



Everest Group Digital Workplace Services PEAK Matrix[®] Assessment 2024 – Europe

Focus on Wipro
September 2024



Introduction

Aftermath a period of substantial growth, the digital workplace market has witnessed a period of slowdown largely in turn to the prevalent global macroeconomic conditions which has accelerated the cycle of realization among enterprises who are now striving toward realization of their prior investments. However, the upcoming years are poised to witness a resurgence in enterprise investment trends. Notably, this resurgence will be marked by a heightened emphasis on a strategic combination of cost optimization and transformative initiatives. At the forefront of this paradigm shift stands the integration of generative Artificial Intelligence (gen AI), signifying a pivotal force driving change within the organizational landscape.

In the European digital workplace market, while there has been an increased focus on cost optimization, improving Employee Experience (EX) remains the top priority, with added focus on maintaining an ideal mix of global and local service delivery to deal with the cultural nuances. While also dealing with increasing regulatory and compliance restrictions, dynamic sustainability mandates, and complex vendor landscapes

Digital workplace service providers are focusing on strengthening their geographical capabilities while offering enterprises industry-specific and persona-specific solutions that follow a security-by-default approach and ESG compliance. Additionally, providers are enhancing their consulting and advisory capabilities to position themselves as strategic partners to their enterprise customers.

In the research, we present an assessment of 23 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe](#).

The full report includes the profiles of the following 23 leading digital workplace providers featured on Digital Workplace Services PEAK Matrix – Europe:

- **Leaders:** Accenture, Capgemini, DXC Technology, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys
- **Aspirants:** Microland, Mphasis, UST, and Zensar

Scope of this report

Geography: Global

Industry: 23 leading digital workplace service providers

Services: Digital Workplace services

Digital workplace services PEAK Matrix® characteristics

Leaders

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

- Leaders continue to showcase high expertise and experience in delivering end-to-end workplace engagements, while maintaining client satisfaction through their balanced portfolio, coherent vision, and robust suite of agnostic and contextualized IP and solutions, supported by skilled talent and strong delivery capabilities
- Further these providers have been able to effectively leverage next-generation themes such as copilot and generative AI, backed by their expansive partnerships with technology vendors, niche providers, and start-ups to co-create solutions and engage in joint Go-to-market (GTM) in this space to deliver quick business outcomes to enterprises
- However, despite this, Leaders face tough competition from Major Contenders in both retaining and winning new deals and must continue to enhance their capabilities to offer clients unique benefits

Major Contenders

Atos, BT Group, Cognizant, Computacenter, Fujitsu, Kyndryl, Lenovo, LTIMindtree, NTT DATA, Stefanini, T-systems, and Unisys

- While these providers continue to strive to augment their broader workplace capabilities with targeted investments in developing their suite of IP and technology, delivery capabilities, and partnership ecosystem, their end-to-end workplace services capabilities continue to have some visible gaps
- Further, while these providers have built meaningful capabilities across workplace segments, their portfolio and delivery capabilities are not as balanced as those of Leaders, which is reflected in their relative market success
- However, these providers continue to make targeted investments in enhancing their talent skills, delivery frameworks, internal IP, and partnerships to address capability gaps, positioning themselves as strong contenders to Leaders in workplace services

Aspirants

Microland, Mphasis, UST, and Zensar

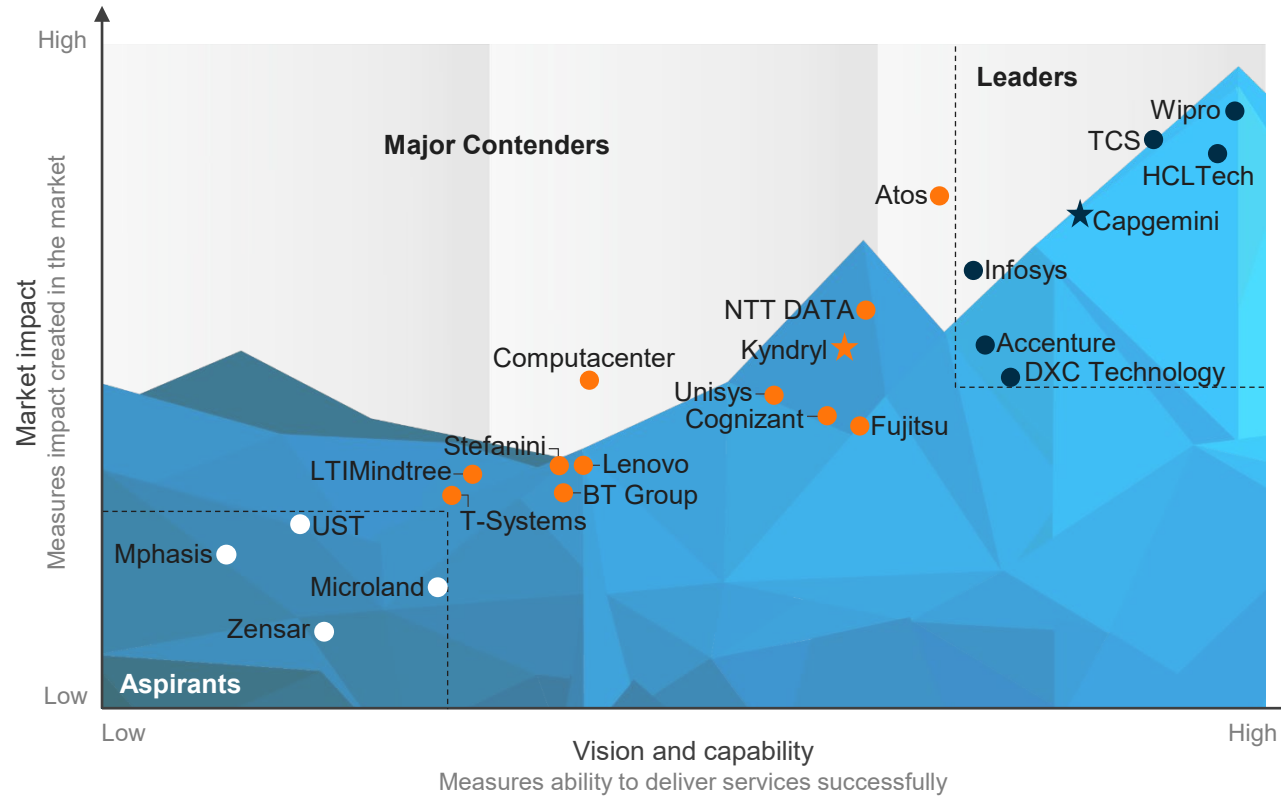
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership to strengthen and to help generate major workplace revenue and improve market positioning

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe | Wipro is positioned as a Leader

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessments for Accenture, Microland, and Zensar excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2024)

Wipro profile – Europe (page 1 of 5)

Overview

Digital workplace services vision

Wipro’s vision is to facilitate its proprietary solution, Live Workspace™, which aims to enable its customers to embrace the generative future of work and play a monumental role in achieving their vision of workplace transformation with:

- Connected workspaces – building an AI-first enterprise with the humanization of total employee experience management
- Purposeful workplaces – achieving the cloudification of workplace platforms along with ensuring sustainable workplace innovation
- Resilient workplaces – enabling a fortified enterprise with a modernized and evergreen estate

Wipro’s approach to attain this vision is through the four parameters, i.e., (i) total experience management, (ii) AI – augmented workplace, (iii) modern work hub, and (iv) AI and digital workplace platform engineering.

Digital workplace services revenue (CY 2023)

<US\$200 million	US\$200-500 million	US\$500 million-US\$1 billion	>US\$1 billion
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Digital workplace revenue mix (CY 2023)

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

By industry

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

By buyer size

- | | | |
|---|---|--|
| ● Small (annual client revenue <US\$ 500 million) | ● Midsize (annual client revenue US\$500 million-US\$1 billion) | ● Medium (annual client revenue US\$1-US\$5 billion) |
| ● Large (annual client revenue US\$5-20 billion) | ● Mega (annual client revenue >US\$20 billion) | |

By IT services segment

- | | | |
|---|-------------------------|---------------------------|
| ● Asset management | ● Deskside support | ● Enterprise mobility |
| ● Desktop management and virtualization | ● IT service management | ● UCC |
| ● Service desk | ● Smart workplace | ● Gen AI in the workplace |

By geography

- | | | |
|------------------|------------------------------|------------------|
| ● UK and Ireland | ● Nordics | ● DACH |
| ● Benelux | ● France and Southern Europe | ● Eastern Europe |

Wipro profile – Europe (page 2 of 5)

Solutions

Proprietary solutions for digital workplace services

Solution name	Details
AI Live Workspace™	This solution offers an integrated gen AI platform for novel future of work solutions and service avenues.
AI Service Desk	This solution offers AI-driven service desk support through predictive, preventive, proactive, and digitally augmented services delivering on the zero-desk vision.
myUniHub	This solution offers a unified user enablement platform combining a consumer-grade user interface with smart automation, analytics, and an extensible API bridge, providing employees with seamless access to tools and resources.
Liva	This solution offers intelligent digital colleagues acting as the first point of contact for employees with its conversational and gen AI solutions enabling the humanization of employee experience through NL-based seamless automation.
ExperienceNXT	This solution offers an advanced employee experience platform for multi-dimensional observability and real-time total experience management for XLA-driven outcomes.
myHubstyle	This solution offers employee profiling and persona definition, with dynamic persona management capability, to deliver hyper-personalized workspaces.
Realview	This solution offers visual support to transform the field service experience with a digital suite of tools powered by enterprise AR and AI.
TruRemote	This solution offers digital support to deliver a zero-touch remote resolution of IT services, overcoming the limitations of the traditional in-band network-based approach, to bring a shift in remote manageability.
WaaS360	This solution is based on an all-inclusive, persona-mapped, digital Workspace-as-a-Service (WaaS) offered in flexible pricing models.
myConfab	This solution is a suite of communication and collaboration tools designed with an employee-centric focus. It is engineered to offer fair, inclusive, and contextualized experiences.
Future of Work Copilot	This solution offers AI-powered assistance across business functions to unlock productivity and empower users to achieve more through the capabilities of LLMs and Microsoft Graph.
Secure360	This solution simplifies and modernizes endpoint security management with a zero-trust-based unified platform powered by AI/ML, advanced analytics, and automation.

Other solutions include verticalized workplace solutions – Green Operation suite, GenAI Foundry, legal research assistant, modern work for retail, modern work for BFSI, modern work for manufacturing, modern work for healthcare, smart i-connect, consulting and advisory service, IoTNEXT, ExperienceNXT for digital adoption, Windows 11-as-a-service, modern management, myUnifiedMobility, unified assessment and monitoring platform, wimigrate, virtuadesk, and metaex.

Wipro profile – Europe (page 3 of 5)

Recent investments

Digital workplace services investments

Investment name/theme	Details
Investments	<ul style="list-style-type: none"> • Invested in setting up a Live Workspace™ GenAI Foundry in Coimbatore (India) • Invested in a Digital Workplace Experience Studio in Munich (Germany) • Invested in the addition of a new experience pod in the Digital Workplace Experience Studio in Bangalore (India) • Invested in building next-generation digital workspace-centric solutions for the Digital Workplace Microsoft CoE
Talent development	<ul style="list-style-type: none"> • Conducted multiple hackathons for hiring gen AI engineering experts • Invested in gen AI training by industry experts and partners, enabling certifications for the entire digital workplace workforce • Conducted SME-led sessions on copilot, gen AI, and total experience for the wider delivery network • Facilitated focused hiring of top graduates from tier-one schools across India to build workplace capabilities (emerging workplace technologies, AI, gen AI, and digital workplace platforms)

Wipro profile – Europe (page 4 of 5)

Partnerships

Digital workplace services partnerships

Partner name	Details
Kore.ai	Leverages this partnership in driving shift-left with intelligent virtual assistant to support self-service resolutions
Microsoft	Leverages gold partner 360-degree partnership for all Windows OS, office, collaboration, copilot, and productivity solutions
Avaamo	Leverages this partnership to drive shift-left with an intelligent virtual assistant to support self-service resolutions; it is a Wipro-backed company
Google	Leverages this partnership for collaboration and productivity solutions
Apple	Leverages this partnership for Device as a DaaS capabilities
ServiceNow	Leverages this partnership to accelerate IT transformation and cross-functional collaboration for better employee and customer engagement experience
Intel	Leverages this partnership for secure device management; it was also recognized as the Partner of the Year 2023
NexThink	Leverages this partnership in using Nextthink's real-time, end-user analytics platform for targeted employee engagement, benchmarking, and proactive improvement
Lakeside Systrack	Leverages this partnership for employee experience measurement
Juriba	Leverages this partnership for evergreen IT
Zscaler	Leverages this partnership for endpoint security
CareAR	Leverages this partnership for AR/VR field support platform
GoTo	Leverages this partnership for remote field support and communication solutions
Whatfix	Leverages this partnership for enterprise-wide digital adoption and increased employee productivity

Other partnerships include 1E, Lakeside Systrack, CoreView, Flexera, Sakon, HP, Dell, Citrix, Avaya, Zinier, Lenovo, VOSS, Prognosis, VMware, Innoserve, Getronics, Compucom, Hemmersbach, Barona, Daisy, ESP, British Telecom, Nectar, Vayusphere, Aternity, Happy Signals, Tangoe, and Qualtrics.










Wipro profile – Europe (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact

Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Enterprises transitioning from traditional SLAs to an experience-centric XLA model will benefit from Wipro’s co-creation mindset, which focuses on creating enterprise-specific XLAs
- Clients focused on ESG will find value in Wipro's Live Workspace™ Green Operation offering, which is a comprehensive suite of Green IT solutions encompassing sustainability assessment, monitoring, and management
- Wipro’s strong focus on driving shift left with Intelligent Virtual Assistants (IVAs) for self-service resolutions, backed by robust partnerships with providers such as Avaamo, Moveworks, and Kore.ai, resonates well with enterprises
- Clients will appreciate Wipro’s strong focus on developing workplace AI solutions, supported by its dedicated AI engineering function within workplace engineering
- Clients have highlighted Wipro’s technical expertise as its key strength area

Limitations

- Wipro's workplace business value articulation and pitch appears to be stagnant, which could lead to a potential loss of appeal among clients in the future as peers continue to innovate and enhance their messaging and value proposition
- Amid multiple transitions and changes in leadership across the company, clients can expect disruptions and incoherence in its approach to deliver workplace services
- Clients have highlighted that Wipro needs to improve its internal team alignment to better support them in complex environments
- Some clients have highlighted cost management as a challenge and want more pricing transparency from Wipro
- Mid-market enterprises with limited budgets and niche transformation needs may not find Wipro to be a right fit, given its limited focus for this buyer segment

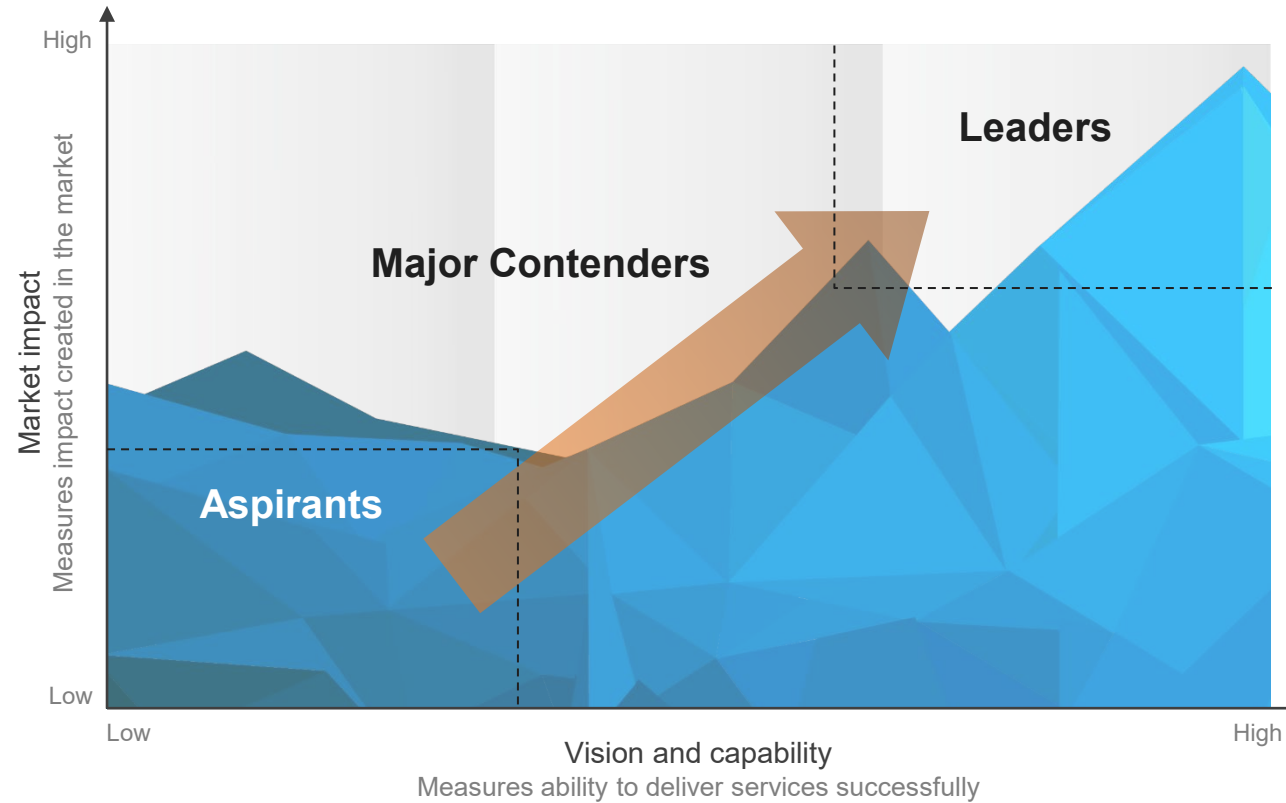
Appendix

PEAK Matrix® framework

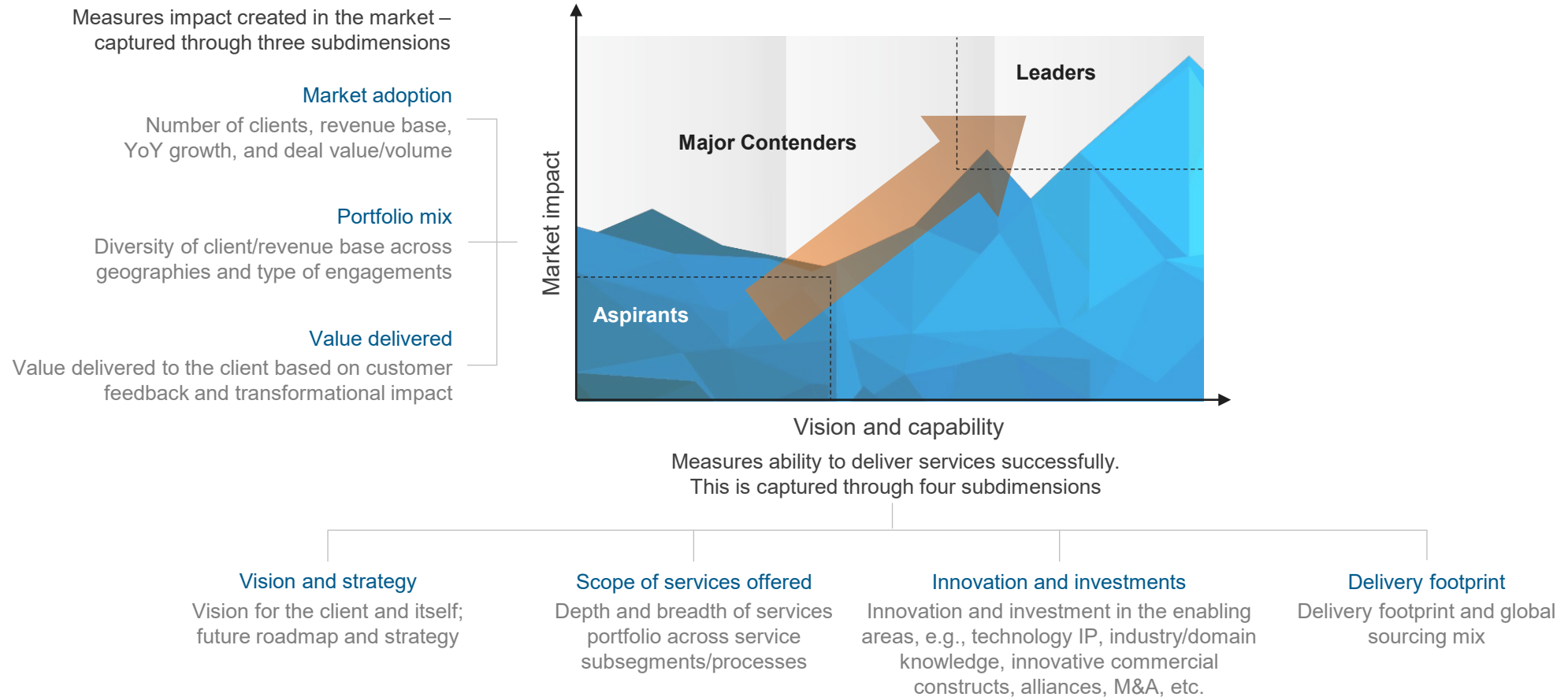
FAQs

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

Everest Group PEAK Matrix



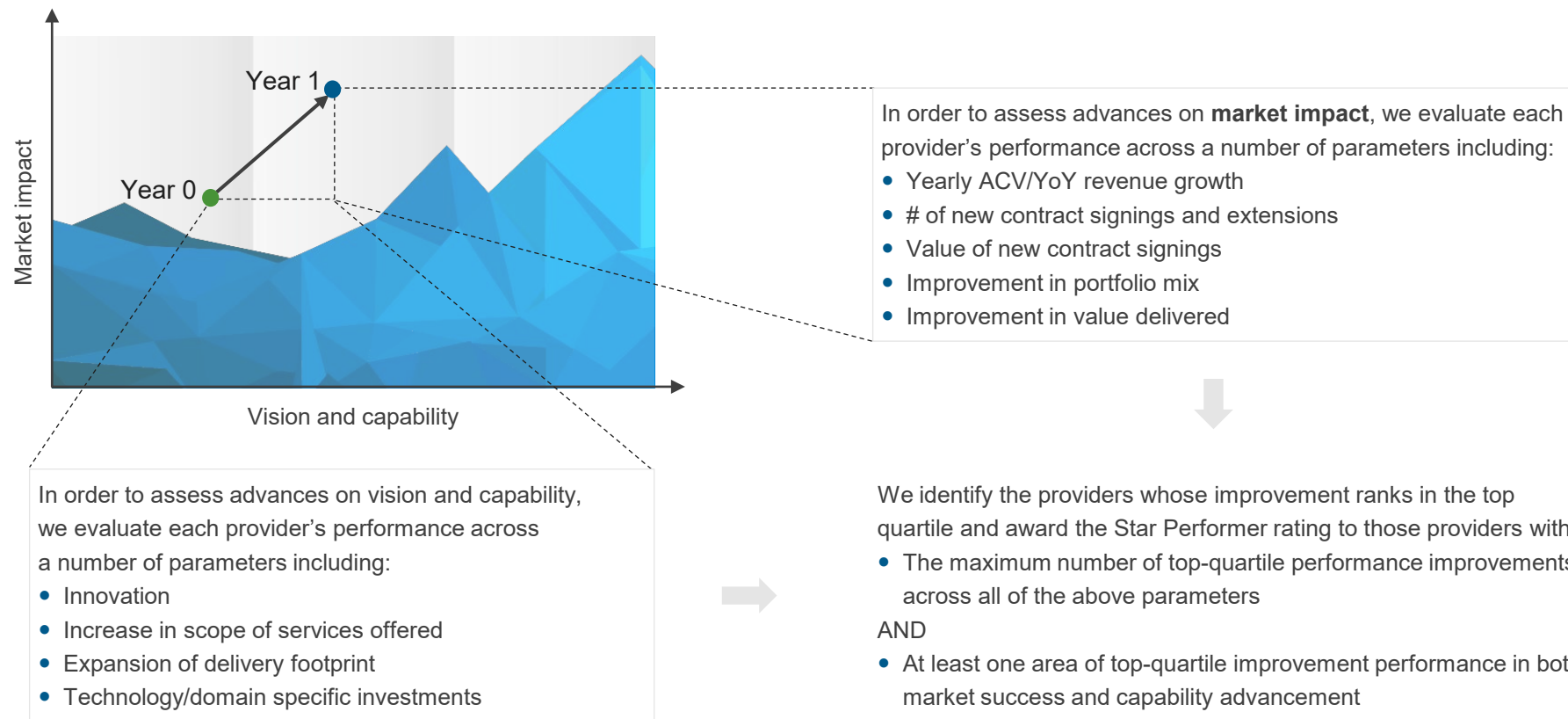
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performer 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 Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: 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.

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

A: 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.

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

A: 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.

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

A: 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

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

A: 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

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

A: 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.

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