



Topic: Enterprise Cloud Services – PEAK Matrix Assessment and Profiles Compendium

Cloud Vista
Market Report: July 2013 – Preview Deck

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Market Vista

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

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Cloud Vista

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

¹ Banking, financial services, and insurance

Background of the research

Background of the research

- The adoption of cloud computing has provided an alternative model for buyers, across segments, to gain access to enterprise-class technology across varied environments, with high levels of flexibility and scalability at reduced costs. Cloud adoption continues to grow in the global services market, with enterprises increasingly demanding cloud delivery as part of their IT outsourcing deals, especially in situations involving transformation
- Service providers have ramped up their capabilities, built up scale, and invested in developing and acquiring IP/proprietary solutions in order to tap the cloud market. They have also formed strategic alliances and partnerships to augment their cloud delivery capabilities. Given the wide range of cloud services and engagement models being offered by service providers, it is critical to have a comprehensive, well-rounded, and fact-based assessment of service providers' cloud value proposition
- In this research, we present the assessment and detailed profiles of the 17 IT service providers featured on the cloud application and infrastructure services PEAK Matrices. Each service provider profile provides a comprehensive picture of their service suite, scale of operations, domain investments, and key partnerships
- The assessment only covers IT service providers, who are involved in delivering cloud-based services including development, migration, deployment, management, and advisory services
- The assessment is based on Everest Group's annual RFI process and interaction with leading cloud service providers, and year-round tracking of 100+ cloud service providers

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

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- Everest Group's annual RFI process with leading cloud service providers, followed by briefing sessions with their leadership teams
- Key elements covered in these interactions include:
 - Focus areas and initiatives for cloud delivery models
 - Scale of cloud operations and delivery locations
 - Areas of investment within the cloud space

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- Everest Group's proprietary database of operational capabilities of more than 100 cloud service providers (tracked round the year)
- The database tracks the following capability elements for each service provider:
 - Major cloud clients
 - Recent wins / contracts
 - Cloud delivery locations
 - Cloud service suite
 - Domain capabilities, proprietary solutions, and intellectual property investments
 - Other cloud-related developments

Service providers assessed



Note: We continuously monitor the market developments and track additional service providers beyond those included in the analysis
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

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From a landscape of 20+ IT service providers, 17 were assessed and mapped on Everest Group's Cloud PEAK Matrices for applications and infrastructure services

This report provides the assessment and detailed profiles of the 17 IT service providers featured on Everest Group's cloud application and infrastructure services PEAK Matrices. The PEAK Matrices are specific to IT service providers, who are involved in delivering cloud-based services including development, migration, deployment, management and advisory services

Assessment of the service provider landscape for cloud applications and infrastructure services leveraging Everest Group's PEAK Matrices highlights the following categories of service providers:

Cloud Application Services

- **Leaders:** Accenture, Capgemini, and IBM
- **Major Contenders:** CGI, Cognizant, CSC, HCL, HP, and Tech Mahindra
- **Emerging Players:** iGate, L&T Infotech, Mindtree, NIIT, Softtek, Syntel, and Xerox

Cloud Infrastructure Services

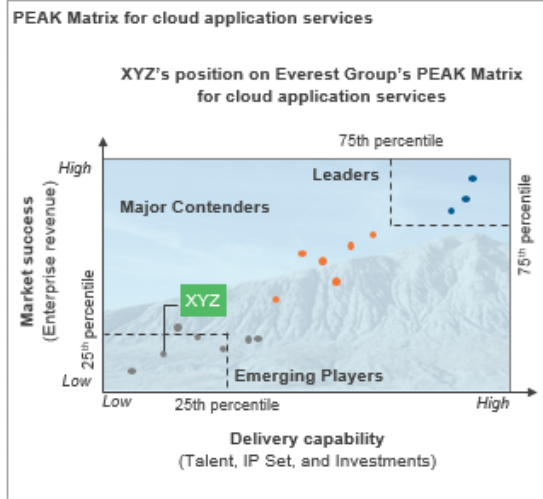
- **Leaders:** CSC, IBM, and HP
- **Major Contenders:** Accenture, Capgemini, CGI, Cognizant, HCL, and Xerox
- **Emerging Players:** iGate, L&T Infotech, Microland, Syntel, and Tech Mahindra,

This cloud service provider compendium report has 17 IT service provider profiles, focusing on their cloud service suite, scale of operations, and domain investments

XYZ| Cloud services profile Everest Group PEAK Matrix position of XYZ



Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix



PEAK M

Market success (Enterprise revenue)

High

Low

25th percentile

75th percentile

Low

High

25th percentile

75th percentile

Delivery capability (Talent, IP Set, and Investments)

Source: Everest Group (2013)



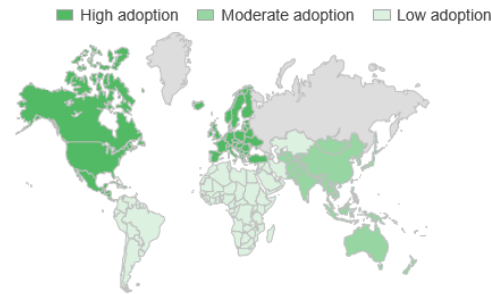
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XYZ | Cloud services profile Enterprise cloud adoption footprint

Overall assessment

XYZ's cloud business is driven by adoption in XXX and YYY regions. It has a clear focus on targeting ABC segment for its cloud services (This stems from its overall strategy for traditional services where it targets ABC segments)

Cloud services adoption by geography



- Adoption of XYZ's cloud services by ABC segment has pegged its cloud-based revenue at US\$XXX million per year
- XYZ is witnessing cloud service traction from XXX and YYY regions. XYZ has generated traction in the ZZZ region through its partnerships with XXX and YYY
- Key industry verticals for XYZ's cloud services adoption include

Relative focus: Buyer groups

High Low



- form the major chunk of buyers of XYZ's cloud services
- Its buyer-focussed strategy for cloud services

Source: Everest Group (2013)



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Source: Everest Group (2013)



Cloud Vista research calendar

Topic	Published	Current	Release date
Webinar Deck: State of the Global Services Market: 2013 Predictions	Published		January-2013
Enterprise Cloud Quarterly Review: Q4 2012	Published		January-2013
Enterprise Cloud Adoption – Year 2012 in Review	Published		February-2013
Adopting Cloud Services – View through a New Evaluation Prism	Published		March-2013
Webinar Deck: Have Business Buyers Driven us to the Cloud Adoption Tipping Point?	Published		April-2013
Enterprise Cloud Quarterly Review: Q1 2013	Published		May-2013
Enterprise Cloud Services – Service Providers Assessment and Profiles Compendium		Current	July-2013
Selling Cloud to the Business – Is Your Salesforce Ready?	Published		Q3-2013
Enterprise Cloud Quarterly Review: Q2 2013	Published		Q3-2013
Enterprise Cloud Adoption – Cloud Deals Insights: H1 2013	Published		Q3-2013
Cloud Service and Solution Spotlight	Published		Q3-2013
View from Clouds	Published		Q4-2013
Cloud Service and Solution Spotlight	Published		Q4-2013
Enterprise Cloud Quarterly Review: Q3 2013	Published		Q4-2013

Additional research references

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

1. **Enterprise Cloud Adoption - Year 2012 in Review** ([EGR-2013-4-R-0849](#)): Cloud adoption continues to dominate the discussion across global service engagements. The year 2012 witnessed different buyers deploying cloud solutions, which are now increasingly becoming an integral part of the newer service engagements. This research analyzes the key cloud engagements that were a part of the larger global service engagements in the calendar year 2012. The report discusses multiple perspectives such as where the cloud is getting adopted within an enterprise, deal parameters, geographies of adoption, major industries that are driving cloud adoption, and roles that various service providers are playing.
2. **Adopting Cloud Services - View through a New Evaluation Prism** ([EGR-2013-4-R-0857](#)): Despite an increase in cloud adoption, the process for evaluation of alternative cloud solutions remains largely in line with the traditional IT services contracting mechanism. This report argues for buyers to use a different prism of evaluation while considering adoption of cloud solutions.
3. **Evaluating Cloud Service Provider: Three "Must-Knows" for Buyers** ([EGR-2012-4-R-0795](#)): This viewpoint analyzes the key challenges buyers face in evaluating cloud service providers under "trinity of relevance". It introduces the TIPSS framework focusing on technology, integration, pricing, security, and services. It also lays down the process of shortlisting and arriving at the broad sample set of cloud service providers that buyers should include in their evaluation

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