



Everest Group PEAK Matrix[®] for Microsoft Azure System Integrator 2022

Focus on DXC Technology
September 2022



Background of the research

Enterprise adoption of the public cloud is on an accelerated growth trend. The public cloud market is experiencing a proliferation of services offered by hyperscalers and a corresponding increase in investments made by System Integrators (SIs) in their hyperscaler-specific cloud services and solution portfolio. Azure continues to enjoy significant enterprise mindshare and is experiencing increased adoption as the preferred public cloud partner, rapidly closing the gap with AWS.

With more and more enterprises embarking on their public cloud migration journey, integrated delivery and effective management of integrated capabilities across core infrastructure, cloud application, and data on the cloud have 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 operation services for the individual hyperscaler portfolio segments.

SIs are investing in an industry cloud-focused joint go-to-market approach, Azure-specific organization structure, Azure-focused 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 Azure accreditations and competencies.

In this research, we present the assessment and detailed profiles of 31 SIs featured on the [System Integration \(SI\) Capabilities on Microsoft Azure PEAK Matrix® Assessment 2022](#). The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading SIs, client reference checks, and an ongoing analysis of the Azure services market.

This report includes the profiles of the following 31 leading Microsoft Azure SIs featured on the Microsoft Azure PEAK Matrix:

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

Scope of this report



Geography
Global



Providers
31 leading Microsoft Azure SIs



Services
Azure cloud services

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

Leaders:

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

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

Major Contenders:

Brillio, Deloitte, EPAM, GFT, IBM, Infogain, LTI, Microland, Mindtree, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, UST, and Virtusa

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

Aspirants:

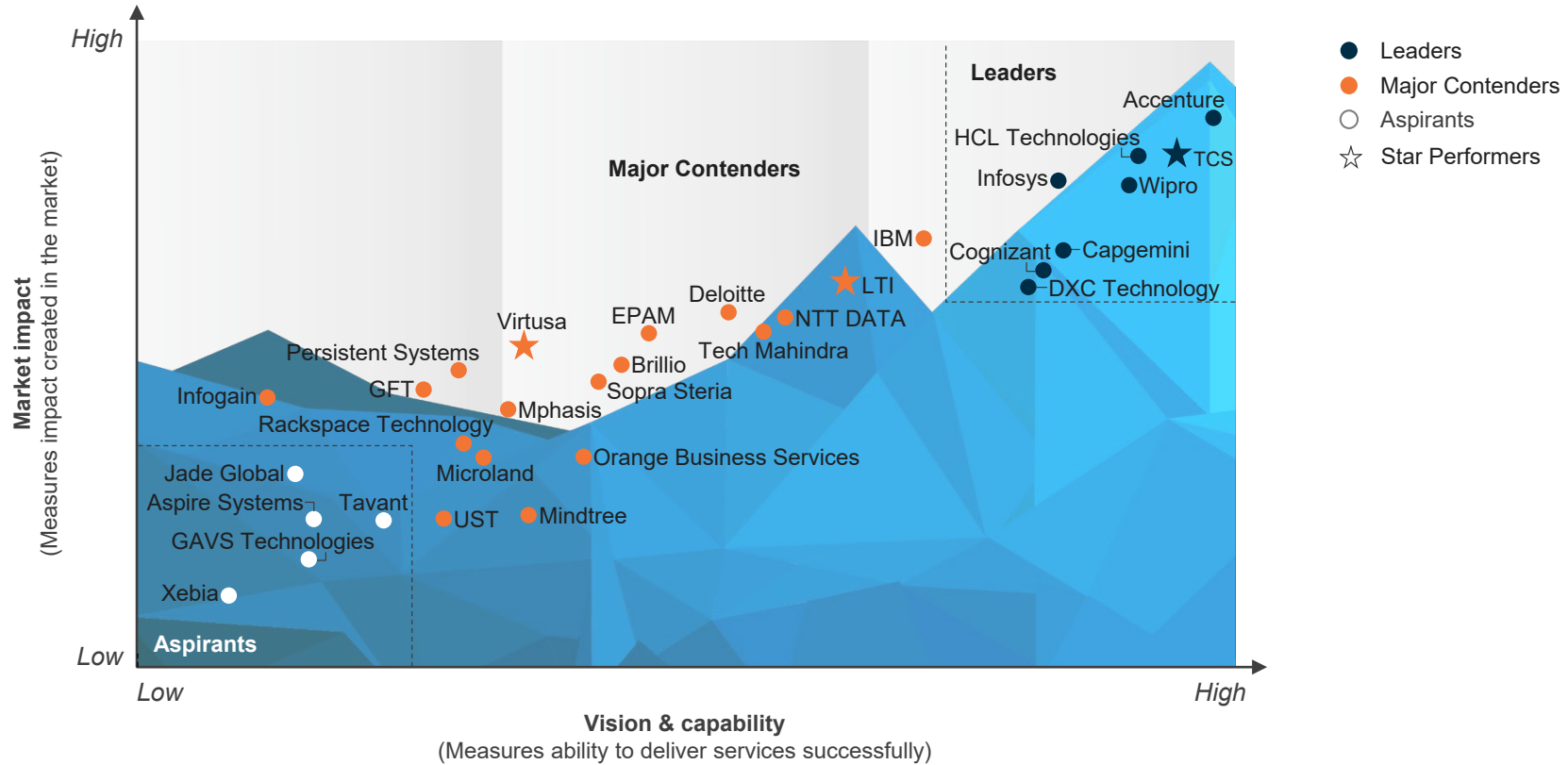
Aspire Systems, GAVS Technologies, Jade Global, Tavant, and Xebia

- Azure 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 Azure's portfolio of industry-specific and cross-vertical solutions instead of investing in natively developed assets and IP portfolio, in order to deliver differentiated services to clients

Everest Group PEAK Matrix®

System Integration (SI) Capabilities on Microsoft Azure PEAK Matrix® Assessment 2022 | DXC Technology positioned as Leader

Everest Group System Integration (SI) Capabilities on Microsoft Azure 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)

DXC Technology | system integration capabilities on Microsoft Azure (page 1 of 6)

Everest Group assessment – Leader

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

- Enterprises can rely on DXC Technology’s capabilities around mainframe modernization and SAP transformation on Azure owing to its legacy-focused expertise, solutions, and credible proof-points
- Enterprises looking for a Managed Services Partner (MSP) will benefit from DXC Technology’s capabilities and offerings portfolio, which includes Azure-specific solutions such as Heartbeat Functionality, Custom Monitoring, and Auto Make Managed
- Enterprises seeking nearshore- and onshore-centric Azure capabilities will benefit from DXC’s market presence and delivery footprint available through its Global Innovation and Delivery Centers (GIDC) and regional delivery centers
- Auto manufacturers can benefit from DXC Technology’s investment in IoT and AI-/ML-based and Azure-powered solutions such as Luxoft Connected Car and Robotic Drive

Limitations

- Enterprises beyond manufacturing, healthcare and life sciences, and public sector industries should carefully assess proof-points as DXC’s industry expertise on Azure is weighted toward these verticals
- Enterprises might find DXC lagging peers in Azure consulting and advisory capabilities and demonstrating consulting-led cloud engagement proof-points
- Enterprises looking for capabilities in up-and-coming technologies might not find DXC as the best fit as it continues to be a laggard when it comes to augmenting its Azure-specific IP portfolio through proactive investments
- Some clients have highlighted the lack of proactive value-addition and innovative push in Azure engagements as an area of improvement

DXC Technology | system integration capabilities on Microsoft Azure (page 2 of 6)

Overview

Azure partnership overview

DXC is a Microsoft Cloud Solution Provider (CSP). Its goal is to deliver transformative digital offerings that help clients harness the power of innovation by creating new ways of connecting people, data, and processes. Together, they aim to embed security in the Microsoft composable stack to deliver tangible business results to ensure that its clients have the insights, agility, control, and security they need to solve business challenges.

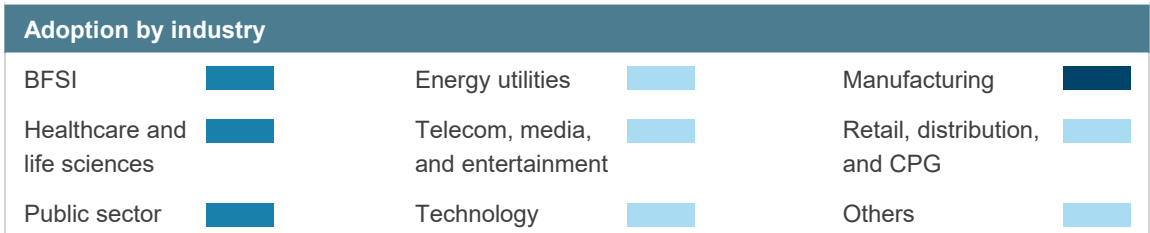
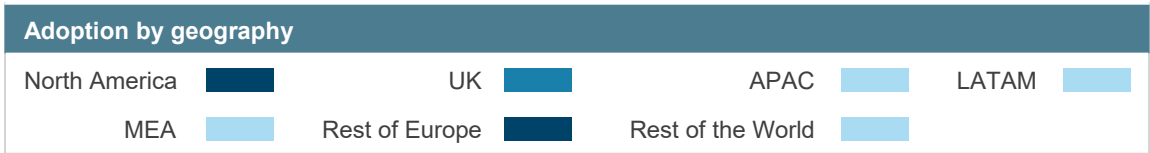
Revenue from Azure-related services (2021)



Azure portfolio – key highlights (representative list)

- Capabilities around integration across the Microsoft ecosystem (workplace/analytics/security), ability to migrate, modernize, and integrate mission-critical applications at a global scale, strong governance and compliance practices in the cloud, automation at scale with a DevOps focus, and use of Azure-native technologies and managed services
- Microsoft advanced specializations in SAP on Azure, Virtual Desktop Infrastructure (VDI), and Windows server and SQL server migration to Azure

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



DXC Technology | system integration capabilities on Microsoft Azure (page 3 of 6)

Case studies

Case study 1

Cutting IT costs to invest in modernization

Client: O-I Glass

Business challenge

The client turned to DXC for a comprehensive technology refresh of hardware platforms, operating systems, and applications. DXC had to rehost and update all of O-I's critical business applications to new and better performing hardware and migrate its applications to a dedicated storage environment to boost availability and flexibility.

Solution

- Created a hybrid solution for non-SAP applications that mirrored DXC's IT Outsourcing (ITO) services production environment in the cloud by using Microsoft Azure Site Recovery (ASR) to provide robust Disaster Recovery (DR)
- Refreshed O-I's Fujitsu FlexFrame hardware to a next-generation PRIMEFLEX environment for SAP applications, which enabled dynamic and demand-based deployment of SAP components across physical and virtual resources
- Designed and implemented a DR solution to manage events in which the backup system automatically takes over when the main system fails, without impacting the production system or business operations

Impact

- Reduced the IT hardware, storage, and support costs by 35% under the new ITO contract
- Improved recovery times as well as recovery point objectives under the new system

Case study 2

Providing a modern IT platform with fast migration to Azure and Oracle cloud

Client: Telent

Business challenge

The client wanted a more flexible and cost-efficient infrastructure to deliver key Enterprise Resource Planning (ERP) applications and network services to customers. It required DXC Technology's assistance to modernize its IT platform.

Solution

- Worked with Telent to move workloads to the public cloud by taking advantage of both Azure and Oracle cloud
- Identified services that could be improved by moving resources such as networking, memory, and storage to the cloud
- Used Microsoft Azure well-architected framework as a set of guiding tenets to improve the quality of workloads
- Used IaC for deployment wherever possible and audited it against Azure's policies to ensure that the standards were being met

Impact

- Increased flexibility and economies of scale that come with moving to a public cloud
- Enabled the client to offer serverless computing operations, Database as a Service (DBaaS), DevOps life cycle management, and dynamic resource allocation

DXC Technology | system integration capabilities on Microsoft Azure (page 4 of 6)

Solutions/IPs/products

Proprietary solutions/IPs/products (representative list)	
Event name	Details
Managed services for Microsoft Azure	Provides comprehensive services for Microsoft Azure cloud across design, deployment, delivery, security, and daily operational support
Modern applications development for Azure	Accelerators to deliver outcomes through data-driven assessments, rapid development of cloud-enabled and cloud-native applications, and APIs/microservices, while incorporating Lean-Agile and DevOps principles into its end-to-end software engineering methods and tooling
Airline booking platform	Modernizes the customer Passenger Service System (PSS) by transforming the current mainframe and mid-range airline PSS applications to Azure to accelerate the integration of diverse industry-centric applications and improve the customer experience for airline clients
Robotic drive & connected car	A solution developed in collaboration with Azure, which provides a development platform and toolkit for automakers to develop autonomous vehicles and increase efficiency in the development process
PaaS for SAP on Azure	Provides full-stack managed SAP services on the cloud to ensure accelerated deployment, highly reliable run support, SAP security, and business innovation with analytics, enabling on-demand capacity and guaranteed high-availability Service Level Agreements (SLAs) for both business applications and infrastructure
DXC platform X	An IT Service Management Control platform for service delivery orchestration and workflow automation with a primary orchestration/workflow engine exploiting ServiceNow capabilities. It incorporates applied intelligence where data ingestion, analytics and visualization, and reporting capabilities provide business insights to enable early detection, prediction, and self-healing.
Heartbeat functionality	Provides resourcing assessment of availability and provides an alert should the resource not be reachable
Custom monitoring	Provides customizable monitoring for all managed service customers
DXC Uptime	A data-driven analytics and intelligence platform that measures user sentiment across the workplace landscape. It is built on Azure with Teams, Outlook, and Azure Active Directory, and underpins DXC's core modern workplace offerings
AKS backup solution	A custom backup solution developed by DXC for Azure Kubernetes Service with proactive monitoring, backup, and restoration services, as well as in-depth reporting

DXC Technology | system integration capabilities on Microsoft Azure (page 5 of 6)

Partnerships

Partnerships (representative list)	
Partner name	Details of the partnership
VMware	Built on years of co-development experience, DXC and VMware help enterprises simplify IT and create and implement successful multi-cloud strategies. It also helps to migrate VMware workloads to Azure and increase customer productivity with elasticity, scale, and fast provisioning cycles.
Micro Focus	Addresses the 'rehost' approach with tools for code analysis and conversion. Its Enterprise Server product provides the mainframe emulation on Windows and Unix/Linux platforms.
ServiceNow	A preferred workflow partner for DXC to accelerate enterprise service management and operational transformation, underpinned by DXC Platform X
SAP	An SAP Global Strategic Services Provider (GSSP) and an SAP Platinum resell partner. DXC has solutions designed to optimize SAP workloads on Microsoft Azure.
NXP Semiconductors	A DXC Luxoft partner with NXP on automotive solutions with a license to perform firmware development
Microsoft Modern Workplace	Provides virtual desktop infrastructure on Azure, which is responsible for virtualizing Windows OS and providing virtualized desktops and applications securely in the cloud
Microsoft Data & AI	Partnership that is a combination of human-centered design with digitalized assets, automation, AI, DataOps, and MLOps, built on Azure while incorporating other Microsoft tools such as Power Bi, Power Apps, and Purview
Crowdstrike	Partnership for providing end-point protection and detection
CloudCheckr	Integration of tools to provide insight and actionable recommendations with automated management of reserved instance and consumption plans usage models to achieve savings
Intel	Joint research and development of solutions built on Azure such as AVS, Mainframe modernization, and industry solutions

DXC Technology | system integration capabilities on Microsoft Azure (page 6 of 6)

Investments and recent activities

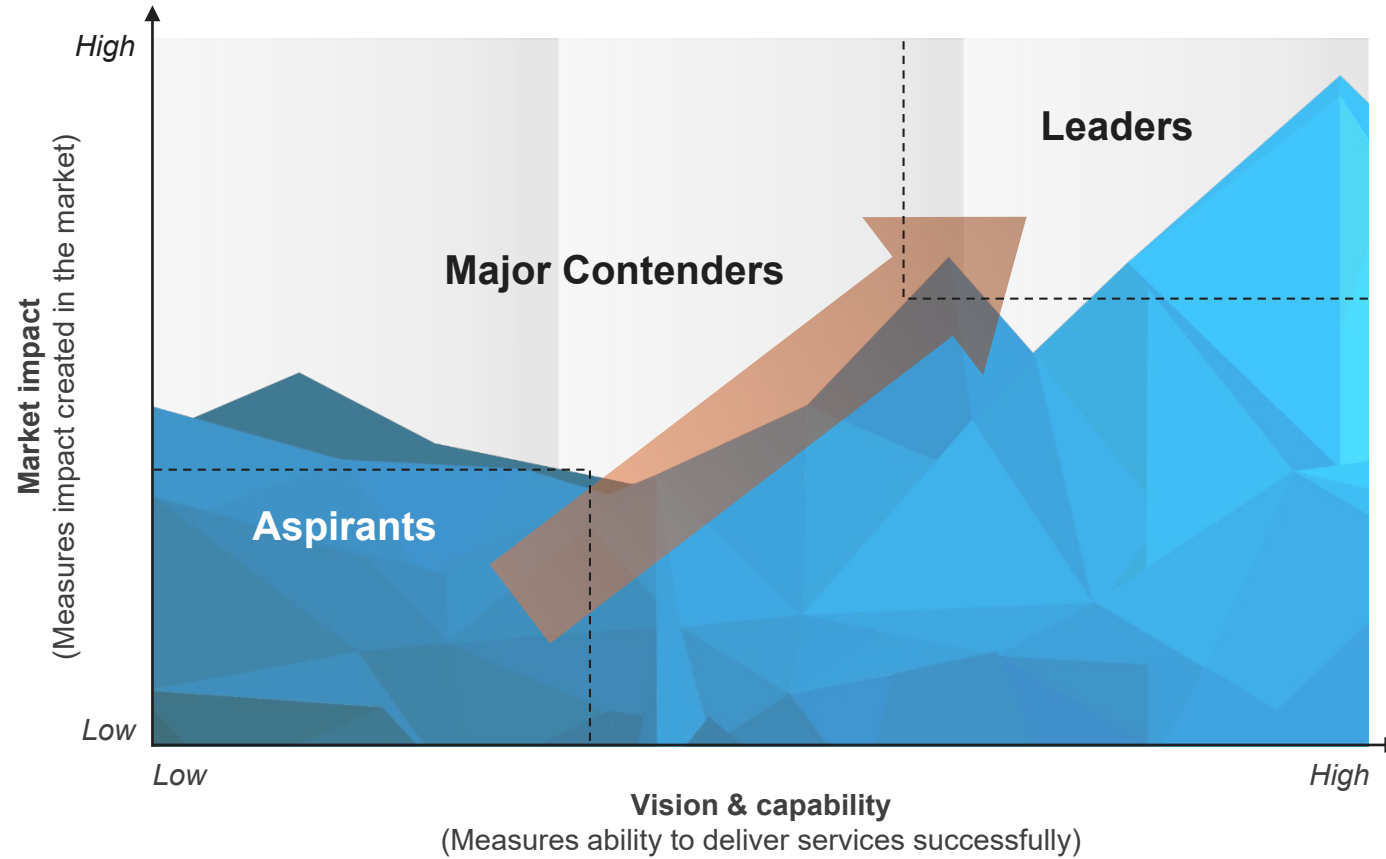
Investments (representative list)	
Investment name	Details
Azure managed services	<ul style="list-style-type: none"> • Investments in the development of new managed service capabilities and automation to maintain DXC's Azure MSP status such as Azure VMware solutions and mainframe modernization on Azure • Invested in event-driven automation that discovers and applies managed services at an enterprise scale and empowers customers to consume Azure services that are automatically onboarded/monitored
Application development and modernization services	<ul style="list-style-type: none"> • Continued investment in DevOps blueprint design models, mainframe modernization, and DXC Modernization Studio in order to incorporate MicroFocus with Azure frameworks • Ongoing annual investments in Kubernetes and DevOps pipeline blueprints/platforms such as support for private clusters, development of an energy platform, development of DevSecOps Integrated Platform, and next-generation managed services platform that automates testing, deployment, and upgrades for all managed services customers
Enhanced security services	<ul style="list-style-type: none"> • Investment in Azure-native security solutions such as Azure Sentinel, Defender, Purview, and Azure Information Protection (AIP) • Invested in the establishment of security baselines to meet customer compliance requirements, as well as proactive compliance assessments and remediation whenever necessary
Talent	<ul style="list-style-type: none"> • DXC plans to increase its Azure talent pool to 20,000 certifications within FY23 • Cloud week with Microsoft and DXC, where over 15,000 participants engaged in learning activities, furthering role-based certifications, and sales professionals training

Appendix

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



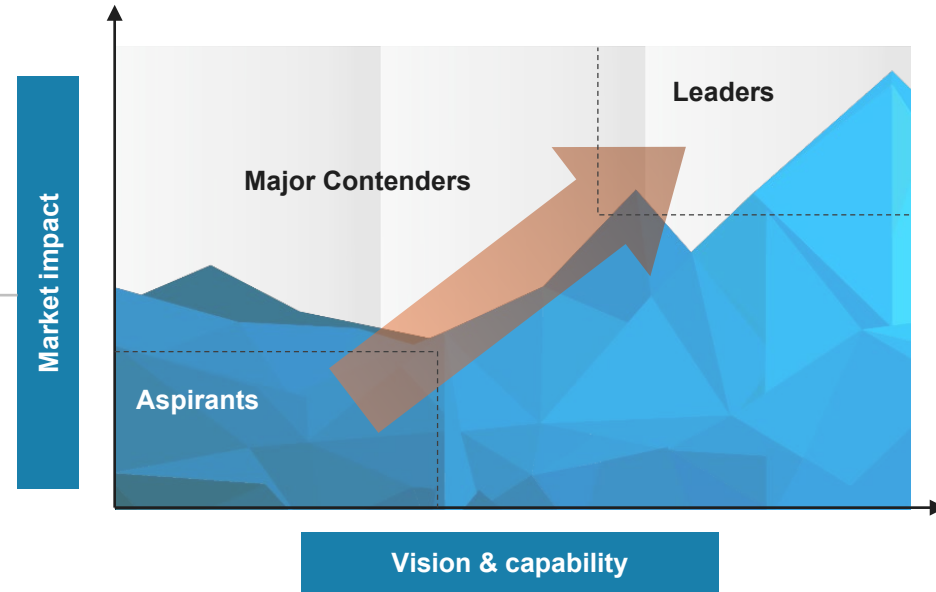
Everest Group PEAK Matrix



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



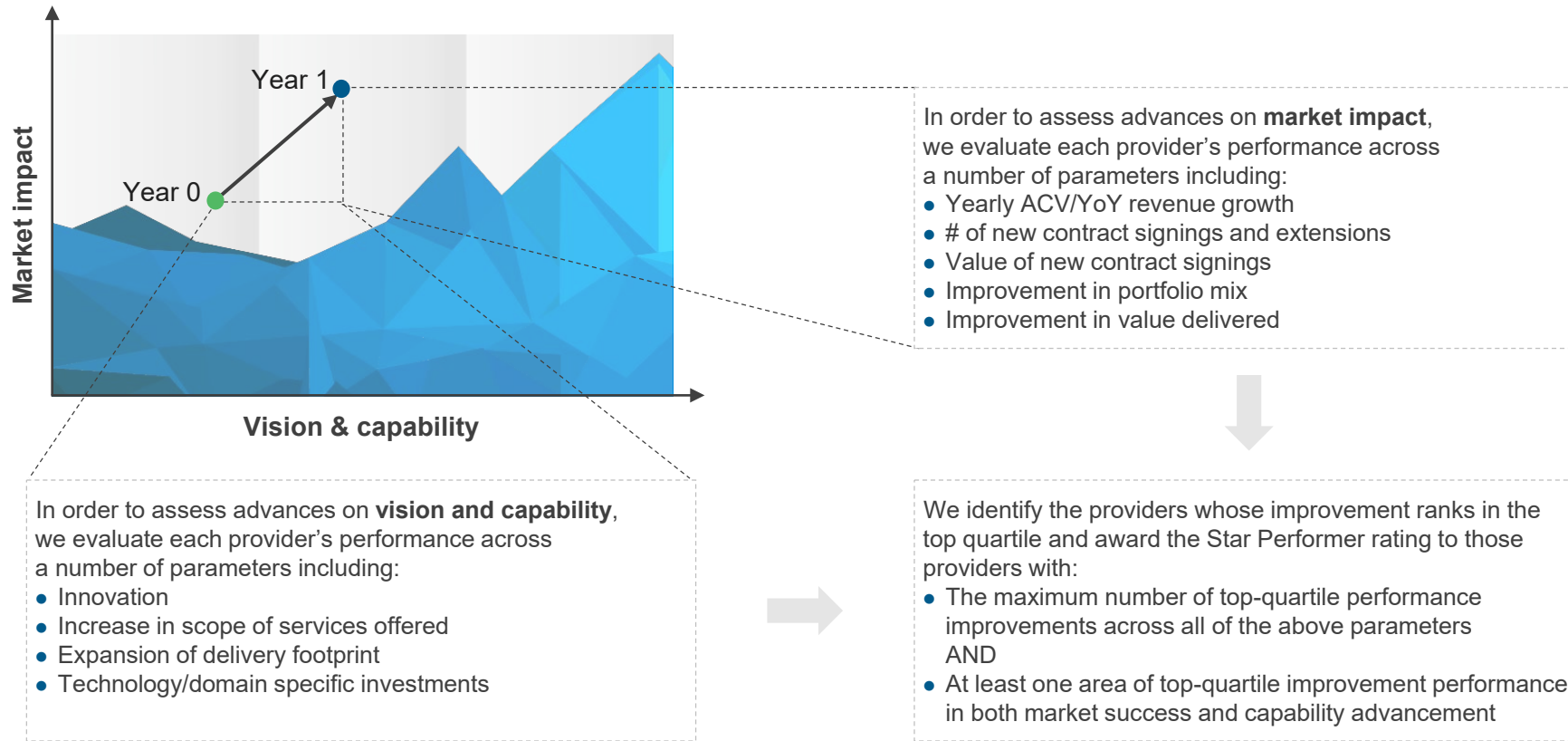
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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 takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for 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 Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at www.everestgrp.com.

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