



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America

Focus on Wipro
September 2023



Background of the research

- With the ongoing changes in the workplace, various trends have driven transformations. The upcoming years are poised to be remarkable for the digital workplace, marked by the third wave of value-centric transformation. This phase will see enterprises adopting a fully digital future of work, prioritizing improved employee experience, value realization, productivity, cost efficiency, and workplace cohesion. Realizing this goal would require collaboration with suitable Service Providers (SPs)
- In North America, existing economic headwinds such as increasing inflation, banking crisis, a steep rise in interest rates, and intense competition for talent have prompted enterprises to scrutinize their spend and intensify their focus on business value outcomes and value creation throughout their workplace transformation journey. At the same time, there is a growing interest in industry-specific workplace solutions, AI-driven innovations, and product-oriented approaches. SPs are focusing on strengthening their capabilities to aid enterprises in their workplace engagements
- In this research, we present an assessment of 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – North America

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

This report includes the profiles of the following 26 leading digital workplace providers featured on [Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America](#):

- **Leaders:** Cognizant, HCLTech, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

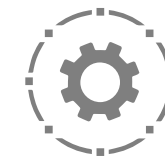
Scope of this report



Geography
North America



Providers
26 leading digital
workplace service
providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® – North America characteristics

Leaders

Cognizant, HCLTech, Infosys, NTT DATA, 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 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 end users
- 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 service cost optimization

Major Contenders

Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones

- 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

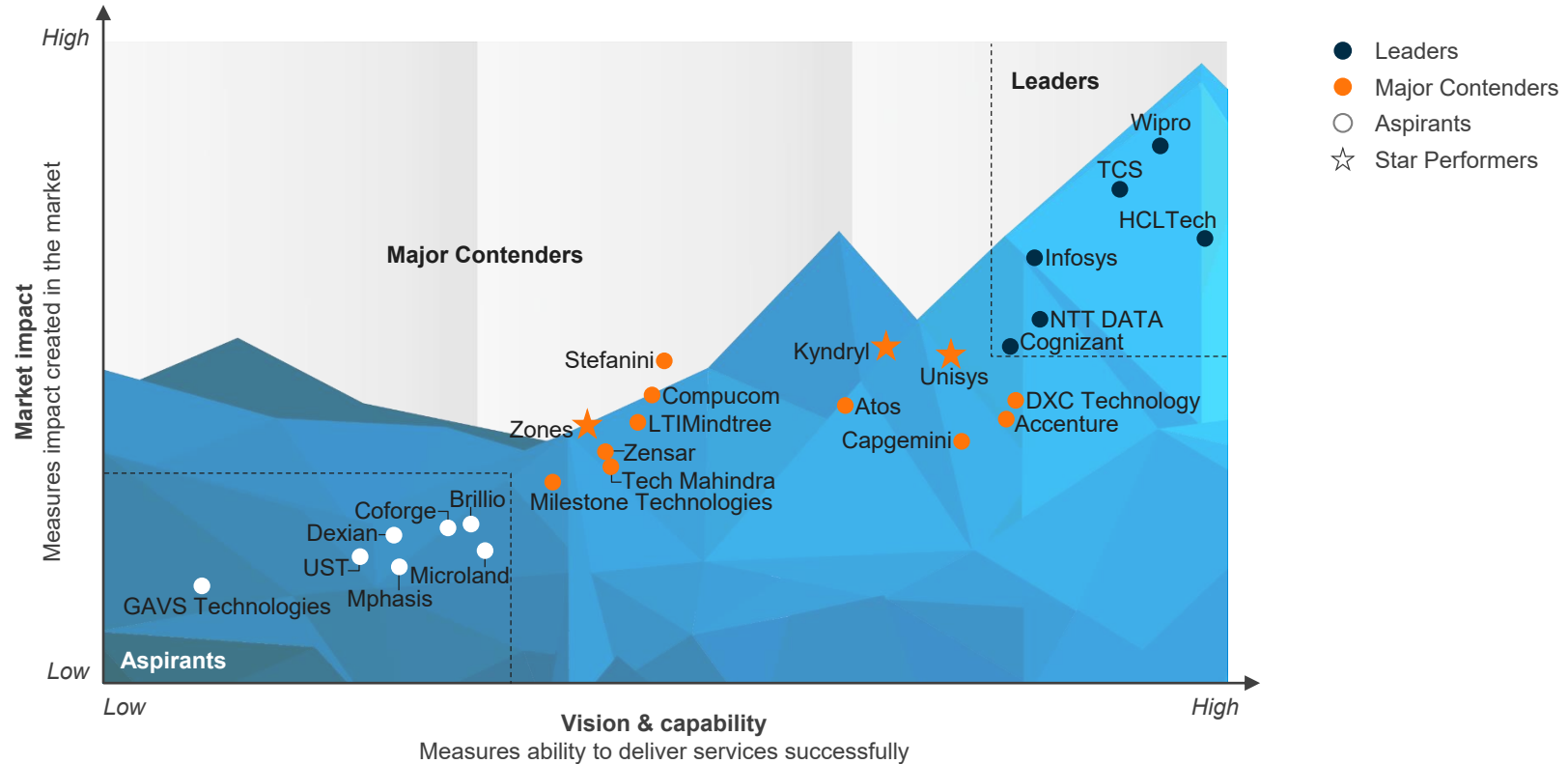
Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

- 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 – North America | Wipro is positioned as a Leader

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



1 Assessments for 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)

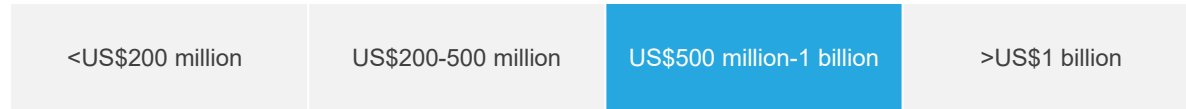
Wipro profile – North America (page 1 of 5)

Overview

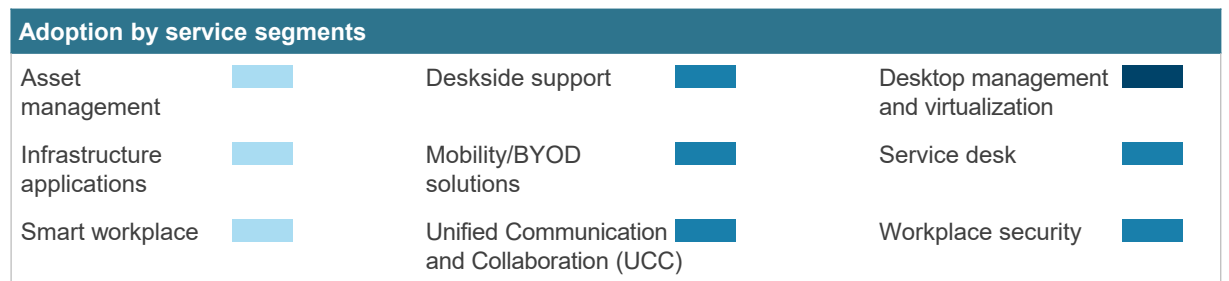
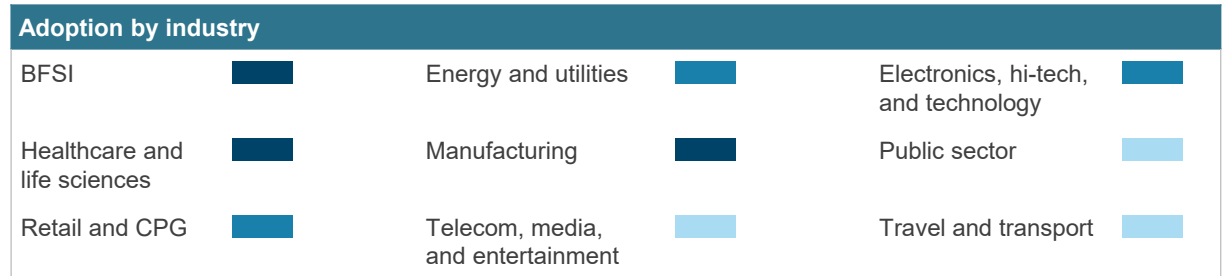
Digital workplace services vision

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%)



Source: Everest Group (2023)

Wipro profile – North America (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, IoTNEXT, Consulting Model, ExperienceNXT for digital adoption, Windows 11 as a service, wiMigrate, and Viva.

Wipro profile – North America (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
Nextthink	Leverages Nextthink’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
Qualtrics	Leverages Qualtrics platform for employee experience measurement
Walkme	Leverages this partnership for enterprise-wide digital adoption and to increase employee productivity

Other digital workplace partnerships include 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 – North America (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 – North America (page 5 of 5)

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

- Wipro has undergone organization restructuring with the aim of focusing on high-growth segments, and is trying to build an app and cloud-led workplace narrative to position itself as a strategic partner of choice for cloud-led workplaces
- Wipro has bolstered its workplace consulting expertise through strategic acquisitions and investments. As a result of these moves, the company has achieved tangible success, particularly in the area of experience transformation services
- Enterprises would benefit from its strong focus on delivering value via total experience management, augmented through offerings such as ExperienceNXT and myUniHub
- Enterprises seeking support for frontline workers would benefit from Wipro's Live Workspace™ MetaEX offering which provides immersive experiences with metaverse for frontline workers
- Wipro has built a generative AI foundry to enable it to build business solutions specific to workplace services
- 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

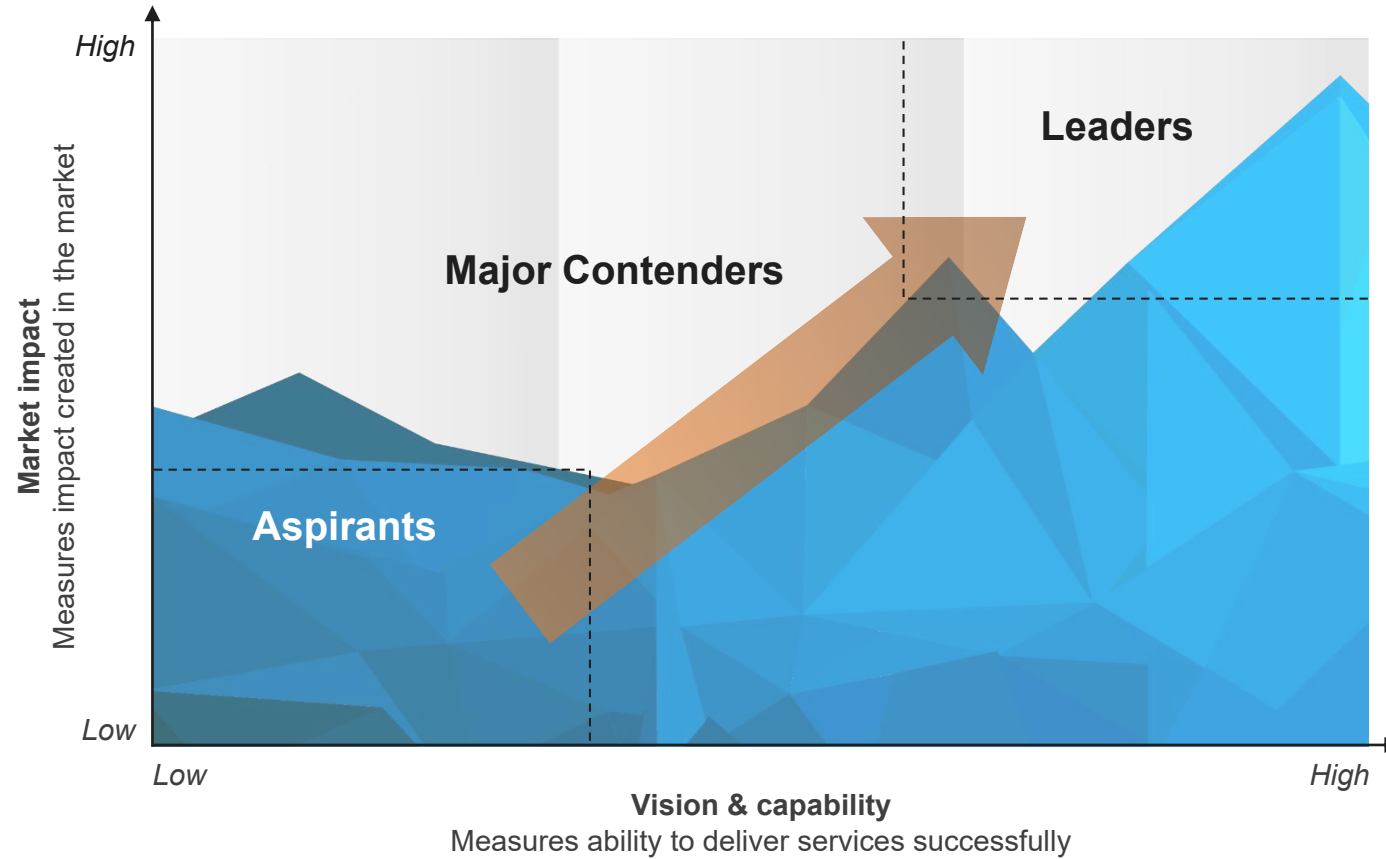
Limitations

- Wipro IP and solutioning approach lacks robustness and expertise. While a lot of solutioning and IP may work in specific scenarios with less than expected benefits in other cases
- Wipro needs to embed client context in its pitch, and focus on client-centric transformation
- Wipro has a greater focus on large deals which might not resonate well with the small and midsize enterprises
- Enterprises from the telecom, media and entertainment, public sector, and travel and transport verticals should carefully evaluate Wipro's capabilities and market impact in their respective verticals
- Clients have experienced gaps in its transformation pitch versus actual implementation and value realization based on the proposed transformations
- Some clients have highlighted staffing issues such as retention and lack of backfill resources, as some of the key areas of improvement
- Some clients have expressed displeasure over the technical expertise of the resources

Appendix

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

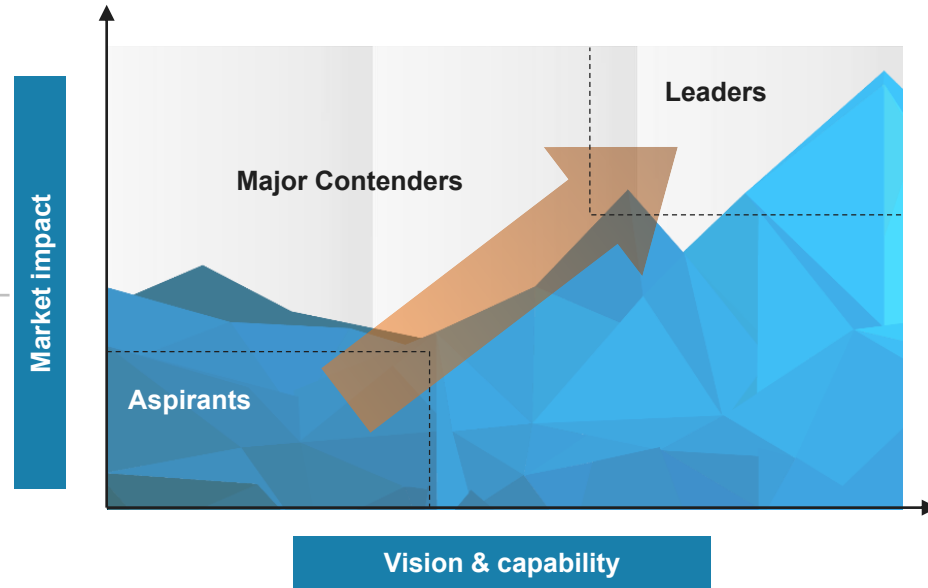
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



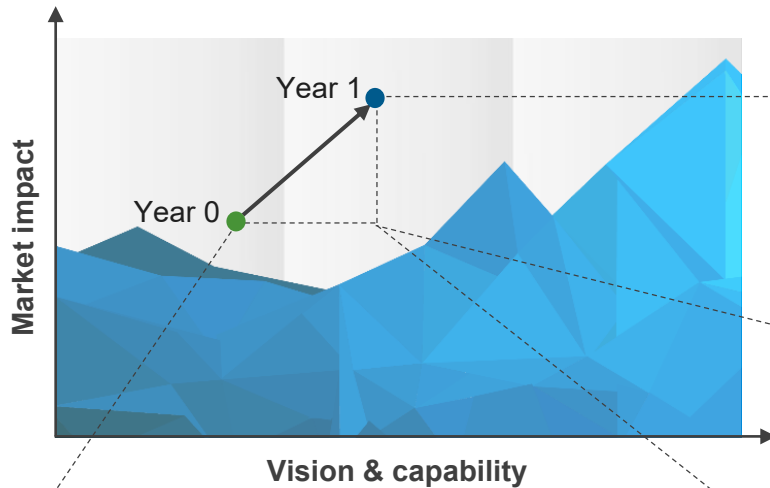
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.



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

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