



Infrastructure Services – PEAK Matrix™ Assessment and Profile Compendium 2014

Information Technology Outsourcing (ITO)
Market Report: December 2014 – Preview Deck

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- Benchmarking | Pricing, delivery model, skill portfolio
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- Tracking services | Service providers, locations, risk
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¹ Banking, financial services, and insurance

Background and scope of the research

Background of the research

- The infrastructure services market place is plagued with growth challenges and is increasingly threatened by next-generation services. Service providers are investing in order to improve their delivery capabilities and developing IP for automating IT infrastructure management. The market is highly competitive and buyers are viewing renewal time, to revisit scope and service providers, thereby, leading to higher anti-incumbency levels
- In this research, we present the assessment and detailed profiles of 28 IT service providers featured on the infrastructure services PEAK Matrix. Each profile provides a comprehensive picture of the provider's service suite, scale of operations, domain investments, recent transactions, and key low-cost delivery centers
- The assessment is based on Everest Group's annual RFI process for the calendar year 2013, interaction with leading infrastructure service providers, buyers of infrastructure services, and analysis of the infrastructure services market place

Scope of this report

- **Services:** Infrastructure services
- **Geography:** Global
- **Service providers:** The leading 28 infrastructure service providers

This report includes the profiles of the following 28 service providers:

- **Infrastructure services PEAK Matrix Leaders:** Fujitsu, HP, and IBM
- **Infrastructure services PEAK Matrix Major Contenders:** Accenture, Atos, Capgemini, CGI, Cognizant, CSC, CompuCom, Dell, HCL, IGATE, Infosys, L&T Infotech, Microland, Mphasis, NTT DATA, TCS, Tech Mahindra, T-Systems, Unisys, Wipro, and Xerox
- **Infrastructure services PEAK Matrix Emerging Players:** Mindtree, NIIT Technologies, Syntel, and Softtek

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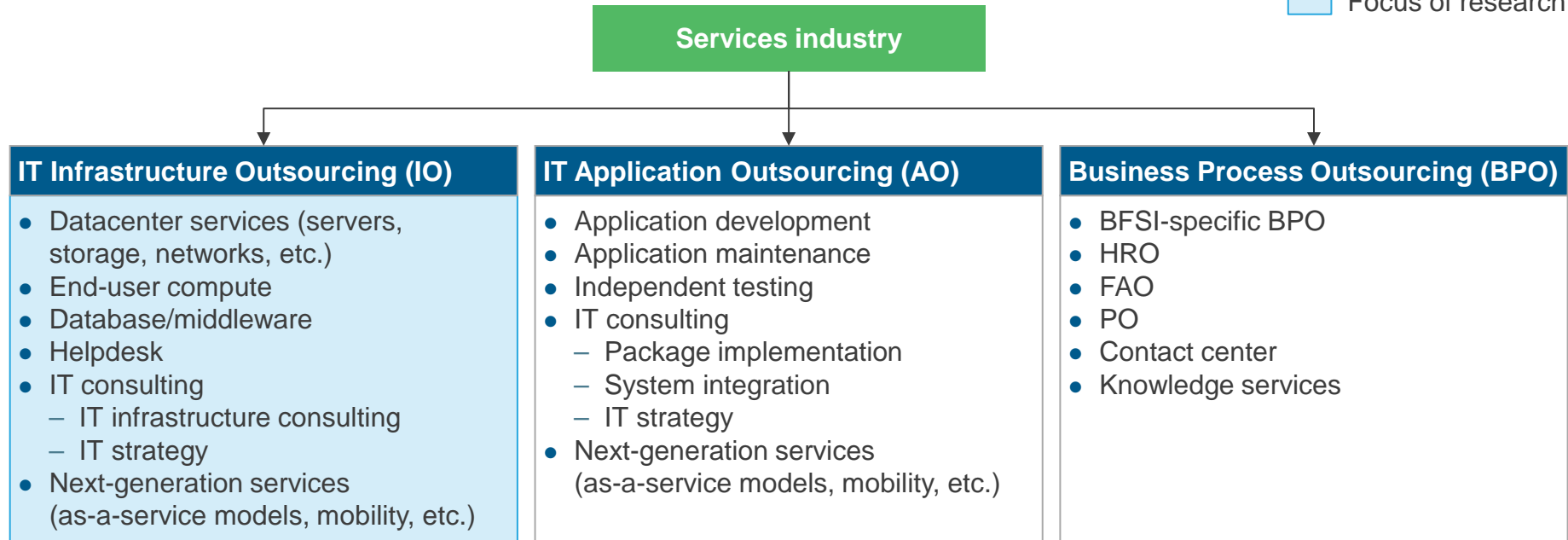
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This report focuses on IT infrastructure services and provides insights on leading service providers

NOT EXHAUSTIVE

 Focus of research



This report analyzes leading service providers in the infrastructure services space and provides insights on their delivery capabilities, scale, domain investments, transaction activity, and delivery centers

This compendium report has 28 profiles, focusing on providers' scale of operations, services capabilities, domain investments, delivery footprint, and market success

ABC | Infrastructure services profile (page 1 of 5)

Corporate and infrastructure services overview

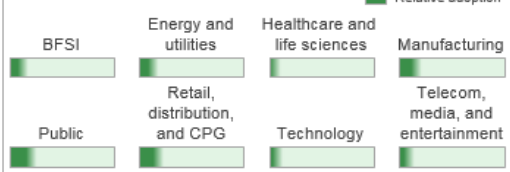
Company description: ABC is an international provider of consulting, technology, outsourcing, and local professional services. We estimate ABC's infrastructure services, which has witnessed adoption across the globe, to have accounted for a revenue of more than US\$5 billion. ABC's infrastructure services footprint includes 46 datacenters, 33,500 servers, more than 35 PB storage in shared SAN, workplace services for more than one million users, service desk for more than 1.25 million users, amongst others

Headquarters: Dallas, United States
Website: www.abc.com

Infrastructure services segments



Infrastructure services by industry



Portfolio of infrastructure services

Managed infrastruc mainframes; cloud-services (including services, mobile da network and comm

Infrastructure sen

<US\$100 million

US\$2-5 billion

Infrastructure sen



ABC | Infrastructure services profile (page 2 of 5)

Infrastructure services capability assessment and market success



Headline assessment

ABC has significantly increased its focus on infrastructure management services, augmenting its strong capabilities in infrastructure transformation (e.g., service integration). It has partnered with [Virtustream](#) to further penetrate the North American markets.

ABC is also focusing on typical "XYZ deals" by leveraging its delivery centers in Brazil and India. However, it needs to increase its "low-cost" delivery capabilities further to effectively compete in this market

Market success

- Infrastructure services revenue in excess of US\$2 billion for 2013
- More than 1,000 active clients
- Large annuity contracts (TCV > US\$20 million) accounted for less than 20% of the infrastructure services revenue in 2013

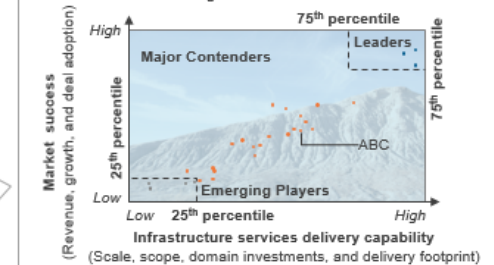
Scale

- Over 12,000 FTEs engaged in delivering infrastructure services, with datacenter services and consulting being key segments
- Infrastructure services account for less than one-fourth of the company's revenue

Domain investments

- Investments in proprietary solutions primarily focused on support services (e.g., helpdesk solutions) and remote infrastructure management
- In addition to investing in its partnership network, the company has also leveraged the inorganic route in the past

ABC's position on Everest Group's PEAK Matrix for infrastructure outsourcing services



Scope

- Strong focus on non-traditional infrastructure services
- Diversified client base across geographies; Europe is the strongest market, accounting for more than 50% of the revenue in 2013
- Key verticals include public sector, manufacturing, and retail, distribution & CPG

Delivery footprint

- Strong global delivery footprint, with significant leverage of low-cost centers across APAC, and Eastern Europe
- More than 10 global delivery centers; China and India are the largest centers, followed by UK & Ireland, North America, and France

Source: Everest Group (2014)



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EGR-2014-X-R-XXXX

Source: Everest Group (2014)



ITO research calendar

■ Published ■ Current

Topic	Release date
European Infrastructure Services – Service Provider Landscape with PEAK Matrix™ Assessment 2014	January 2014
Upcoming Contract Renewals – Infrastructure Services	March 2014
Upcoming Contract Renewals – Application Services	March 2014
Contract Renewal Database (April 2014 to April 2016)	April 2014
In Search of ADM Productivity	May 2014
Application Outsourcing – Annual Report 2014: “Rationalization Goes Hyper”	May 2014
Mobile Banking Adoption Trends	May 2014
Boosting Productivity in Independent Testing Services	June 2014
Infrastructure Outsourcing (IO) – Annual Report 2014	June 2014
Enterprise Mobility – Move Beyond “Feel Good” ROI	July 2014
Independent Testing Services PEAK Matrix Assessment	July 2014
Infrastructure Services – PEAK Matrix™ Assessment and Profile Compendium 2014	December 2014
Infrastructure Services PEAK Matrix Assessment – Europe	Q4 2014

Additional research recommendations

The following documents are recommended for additional insight into the topic covered in this research. The recommended documents either provide additional details on the topic or complementary content which may be of interest

- 1. Infrastructure Outsourcing – Annual Report 2014: “The Future is Software”** ([EGR-2014-4-R-1137](#)); 2014. Everest Group’s annual research on infrastructure services provides fact-based perspectives on buyer adoption by geography, industry, and revenue size. It analyzes major trends that are shaping the infrastructure services market and the outlook for the next year. It also sizes the IT services market in terms of infrastructure services and consulting.
- 2. Enterprise Cloud Infrastructure Services – PEAK Matrix™ Assessment and Profiles Compendium** ([EGR-2014-4-R-1278](#)); 2014. This Everest Group research provides a comprehensive assessment of cloud delivery capabilities of IT service providers and system integrators specifically for cloud infrastructure services such as scale of operations, adoption across enterprise segments and geographies, types of services provided, and domain investments. This report provides the detailed profiles and assessment of 20 IT service providers featured on Everest Group’s PEAK Matrix for cloud infrastructure services.

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At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories

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