Everest Group PEAK Matrix® for Amazon Web Services (AWS) System Integrators (SI) 2021

Focus on Infosys
November 2020

Introduction and scope

Everest Group recently released its report titled "System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021". This report analyzes the changing dynamics of the AWS public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 27 system integrators on the Everest Group PEAK Matrix® for SI capabilities on AWS into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of AWS 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 AWS and includes:

- Infosys' position on the SI capabilities on AWS PEAK Matrix®
- Detailed AWS 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 more 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

- Being the market leader, AWS has witnessed a spike in adoption for its products across compute, storage, applications, data & analytics, IoT, and blockchain. AWS has also undertaken several COVID-19 initiatives to help customers in ensuring business continuity in the areas of remote work & learning, research, and other initiatives. This has led to a proliferation of AWS offerings in the market, which coupled with management complexities, and talent crunch is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the AWS landscape across infrastructure, platform, data, and next-generation technology segments

- In this research, we present an assessment and detailed profiles of 27 system integrators featured on the SI capabilities on AWS PEAK Matrix®. Each system integrator profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies.

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

This report assessed the following 27 system integrators on the SI capabilities on AWS PEAK Matrix® :

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

Scope of this report:

Geography
Global

System Integrators
27 leading cloud system integrators

Services
Cloud services

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System Integrator (SI) Capabilities on AWS PEAK Matrix® characteristics

Leaders:

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

- Leaders have established successful businesses in AWS 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 AWS services (internal IP/tools, partnerships, and acquisitions)
- Leaders have a strong focus on driving alignment between the business and IT teams of enterprises to drive 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:

Blazeclan, Brillio, Cloudreach, Ensono, Genpact, GFT, LTI, Microland, Mphasis, NTT DATA, Sopra Steria, Tech Mahindra, Trianz, UST Global, and Virtusa

- Major Contenders in the AWS 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 AWS 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 AWS services spectrum, as well as in increasing their global coverage

Aspirants:

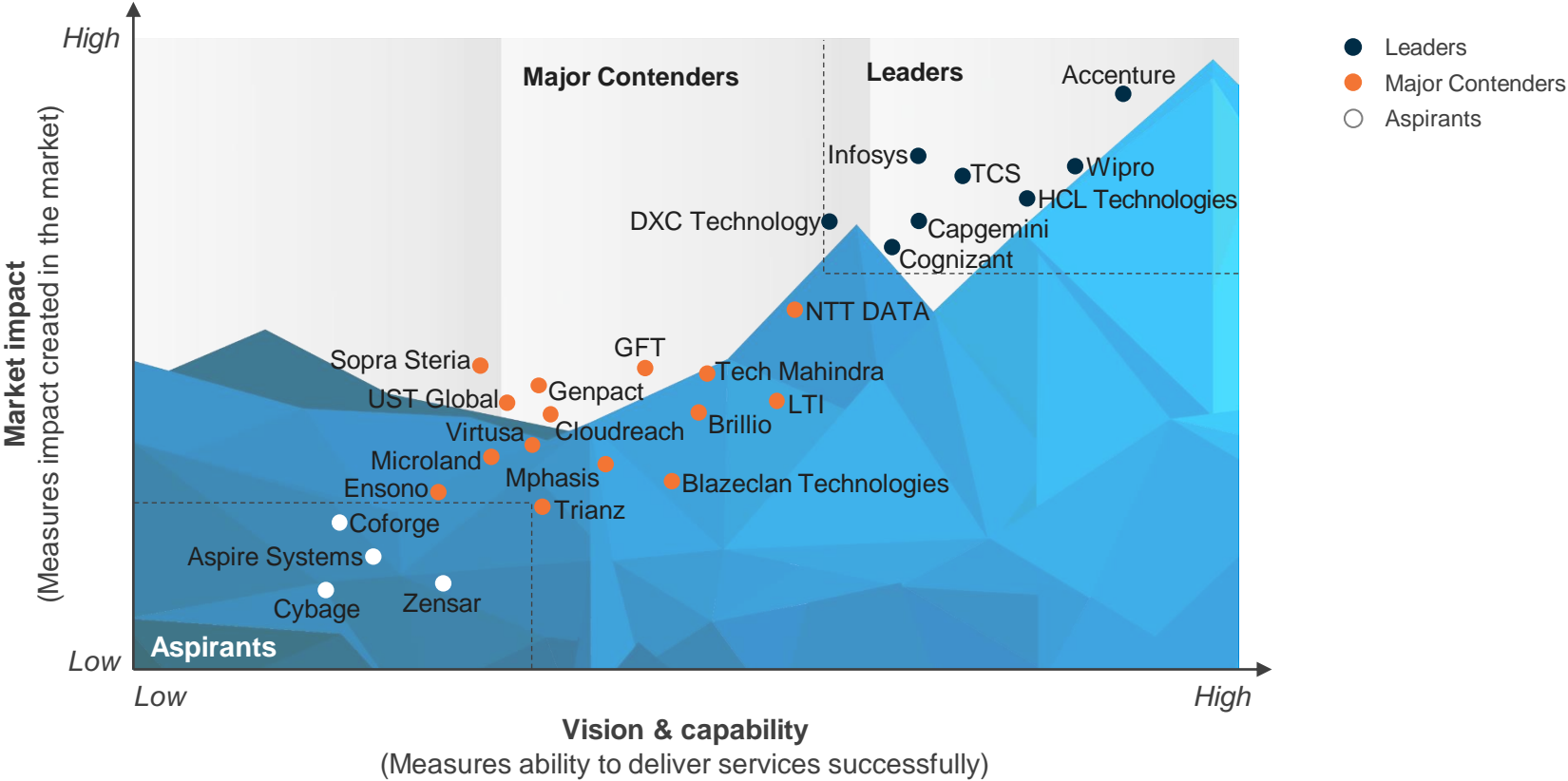Aspire System, Coforge, Cybage, and Zensar

- The AWS 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 AWS to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®
System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021 | Infosys positioned as Leader

Everest Group System Integrator (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2021
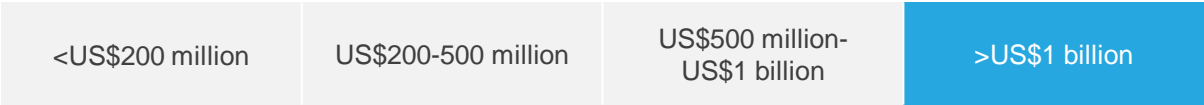
Source: Everest Group (2020)

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Infosys | system integrator capabilities on AWS (page 1 of 4)
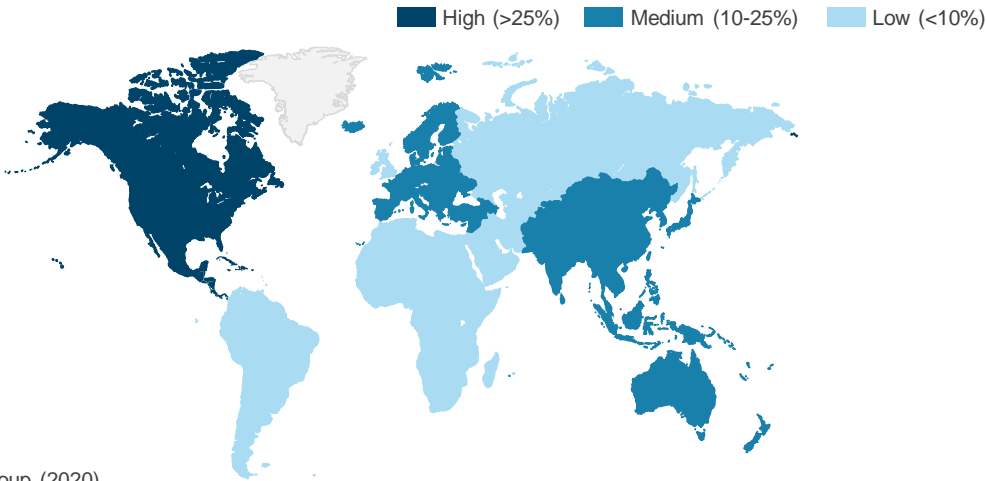## Overall cloud services overview

Cloud services vision

Infosys' 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, the company is looking to help businesses redesign the enterprise from the core and build new cloud-first capabilities to create seamless experiences in public, private, and hybrid cloud.

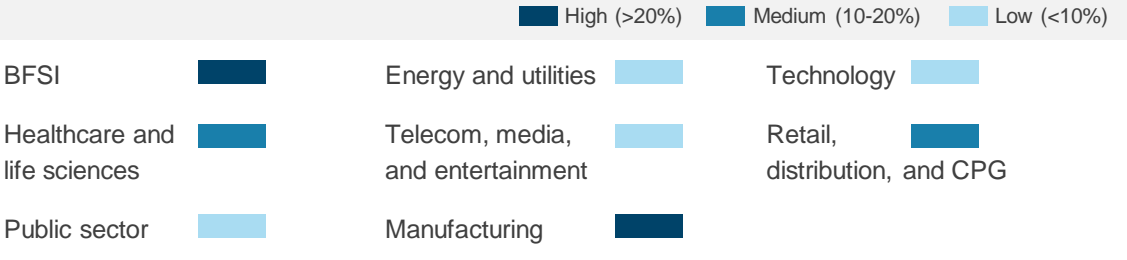### Overall cloud services revenue (2019)

<US$200 million	US$200-500 million	US$500 million-US$1 billion	>US$1 billion

Adoption by geography

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

Adoption by industry

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

BFSI	Energy and utilities	Technology
Healthcare and life sciences	Telecom, media, and entertainment	Retail, distribution, and CPG
Public sector	Manufacturing	

Adoption by service segments

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

Consulting services	Cloud modernization services	Cloud infrastructure design/build services	Cloud operate services

Adoption by buyer group

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

| Small (annual revenue < US$1 billion)	Medium (annual revenue = US$1-5 billion)	Large (annual revenue > US$5 billion)

Source: Everest Group (2020)
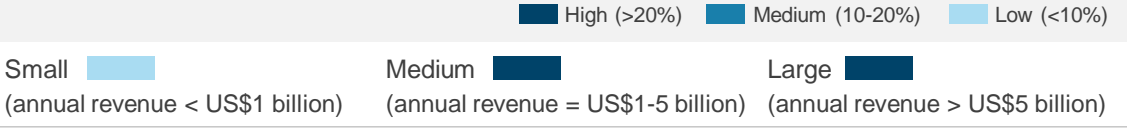
Infosys | system integrator capabilities on AWS (page 2 of 4)
Capabilities on AWS overview

AWS partnership overview

Infosys has been an AWS partner since 2009. Infosys is a premier consulting partner for AWS with competencies across AWS MSP, premium consulting partner, public sector partner, solution provider, DevOps partner, data and analytics provider, and Well Architected partner.
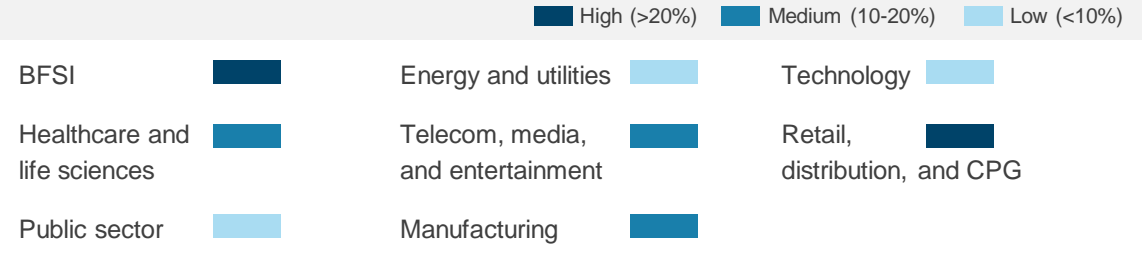
Revenue from AWS-related services (2019)

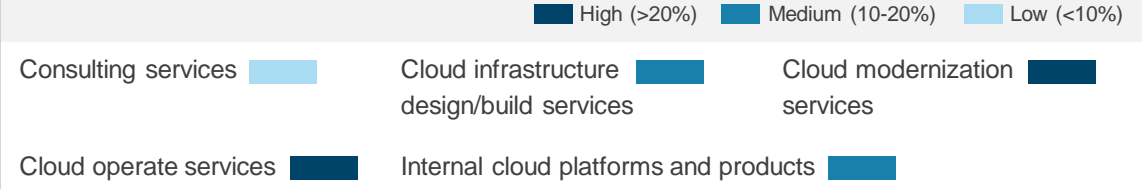| <US$50 million	US$50-200 million	US$200-500 million	>US$500 million
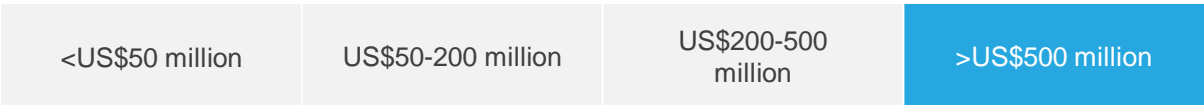
AWS portfolio – key highlights (representative list)

- Infosys is focusing on developing AWS-specific capabilities in the following areas: DevOps, Data Analytics, Migration, Financial Services, Digital Customer Experience, and Retail
- Infosys IPs including Infosys Genome and Analyst Workbench are available in the AWS Marketplace
- Key use cases delivered on AWS include:
  - VMware on AWS including Tanzu
  - Modernizing B2C platforms and migrating to cloud
  - Modernization of Microsoft workloads on AWS
  - Business banking gateway

Adoption by industry

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

BFSI	High	Energy and utilities	Low	Technology	Low
Healthcare and life sciences	Medium	Telecom, media, and entertainment	Medium	Retail, distribution, and CPG	High
Public sector	Low	Manufacturing	Medium		

Adoption by service segments

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

Consulting services	Low	Cloud infrastructure design/build services	Medium	Cloud modernization services	High
Cloud operate services	High	Internal cloud platforms and products	Medium		

Revenue by geography

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

North America (US & Canada)	High	Asia Pacific	Medium	United Kingdom	Medium
Middle East & Africa	Low	Rest of Europe	Medium	Rest of the World	Low

Infosys | system integrator capabilities on AWS (page 3 of 4)
Key solutions

Proprietary solutions (representative list)	
Solution name	**Details**
Infosys Data Services Suite (iDSS)	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
Infosys Genome solution	Builds entity-centric pre-fabricated behavioral attributes by collating both internal and external data to help embed intelligence in sales, marketing, customer journeys, and operational processes
Infosys Analytics Workbench (AWB)	Provides data discovery, data wrangling, analytical modeling, model management, visualization, and self-service model consumption to the data analyst and data scientist community
AWS PaaS adopters	The solution comprises a set of features native to AWS including application modernization path to AWS, containerization on AWS, and serverless deployments
Integrate+ for AWS	It is a block integration engine built using cloud native principles to connect enterprise systems to AWS and integrate fully with it. Also provides the ability to connect the broader business ecosystem including SaaS, on-premise, and cloud applications
Voice-based e-commerce with Alexa	The framework enables enterprises to accelerate the process of launching voice-based services integrated through Alexa
Infosys smart asset store	Enables end to end management of various types of assets across portfolios
Infosys Banking API Platform (IBAP)	Enterprise-class, integrated platform that helps organizations accelerate their open banking transformation journey – with quality, and at speed and scale.
Industrial IoT – Pharma 4.0	Digital capabilities of key parameters across the pharma manufacturing digital thread

Infosys | system integrator capabilities on AWS (page 4 of 4)
Case study, investments, and recent activities

Case study	Technology-driven optimization of existing estate

Client: A leading semiconductor manufacturer with Fabrication plants (FAB) across the US, Europe, and APAC

Business challenge
The client has grown through mergers and acquisitions and had disparate IT systems, which were ageing and not providing enterprise visibility to drive operational efficiencies. The technology debt was putting business under risk as well due to lack of stability, performance, and resiliency.

Solution
Creating a multi-pronged approach to bring in agility through integrated transformation across public cloud (AWS) and private cloud with structured change management to reduce risks. A data marketplace and consumption platform was created on the cloud, adopting a hybrid approach of rewriting data aggregation to collate data from all FABs with speed & accuracy and extending existing analytics platform with one of the FABs, to create maximum value in the shortest time.

Impact
The cloud transformation of the existing estate with focus on technology debt reduction enhanced the resiliency of the applications. The new data marketplace provided greater visibility into business operations, driving synergies and operational efficiency across fabrication plants (FAB).

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 clients' cloud transformation journey
Acquisitions	• 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, and bolstering capabilities in the design of smart products
Partnerships	• Partnering with AWS for the omni-channel experience. Has created a digital experience on the voice channel with Alexa and AWS services across industry segments such as insurance and retail, etc. to adapt to the new customer behavior/expectation regarding the experiences • Partnering with AWS to drive industry segment-focused growth; many business assets have been created on the AWS stack with joint investment in infrastructure, engineering, and go-to market
Delivery centers	• Invested in innovation centers across the US, the UK, Germany, the Czech Republic, Australia, and India • 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

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Infosys | system integrator capabilities on AWS
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

- Witnessed significant growth in its AWS services portfolio across use cases and regions. Its ability to contextualize AWS-related services and offerings across different verticals has led to this growth

- Its design thinking approach, joint workshops with clients, and ability to showcase a clear transformational roadmap during RFP's were cited as key win themes across AWS engagements

- Clients have appreciated Infosys' relationship with AWS account managers and the ability to manage crisis by bringing in the right support from both Infosys and AWS

- 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

- Has developed several assets and blueprints on the cloud to expedite specific business use cases, including both horizontal- and vertical-specific use cases

Areas of improvement

- Infosys needs to further enhance its next-generation portfolio on AWS, especially in the areas of blockchain and IoT

- Despite the volume and success of its internally trained employees on AWS, it needs to further increase the number of AWS-certified employees and lags other leaders in this assessment

- 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

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Appendix

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

Everest Group PEAK Matrix
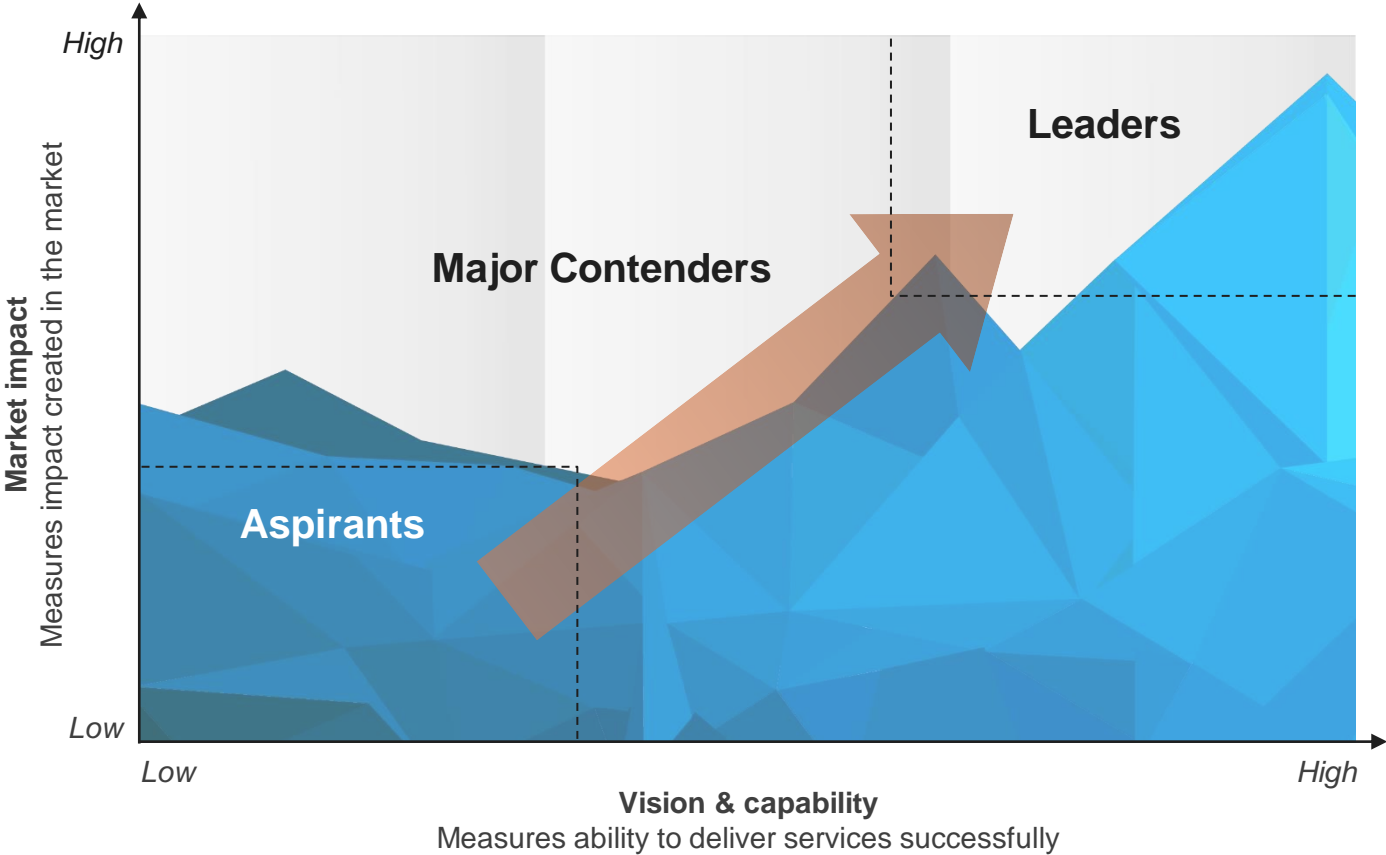
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions
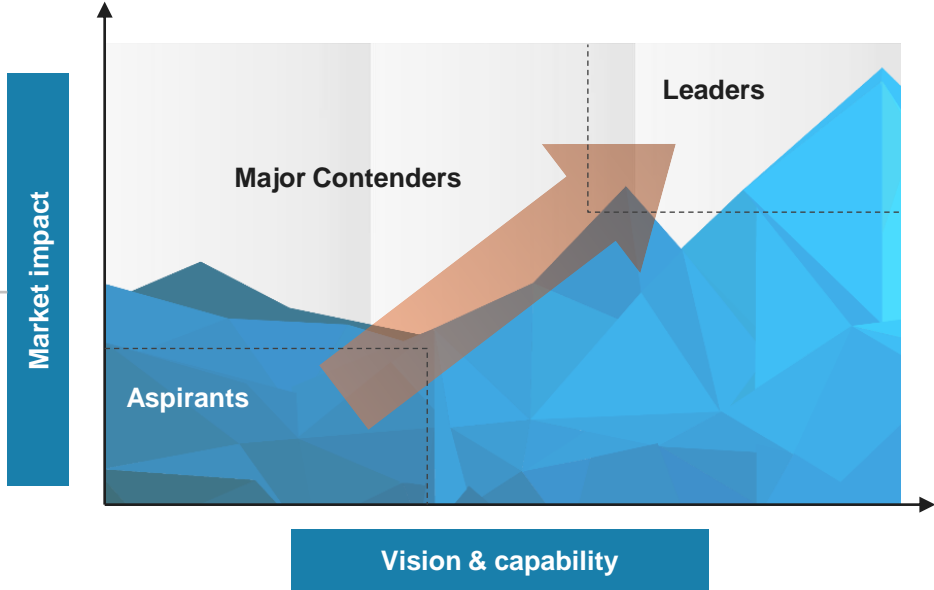
Market adoption

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

Market impact

Leaders

Major Contenders

Aspirants

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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With you on the journey

Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, system integrators, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **everestgrp.com**.

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

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

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

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

Toronto
canada@everestgrp.com
+1-416-388-6765