Everest Group
RESEARCH

Private Cloud Enablement Services – PEAK Matrix^{TM} Assessment and Profiles Compendium

Cloud & Infrastructure Services
Market Report: November 2015 – Preview Deck

EGR-2015-4-PD-1628

Our research offerings for global services

- ▶ **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available
- ▶ **BFSI[1] Information Technology**
- ▶ **BFSI[1] Business Process**
- ▶ **Healthcare & Life Sciences**
- ▶ **Application & Digital**
- ▶ **Cloud & Infrastructure**
- ▶ **Global Sourcing**
- ▶ **Locations Insider™**
- ▶ **PricePoint™**
- ▶ **Finance & Accounting**
- ▶ **Procurement**
- ▶ **Human Resources**
- ▶ **Recruitment Process**
- ▶ **Contact Center**
- ▶ **Transaction Intelligence**

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
  - Cloud & Infrastructure Services
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

Corporate Headquarters
Office: +1-214-451-3000
info@everestgrp.com

European Headquarters
Office: +44-207-129-1318
unitedkingdom@everestgrp.com

---

1 Banking, financial services, and insurance

Everest Group RESEARCH

Table of contents (page 1 of 2)

Table of contents (page 2 of 2)

Background of the research

Background of the research

- Private cloud deployment continues to witness increasing acceptance/traction as enterprises are looking to make their IT setups more streamlined and flexible, while at the same time adhering to various industry- and geographic-specific security and compliance requirements. In addition to mission-critical workloads (such as ERP and CRM), private cloud has started witnessing newer use cases within enterprises, driven by the availability of more robust multi-cloud integration solutions; DevOps being a case in point
- That said, the technology complexities associated with private cloud deployments and lack of internal skills is pushing enterprises to increasingly seek third-party support for private/hybrid cloud initiatives. Service providers are beefing up their private cloud enablement services capabilities, specifically around supporting multiple industry-standard private cloud platforms, private cloud consulting & rapid migration, security, multi-cloud orchestration, and vertical-specific private cloud solutions
- In this research, we present the assessment and detailed profiles of 18 IT service providers featured on the private cloud enablement services PEAK Matrix. Each service provider profile gives a comprehensive picture of their private cloud enablement services vision, scale of operations, and domain investments
- The assessment is based on Everest Group's annual Request for Information (RFI) process conducted in Q2 2015, interactions with leading private cloud service providers, and analysis of the broader cloud services marketplace

Scope of this report

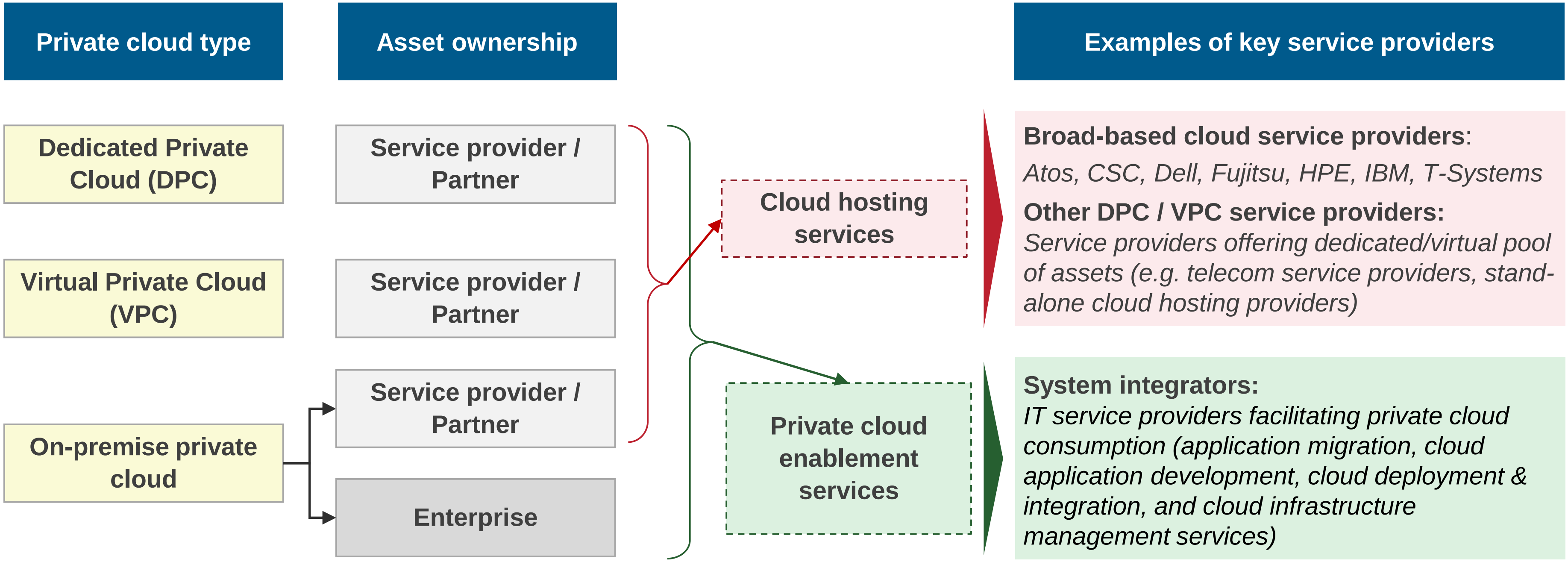
- **Services:** Private cloud enablement services
- **Geography:** Global
- **Service providers:** 18 leading private cloud enablement service providers

This report includes the profiles of the following 18 service providers on the private cloud enablement and management services PEAK Matrix:

- **Leaders:** Accenture, Atos, HPE, and IBM
- **Major Contenders:** Capgemini + IGATE, CGI, Cognizant, CSC, Dell, Fujitsu, HCL Technologies, TCS, T-Systems, and Wipro
- **Aspirants:** EPAM, L&T Infotech, Tech Mahindra, and Virtusa

This report focuses on private cloud enablement services and offers insights into prominent service providers operating in this space

NOT EXHAUSTIVE



Private cloud type	Asset ownership
Dedicated Private Cloud (DPC)	Service provider / Partner
Virtual Private Cloud (VPC)	Service provider / Partner
On-premise private cloud	Service provider / Partner Enterprise

Cloud hosting services

Private cloud enablement services

Examples of key service providers

Broad-based cloud service providers:
Atos, CSC, Dell, Fujitsu, HPE, IBM, T-Systems

Other DPC / VPC service providers:
Service providers offering dedicated/virtual pool of assets (e.g. telecom service providers, stand-alone cloud hosting providers)

System integrators:
IT service providers facilitating private cloud consumption (application migration, cloud application development, cloud deployment & integration, and cloud infrastructure management services)

Private Cloud Enablement Services Coverage

- **Professional services:**
  - Cloud consulting services: Strategy, roadmap formulation, readiness assessment, Total Cost of Ownership (TCO) analysis, etc.
  - Design and build services: Designing and building ground-up cloud infrastructure/ customization, implementation of cloud infrastructure, application migration, developing green-field applications with cloud features, etc.
- **Management services:** Management of cloud assets, lights-on / helpdesk, orchestration, day-to-day operations, and other related activities (**excludes** day-to-day monitoring and management of cloud applications)

Focus of this research

Everest Group’s private cloud services research is based on two key sources of proprietary information

1

- Proprietary database of IT service contracts of major IT service providers with private cloud scope of work (updated annually)
- The database tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including service provider, contract type, TCV and ACV, service provider FTEs, start and end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Line of Business (LoB) served, and pricing model employed

2

- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different lines of business
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

3

- **Service provider briefings**
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment

4

- **Ongoing buyer surveys and interactions**
  - Drivers and challenges for adopting private cloud enablement services
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learnt and best practices

Service providers assessed

accenture High performance. Delivered.
Atos
Capgemini CONSULTING. TECHNOLOGY. OUTSOURCING
IGATE
CGI
CSC
Cognizant
DELL
<epam>
FUJITSU
HCL
Hewlett Packard Enterprise
IBM
L&T Infotech
TATA CONSULTANCY SERVICES
T · · Systems · · ·
Tech Mahindra
virtusa Accelerating Business Outcomes
WIPRO Applying Thought

Note: Assessment for Capgemini, Fujitsu, IBM, and T-Systems excludes service provider inputs on this particular study and is based on Everest Group’s estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers. Capgemini acquired IGATE in April 2015 and the assessment covers the combined capabilities of the companies

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information, that is contract-specific, will be presented back to the industry only in an aggregated fashion

Eighteen IT service providers were assessed and mapped on Everest Group's PEAK Matrix for private cloud enablement services

This report provides the assessment and detailed profiles of the 18 IT service providers featured on Everest Group's private cloud enablement services PEAK Matrix. The PEAK Matrix is specific to IT service providers, who are involved in delivering industry-standard private cloud platforms, private cloud consulting & rapid migration, security, multi-cloud orchestration, and vertical-specific private cloud solutions

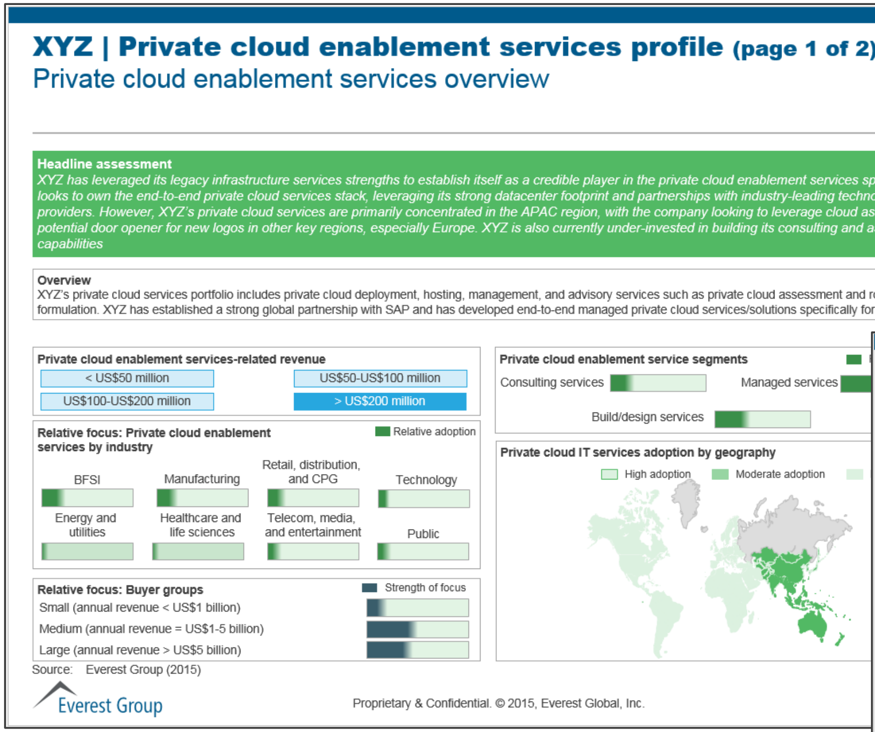
Assessment of the service provider landscape for private cloud enablement services leveraging Everest Group's PEAK Matrix highlights the following categories of service providers:

- **Leaders:** Accenture, Atos, HPE, and IBM

- **Major Contenders:** Capgemini + IGATE, CGI, Cognizant, CSC, Dell, Fujitsu, HCL Technologies, TCS, T-Systems, and Wipro

- **PEAK Matrix Aspirants:** EPAM, L&T Infotech, Tech Mahindra, and Virtusa

This private cloud enablement service provider compendium report has 18 IT service provider profiles, focusing on their scale of operations, and domain investments



XYZ | Private cloud enablement services profile (page 1 of 2)

Private cloud enablement services overview

Headline assessment
XYZ has leveraged its legacy infrastructure services strengths to establish itself as a credible player in the private cloud enablement services space. XYZ looks to own the end-to-end private cloud services stack, leveraging its strong datacenter footprint and partnerships with industry-leading technology providers. However, XYZ's private cloud services are primarily concentrated in the APAC region, with the company looking to leverage cloud as a potential door opener for new logos in other key regions, especially Europe. XYZ is also currently under-invested in building its consulting and assessment capabilities

Overview
XYZ's private cloud services portfolio includes private cloud deployment, hosting, management, and advisory services such as private cloud assessment and roadmap formulation. XYZ has established a strong global partnership with SAP and has developed end-to-end managed private cloud services/solutions specifically for SAP

Private cloud enablement services-related revenue

< US$50 million	US$50-US$100 million
US$100-US$200 million	> US$200 million

Relative focus: Private cloud enablement services by industry

Relative focus: Buyer groups

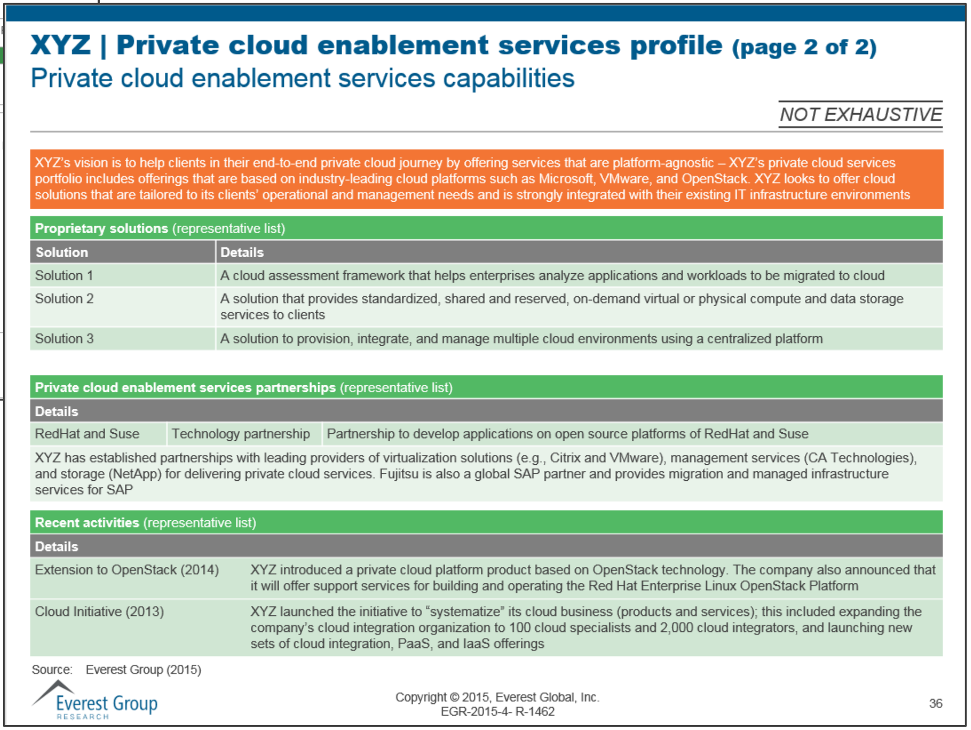
Private cloud enablement service segments

Private cloud IT services adoption by geography

Source: Everest Group (2015)

Everest Group

Proprietary & Confidential. © 2015, Everest Global, Inc.



XYZ | Private cloud enablement services profile (page 2 of 2)

Private cloud enablement services capabilities

NOT EXHAUSTIVE

XYZ's vision is to help clients in their end-to-end private cloud journey by offering services that are platform-agnostic – XYZ's private cloud services portfolio includes offerings that are based on industry-leading cloud platforms such as Microsoft, VMware, and OpenStack. XYZ looks to offer cloud solutions that are tailored to its clients' operational and management needs and is strongly integrated with their existing IT infrastructure environments

Proprietary solutions (representative list)

Solution	Details
Solution 1	A cloud assessment framework that helps enterprises analyze applications and workloads to be migrated to cloud
Solution 2	A solution that provides standardized, shared and reserved, on-demand virtual or physical compute and data storage services to clients
Solution 3	A solution to provision, integrate, and manage multiple cloud environments using a centralized platform

Private cloud enablement services partnerships (representative list)

Details		
RedHat and Suse	Technology partnership	Partnership to develop applications on open source platforms of RedHat and Suse
XYZ has established partnerships with leading providers of virtualization solutions (e.g., Citrix and VMware), management services (CA Technologies), and storage (NetApp) for delivering private cloud services. Fujitsu is also a global SAP partner and provides migration and managed infrastructure services for SAP		

Recent activities (representative list)

Details	
Extension to OpenStack (2014)	XYZ introduced a private cloud platform product based on OpenStack technology. The company also announced that it will offer support services for building and operating the Red Hat Enterprise Linux OpenStack Platform
Cloud Initiative (2013)	XYZ launched the initiative to "systematize" its cloud business (products and services); this included expanding the company's cloud integration organization to 100 cloud specialists and 2,000 cloud integrators, and launching new sets of cloud integration, PaaS, and IaaS offerings

Source: Everest Group (2015)

Everest Group RESEARCH

Copyright © 2015, Everest Global, Inc.
EGR-2015-4- R-1462

36

Cloud and Infrastructure Services research calendar

🟦 Published 🟩 Current

	Topic	Release date
🟦	Optimizing IT Service Delivery: Technology is the Answer	February 2015
🟦	Enterprise Cloud Adoption – Solving the Pricing Conundrum	March 2015
🟦	Enterprise Cloud Services – Annual Report 2015: “Contracting Remains Cloudy”	March 2015
🟦	Upcoming Contract Renewals – Infrastructure Services	March 2015
🟦	Workplace Services – PEAK Matrix™ Assessment and Profiles Compendium	June 2015
🟦	Infrastructure Services – Annual Report 2015: “Digital Businesses: Mind Your Security”	July 2015
🟦	Workplace Services Market Update 2015 – Left is Right for the Service Desk!	July 2015
🟦	Workplace Services PEAK Matrix – Europe-focused – Assessment and Profiles Compendium	September 2015
🟩	Private Cloud Enablement Services – PEAK Matrix™ Assessment and Profiles Compendium	November 2015
	Hosted Private Cloud Services – PEAK Matrix™ Assessment and Profiles Compendium	Q4 2015
	IT Security Services – PEAK Matrix™ Assessment and Profiles Compendium	Q4 2015

Additional research recommendations

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

1. **Enterprise Cloud Services – Annual Report 2015: "Contracting Remains Cloudy"** (EGR-2015-4-R-1434); 2015. This research provides fact-based trends impacting the cloud services market. It analyzes multiple aspects such as overall cloud service market size and growth estimates, deal size, cloud deployment trends, buyer adoption trends, and outlook for 2015-2016. Buyers will gain by understanding these trends and evolving their sourcing portfolio accordingly. Service providers will benefit by aligning their strategy to cater to these trends

2. **Workplace Services – PEAK Matrix^{TM} Assessment and Profiles Compendium** (EGR-2015-4-R-1462); 2015. Today's enterprise workplace is characterized by a strong focus on improving the overall end-user experience by offering secure and on-demand access to applications and data across the devices of choice, based on the individual personas of the users. Service providers are investing to ramp up their capabilities, build up scale, and develop and acquire IP to align their capabilities with changing market dynamics. This report provides the assessment and detailed profiles of 23 IT service providers featured on Everest Group's Workplace Services PEAK Matrix

For more information on this and other research published by Everest Group, please contact us:

Chirajeet Sengupta, Vice President:	chirajeet.sengupta@everestgrp.com
Yugal Joshi, Practice Director:	yugal.joshi@everestgrp.com
Ashwin Venkatesan, Senior Analyst:	ashwin.venkatesan@everestgrp.com
V. Deepak, Analyst:	v.deepak@everestgrp.com
ITS research:	ITSresearch@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com

Everest Group
From **insight** to ***action***.

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com and research.everestgrp.com.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-647-557-3475

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Delhi
india@everestgrp.com
+91-124-284-1000

Stay connected

Websites

www.everestgrp.com
research.everestgrp.com

Twitter

@EverestGroup

Blog

www.sherpasinblueshirts.com