



Topic: European Infrastructure Services – Service Provider Landscape with PEAK Matrix™ Assessment 2014

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

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Background and scope of the research

Background of the research

- | The infrastructure services market in Europe is witnessing an increasing adoption of cloud computing and Remote Infrastructure Management (RIM), which in turn has impacted the demand for traditional infrastructure services. Nevertheless, the market continues to provide reasonable growth opportunities across the infrastructure services spectrum, with service providers focused on strengthening their delivery capabilities and increasing their clientele within the region
- | In this research, we present an overview of the infrastructure services market in Europe, along with the assessment and brief profiles of 21 IT service providers featured on the PEAK Matrix for infrastructure services in Europe.
- | The assessment is based on Everest Group's annual RFI process conducted in 2013, interaction with leading infrastructure service providers, and analysis of the infrastructure services market place

Scope of this report

- | **Services:** Infrastructure services
- | **Geography:** Europe
- | **Service providers:** The leading 21 infrastructure service providers

This report includes the brief profiles of the following 21 service providers:

- | **European infrastructure services PEAK Matrix Leaders:** Atos, Capgemini, CSC, HP, IBM, and T-Systems
- | **European infrastructure services PEAK Matrix Major Contenders:** Accenture, CGI-Logica, Dell, Fujitsu, HCL, Indra, NTT DATA, Steria, Tech Mahindra, TCS, Tieto, Unisys, and Wipro
- | **European infrastructure services PEAK Matrix Emerging Players:** Cognizant and Infosys

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Major infrastructure service providers in the European market are assessed and mapped on Everest Group PEAK Matrix for their capabilities and market success

This report provides an overview of the infrastructure services market in Europe, along with the assessment and brief profiles of 21 IT service providers featured on the PEAK Matrix for infrastructure services in Europe. The PEAK Matrix is specific to IT service providers, who are involved in delivering infrastructure services across datacentres, middleware, end-user compute, helpdesk, and consulting.

Some of the findings in this report, among others, are:

European infrastructure service market

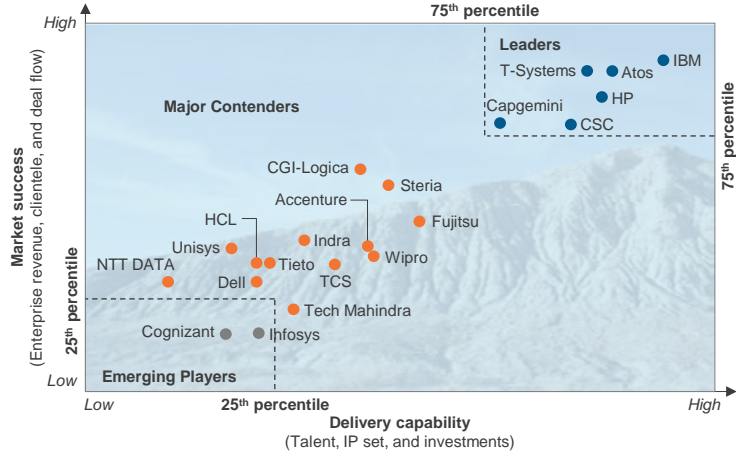
- | Overall infrastructure service market of ~US\$50 billion. The growth has stagnated and will be muted in years to come. Service providers need to take market share away from others to grow
- | Europe continues to provide over one third of global infrastructure service engagements. Increasing adoption of “offshore-centric” engagements

PEAK Matrix assessment for Europe infrastructure services

- | **Leaders:** Atos, Capgemini, CSC, HP, IBM, and T-Systems
- | **Major Contenders:** Accenture, CGI-Logica, Dell, Fujitsu, HCL, Indra, NTT DATA, Steria, Tech Mahindra, TCS, Tieto, Unisys, and Wipro
- | **Emerging Players:** Cognizant and Infosys

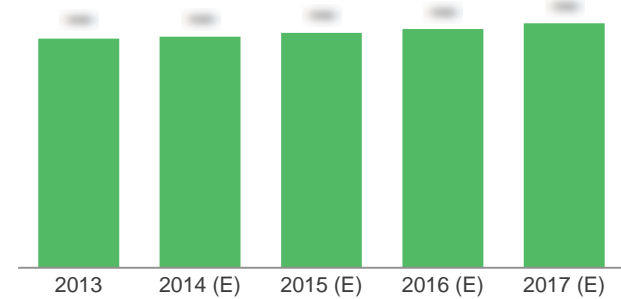
The research gives insights on the overall European infrastructure service market and assess 21 key service providers

Service providers featured on the PEAK Matrix



Europe infrastructure service market size

European IT infrastructure services market
2013-2017; US\$ billion



Infrastructure services assessment dashboard

Service provider	Delivery capability				Market success
	Scale	Scope	Domain investments	Delivery footprint	
Service provider A	●	●	●	●	●
Service provider B	●	●	●	●	●
Service provider C	●	●	●	●	●
Service provider D	●	●	●	●	●
Service provider E	●	●	●	●	●
Service provider F	●	●	●	●	●

Service providers profiles

Company	Infrastructure services revenue from Europe (US\$ million)	Major low-cost delivery centers in Europe	Infrastructure services in Europe: Focus areas, investments, and clientele
Service provider A	XXXX	Region 1	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
Service provider B	XXXX	Region 2	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
Service provider C	XXXX	Region 3	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
Service provider D	XXXX	Region 4	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
Service provider E	XXXX	Region 5	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
Service provider F	XXXX	Region 6	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX

Source: Everest Group (2014)

ITO research calendar

■ Published ■ Current

Topic	Release date
Application Outsourcing (AO) – Annual Report: "Declining Productivity Rising Anti-incumbency"	September-2013
Infrastructure Outsourcing (IO) – Annual Report 2013: "Automating the Next Horizon"	November-2013
Infrastructure Services – PEAK Matrix™ Assessment and Profile Compendium 2013	December-2013
Remote Infrastructure Management – "RIMO is Dead, Long Live RIMO"	December-2013
Infrastructure Services in Europe – Market Update and PEAK Matrix™ Assessment	January 2014
Renewal Intelligence – Infrastructure contracts	Q1-2014
Renewal Intelligence – ADM contracts	Q1-2014
Contract Renewal Database (April 2014 to April 2016)	Q1-2014
Next-gen application service	Q1-2014
Buyer Next Generation Technology Adoption	Q1-2014
Automating IT services	Q2-2014
Application Outsourcing Annual Report 2014	Q3-2014
Infrastructure Outsourcing Market Update 2014	Q3-2014

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 (IO) – Annual Report 2013: “Automating the Next Horizon”** ([EGR-2013-4-R-0994](#)); 2013: This annual research deep-dives into the infrastructure outsourcing landscape. It provides data-driven facts and perspectives on the overall market. The research covers IO adoption trends, demand drivers, in addition to buyer challenges, trends shaping the market, and also provides an outlook for 2014 for the broader IT as well as the IO market
2. **Infrastructure Services – PEAK Matrix™ Assessment and Profile Compendium** ([EGR-2013-4-R-1024](#)); 2013: With existing growth challenges in the infrastructure services marketplace, service providers must rethink their investment strategy. With evolving buyer behavior and changing technology preferences, service providers will need to strengthen their capabilities to increase adoption footprint and garner a greater wallet share amidst the highly competitive infrastructure services market place. This report provides the assessment and detailed profiles of 27 IT service providers featured on Everest Group’s Enterprise Infrastructure Services PEAK Matrix.

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