

Everest Group PEAK Matrix[®] for Microsoft Azure System Integrators 2021

Focus on Infosys
January 2021



Introduction and scope

Everest Group recently released its report titled [System Integrator \(SI\) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021](#). This report analyzes the changing dynamics of the Microsoft Azure public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 26 system integrators on the Everest Group PEAK Matrix® for SI capabilities on Microsoft Azure Services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of Microsoft Azure system integrators based on their absolute market success and delivery capability.

Based on the analysis, **Infosys emerged as a Leader**. This document focuses on **Infosys'** SI capabilities on Microsoft Azure and includes:

- Infosys' position on the SI capabilities on Microsoft Azure Services PEAK Matrix®
- Detailed Microsoft Azure services profile of Infosys

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators' 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 system integrator capability for an ideal fit.

Background of the research

- Enterprise consumption of cloud has witnessed a dramatic shift, from a skeptical outlook towards public cloud to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or public clouds in their enterprise environment
- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises could see clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts with migration to public cloud being a key transformation lever
- Microsoft Azure, with its full stack of offerings across workplace, enterprise IT applications, IT infrastructure, data & analytics, business applications, and collaboration tools, along with its strong existing relationship with enterprises, is becoming a preferred public cloud provider. Rapid adoption of Azure offerings in the market coupled with management complexities and talent crunch is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the Azure landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we provide an assessment of 26 Azure cloud system integrators featured on the SI capabilities on Microsoft Azure PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with Azure cloud system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 26 system integrators on Microsoft Azure PEAK Matrix® Assessment 2021:

- **Leaders:** Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Brillio, Cloudreach, Coforge, Ensono, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, UST Global, and Virtusa
- **Aspirants:** Aspire Systems, Blazeclan Technologies, Coretek, and Zensar

Scope of this report:



Geography
Global



System integrators
26 leading cloud system integrators



Services
Cloud services

System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, DXC Technology, HCL Technologies, Infosys, TCS, and Wipro

- Leaders have established successful businesses in Azure services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes and build strategic roadmaps for Azure services (internal IP/tools, partnerships, and acquisitions)
- Leaders have a strong focus in driving alignment between the business and IT teams of enterprises to derive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale / complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US\$5 billion)

Major Contenders:

Brillio, Cloudreach, Coforge, Ensono, GFT, LTI, Microland, Mindtree, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, UST Global, and Virtusa

- Major Contenders in the Azure services space include born in the cloud system integrators as well as Indian-heritage system integrators
- While global players strongly leverage/include their assets and datacenter footprint along with their Azure services offerings, “asset-light” providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the Azure services spectrum, as well as in increasing their global coverage

Aspirants:

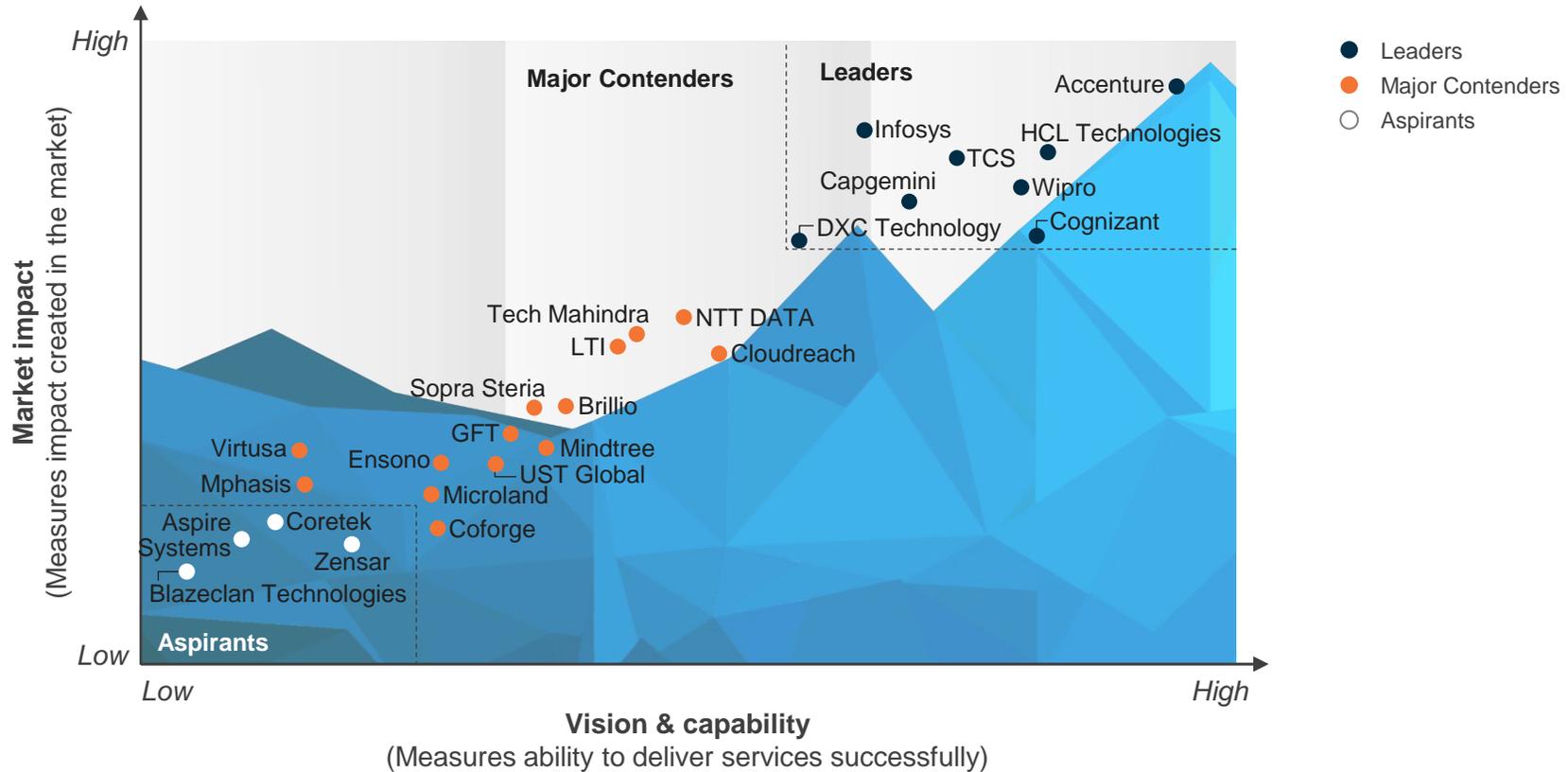
Aspire Systems, Blazeclan Technologies, Coretek, and Zensar

- The Azure services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on Azure to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®

System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021 | Infosys positioned as Leader

Everest Group System Integrator (SI) Capabilities on Microsoft Azure Services PEAK Matrix® Assessment 2021



Source: Everest Group (2021)

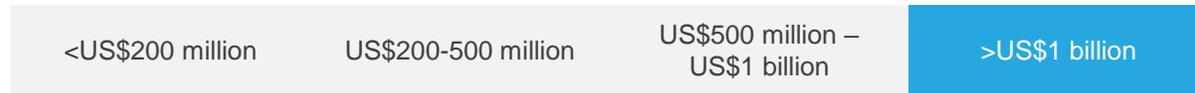
Infosys | system integrator capabilities on Microsoft Azure (page 1 of 5)

Overall cloud services overview

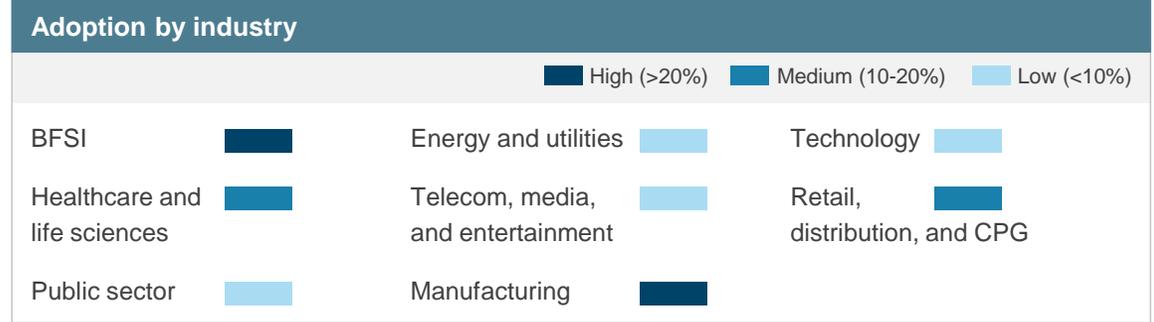
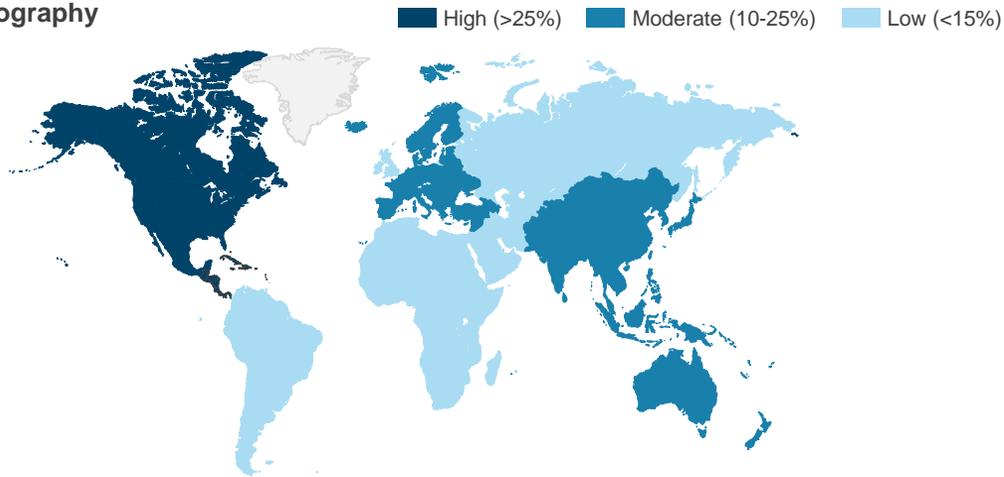
Cloud services vision:

Infosys's cloud services vision is to help redesign enterprises from core and build cloud-first capabilities to deliver seamless experiences. The firm aims to provide a blueprint to clients for launching next-generation services and co-creating solutions. With the recent launch of Infosys Cobalt, Infosys wants to create seamless experiences in public, private, and hybrid cloud.

Overall cloud services revenue (2019)



Adoption by geography



Source: Everest Group (2021)

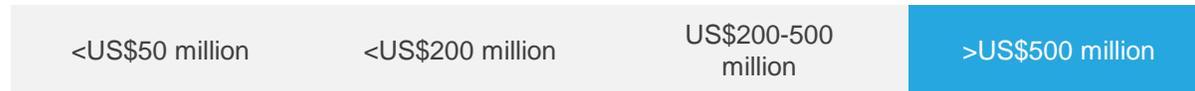
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Capabilities on Microsoft Azure overview

Azure partnership overview:

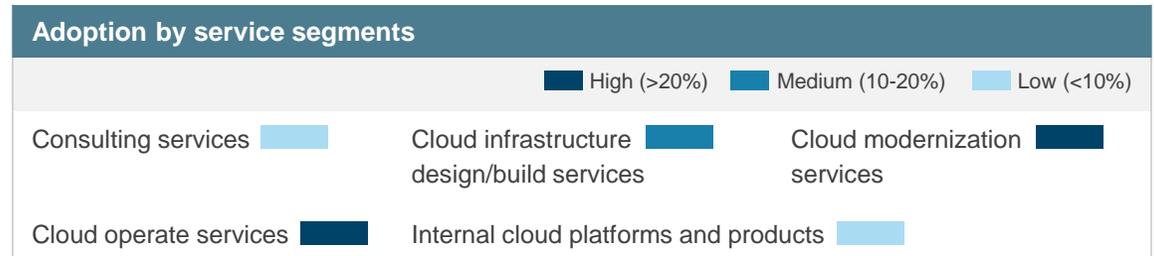
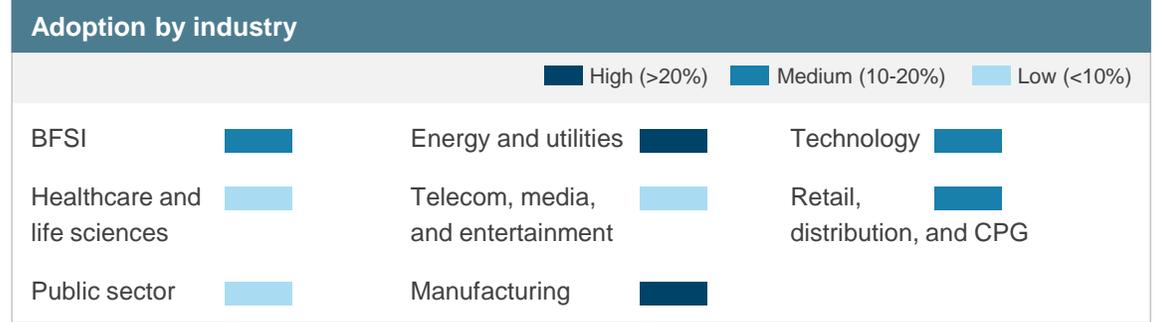
Infosys has been a Microsoft Azure Partner since 2010. Infosys is a gold competency partner for Azure. It has won several partner awards including Azure expert MSP partner, Azure partner of the year 2019, Azure UK partner of the year 2020, Azure Philippines partner of the year 2020, and was the finalist for SAP 2020.

Revenue from Azure-related services (2019)



Azure portfolio – key highlights (representative list)

- Infosys' Azure service competencies includes Datacenter, Data Analytics, Collaboration and Content, Cloud Productivity, Cloud Platform, Cloud Customer Relationship Management, and Cloud Business Applications
- Infosys has a joint white paper with Microsoft like "integration at scale" using Azure integration services
- Key use cases delivered on Azure include:
 - SAP migration to Azure
 - Datacenter migration
 - Healthcare payer and provider platforms
 - Security management using AI and ML capabilities
 - Digital experience platforms
 - Smart buildings and spaces



Infosys | system integrator capabilities on Microsoft Azure (page 3 of 5)

Key solutions

Proprietary solutions (representative list)	
Solution name	Details
iDSS – Infosys Data Services Suite	A data management solution for legacy modernization, enterprise transformations, and data migration for migrating to RDS and cloud native databases
Infosys DevOps Platform (IDP)	An integrated open-source platform that helps organizations accelerate their agile and DevOps transformation journey
Workload migration suite	Codified and scientific approach to determine application readiness for cloud adoption and detailed planning for application migration including remediation and validation
JuniperX	A petabyte scale multi-cloud data management platform that is uniquely open-source. It manages seamless, secure, and reliable transfer of critical data irrespective of the CSP, automating the collection and delivery of data from a variety of on-premise locations to the cloud
Infosys Polycloud Platform	A next-generation multi-cloud management platform, which enables enterprises to accelerate and amplify their cloud-based transformation journey from “Cloud First” to “Cloud Smart”
Infosys Cloud Native Development Platform	A platform that supports open-source technologies and covers the entire range of application development life cycle from architecture evaluation to support. The platform covers automated provisioning, application development accelerators, and integrated DevSecOps and FinOps capabilities
Infosys Microservices Application Platform (IMAP)	A cloud integration productivity framework supported by accelerators, tools, and reusable assets that can be assembled into a complete cloud native development squad operating platform for a client within two to four weeks
Azure PaaS adopters	The solution comprises a set of features native to Azure including application modernization path to Azure and containerization on Azure
Container automation solution	Automates the migration of legacy applications to microservices on Azure Kubernetes Service (AKS)
Integrate+ for Azure	It is a block integration engine built using cloud native principles to connect and fully integrate with Azure. It is designated as a preferred solution by Microsoft in Azure marketplace
Intelligent order creation	Microsoft Azure AI-based document extraction service “Form Recognizer” provides the ability to extract information from incoming documents, apply advanced machine learning algorithms to it, and present data in the form of key-value pairs
Infosys mortgage solution	Based on MS Azure cloud and open text Documentum D2, this is an end-to-end SaaS offering for cloud provision, implementation, and legacy content migration

Infosys | system integrator capabilities on Microsoft Azure (page 4 of 5)

Case study, investments, and recent activities

Case study	
Transform to cloud, bringing in agility, simplification, as well as innovation	
Client	A leading oil & gas major with operations across the globe
Business challenge	To drive IT resiliency, cost optimization, and business growth, the existing DC assets and the ways of IT lifecycle management were not scalable and agile. The client was considering a two-pronged approach; to transform the existing applications by bringing in agility and adopt a cloud-first approach for new initiatives, giving access to innovative technologies
Solution	Adopted a platform engineering centric approach to create cloud foundation and empower application developers to consume cloud services in DevOps-oriented fashion. The application team created DevOps pipeline for application and leveraged the same to move the application to cloud. The whole transformation was executed in Agile tribe model with a focused track for data migration as well. For the other initiatives such as transforming the subsurface technical data in paper format to digital or transforming the fleet fuel card services, a cloud first strategy was adopted to redevelop new capabilities on the cloud
Impact	<ul style="list-style-type: none"> Over 1,800 applications migrated to cloud, leading to shutdown of two major datacenters in America, ahead of the planned time. With DevOps enabled, the application release cycle has reduced to fortnightly from quarterly earlier About 450TB+ of subsurface data accessible to geo-scientists across the globe to work collaboratively, while eliminating the risk of data loss and storage cost of paper, CD, and DVD in 100+ local sites

Recent investments and activities (representative list)	
Development	Details
New IPs	Launched Infosys Cobalt in 2020, which provides 14,000 cloud assets and over 200 industry cloud solution blueprints to accelerate the client’s cloud transformation journey
Acquisitions	<ul style="list-style-type: none"> Acquired Simplus, a Salesforce integration consultant, to strengthen its Salesforce capabilities and leverage Simplus’ cloud consulting, implementation, and data integration Acquired “Kaleidoscope Innovation,” a full-spectrum product design, development, and insights firm innovating across medical, consumer, and industrial markets, bolstering capabilities in the design of smart products.
Partnerships	<ul style="list-style-type: none"> Partnered with Microsoft to jointly develop smart buildings and spaces solutions leveraging Microsoft Azure services and sensor-enabled devices along with Infosys’ design and capabilities in building connected ecosystems Infosys has partnered with Azure Sentinel, Microsoft’s cloud cybersecurity platform, to deliver better threat detection and response capabilities to its enterprise clients
Delivery centers	Opened a digital innovation center in Dusseldorf, Germany, to provide digital transformation to its clients. The center will focus on next-generation business suites such as SAP HANA, cloud-based services, IoT, 5G, and AI

Infosys | system integrator capabilities on Microsoft Azure (page 5 of 5)

Everest Group assessment – Leader

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

- Since establishing a dedicated Microsoft Cloud Business Unit in 2018, it continues to experience strong growth in its Azure services demonstrated by marquee wins across all solution areas
- It is driving industry-focused solution development for SAP on Azure and a joint go-to-market initiative for smart buildings & spaces on Azure
- Clients have appreciated Infosys’ flexibility, quality of resources in the infrastructure and platform segments of Azure, and scope of services provided on Azure
- It has evolved its offerings and value proposition to address the post-pandemic requirements of enterprises. Specifically, its latest offering “Infosys Cobalt” aims to deliver security, innovation, and speed-to-market under a single offering, with cloud as the bedrock
- It has developed several assets and blueprints on Azure and other cloud providers to expedite specific business use cases, including both horizontal- and vertical- specific use cases

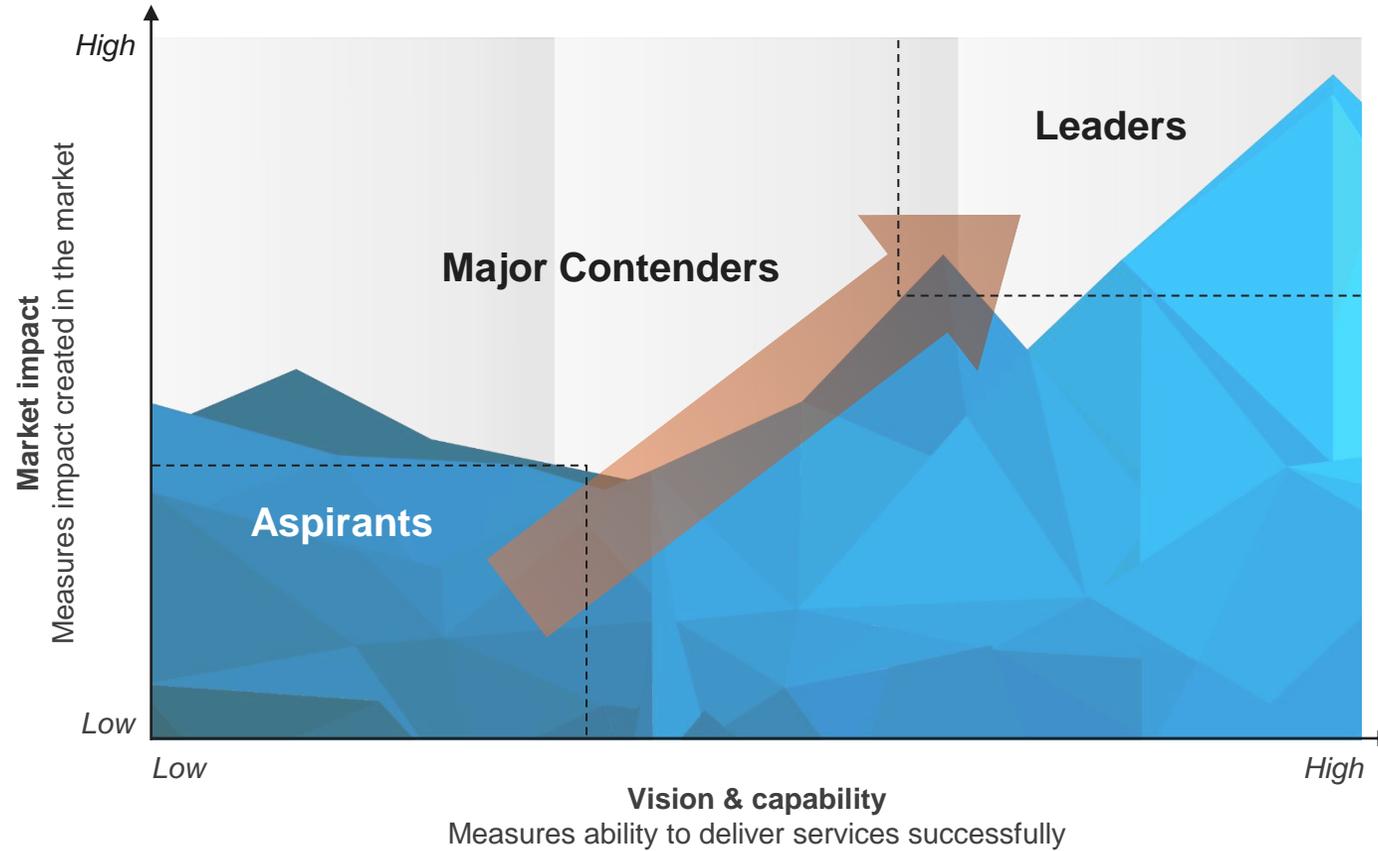
Areas of improvement

- Compared to other leaders in this assessment, Infosys is slightly behind when it comes to showcasing proof-points for data-led transformation engagements on Azure
- It needs to further increase the number of certifications in the data & analytics and next-generation technology segments
- It has made initial strides in driving consulting-led engagements focused on large transformations. However, there is further scope of improvement to compete with peers on similar engagements
- Clients have cited that Infosys needs to further leverage AI/ML, advanced analytics, and automation to reduce process effort and improve problem remediation

Appendix

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

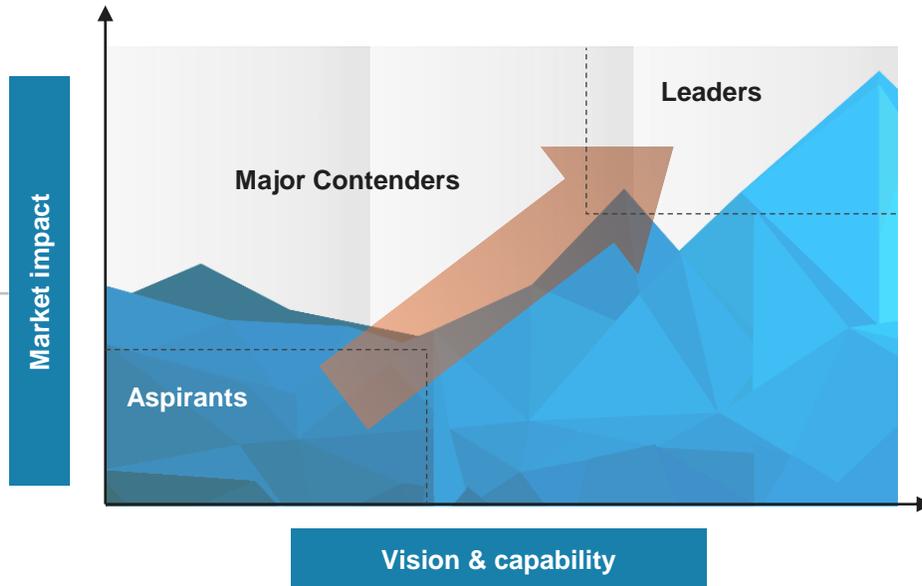
Everest Group PEAK Matrix



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



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

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging system integrator / 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 system integrators / 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/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 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 system integrator / 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 present and future needs of the 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



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