Introduction and scope

Everest Group recently released its report titled “Infrastructure Services – PEAK Matrix™ Assessment and Profile Compendium 2013”. This report assesses service providers' infrastructure services capabilities across several key dimensions.

As a part of this report, Everest Group assessed 27 leading service providers on the Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for infrastructure services into Leaders, Major Contenders, and Emerging Players. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of infrastructure services providers based on their market success and delivery capability.

Based on the analysis, Wipro Technologies emerged as a Major Contender. This document focuses on Wipro Technologies’ infrastructure services experience and capabilities and includes:

- Wipro Technologies’ position on the infrastructure services PEAK Matrix
- Detailed infrastructure services profile of Wipro Technologies

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.
Background and scope of the research

Background of the research

The infrastructure services market place is witnessing growth challenges and is governed by a plethora of trends which govern the investments and strategy of service providers. In a very competitive market place, service providers are strengthening their capabilities and aim to increase their adoption footprint.

In this research, we present the assessment and detailed profiles of 27 IT service providers featured on the infrastructure services PEAK Matrix. Each service provider profile provides a comprehensive picture of their service suite, scale of operations, domain investments, recent transactions, and key low-cost delivery centers.

The assessment is based on Everest Group’s annual RFI process for the calendar year 2012, interaction with leading infrastructure service providers, and analysis of the infrastructure services market place.

Scope of this report

- **Services**: Infrastructure services
- **Geography**: Global
- **Service providers**: The leading 27 infrastructure service providers

This report includes the profiles of the following 27 service providers:

- **Infrastructure services PEAK Matrix Leaders**: CSC, Fujitsu, HP, and IBM
- **Infrastructure services PEAK Matrix Major Contenders**: Accenture, Atos, Capgemini, CGI, Cognizant, CompuCom, Dell, HCL, Infosys, Microland, Mphasis, NTT DATA, TCS, Tech Mahindra, T-Systems, Unisys, and Wipro
- **Infrastructure services PEAK Matrix Emerging Players**: Genpact, Hexaware, L&T Infotech, Mindtree, NIIT Technologies, and Softtek
Wipro is positioned as a Major Contender in enterprise infrastructure services

Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for enterprise infrastructure services

1 PEAK Matrix specific to large (>US$25 million TCV), multi-year infrastructure outsourcing relationships

Source: Everest Group (2013)
**Company description:** Wipro is a global information technology, consulting and outsourcing company that is present across 57 countries. Wipro provides a range of IT application and infrastructure services, product engineering, technology integration, and consulting solutions. Wipro’s Global Infrastructure Services portfolio covers about 200,000 servers, 100,000 MIPS, 40 PB of storage, 1.5 million desktop/laptops, and 630,000 network devices, amongst others. Wipro’s infrastructure services are spread across many key industry verticals, with datacenter services being the most prominent segment.

**Headquarters:** Bangalore, India

**Website:** [www.wipro.com](http://www.wipro.com)

---

**Portfolio of infrastructure services**

**Services:** Datacenter services, end-user computing, network services, cloud services, managed security services, business advisory & consulting services, and global system integration services

**Solutions:** Remote infrastructure management services, virtualization, Unified Communication (integration of communications with business processes), integrated device management services, ServiceNXT™ VirtuaDesk™ (desktop virtualization), and IT360™ (IT investment framework)

**Infrastructure service revenue**

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Relative Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;US$100 million</td>
<td>Low</td>
</tr>
<tr>
<td>US$100-500 million</td>
<td>Moderate</td>
</tr>
<tr>
<td>US$0.5-2 billion</td>
<td>High</td>
</tr>
<tr>
<td>US$2-5 billion</td>
<td>High</td>
</tr>
<tr>
<td>US$5-10 billion</td>
<td>Moderate</td>
</tr>
<tr>
<td>&gt;US$10 billion</td>
<td>Low</td>
</tr>
</tbody>
</table>

**Infrastructure services by geography**

- **North America**
- **UK**
- **Europe**
- **APAC**
- **RoW**

---

1 Everest Group estimates

Source: Everest Group (2013)
**Wipro | Infrastructure services profile (page 2 of 5)**

**Infrastructure services capability assessment and market success**

---

**Headline assessment**

Wipro's infrastructure services business has witnessed a steady growth over the past few years, albeit lagging that of most of its Indian peers. The company has recently witnessed a management rejig in its "Global infrastructure Services" division.

Wipro is making efforts to adopt next-generation services (especially cloud) as part of its infrastructure services delivery strategy. Diversifying clientele focus beyond the North American market as well as to other verticals will hold the key for Wipro to sustain and build on its market positioning.

---

**Market success**

- Infrastructure services revenue in excess of US$1 billion for 2012
- More than 2,000 active IO clients
- Large annuity contracts (TCV>US$20 million) accounted for about half of the infrastructure services revenue in 2012

---

**Scale**

- Infrastructure services account for less than a quarter of the company's services revenue
- Over 30,000 FTEs engaged in delivering infrastructure services, across various service segments

---

**Domain investments**

- Investments in proprietary solutions primarily focused on tools and solutions for infrastructure management
- Has struck alliances with key players across the infrastructure ecosystem (e.g., EMC) as well as with niche players (e.g., Infoblox)

---

**Delivery footprint**

- Global delivery footprint with a strong offshore delivery component - India is the largest low-cost delivery location followed by China
- Philippines, Poland, Romania, Mexico, and Brazil are other sizeable low-cost delivery locations

---

Source: Everest Group (2013)
### Proprietary solutions (representative list)

<table>
<thead>
<tr>
<th>Service area</th>
<th>Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure management services</td>
<td>ServiceNXT™ – Platform as a next-generation integrated managed services offering which brings together application, infrastructure and security operations for its clients under a standardized and automated delivery model</td>
</tr>
<tr>
<td></td>
<td>FixOmatic – Suite of next-generation IT infrastructure automation tools managed through a single pane of glass to support datacenter and end-user operations.</td>
</tr>
<tr>
<td></td>
<td>IStructure: IaaS services to provide a platform for hosting “as-a-service” offerings</td>
</tr>
<tr>
<td></td>
<td>E-Helpline: ITSM tool – certified by APM as “gold level”</td>
</tr>
<tr>
<td></td>
<td>Healix: Dynamically detects, diagnoses, and auto-correts incidents occurring in client’s datacenter environment</td>
</tr>
<tr>
<td></td>
<td>VIKING: Availability and performance management tool (agentless management)</td>
</tr>
<tr>
<td></td>
<td>KAT-MICE: Asset discovery tool for Wintel, Linux servers, Windows desktops, Cisco routers, and switches</td>
</tr>
<tr>
<td></td>
<td>Scriptorium: Ready repository of 1,400 scripts across WINTEL, Unix, and database domains</td>
</tr>
<tr>
<td></td>
<td>Smartview: Shared BI platform delivered through GSCM built on QlikView platform</td>
</tr>
</tbody>
</table>

### Alliances (representative list)

<table>
<thead>
<tr>
<th>Partner</th>
<th>Purpose/details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infoblox</td>
<td>Customized solutions on DDI (DNS, DHCP and IPAM) for telecom and enterprise customers</td>
</tr>
</tbody>
</table>

Wipro has several partnerships with technology majors such as EMC, Microsoft, HP, NetApp, Cisco, and Hitachi

### Investments (representative list)

<table>
<thead>
<tr>
<th>Investment type</th>
<th>Purpose/details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP V6</td>
<td>Solution focused on telecom and BFSI segments – enablement completed</td>
</tr>
<tr>
<td>Virtual desktop infrastructure</td>
<td>Dedicated CoE in Bengaluru with rollout completed for 10 clients</td>
</tr>
<tr>
<td></td>
<td>Created on Netapp/Cisco- and Citrix-based solutions</td>
</tr>
</tbody>
</table>

Source: Everest Group (2013)
## Recent transaction activity

<table>
<thead>
<tr>
<th>Buyer details</th>
<th>Engagement details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>Industry</strong></td>
</tr>
<tr>
<td>Catholic Health Initiatives</td>
<td>Healthcare</td>
</tr>
<tr>
<td>Emirates NBD</td>
<td>Banking</td>
</tr>
<tr>
<td>Unknown client</td>
<td>Technology</td>
</tr>
<tr>
<td>AstraZeneca</td>
<td>Healthcare</td>
</tr>
<tr>
<td>Electricity North West</td>
<td>Energy &amp; utilities</td>
</tr>
<tr>
<td>Atheeb Telecom</td>
<td>Telecom</td>
</tr>
</tbody>
</table>

1 Publicly-announced infrastructure services transactions during 2009 to 2013 as on date

Source: Everest Group (2013)
Key low-cost delivery locations

1 Only includes locations which are being leveraged by the service provider for low-cost delivery

Source: Everest Group (2013)
Appendix
Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix is a proprietary framework for assessment of a service provider’s capability

Everest Group’s PEAK Matrix is a composite index of a range of distinct metrics related to a service provider’s scale, scope, technology/domain investments, delivery footprint, and resultant market success in the context of a given services function.
Dimensions of service providers’ capability and market success underlying the PEAK Matrix

- **Market success**
  - Revenue
  - Adoption across enterprise segments
  - Growth in the last 2-3 years

- **Delivery capability**
  - Scale and delivery footprint
    - Talent
    - Delivery centers, global asset ownership, etc.
  - Focus across types of services
    - Datacenter
    - Middleware
    - End-user compute
    - Helpdesk
    - Consulting
  - Domain investments
    - IP / proprietary solutions / assets
    - Certifications
    - M&A and alliances

- **Everest Group PEAK Matrix**
  - Leaders
  - Major Contenders
  - Emerging Players
  - Delivery capability
FAQs (page 1 of 2)

Does the PEAK Matrix assessment incorporate any subjective criteria?
Everest Group’s PEAK Matrix assessment adopts an objective and fact-based approach (leveraging service provider RFI’s 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 briefings.

Is being a “Major Contender” or “Emerging Player” on the PEAK Matrix, an unfavorable outcome?
No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. 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”?
PEAK Matrix position is only one aspect of Everest Group’s overall assessment. In addition to assigning a “Leader”, “Major Contender”, or “Emerging Player” 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 for their specific requirements. It also helps providers showcase their strengths in specific areas.

What are the incentives for buyers and providers to participate/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 include adequate representation and recognition of their capabilities/success in the market place, 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 to leverage their PEAK Matrix positioning status?

- Providers can use their PEAK Matrix positioning rating in multiple ways including:
  - Issue a press release declaring their positioning/rating
  - 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
At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services.
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches.
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-647-557-3475

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Delhi
india@everestgrp.com
+91-124-284-1000

Stay connected

Websites
www.everestgrp.com
research.everestgrp.com

Twitter
@EverestGroup
@Everest_Cloud

Blogs
www.sherpasinblueshirts.com
www.gainingaltitudeinthecloud.com