



Everest Group PEAK Matrix[®] for Amazon Web Services (AWS) System Integrator 2022

Focus on Accenture
August 2022



Background of the research

The growth of enterprise adoption of public cloud is accelerating. The public cloud market is seeing a proliferation in services offered by the hyperscalers and a corresponding increase in the investments made by SIs in their hyperscaler-specific cloud services and solution portfolio. AWS continues to dominate the overall public cloud market and is focusing on innovation across different portfolio segments covering infrastructure, platform, data, and next-generation services.

With more enterprises embarking on their public cloud migration journey, integrated delivery, and effective management of integrated capabilities across the core infrastructure, cloud application, and data on cloud has become crucial. Enterprises are looking for strong system integration capabilities across the entire life cycle of the cloud journey covering consulting, infrastructure design/build, cloud modernization, and cloud operate services for individual hyperscaler portfolio segments.

SIs are investing in a joint go-to-market approach, AWS-specific organization structure, talent development roadmap, AWS-specific solutions and IPs, and co-innovation activities to cater to enterprise demands. There has been an uptick in both organic and inorganic investments by SIs to attain AWS accreditations and competencies.

In this research, we present the assessment and detailed profiles of 29 SIs featured on the [System Integration \(SI\) Capabilities on Amazon Web Services \(AWS\) PEAK Matrix® Assessment 2022](#). The assessment is based on Everest Group's annual RFI process for calendar year 2022, interactions with leading SIs, client reference checks, and an ongoing analysis of the AWS services market.

This report includes the profiles of the following 29 leading AWS SIs featured on the AWS PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa
- **Aspirants:** Aspire Systems, Jade Global, Tavant, and Xebia

Scope of this report



Geography
Global



Providers
29 leading AWS SIs



Services
AWS cloud services

System Integration (SI) capabilities on AWS PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro

- Leaders continue to make strategic investments in AWS partnership through AWS accreditations, partner launch programs, and competencies for various industries, use cases, and workloads, along with joint go-to-market initiatives and solution co-creation with AWS
- These players have a credible industry-specific cloud offerings portfolio, AWS-specific assets and IPs, next-generation offerings, strong complex workload transformation capabilities, and a platform-centric solutioning approach
- Leaders have demonstrated capabilities of successful integrated cloud transformations across core AWS infrastructure, application, and data on cloud layers
- These players have demonstrated strong market impact and extensive capabilities in delivering value on cloud by being strategic partners in the customer's transformational journey

Major Contenders:

IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa

- While these players are increasingly investing in building AWS competencies across various workloads and use cases, their capabilities in offering verticalized cloud solutions built on AWS and AWS-specific cross-industry assets lag Leaders
- These players have demonstrated high market impact in terms of YoY growth and value delivered to clients, while providing system integration capabilities on AWS
- They are making targeted investments in AWS-specific talent development, delivery capabilities, and partnership ecosystem

Aspirants:

Aspire Systems, Jade Global, Tavant, and Xebia

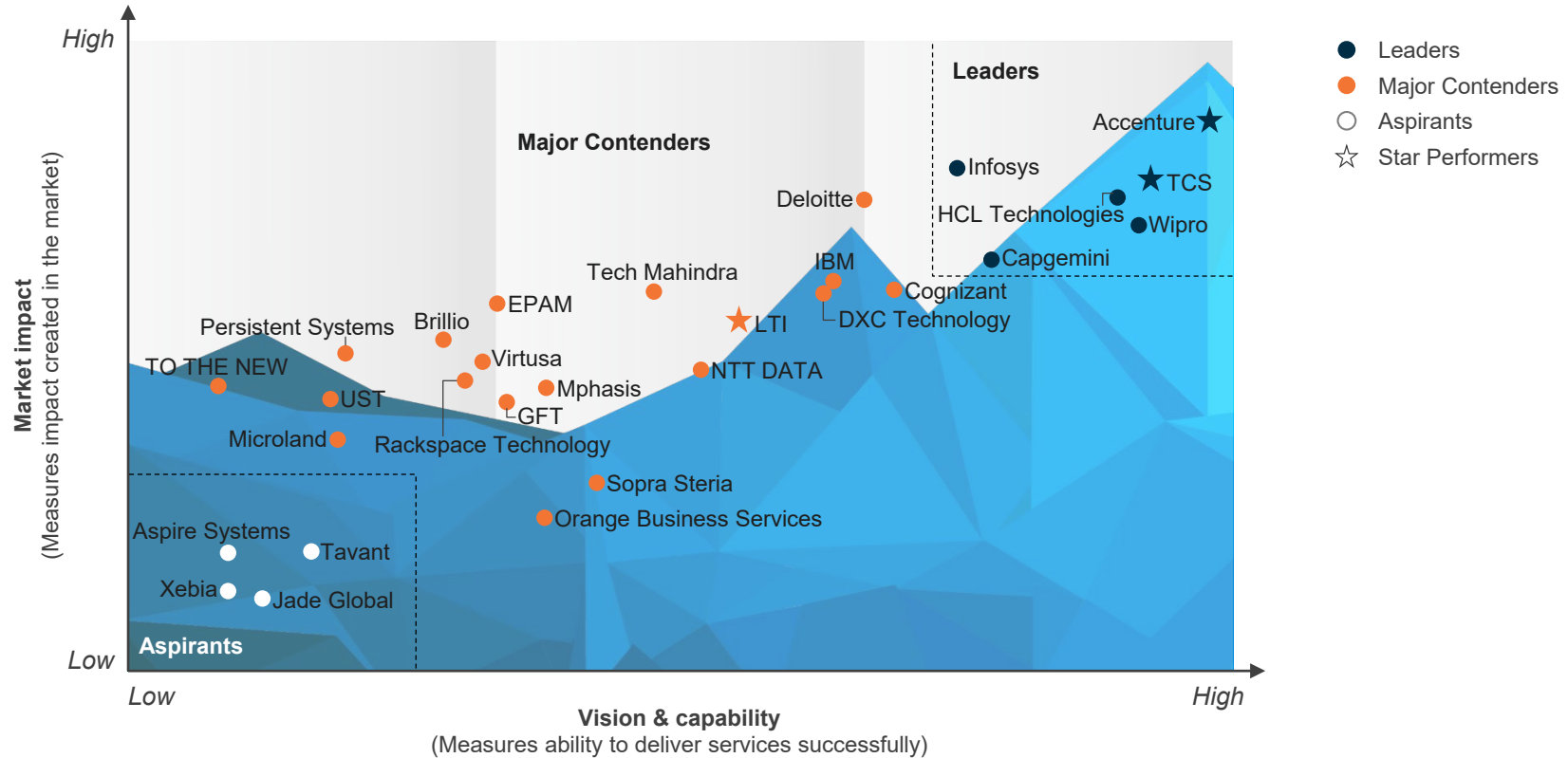
- AWS system integration capabilities of Aspirants are in the initial stages of the partnership level in terms of accreditations, qualifications, and competencies
- These players prefer relying majorly on AWS' portfolio of industry-specific and cross-vertical solutions instead of investing in natively developed asset and IP portfolio, in order to deliver differentiated services to clients



Everest Group PEAK Matrix®

System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022 | Accenture positioned as Leader and Star Performer

Everest Group System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022¹












¹ Assessment for Capgemini and Deloitte excludes system integrator inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these system integrators, system integrator public disclosures, and Everest Group's interaction with buyers

Source: Everest Group (2022)

Accenture | system integration capabilities on AWS (page 1 of 6)

Everest Group assessment – Leader and Star Performer

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

- Accenture, through its market-leading AWS-specific BU, has co-created multiple industry-relevant solutions with AWS that can accelerate enterprises' cloud adoption and improve their time-to-market
- Enterprises exploring SIs with transformation capabilities in SAP, Oracle, and other complex workloads will benefit from Accenture's multiple AWS-focused acquisitions
- Accenture can help enterprises realize greater value from cloud adoption through its cloud first operating model, which aims to simplify the transformation process. Enterprises can measure the value realized through Accenture's 360° value framework
- Accenture's investments in AWS+Pan-Amazon partnership will offer enterprises an opportunity to leverage the capabilities of the larger Amazon ecosystem
- Some clients have appreciated the technical knowledge and experience of Accenture's talent

Limitations

- Enterprises looking for specialized AWS certified talent in areas such as big data and ML may not receive what they expect as Accenture's current focus has been on building a pool of more generic AWS certified talent
- It might not be suitable for enterprises seeking delivery presence in LATAM and the Middle East as its geographical presence and market focus is centered mostly around North America, Europe, and the APAC regions
- Some clients have highlighted the lack of an enterprise-contextualized approach for solutioning and security as a challenge when working with Accenture on AWS engagements
- Some clients have highlighted the lack of contractual and commercial flexibility during engagements

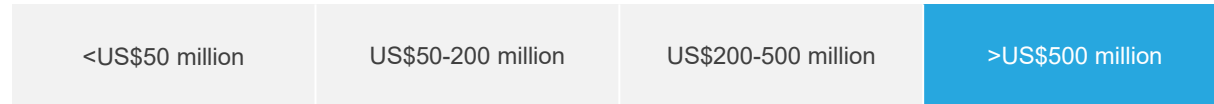
Accenture | system integration capabilities on AWS (page 2 of 6)

Overview

AWS partnership overview

Accenture and AWS began working together in 2006 and established their joint business partnership called Accenture AWS Business Group (AABG) in 2015. The partnership has evolved to include over US\$40 million of annual investment in both assets and offerings, as well as in the growing number of dedicated resources to support its clients. Accenture is an AWS Global GSI partner across all AWS tracked metrics and continues to help clients achieve value with AWS.

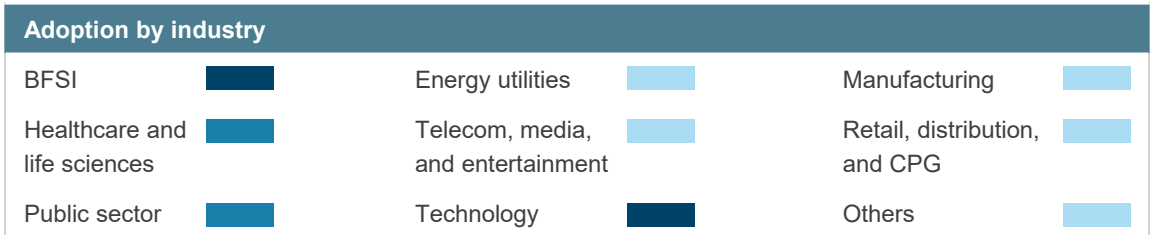
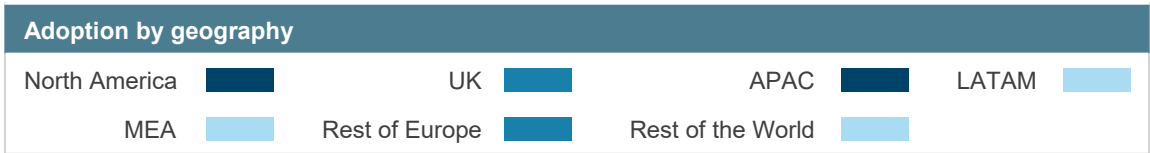
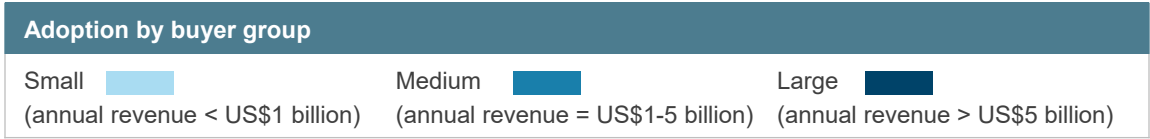
Revenue from AWS-related services (2021)



AWS portfolio – key highlights (representative list)

- AWS Global System Integrator Partner of the year 2021: US, Public Sector, UKI, Italy, South Africa
- Over 100,000 workloads migrated/modernized
- Over 175 acceleration assets, including Secure Cloud Foundation and Conversational AI Platform
- About 40 vertical solutions supporting all industries
- As many as 30 AWS Competency Awards, service delivery, and program validations
- About 10 one-click solutions in the AWS marketplace, including managed detection and response

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



Accenture | system integration capabilities on AWS (page 3 of 6)

Case studies

| | |
|---|--|
| Case study 1 | Attained water neutrality through open platform |
| Client: a large energy company | |
| Business challenge The company's environmental, community, sustainability, and operational goals set up a new opportunity to address water management business challenges in the energy industry. This had to be done by developing an industry-wide platform to launch the cooperation to optimize the use of water in oil and gas operations. | |
| Solution <ul style="list-style-type: none">• The energy company, Accenture, and AWS, together, developed a solution for water management to help the company digitally advance operational objectives in water management and sustainability• Leveraged Accenture industry insights and cloud capabilities from AWS such as high-performance computing, storage, ML, and AI | |
| Impact <ul style="list-style-type: none">• Optimized capturing, treating, reusing, using, and disposing of water in operations• Ensured cost optimization across the value chain to support decision making | |

| | |
|--|--|
| Case study 2 | Built a new future-ready digital cloud infrastructure |
| Client: Generali Vitality | |
| Business challenge Generali Vitality was looking for a solution to help increase speed-to-market, global user engagement, and retention. | |
| Solution <ul style="list-style-type: none">• Tailored a cloud-native application with a focus on User Experience (UX) and push-button deployments• Broke down the core building blocks of the implementation and technical architecture into four main elements such as cloud-native development, including databases, API management, and web content distribution, a custom-built responsive web application, and an event-driven microservices architecture• Drove automation across the whole software development life cycle by using a DevOps and automation approach | |
| Impact <ul style="list-style-type: none">• Expanded the client's customer base beyond the existing markets by integrating multiple rewards partners and becoming localizable for multiple markets and languages• Facilitated the rolling out of new features on its benefits platform faster and unlocked opportunities for continuous product improvements and better customer engagement | |

Accenture | system integration capabilities on AWS (page 4 of 6)

Solutions/IPs/products

| Proprietary solutions/IPs/products (representative list) | |
|--|--|
| Event name | Details of the tool/solution |
| Accenture myNav® | <p>It consists of:</p> <ul style="list-style-type: none"> • Migrating IT landscapes and selecting the right cloud infrastructure for enterprise needs • Accelerating value by structuring the architecture, applications, and data for the cloud and implementing cloud-first strategies in the workforce and operating model |
| Carbon Explorer | <p>It is a carbon footprint tool that</p> <ul style="list-style-type: none"> • Baselines carbon usage, calculates real-time usage, and predicts the future use of AWS IaaS capacity • Allows clients to track and assess carbon usage by their AWS infrastructure and track compliance with internal sustainability targets |
| Cloud Transformation and Run | Transforms the core IT business through migration, modernization, and innovation in the cloud with Accenture's cloud CoE, operating model, and optimized cloud-managed services |
| The Connected Customer Experience | Reimagines experiences for the digital age and helps clients scale personalized, real-time, and omnichannel service journeys at speed using AI and predictive analytics |
| Accenture AWS Data Lake Accelerator | Builds scalable modern data platforms on the cloud, which empowers clients to embrace new technological possibilities and innovate continuously with reduced risk |
| Accenture AWS Intelligent Public Safety Platform (IPSP) | <ul style="list-style-type: none"> • Generates strategic, data-driven insights on crimes to get data to investigating officers faster • Helps law enforcement to identify crimes and enable conviction |
| Applied Technology and Operations for Markets (ATOM) | <ul style="list-style-type: none"> • It is a multi-client processing on-demand service platform where clients plug their trading and treasury processes and related IT and operations functions • It is a fully-integrated modular service with near real-time data MI and reporting, comprehensive multi-market support, and trade status information; it has an integrated view of the business across all regions • Accenture provides this solution as a Business Process-as-a-Service (BPaaS) model or Platform-as-a-Service (PaaS) model for transaction processing and shared services including IT and operations |

Accenture | system integration capabilities on AWS (page 5 of 6)

Partnerships

| Partnerships (representative list) | |
|------------------------------------|---|
| Partner name | Details |
| SAP | <ul style="list-style-type: none"> • Cross-industry focus on AWS and over 50 advanced technology centers delivering SAP services, with Accenture achieving SAP on AWS advanced specialization • Jointly developed tools to expedite the migration and reduce the run of SAP on AWS (Cloud Suite). Accenture collaborated with SAP on AWS Migration and Modernization, AWS Data Lake Accelerator (DLA) for SAP, and SAP Utilities Industry Cloud Solution with AWS |
| Salesforce | <ul style="list-style-type: none"> • Three-way partnership between AWS, Accenture, and Salesforce to develop cross-industry offerings, including the integration of Amazon Connect with Salesforce and the development of AWS native solutions connected with Salesforce • Accenture has worked with Salesforce on the Salesforce Vaccine Management solution |
| VMware | <ul style="list-style-type: none"> • Global partnership with a cross-industry focus on AWS VMware solutions with 5,400 Accenture VMware resources with over 800 certifications • Hybrid Cloud Migration Accelerator (HCMA) to facilitate VMware cloud migrations to VMC on AWS. The focus is on the migration, modernization, and long-term operational services for clients' application suites • Accenture collaborated with VMWare to offer VMware Cloud on AWS |
| Pega | <ul style="list-style-type: none"> • Pegasystems is a provider of solutions for customer relationship management, Robotic Process Automation (RPA), and Business Process Management (BPM) • Accenture is developing cross-industry solutions on AWS with an initial focus on Insurance • Accenture's collaboration has resulted in Pega Migration and Modernization and Pega Personalized Products and Services offering with AWS |
| HashiCorp | <ul style="list-style-type: none"> • HashiCorp is an enterprise Infrastructure-as-Code (IaC) and network orchestration and secrets management software solution using AWS • Accenture's collaboration has offered implementation and configuration of automated Terraform cloud/enterprise, Vault, Consul application and infrastructure transformations, DevSecOps operation improvements, custom integrations, and audit and regulatory compliance solutions |
| Databricks | <ul style="list-style-type: none"> • Databricks is a cloud-agnostic data acquisition and aggregation platform with a cross-industry focus on AWS • Accenture collaborated with Databricks to offer Databricks Hadoop Migration and Databricks Lakehouse for life sciences offerings to target drug repurposing |

Accenture | system integration capabilities on AWS (page 6 of 6)

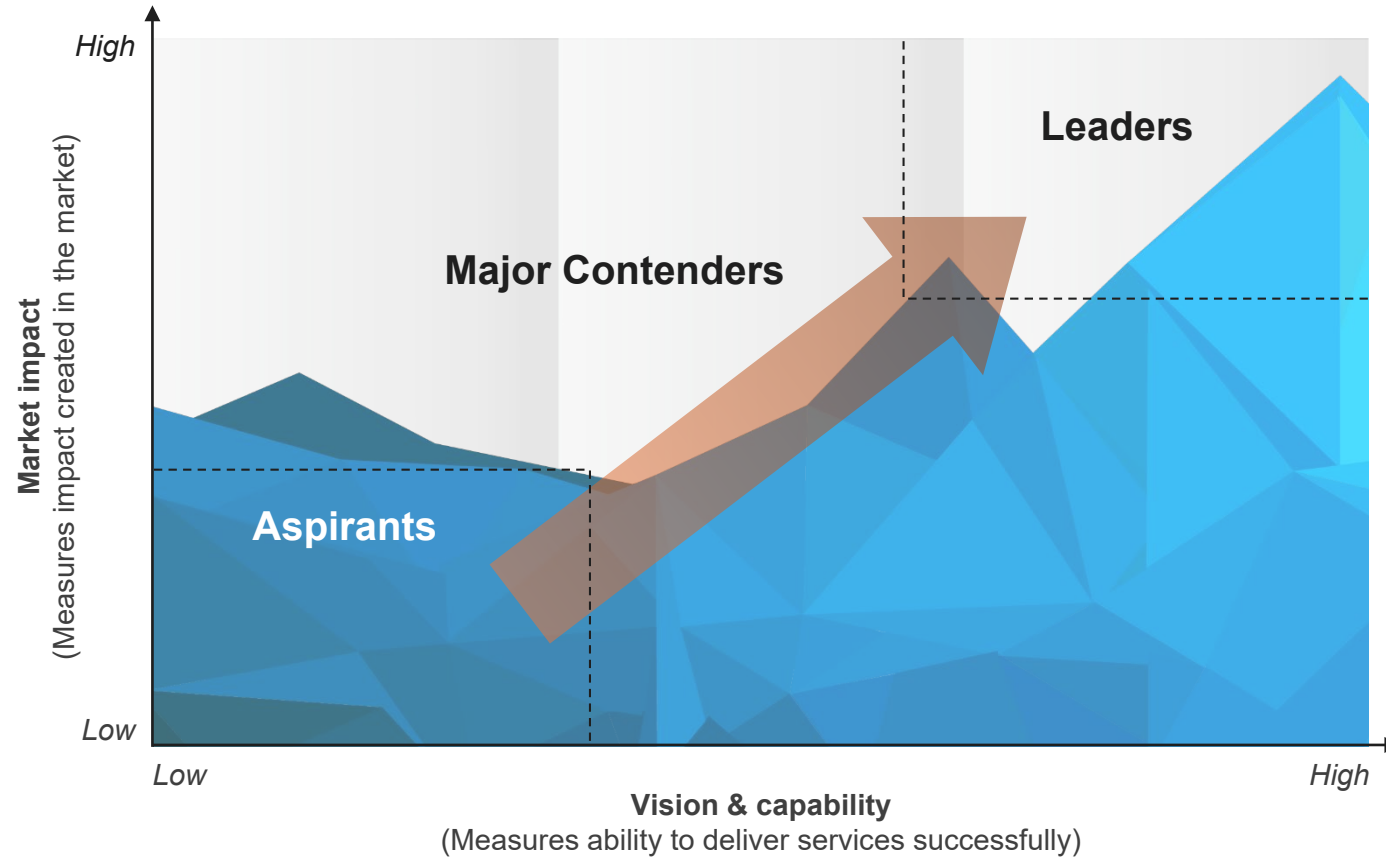
Investments and recent activities

| Investments (representative list) | |
|---|---|
| Investment name | Details |
| Acquisitions | Some of Accenture's recent acquisitions include Enimbos (ANZ) and Olikka (IBERIA). In addition to the 10 (two in North America, six in Europe, one in APAC, and one in the LATAM region) multi-cloud acquisitions, two additional acquisitions were AWS-specific companies, namely Gekko and Solitius (ZAG) |
| AWS Investment Desk and Proof of Value Function | <ul style="list-style-type: none"> • A team and a set of tools were developed to help Accenture and its customers maximize the investments of the AWS program • Accenture built a global LaunchPad program. These dedicated rapid prototyping teams build AWS proofs of value in areas ranging from big data to quantum computing to AI as part of either RFP responses or when proactively taking proposals to clients. LaunchPad helps bring the solutions to life using AWS services |
| Horizontal assets | Investments to develop Accenture cloud assets that leverage AWS services to support customers migrating or modernizing to AWS or using AWS as a platform to address specific business needs |
| Industry solutions | Investments to develop industry-specific solutions that leverage AWS services to meet specific business needs across the wide variety of industries that Accenture covers including BFSI, healthcare and life sciences, public sector, energy and utilities, telecom, media and entertainment, manufacturing, technology, retail, distribution, CPG, and others |
| AWS talent and certifications | Trained over 15000 people in AWS and achieved over 7500 new AWS certifications over the past year |

Appendix

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

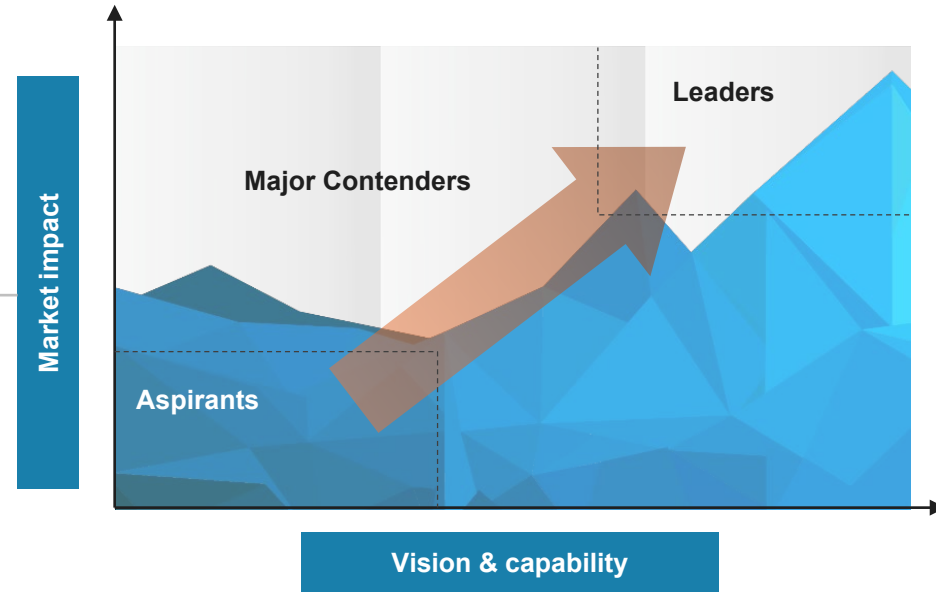
Everest Group PEAK Matrix



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



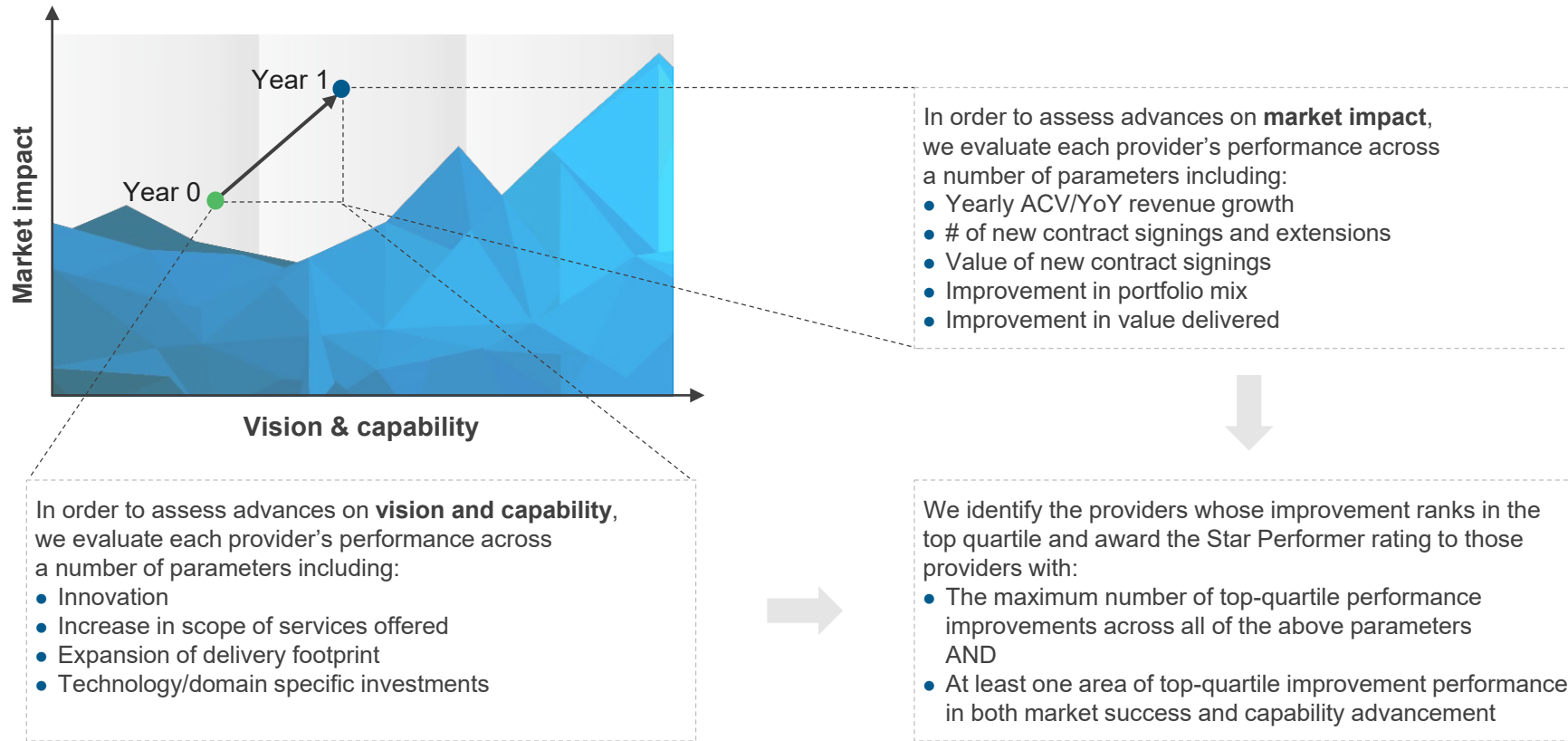
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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



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 adopts an unbiased and fact-based approach (leveraging provider / 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 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 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 provider / 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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