

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

Focus on Accenture
December 2020



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, **Accenture emerged as a Leader**. This document focuses on **Accenture's** SI capabilities on Microsoft Azure and includes:

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

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:

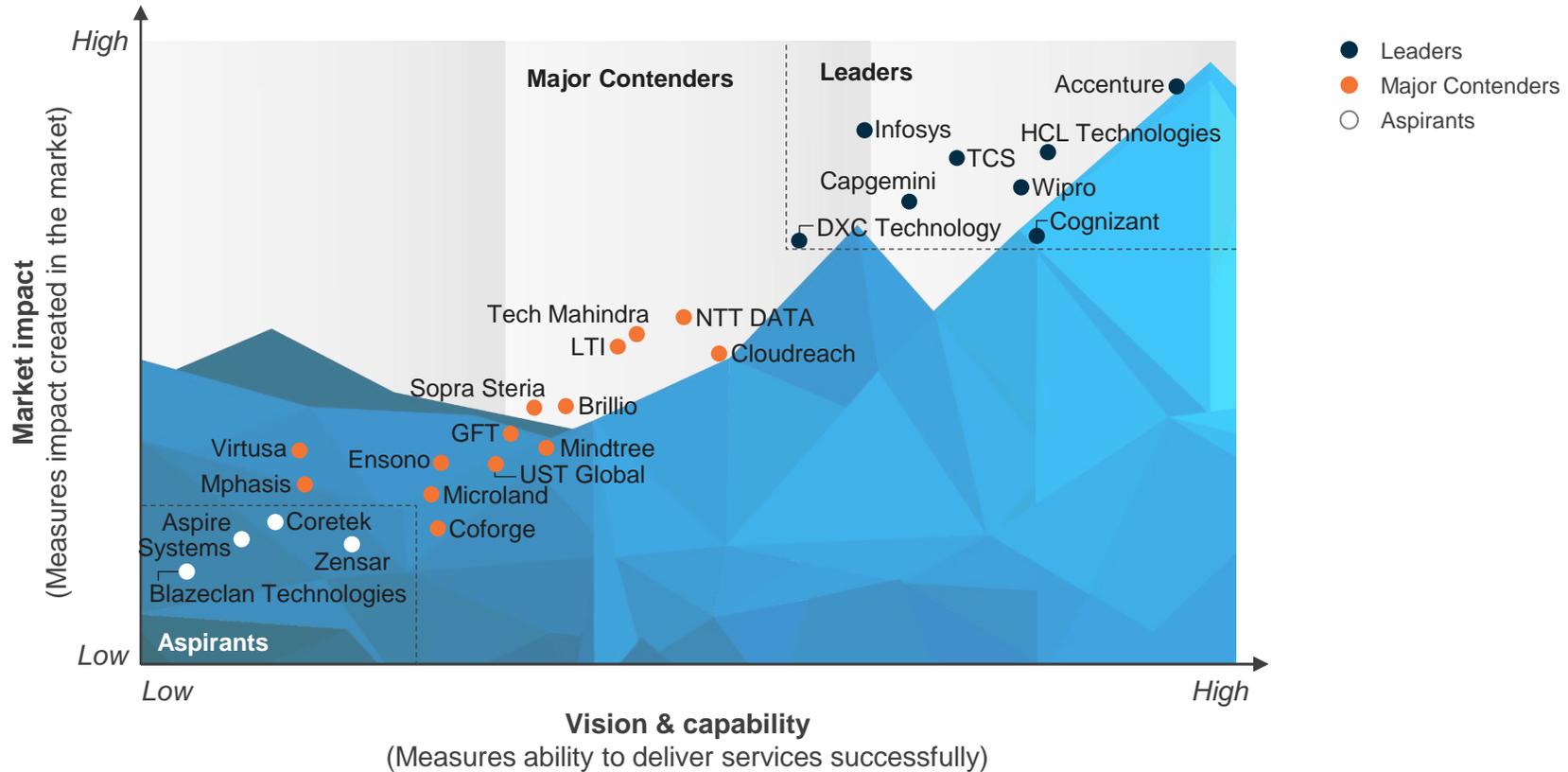
Aspire Systems, Blazeclan Technologies, Coretek, and Zensar

- 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 | Accenture positioned as Leader

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



Source: Everest Group (2020)

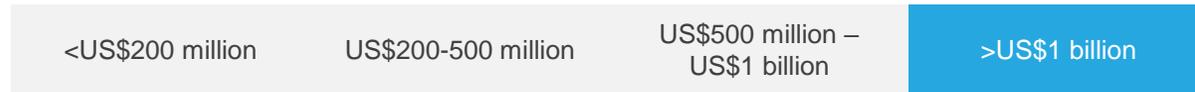
Accenture | system integrator capabilities on Microsoft Azure (page 1 of 5)

Overall cloud services overview

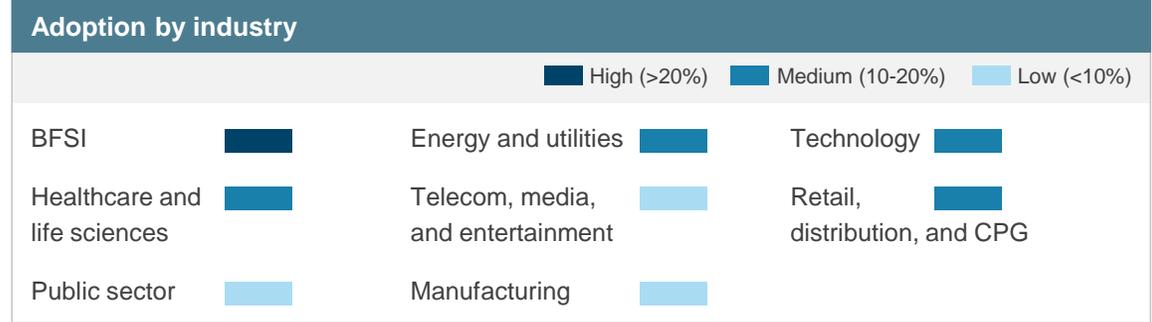
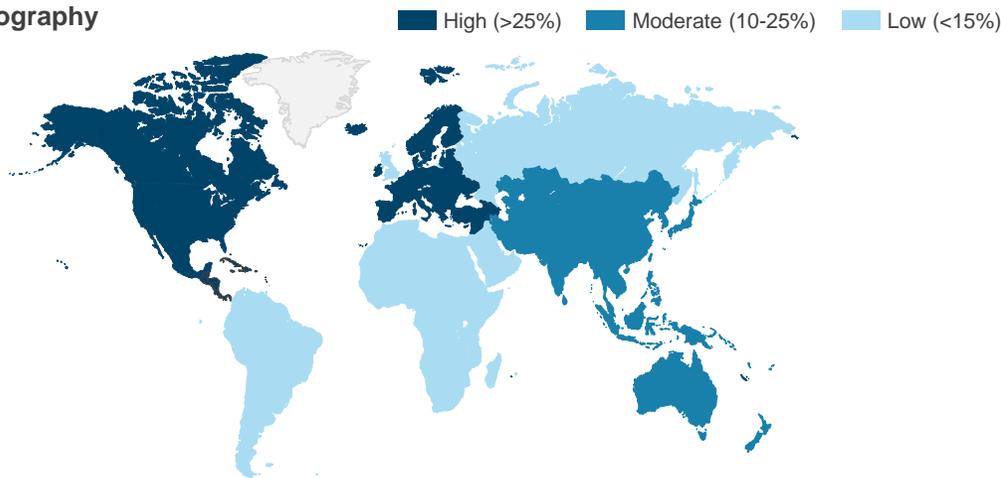
Cloud services vision:

Accenture’s vision is to help its clients leverage cloud at the enterprise level to unshackle themselves from capital-intensive capabilities that are not related to their core business. It wants to define and implement the right cloud solution for its clients' business, both from a present and future perspective. The formation of Accenture Cloud First, with a US\$3 billion investment over three years, will focus on developing new capabilities, solutions, partnerships, and client engagements with the aim to help clients innovate quickly.

Overall cloud services revenue (2019)



Adoption by geography



Source: Everest Group (2020)

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Capabilities on Azure overview

Azure partnership overview:

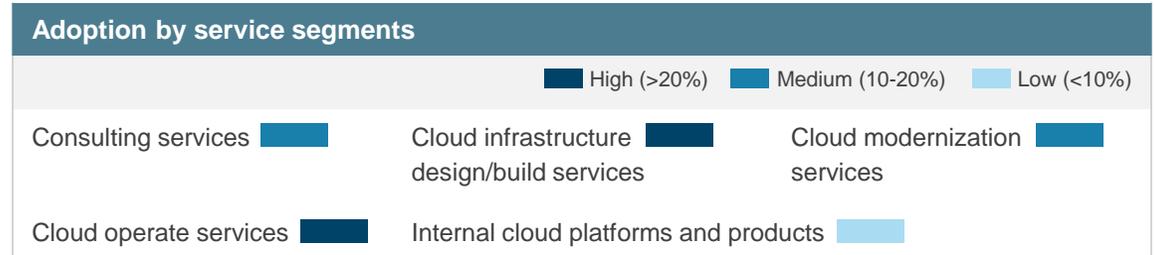
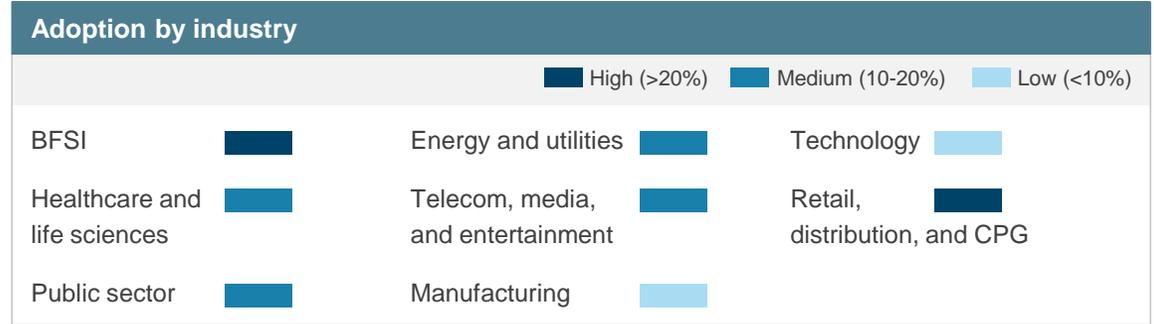
Established the Accenture Microsoft Business Group (AMBG) to expand services capabilities on a global scale, establish joint solution development practices, and help clients overcome disruption and become industry leaders through transformation.

Revenue from Azure-related services (2019)



Azure portfolio – key highlights (representative list)

- Over 17 Microsoft Gold Network competencies, Microsoft-certified Azure Managed Service Provider (MSP), and one of the largest talent pools on Azure across different system integrators
- Displayed industry-specific assets on Azure including Murex, Finastra, Guidewire, Temenos, Duck Creek, retail analytics platform, and intelligent fleet management
- Developed next-generation-focused Azure technologies and offerings, which include digital plant, connected mine, fleet management, smart campus, connected insurance, and factory of the future
- Three prioritized areas in response to COVID-19: Elastic digital workplace, Azure migration, and data modernization
- Key use cases delivered on Azure include:
 - SAP migration to Azure
 - Large-scale data migrations
 - Customer engagement platforms



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

Key solutions

Proprietary solutions (representative list)	
Solution name	Details
myNav®	It helps to navigate the complex cloud landscape and select the right architecture and cloud solution to meet specific needs based on cost, implementation, compliance, and environmental sustainability
Sovereign cloud advisor (part of myNav)	It helps create a cloud architecture that complies with data sovereignty regulations and supports clients to understand the implications of global data sovereignty laws and ultimately create a cloud architecture that complies with data sovereignty regulations
Green cloud advisor (part of myNav)	It provides insights into the sustainability value of cloud solution based on the cloud service provider and location greenness through simulations, resulting in better energy resource management
myConcerto®	A single digitally integrated platform that accelerates and de-risks the transformation journey with a value-led approach to ROI. It supports technology-agnostic, cross-platform advisory work, and transformation work for six key platforms such as SAP, Oracle, Workday, Salesforce, Microsoft, and Adobe
myWizard®	Accenture's signature platform for intelligent software engineering and IT services delivery. It is a liquid modular platform that evolves service delivery and provides intelligence through integration of its proprietary methods, intelligent tools, and assets
Accenture Cloud Platform (part of myWizard)	The Accenture Cloud Platform (ACP) is a comprehensive and flexible service that provides today's global enterprises the control and knowledge they need to help them accomplish their legacy-to-cloud transformation and subsequent management of their estate
SAP CloudSuite	<ul style="list-style-type: none"> • SAP on cloud automation – Cloud Builder: This tool can deploy SAP industry reference architectures and can install various SAP modules in certified OS/DB combinations • SAP on cloud automation – Cloud Runner: This tool helps to automatically manage the run schedule of SAP Infrastructure in the public cloud • SAP on cloud automation – Cloud Admin: This tool helps to automate the BAI operations performed by the basis administrator and provide more flexibility to execute them from a central console in a scheduled manner
Smart data mover	Facilitates automated migration to Azure cloud from sources such as Teradata, Oracle, and Netezza
.NET & cloud insights	Analyzes current .NET applications on a line-by-line basis and reduces migration time through automation
Azure API Sandbox Accelerator	Enabling clients to speed up API adoption through an accelerator and API catalog
BizTalk to Azure Migrator	An accelerator to migrate the on-premise BizTalk artifacts, and generate the ready-to-deploy artifacts in Azure with a single click

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

Case study, investments, and recent activities

Case study	
SAP estate migration for a leading retailer	
Client	A leading retailer
Business challenge	The client sought to accelerate its digital transformation journey and reduce selling, general, and administrative spend, aspiring for significant dollar savings over the course of the project
Solution	Accenture helped the client move its entire global SAP estate to Azure and claims it to be one of the largest such moves to the public cloud ever done. Accenture migrated a massive estate of >1,500 servers and >120 TB ERP central component systems. Accenture followed the engagement with a five-year managed services agreement, delivering intelligent operations and continued end-to-end transformation
Impact	As a result, the client could spin up new environments in hours, not weeks, and leveraged automation, which helped in reducing support resourcing by up to 30%, or US\$1 million per month. Additionally, IT Opex went down by 30-50%, freeing up capital for new strategic initiatives

Recent investments and activities (representative list)	
Development	Details <ul style="list-style-type: none"> • Azeo, acquired in 2020, is a highly regarded provider of Microsoft and IoT services in France with deep expertise across modern workplace, data and Artificial Intelligence (AI), cloud, and IoT solutions • Acquired Altius, a UK-based data and AI company, in 2020 to strengthen industry and cloud capabilities in solutions for retail, travel and transport, infrastructure, and public sector • Alnamic AG, acquired in 2019, focuses on industry-specific solutions based on Microsoft Dynamics 365 and AX in Germany. Headquartered near Dusseldorf in Neuss, Germany, it specializes in Microsoft technology solutions in manufacturing, IoT, wholesale, and distribution sectors
Investment	Invested in establishing the Accenture Microsoft Business Group (AMBG), a group that elevates its long-standing strategic alliance with Microsoft and expanded combined service capabilities at a global scale with joint solution development, to help clients overcome disruption and lead transformation in their industries
Talent	Accenture has over 30,000 Microsoft Azure-certified practitioners

Accenture | 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

- It delivers a broad range of Azure services across infrastructure, platform, data, IoT, and cognitive services through its Accenture Microsoft Business group, in collaboration with Microsoft, Accenture, and Avanade
- Accenture has 19 Microsoft Gold Network competencies and one of the largest pool of certified FTEs expanding its reach across geographies
- Clients have identified strategy development, knowledgeable talent pool, cost optimization, and client management as key strength areas for Accenture
- It acquired Azeo and Alnamic AG to increase its presence in Europe and enhance its competencies across Azure and other Microsoft stack capabilities including IoT and AI
- Accenture has launched Azure migration with end-to-end implementation and Azure data modernization solution to enable agile analytics and AI. These solutions are being jointly driven in the market with Microsoft

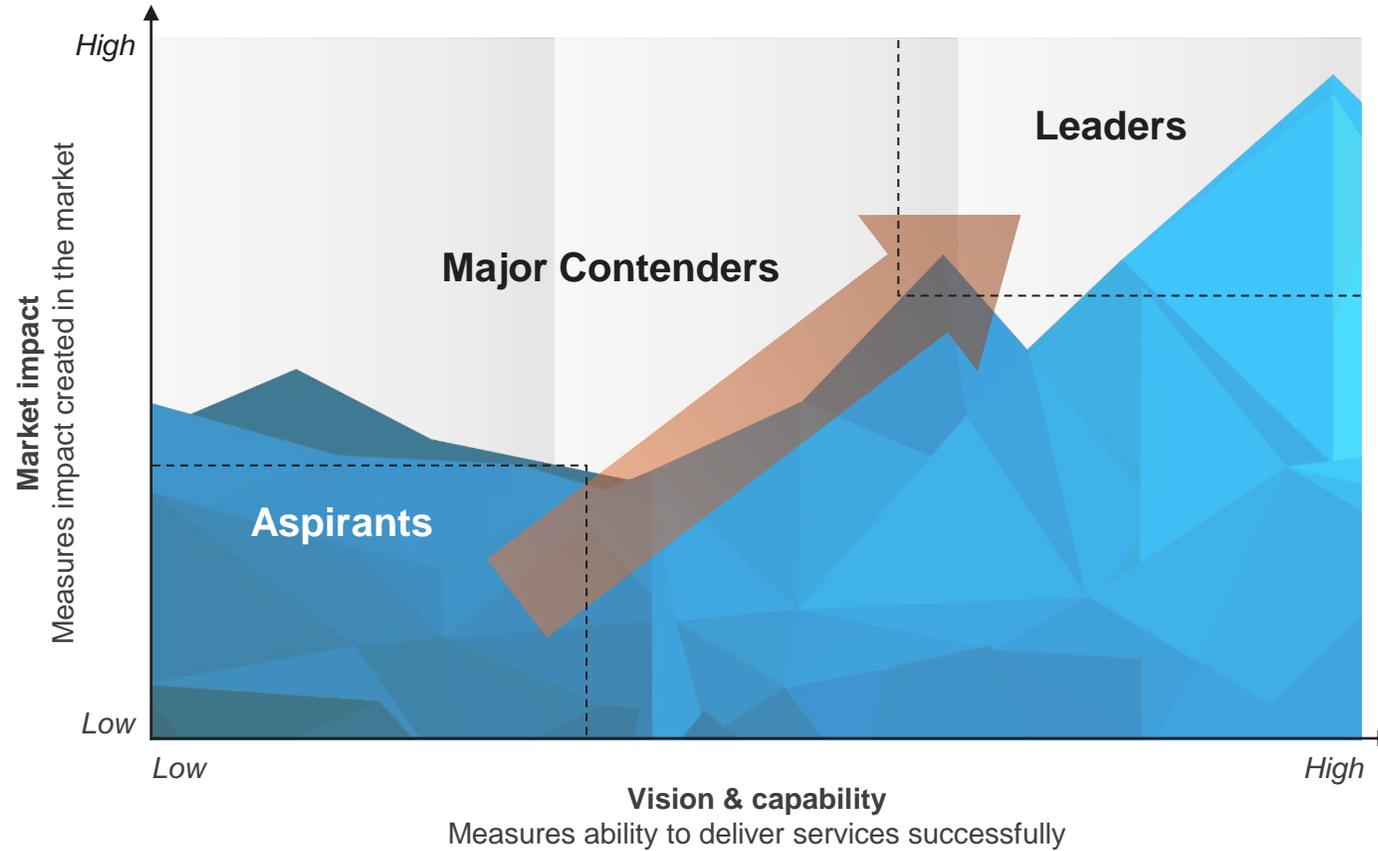
Areas of improvement

- To further augment existing capabilities, Accenture needs to develop competencies on the Azure-native hybrid cloud solution such as Azure Stack and Azure Arc
- Clients have cited internal communication and initial training, reducing contract costs, and removal of human error as areas of improvement for Accenture
- Though Accenture possesses good cloud automation capabilities and IPs, enterprise clients have pointed out that Accenture can be more proactive in identifying automation opportunities and building implementation roadmap
- Accenture needs to be more flexible in designing solutions based on client's appetite and context. Some clients perceive them to lack contracting flexibility owing to its consultative approach

Appendix

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

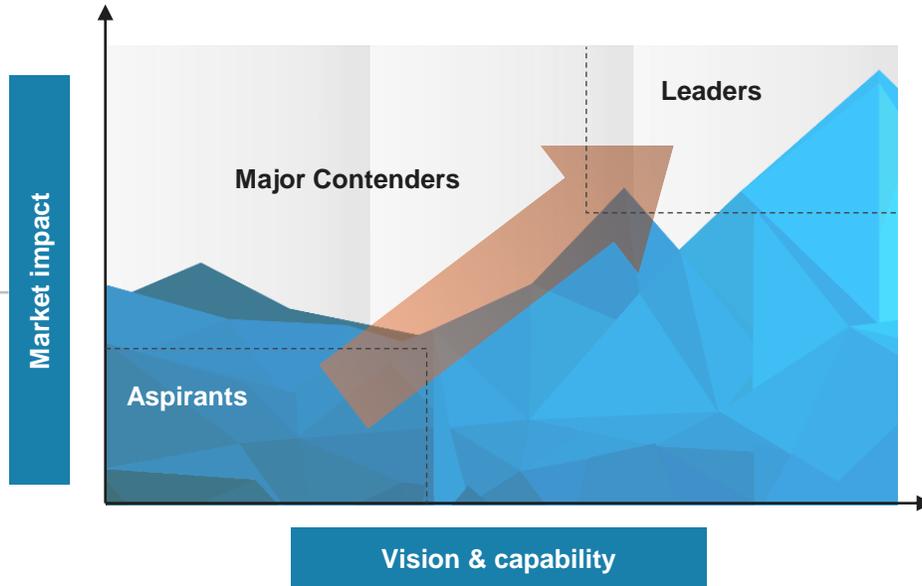
Everest Group PEAK Matrix



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

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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