 25% reduction in report-related production incidents
An American healthcare technology leader	Not disclosed	The US	Developed an enhanced AI & analytics roadmap by conducting value discovery workshops. The implementation optimized the supply chain process by providing end-to-end solution from forecast-to-delivery, and further helped to benchmark KPIs using IP Data Discovery Platform (DDP), leading to accelerated implementation. This resulted in increased forecast accuracy of injection systems by 10%
A global pharmaceutical company	Not disclosed	Not disclosed	Executed data migration services leveraging Wipro-patented Data Migration Factory Framework, replacing client's legacy ERP systems, to optimize the execution cost without compromising on quality and regulatory compliance. This resulted in reduction in data migration operation cost by 60% and enabled 85% revenue recognition across pharma and consumer divisions. It enabled 20% reduction in time-to-market and increased efficiency and optimized the procurement process

Wipro | D&A services profile (page 5 of 5)

Everest Group assessment – Leader and Star Performer

Measure of capability:  High  Low

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 has a wide portfolio of offerings across the D&A value chain with technical expertise as a key differentiator. An asset-based approach strengthen its implementation capabilities – DDP for insights transformation, HOLMES for automation, and multiple industry-specific offerings
- Proactive investments in innovative talent building initiatives such as TopGear and crowd sourcing facilitated by Topcoder have enabled Wipro onboard talent quickly and ensure availability and flexibility of skilled resources. Wipro’s responsiveness to the proliferating digital skills gap and ability to onboard talent quickly is resonating well with clients
- Given its investments in areas such as AI-infused data quality, MDM, and lineage supported by partnership with established and emerging technology vendors in AI-driven data transformation, Wipro is in a competitive position to deliver on emerging demand for intelligent data management
- There is strong focus on innovation through Open Innovation initiatives leveraging partnerships with start-ups, academia, and niche technology consortia. It has also invested in multiple emerging D&A start-ups (Incorta, Moogsoft, etc.) through its strategic investment arm, Wipro Ventures
- Clients appreciate the quality of services provided by Wipro with respect to agility, ownership-driven culture, and professionalism showcased across engagements

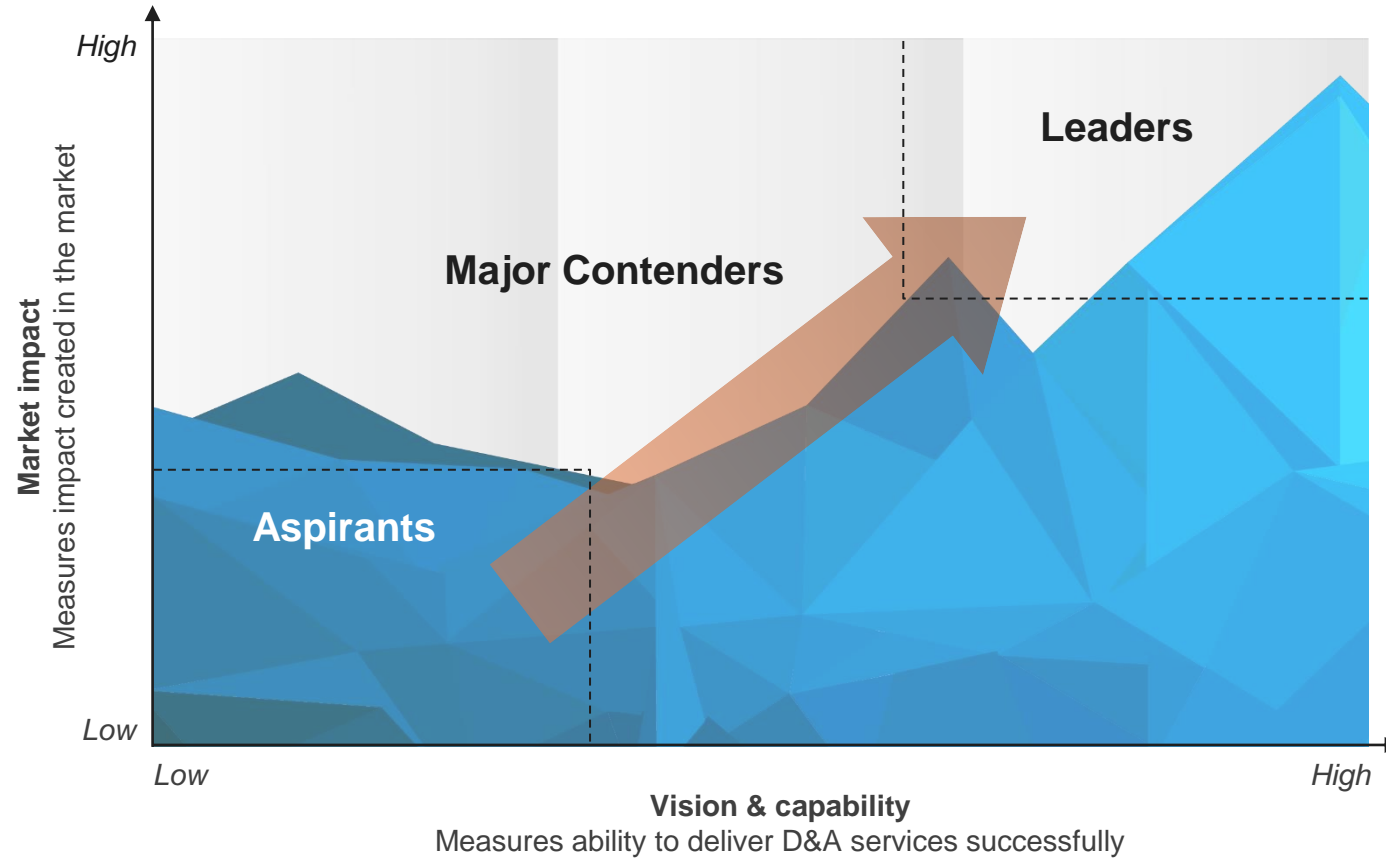
Areas of improvement

- While referenced clients appreciate the technical expertise of Wipro’s resources, they feel domain expertise, communication skills, and proactive strategic value-addition capabilities are the key areas of improvement
- Due to lack of brand recognition in the high-end data analytics space, Wipro’s consulting-led solutioning discussions do not generate enough credibility with clients
- Clients feel there is often a disconnect between its solutioning teams and delivery leadership, leading to unanticipated delays in delivery commitments
- Despite proactive investments in transforming its market messaging around business outcome-focused offerings to effectively cater to evolving client expectations, market success and perception of these initiatives remain untested

Appendix

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

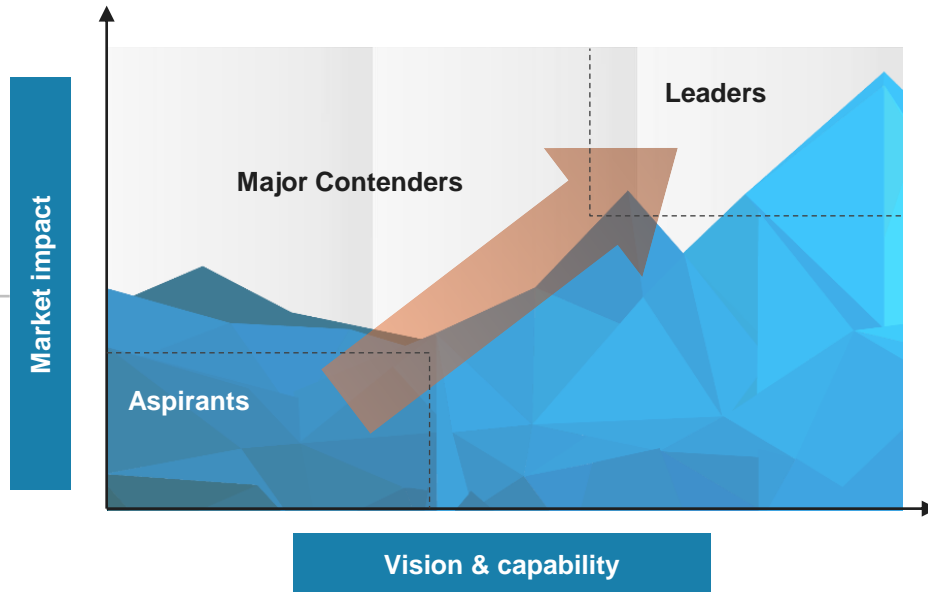
Everest Group PEAK Matrix



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



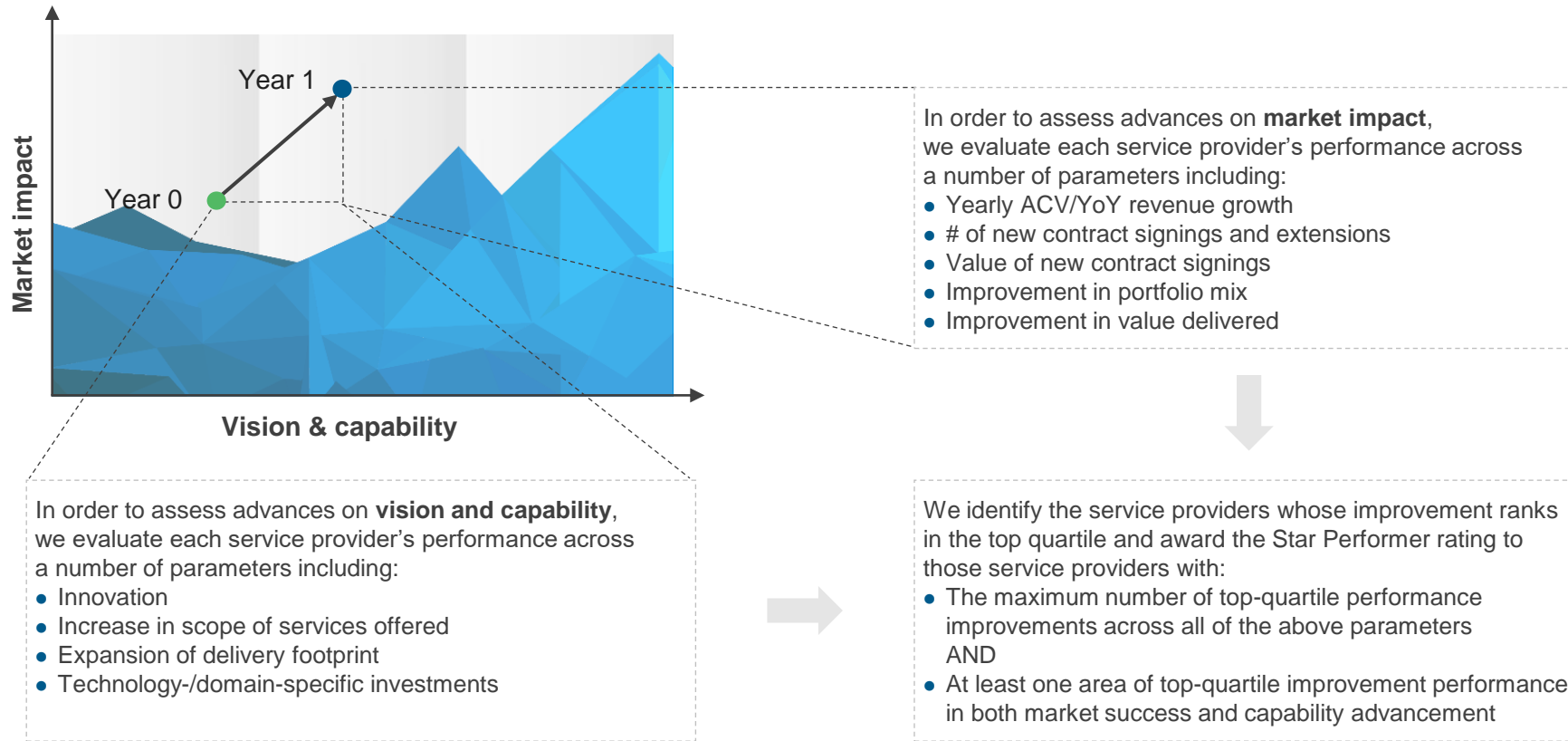
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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, and M&A
- 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 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 in / 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 marketplace, 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 the present and future needs of 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



With you on the journey

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